



K.R. MANGALAM UNIVERSITY

THE COMPLETE WORLD OF EDUCATION

Recognised under the section 2 (f) of the UGC Act 1956



Empowering the Youth; Empowering the Nation





K.R. MANGALAM UNIVERSITY
THE COMPLETE WORLD OF EDUCATION

FinDOC

Second Year Project Synopsis Submitted by

ROLL	NAME
2301730205	Kartik Kumar
2301730202	Md Umar Farooq
2301730156	Lakshya
2301730176	Vinay

Industry Mentor: Mr. Rajesh Kumar
Faculty Mentor: Dr. Monika Khatkar

Project Overview

An application that allows user to download his all documents regarding financial services which will be uploaded by the firm or the admin and can only be modified by admin.



About the Problem

Problem Identified

1. Manual Data Handling
2. Lack of Secure Document Management
3. Delayed Loan Status Updates
4. Limited Role-Based Access



About the Problem

Issues or Problems

1. High risk of data loss and duplication due to unstructured record-keeping.
2. Unauthorized access to sensitive documents.
3. Inefficiency in loan tracking



About the Problem

Need for a Solution

1. **Centralized Data Management** – Store and manage loan/customer data using an SQL database.
2. **Role-Based Access Control** – Restrict document modifications to Admins for security.



About the Problem

Existing Solutions & Their Problem

- 1. Spreadsheets & Paper Records** – Easy to lose, mistakes happen, not secure.
- 2. Basic CRM Software** – Expensive, not made for DSAs, doesn't connect well with HDFC Bank.
- 3. Cloud-Based Loan Tools** – Needs internet all the time, doesn't have strong document security.



Problem Statement

Define the problem clearly

1. