Buckers Technology Customer Service
Management Systems

By

Jacqueline E. Ndam

Submitted to
the Faculty of the Information Engineering Technology Program
in Partial Fulfillment of the Requirements for
the Degree of Bachelor of Science
in Information Engineering Technology

University of Cincinnati
College of Applied Science

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Acknowledgements

I would like to give thanks first to God for giving me the strength and knowledge for this accomplishment. I would also like to give special thanks to Prof. McMahon and Prof. Sanyal for their helpful suggestions. I would also like to give special thanks to my family for their prayers and emotional support as I completed this project.
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Abstract

Buckers Technology is a small software development company that develops custom applications for mobile devices such as cellular phones, palm pilots, pocket PCs, and portable printers. It specializes in solutions that allow detached users access to corporate information. Its products and services are marketable mostly to distributing and consumer products companies that have sales associate that move from one location to another distributing their goods and services. They analyze businesses, gather requirements and map out the solutions that are right for each company. Their technology exists to give mobile employees the advantage of timely and up-to-date information about their products, services, and inventories. The company needs an application that will keep track of its inventories and all services rendered to its customers.

Buckers Technology Customer Management Systems is a database web application that will enable Buckers Technology to keep track of all devices that have been given out to customers. It will keep a record of all customers, their information and order habits, and will also keep a record of all support calls and services rendered to customers. By keeping track of all support calls, Buckers Technology will have the ability to determine the cost of all services. This application will also provide a Web site to advertise products and services to a broad audience.
1. PROJECT DESCRIPTION

1.1 Problem Statement

Buckers Technology is a small software development company that develops custom applications for mobile devices such as cellular phones, palm pilots, pocket PCs, and portable printers. It specializes in solutions that allow detached users access to corporate information. Its products and services are marketable mostly to distributing and consumer products companies that have sales associate that move from one location to another distributing their goods and services. They analyze businesses, gather requirements and map out the solutions that are right for each company. Their technology exists to give mobile employees the advantage of timely and up-to-date information about their products, services, and inventories. The company needs an application that will keep track of its inventories and all services rendered to its customers.

Buckers Technology Customer Management Systems is a database web application that will enable Buckers Technology to keep track of all devices that have been given out to customers. It will keep a record of all customers, their information and order habits, and will also keep a record of all support calls and services rendered to customers. By keeping track of all support calls, Buckers Technology will have the ability to determine the cost of all services. This application will also provide a Web site to advertise products and services to a broad audience.
Currently, Buckers Technology is primarily focused on developing their software and so, they don’t have any inventories management system to monitor and track their inventories. They are growing at an alarming rate and as a result, keeping track of their inventories on paper has become less manageable and very time consuming. It is unable to track devices that have been given out to customers. They are unable to keep records of customer’s information, and their orders. They are also unable to keep track of all the support calls rendered to their customers and because of this; they are unable to determine the cost of their services rendered to the customers.

Because Buckers Technology is a relatively new company, and it is growing at an alarming rate, it needs to expand its business to other parts of the country. They need a website, which they will use to advertise their products and services to the mass media. The Website will give potential customers the ability to view their products and services and based on their business need, they could make a decision on which products and services they will need.

1.2 DESCRIPTION OF THE SOLUTION

Buckers Technology Customer Service Management System is a database web application that will enable Buckers Technology to keep track of its inventories, technical support calls, devices that have been given out to sales associates and their contact information. By keeping track of their technical support calls, Buckers Technology will have the ability to accurately charge their customer for these services.

They will be able to advertise their products to the mass media
Key functions of the application will be:

- A secure backend login authentication. Each authenticated user will have a given set of permissions that will allow him or her to access only the data they are authorized for in order to do their job.

- A user friendly website that will add credibility to the company. This will give the customer an inviting and friendly atmosphere.

- Easy navigational tool and menu of the Website. This will make it easy for user to search and browse the application.

1.3 USER PROFILE

Intended users will be customers, customer services representatives and Administrators.

Customers

Customers will use the Website to view products and Services that are available to them.

- The customers should be a distributing company that has sales associates.

- Customers should be interested in mobile devices that the company carries.

- Customers should have a clear understanding of the custom application and how it will fit their needs.

- Customers should have access to the internet and have basic knowledge of how to surf the internet

Customer Service Representatives

Customer Service Representatives will be the ones handling the calls from the sale associates and customers. Their key functions will be to the following:
• Create customers; update customers’ profile and Search customers.

