SharePoint Portal Solution

About the Client

For more than 40 years, Merchants Leasing has been providing customized, total fleet leasing solutions for businesses and government agencies across United States.

Client's Industry:

Auto Leasing

Challenges:

User experience

Solution Overview:

SharePoint Portal Solution

Benefits:

Enriched user experience

Business Challenge

Business challenges:

The goal and objective is to improve its client-facing information portal by providing a single source of tools to help users manage their entire fleet.

Thy seriously had to enhance the website with more features of Merchants Leasing and improve the usability.

The Client desires to:

- Partner with an organization that is a strong culture fit, is willing to learn and understand our business and is able to relate that to our development requirements. One that understands the core values that we wish to bring to the table for our clients: customizing a solution that fits their very specific business needs.
- Develop a client facing private portal that is user friendly and easy to use where our clients can access their fleet management data and other functions that assist in managing their fleets and that can, if the client so chooses, allow them to self-service their account for many required functions.
- Follow an agile development cycle with quarterly releases of new features, functions and reports.
- Utilize state of the art technology throughout the architecture of the system (in the reporting engine, delivery layer, browser compatibility, drag and drop portlets, mobile compatibility and whatever technology spurts up tomorrow).
- Ensure that the end product of each phase of development is scalable for future enhancements, which includes development, warranty support and content management tools from our vendor.
- Obtain the 'right size and shape' in the delivery of our product; meaning that the system is appropriate for the various levels of sophistication of our clients (shouldn't be overwhelming for our less sophisticated clients; shouldn't be lacking for the more sophisticated ones).
- Ensure a seamless presentation of various data sources to our clients.

Oakridge Infotech's solution:

Oakridge Infotech proposes a solution on Microsoft SharePoint that will develop the following internal modules with multiple roles and scale cross various external applications:

Modules: Driver Change/Addition, Standard Invoice, Custom Invoice, Document Center Upload, Access Document Center, Request New Ancillary Product (s), Reprint Roadside Card, Request Roadside Contract Extension, Request Duplicate Coupon Book, Taxable Benefit Setup, Taxable Benefit Submission (A Driver / someone for Driver), Taxable Benefit Submission (not a Driver) [Roles assigned: FM/ ME], Taxable Benefit Submission, Review or Edit, Order without Selector or Structure, Approval Chain, Selector [Admin], Fleet Manager Order, Order Status for FM, Order Status for Driver.

The solution includes these key features:

- Mobile enabled functionality
- Customers information and their users (Profile)
- Record all services requested by customers (History)
- Extremely strong security model (Role and Hierarchy based)
- Generate maintenance records
- Integration with external applications like Lombardi, chrome, CRM etc.
- Single Sign On
- Reporting using Jasper BI
- Basic & Search Functionality
- Workflow Management

Delivery Methodology:

Oakridge Infotech Agile development methodology provided many opportunities to assess the direction of a project throughout the development lifecycle. This was achieved through regular cadences of work, known as sprints or iterations, at the end of which the Oakridge Infotech team presented a shippable increment of work. Thus by focusing on the repetition of abbreviated work cycles as well as the functional product they yield.

Technology used:

Microsoft .NET

Microsoft SharePoint 2013

BizTalk 2012 R2

SQL Server 2012 R2

Benefits:

Oakridge Infotech SharePoint based Portal Solution was designed to not only simplify the users work experience but have it cater to Client's preferences and needs. Leveraging our innovation and invaluable experience from various implementations, Oakridge Infotech's Portal Solution offered a high-quality UI, multiple layers of personalization and desktop conventions that make for unbeatable ease of use and quick adoption.