Credit Portal App Design

Exercise

Outline

In this exercise, we will use the Architecture Design Process to design the Architecture for a Credit Portal application. We will use the OutSystems Architecture Canvas and follow the three steps of the design process:

At the end of this exercise, we will have the Architecture Canvas populated with the application's modules. The solutions will be presented and discussed in the Boot Camp.
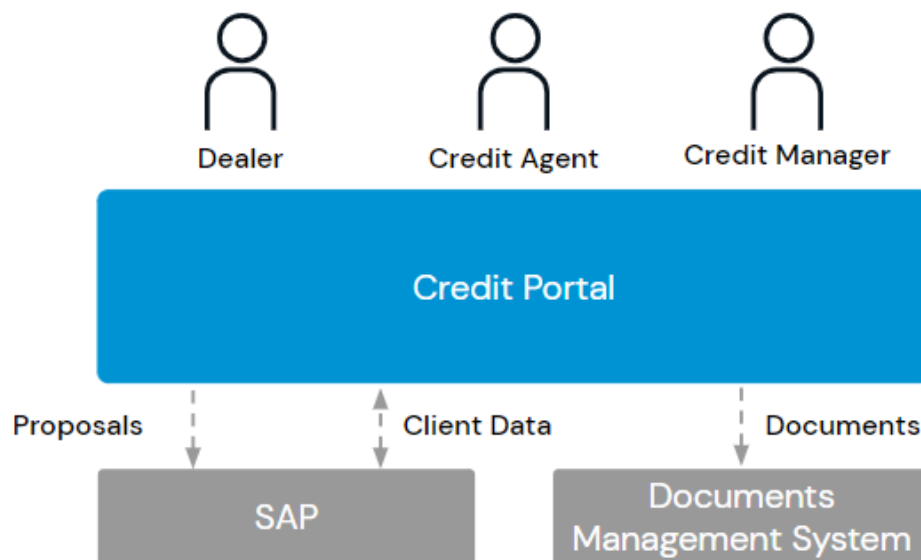
Resources

For this exercise, we will use a template of an Architecture Canvas that can be found in the Resources folder of the Boot Camp materials. Alternatively, we can also use the [Electronic Canvas Forge Component](#).

Hands-on

Design the Architecture for the Credit Portal Use Case, using the 3 phases of the Architecture Design and the OutSystems Architecture Canvas. This exercise will be made in groups of 3–4 people.

Use Case – Credit Portal

The Credit Portal consolidates all SAP and SFDC customer information into a single application. It allows users to manage customer information from a single location.

User Stories

Dealer

- Register proposals for specific products on a mobile device, while visiting a client
- Access client information from an external system
- Keep track of the proposal status

Credit Agent

- Pick a new proposal from the proposals list
- Receive documentation from the prospect related to a proposal which should be stored in a documents management system (external system)
- Analyze a proposal based on the client score and add notes to a proposal before approving or reject
- Approved proposals and clients are registered in the ERP

Credit Manager

- Needs to access and search for all proposals and status (new, ongoing, approved, rejected) and order by value
- Needs a dashboard to monitor agents' and dealers' performance

Application Requirements

Aggregate the Information

- Data from SAP must be aggregated in the application.

Help

- Application should provide online help to the users.
- The help contents should be editable within the application.

Audit

- All information changes, either made by users or by synchronization processes, must be logged for auditing purposes.

Exercise Requirements

- Use the Architecture Design Process presented in class
- First, prepare a draft of your concepts while you iteratively disclose, organize, and assemble your solution.
  - Make sure you provide a list of identified concepts first, before thinking about modules.
- Place each module in the correct canvas layer
- Name each module appropriately, according to their layer

- In the end, present the solution to the class using the Canvas