# MCA - Dashboards Page

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| **Sr. No.** | **Task** | **Effort in Hours** |
|  | Custom Development   * Custom Objects and Fields * Visualforce Page * Apex Controller * Unit testing * Visualforce Tab | 4 |
| 2 | Test code development | 1.5 |
| 3 | Packaging & Deployment | 1 |
| ***Total Effort (Hours)*** | | ***6*** |

**Open Items**

1. Create Contracts page
2. Dashboards page development
3. Count the total # of Open Tasks and Activities and store on a field

MCA App – Tradeshow demo

Discussion Points

1. Renewals page modifications

* Add % Paid as a column
* Adding slider for % Paid (Increment of 20)
* Remove Renewal Eligibility %, Renewal Date, Current Balance Amount
* Renewal Eligibility Date should be a date field. For filter should use less than or equal to.
* Renewal Eligibility Date and Credit Balance Date should be a range (Phase 2 item)
* Funded Date – Last 2 Months / Last 4 Months / Last 6 Months / Last 12 Months
* Bank Name should be a lookup
* Adding Chatter

1. Create a Renewal Management Dashboard for the reports

* Add a third chart – Forecast by Renewal Eligibility Date. Potential Renewal Amount field to be used for this. (Phase 2)
* Paid Amt = Payback amount – Current balance
* Rate = Payback Amt / Funded Amt
* Renewal Amount by Potential Renewal Date i.e. next 6 months

1. Dashboards idea page.

* It is a static page.
* Quick find functionality is not required
* Unread Leads – List View (Use the Unread by Owner field)

1. Fix to the Lead rating image.
2. Funding Application Visualforce Page

* Create a spreadsheet containing the field details with object name on the screen

1. Submissions Wizard

* New button for Multiple Attachments to link to existing screen
* Remove decimal for Matching %
* Make the sending error msg red and change the id to address in the msg
* Add green and red icons on the send attachments page (nice to have)
* Remove the Industry column
* Add a column for Eligible Funding Amount. Funding Amt - % of Monthly Gross Sales. Multiple for calculating the Eligible Funding Amt.
* Ability to sort columns on Submission Wizard (Phase 2)
* Credit Score – Change label to Min. Credit Score
* Add the ability to clear filter and show all the Programs.
* Submissions email or custom label. Ability to choose CC or BCC and that should be configurable

1. Renewals

* Add a status bar to signify the % of Loan is paid (Refer to the paid % calculations). Use this from a formula field.
* Change train icon for Manage renewals
* Add the Funding Amount / Payback Amount / Term columns to the page

1. Replace Grid buddy with apex tabs (Phase 2). Need effort.
2. Create Contracts

* If no offers no ability to navigate. Add previous link.
* Add a field for Payback Amount
* Remove the error for Status to be signed

1. Send an email for the last date. Friday to be the target end date.