• Ship devices to customers.

• Resolve customers’ issues and document the solution.

• View call history.

**Administrator**

The Administrator has the same functionalities as the Customer Service Representatives. In addition, Administrator will be able to do the following.

• Create New User accounts for Customer Service Representatives.

• Update Web sites with new devices, products and services.

• Add and delete customers from the systems.

2. DESIGN PROTOCOL

2.1 Organizational Scheme

Buckers Technology Management Systems has three user interfaces. The customer (sales associate), the Customer Service Representative, and the Administrator. The opening page displays the products and services of the company; it provides the history of the company; and it provides the contact information of the company, along with terms and conditions, and a privacy statement. It has a link to company employees, which will be the Administrator and Customer Service Representatives. Once an authenticated user logs in, he or she will see a set of links on the screen, which could be accessed, based on the
functionality needed. The function that each type of login will have can be viewed on the User Case Diagram. For example, when a Customer Service Rep logs in, he or she will be able to access customer information. Customers can be searched by their names. The Customer Service Rep will also have the ability to create new customers. After searching the customer’s records, the user will be able to resolve any technical issues, and ship out any equipment.

The home page opens up with the company logo and a display of some mobile devices. It has links to the login page, the company history, and contact information.

2.2 Users-Case Diagram

![Users-Case Diagram](image)

Figure 1. Users-Case Diagram
2.3 Data Source Design

Buckers Technology Customer Service Management Systems is divided into three sections based on the three users. The main focus is the customer table, which contains foreign keys to customer information, problems, solutions, equipment shipped out, and calls records. The tables have one-to-many and many-to-many relationships as necessary.

**Customer User Interface**

The Website will be an inviting atmosphere that will enable customers to have a clear view of products and service. It will have a display of its products and services. A menu will be located at the top of the page for easy browsing and navigation of the website. The overall method of moving through the systems will be by clicking the links. All screens have hyperlinks that will interact with the database and bring up other screens.

**Customer Service Representative User Interface**

The Customer Service Representatives user interface is as follows.

- **Customer Search:** This feature will allow the (CSR) to search for an existing customer by name. (See. Fig.3)

- **Create a Call:** Once a customer is validated, the call is recorded, which a log of all calls keeps coming into the call center. CSR resolves issues, while documenting a solution. If the issue cannot be resolved over the phone, replacement equipment is shipped out to the customer.
- **Add Customer**: The CSR will have the ability to add new customers to the company’s database.

- **View Equipment Report**: Once equipment is shipped out, the CSR has the ability to view all equipment that has been shipped out to a customer, the date it was shipped, and the CSR who sent out the request. This will help the company keep track of all its equipments. (See. Fig.6)

- **View calls**: The CSR will be able to view call history per each customer. This report tracks all service rendered to customers and this will ensure appropriate billing for services. (See. Fig.6)

- The CSR will provide technical support to all their customers while documenting the solution. If the equipment cannot be fixed over the phone, a replacement is shipped out to the customer. (see. Fig.4)

---

**Figure 2. Login Screen**
Authenticated users will sign in and receive a confirmation notice for a successful sign on.

Figure 3. Customer Screen

Figure 4. Support Screen
Figure 5. Equipement screen

Figure 6. Equipment Report Screen
Administrator User-Interface

The administrator User has the same functionality as the CSR; however, they have a few more additional functionalities, as listed below.

- **Create New User.** Create a username and password for a new employee. (see Fig.7)

- **Generate Reports.** Call reports are generated every month so the company can keep track of all calls. (see Fig. 10)

![Setting up New Account For New Users](image)

**Figure 7. New User Setup**
Figure 8: Change Username/Password Screen

Figure 9. Monthly Report

Administrator can generate monthly report, by clicking on any specific month and pulling up all the calls, the customer who made the call and the time of the call.
Figure 10. Excel Report

The company will have the ability to print and file out all the calls for each month. This will ensure they have a hard copy of all their call. This will act as a back up in case of a disaster.

2.4 User Interface

2.4.1 Interface Design / Navigation

The overall method of moving through the system will be following the links, which is located at the top of the screen. The screen from the links will be brought up in the main window. All screens will have hyperlinks that will interact with the database as well as bring up other screens.
2.4.2 Icons / Graphics / Symbols

The pictures of mobile devices on the webpage will introduce the customers to its products and services. Also, the company’s logo will be displayed on the Web site.

