INTEREST LOAN PROJECT TECHNICAL DOCUMENTATION

DASHBOARD

- Upon **user login**, the system identifies and filters data based on the **branches mapped** to that user during **User Creation**
- The following modules display **branch-specific data** for the logged-in user:
- Loan Entry, Approval, Loan Issue, Collection, Closed
- **Today**: Displays data entries made on the **current system date**.
- **Overall**: Displays **cumulative data** from the **first entry** made by the user up to the **current date**.
- A **branch filter** dropdown is available:
- Option **"All Branches"** to view cumulative data across all mapped branches.
- Option to **select specific branches** to filter and display data relevant only to the selected branch.

MASTER – COMPANY CREATION

Single Record Creation:

- The system allows **only one** company to be created.
- Upon successful creation, the form will **automatically switch to edit mode**.

Edit Only Mode:

- After the initial save, the screen will **only allow editing** the existing company details.
- Fields remain editable to accommodate changes in name, address, contact, or branding.

MASTER – BRANCH CREATION

Branch Deletion Restriction:

- A branch **cannot be deleted** if it is **linked or used in the Area Creation module**.
- System validation will prevent deletion and display an alert such as:
- "Access Denied Used in area creation."

MASTER – LOAN CATEGORY CREATION

Deletion Restriction:

- **A loan category cannot be deleted.** It is **used in Loan Category Creation** for any loan that has been initiated or submitted.
- If deletion is attempted on such a loan category, a validation error will be triggered: "Used in Loan Category Creation."
- It is **referenced in User Creation.** If deletion is attempted on such a category, a validation error will be triggered: "Used in user creation."

MASTER – AREA CREATION

Branch Selection Validation:

- Before entering **Line Name** and **Area Name**, the **Branch Name must be selected**.
- If the user attempts to enter a line or area without selecting a branch, the system will trigger an alert: "Kindly Select the Branch Name."

Deletion Restrictions:

Line Name Deletion:

- A line **cannot be deleted** if it is used in **User Creation.**
- If deletion is attempted on such a Line name, a validation error will be triggered: "Used in user creation."

Area Name Deletion:

- An area **cannot be deleted** if it is already **used in Area Creation.**
- If deletion is attempted on such an Area name, a validation error will be triggered: "Used in area creation."

ADMINISTRAION – USER CREATION

Deletion Restrictions:

- A role and designation **cannot be deleted** if it is used in **User Creation.**
- If deletion is attempted on such a role name and designation, a validation error will be triggered: "Used in user creation."

LOAN ENTRY

- Loan Count & First Loan Date Fields (Visibility Control):
- Default Behavior: When entering a **new loan** for a **first-time customer**, the fields **Loan Count** and **First Loan Date** are **hidden** by default.
- Returning Customer Behavior: If the customer's **previous loan is fully closed**, and the customer is reapplying for a new loan. The system will **automatically display**:
- **Loan Count** (incremented from previous)
- **First Loan Date** (original date of the very first loan issued)
- Loan Closure Dependency: Loan Count and First Loan Date will **only be shown** if:
- The customer has a previous loan entry.
- The **loan is completely closed** (i.e., no pending balance, fines, or penalties)
- Customer Profile Inserted – Customer status 1
- Loan Entry Inserted – Customer status 2

APPROVAL

- In Approval – Customer status 3
- Approval in Approve – Customer status 4
- Cancel – Customer status 5
- Revoke – Customer status 6

LOAN ISSUE

- Loan Issued – Customer status 7
- Cancel – Customer status 8
- Revoke – Customer status 9

COLLECTION

- In Collection – Customer status 7
- Sub status is dynamically fetched from the reset customer status Ajax page based on the selected customer.
- **Financial fields** like **Balance Amount**, **Pending Amount**, **Penalty**, **Fine**, **Payable Amount**, **Loan Amount**, and **Paid Amount** are auto-fetched from the **customer status** data.
- All values are preloaded automatically when a customer is selected for collection, ensuring real-time accuracy.
- These fields are **non-editable** as they are system-generated and calculated based on the latest collection and loan data.

CLOSED

- To Close - When Loan Balance Amount is 0, status has to change to '10' on collection screen. To Move Closed – Customer status 10.
- Closed – Customer status 11

NOC

- Moved to NOC – Customer status 12
- NOC completed – Customer status 13
- Removed From NOC – Customer status 14

UPDATE CUSTOMER

- The **Update Documentation** action in the **Actions** column is shown **only if** the customer's current status value is **less than or equal to 12**.

SEARCH

- Documentation Option – Displayed **only if** the Customer status >=7.
- Remark View Option – Displayed **only if** the Customer status >=10.
- NOC Summary Option – Displayed **only if** the Customer status =12 or 13.
- Due chart, Penalty chart, Fine chart Option – Displayed **only if** the Customer status < 7. Otherwise disabled the option.