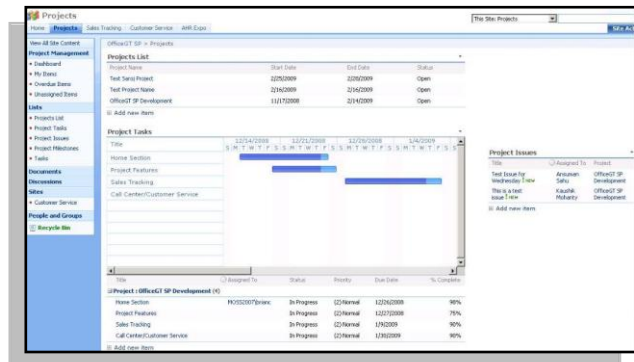# Manage Office

## A SharePoint solution.

## Executive Summary

Mindfire Solutions developed a SharePoint site that involved customization of the existing Microsoft Server Admin templates to meet specific needs/requirement of the customer to manage day to day tasks at office.

One of our customers had this vision of developing a site that can provide complete business solutions like Contacts Management, Projects Management, Sales Lead Management, Customer Service Management and Time Sheet Management for different tasks so that he can sell it to companies. He also required a Sales Management module to be developed wherein custom workflows had to be developed to manage conversion of leads into opportunity and opportunity into project. Mindfire understood the client's requirement and delivered a solution named "Manage Office".

## About our Client

**Client**  Software Services and Solutions      |      **Location**  FL, USA      |      **Industry**  Software & IT

## Business Situation

The business requirement was to develop a WSS 3.0 site "Manage Office" that can be sold by the customer to multiple companies. The site was intent for delivering all the business requirements of an office from Contacts to Projects Management and from Sales Analysis to Customer Service.

The approach of developing this site was by starting with existing server admin templates provided by Microsoft and then combining and customizing each according to customers need and requirement. The templates which needs to be consumed are,

- o   Contacts Management

- o   Budgeting and Tracking Multiple Projects

- o   Sales Lead Pipeline

- o   Call Center

## Solution Details

## The Mindfire Solution

After intensive study and analysis of the client requirements the primary task was to come up with a hierarchy model to accommodate all the 4 server admin templates. The main challenge for us was in identifying and designing it in such a way that the child templates can share all the required information of the parent templates.

**Contact Management Template**: This is the root template or the template for *HOME* tab, which will contain the master Contact list and the master Company list. This is selected as the root template as the data from this template will be shared as reference / look-up data in other templates appearing below in the hierarchy but not vice-versa.

**Budget and Tracking Multiple Projects**: This represents the *PROJECTS* tab of the site. As this template has the only need of sharing the columns from Contact and Company list belonging to the Contacts Management template with the Project List, the template is decided to be placed just below the Contacts template in the hierarchy.

**Sales Lead Pipeline**:  It is the template just below to the Contacts template in the hierarchy as this also has need of sharing columns from Contact Management template with the Lead and Opportunity list. This makes for the content of the *SALES* tab. This also consists of the flow for converting a Lead to an Opportunity and an Opportunity to a Project.

**Call Center**: This represents the *CUSTOMER SERVICE* template of the site. As this template has the requirement of sharing data/information with both Contacts and Project template, it is decided to nest it below the Project template. This makes Projects as the parent template and Contacts as the parent's Parent template and enables the data sharing from both the templates defined in the hierarchical order.
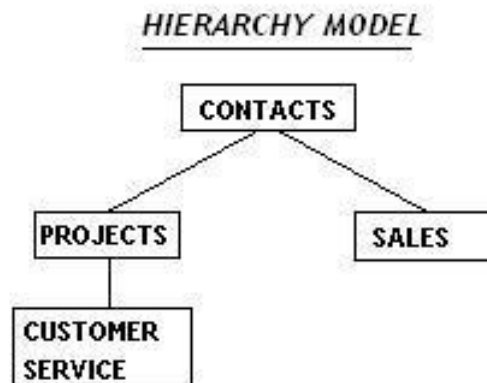
## Achievements

A number of custom web-parts and workflows were developed and a lot of customization is made to the OOTB SharePoint pages using SharePoint Designer 2007 to achieve various functionalities of the Manage Office application. New/Extra columns were introduced and few of existing columns were modified for customization of the lists.  The default pages for add/edit/view functionalities of different lists were re-designed using SharePoint Designer 2007 to accommodate the changes made to the list. These include the following:

**Contacts**

Add/Edit Contacts Web-part: This web-part helps in achieving the custom add/edit functionality for the Contacts list.