![Mobile Devices](image)

Figure 11. Mobile Devices

2.4.3 Color Scheme

The Color scheme for this project is orange and yellow, which is the color of the company’s logo. The background color will be light blue, and the text will be black. All links, buttons, and dialogue boxes are blue. The color choices are being used to maintain consistency with other Buckers Technology applications.
3. PROJECT PLANNING

3.1 Project Schedule

The project involved learning experience, mistakes, challenges, opportunities, and a feeling of accomplishment. I followed my schedule as closely as possible, and this has helped me to stay focused on my project and accomplish
all my tasks. Some of the applications were a learning experience for me, so I had to spend extra time learning the applications and getting familiar with the concepts.

![Timeline](image14.png)

**Figure 14. Timeline**

### 3.2 Project Budget

The budget for my project as referenced in Table 1 was very reasonable compared to the budget for similar projects. I had a free version of SQL Server 2005 Express; the rest of the software had academic licenses. Computer and printer prices were incurred prior to the conception of the project.
I used VB.NET (Visual Basic.Net) for my programming because it will help me improve my programming skills.

I used SQL (Structural Query Language) server 2005 Express for my database.

SQL Server 2005 Express provides more reliability, scalability and security that MS
(Microsoft) Access. It also has a high level of default security. Also SQL server has the potential of holding a more complex database which is what it will look like in the future because Buckers Technology is still growing.

I used ASP.NET (Active Server Pages.Net) technology to connect my database to Web site. ASP is used to access the database. ASP is not the only technology used to implement connectivity, but it’s one of the most current, and very popular in the industry. It also ensures that the connectivity to the database is secure. Using this ASP.NET will also improve my knowledge and help me stay current with the latest technology. This will help the company stay on track with high tech hardware and software developments.
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Table 2. Project Resources
4. PROOF OF CONCEPT

Once the CSR logs in, he or she is directed to the customer support screen. The customer’s issues will be resolved, and if the issues cannot be resolved, a replacement is sent out to the customer. This application keeps tracks of all equipment shipped out, so the company will know which customer has which device. This application also tracks all service calls that are made by customers. This tracking will help the company to determine the cost of its services.

5. TESTING

The development of this Buckers Technology Management Systems will be an iterative process. The design phase will be done in modules. This will allow unit testing to be done at the end of each module. In addition, each system unit will be tested before and after deployment. Each function will be thoroughly tested, in conjunction with other modules. First, data was be entered correctly to see if saving to the database was successful, and then it will be entered incorrectly to make sure incorrect data is not saved in the database. Successfully saved data was verified in the database to make sure the data is saved correctly.

Intended users of the application tested each module by putting in the incorrect information and then putting in correct information.

The “find” functionality was be tested by finding customers in the database. For example, customers can be searched by their names and the results will be verified with the information that displays on the screen.
Permissions for all the users were tested, to make sure users have permission and access to the functionality they need. The administrator’s permission was tested to make sure he or she is the only one that can add new users to the database. CSR cannot add new user to the database because they don’t have permissions to operate that functionality.

The Login functionality was tested to make sure only authenticated users have access to the Web Site and also to the company’s information. Once an authenticated user logs on he or she gets a confirmation notice saying that login was successful.

6. DELIVERABLES

This project is a Web Based Customer Service Management System that services customers and track customer calls. The following deliverables will indicate successful completion of the project:

1. A Web interface developed in VB.Net and ASP technology.
2. A Navigation bar on each page for easy navigation.
3. The User interface is very easy to navigate and very user friendly. It provides a professional look, and this adds credibility to the company.
4. Users of BCMS have a secure login that is authenticated by the database.
5. Authenticated Administrator will have the ability to:
   - Create New User account.
   - Employees can change their username and password
   - Update Web sites with new products and services.
   - Deactivate and delete users and customer for the system.
• Edit customer information from the system.

• Generate monthly call report for billing purpose.

• Track down all equipment shipped out to customers.

• Search existing customers by name.

• View calls history made by each sales associate or customer.

• Resolve technical issues from customers and document solutions.

• Ship out equipment to customers and be able to view equipment history.

• Resolve technical issues and document solutions.
7. Conclusion

This project was created to fulfill the need for Buckers Technology Customer Service Management Systems. I created a Web site and an application that met their needs for a critical time of their business. I used all the latest technologies necessary to keep them on track of the business. The project fulfilled all Design freeze deliverables, and testing was done to ensure product usability.
Appendix A

Code Snippets

C 1. Monthly Report

The code below was used to generate the monthly call reports. When a user clicks on a month, it pulls all the call for that month.

```vbnet
Dim SecondDate As String = String.Empty
Dim MonthDate As String = CStr(Session("SelectedMonth"))
Dim YearDate As String = CStr(Session("SelectedYear"))
Dim FirstDate As String = MonthDate + "-" + "01" + "-" + YearDate

If MonthDate = "4" Or MonthDate = "6" Or MonthDate = "9" Or MonthDate = "11" Then
    SecondDate = MonthDate + "-" + "30" + "-" + YearDate
ElseIf MonthDate = "2" Then
    SecondDate = MonthDate + "-" + "27" + "-" + YearDate
Else
    SecondDate = MonthDate + "-" + "31" + "-" + YearDate
End If

Dim ds As DataSet = New DataSet
Dim da As SqlDataAdapter = Nothing

Try
    conn = New SqlConnection(ConnectString)
    conn.Open()
    Dim LoadString As String = "Select ProblemType,
    ProblemDescription, Solution, ProblemDate," & 
    "HandheldNumber, LoggedBy From CallTable Where ProblemDate 
    >= '' & FirstDate & ' ' and ProblemDate <= '' & SecondDate & ' '"
    da = New SqlDataAdapter(LoadString, conn)
    da.Fill(ds, "CallTable")

    If ds.Tables.Count > 0 And ds.Tables(0).Rows.Count > 0 Then 
        Me.GridView1.DataSource = ds.Tables("CallTable")
        GridView1.DataBind()
End Try
```
Else
    Me.MonthlyErrorlbl.Text = "No Calls For this Month"
End If

Catch ex As SqlException
    Throw New Exception(ex.ToString())
Catch ex As Exception
    Throw New Exception(ex.ToString())
Finally
    conn.Close()
End Try

C.2 Exporting Calls to MS Excel Spreadsheet

The following below exports the monthly call reports to an Excel spreadsheet

Imports System
Imports System.Data
Imports System.Data.SqlClient

Partial Class ExcelReportForm
    Inherits System.Web.UI.Page

    Dim ExcelService As New BuckersWebService

    Protected Sub Page_Load(ByVal sender As Object, ByVal e As System.EventArgs) Handles Me.Load

        If CInt(Session("SelectedMonth")) = 1 Then
            'If Selected month is January export January information on datagrid to excel
            ExcelService.ExportJanData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))
        
        ElseIf CInt(Session("SelectedMonth")) = 2 Then
            'If Selected month is February, export February information on datagrid to excel
            ExcelService.ExportFebData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

        ElseIf CInt(Session("SelectedMonth")) = 3 Then
            'If Selected month is March export March information on datagrid to excel
            ExcelService.ExportMarchData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

        ElseIf CInt(Session("SelectedMonth")) = 4 Then
            'If Selected month is April export april information on datagrid to excel

End Sub
ExcelService.ExportAprilData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 5 Then
  'If Selected month is May export May information on
datagrid to excel
  ExcelService.ExportMayData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 6 Then
  'If Selected month is June export June information on
datagrid to excel
  ExcelService.ExportJuneData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 7 Then
  'If Selected month is July export July information on
datagrid to excel
  ExcelService.ExportJulyData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 8 Then
  'If Selected month is August export August information on
datagrid to excel
  ExcelService.ExportAugData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 9 Then
  'If Selected month is September export September
information on datagrid to excel
  ExcelService.ExportSepData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 10 Then
  'If Selected month is October export October information on
datagrid to excel
  ExcelService.ExportOctData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 11 Then
  'If Selected month is November export November information
on datagrid to excel
  ExcelService.ExportNovData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

ElseIf CInt(Session("SelectedMonth")) = 12 Then
  'If Selected month is December export December information
on datagrid to excel
  ExcelService.ExportDecData(ExcelGridView, ExcelTitlelbl, Response, CStr(Session("SelectedYear")))

End If
End Sub
Appendix B

C2. Words/Abbreviation

Customer Service Representative is abbreviated as CSR

Representative is abbreviated as Rep

Administrator is abbreviated as Admin

Buckers Technology Customer Service Management Systems is abbreviated as BCMS
References