**Projects**

Add/Edit Projects Web-part: This web-part helps in achieving the custom add/edit functionality for the Projects list.

**Sales**

Add/Edit Leads Web-part: This web-part helps in achieving the custom add/edit functionality for the Lead list.

Convert Lead to Opportunity Workflow: This workflow helps in converting a Lead to an Opportunity and is designed using Sharepoint Designer 2007 workflow settings.

Convert Opportunity to Project Workflow: This is a custom workflow designed using VS 2008 which helps convert an Opportunity to a Project.
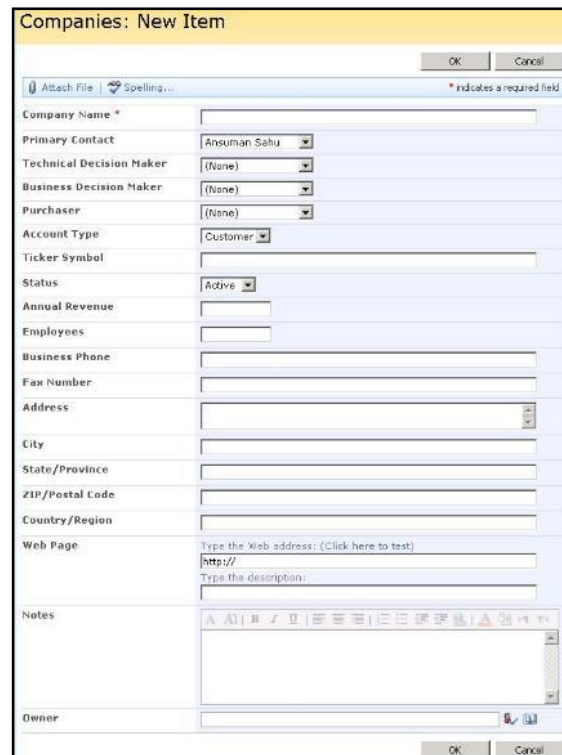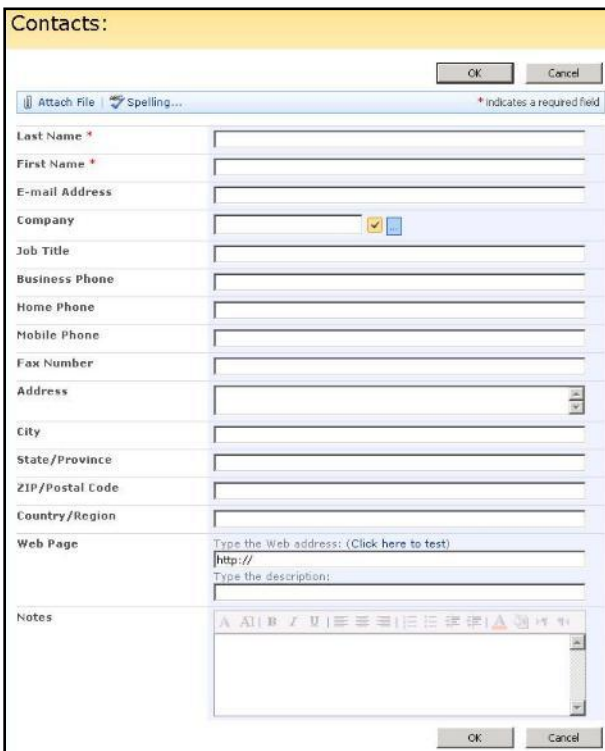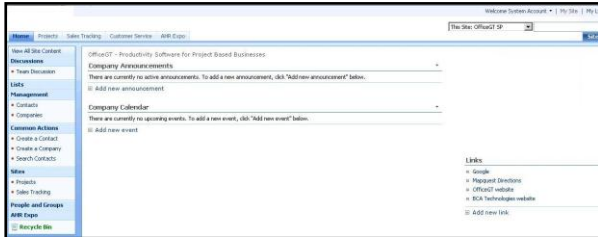
**Customer Service**

Add/Edit Service Request Web-part: This web-part helps in achieving the custom add/edit functionality for the Service Request list.

## Technologies

WSS 3.0, ASP.Net 2.0 & 3.5, VB.Net, SQL 2005

## *Final Results*
### **Software System**

## Customer Benefits

Since this was a complete packaged solution for an office management process, the software helped the customer to have a centralized control over all the aspects through a single solution. This was one of the unique products which the customer was able to pitch on and generate revenue by selling it to multiple companies.

## Future relationship

Since this product was a success, the customer retained us for maintenance and enhancement of new features of the existing product.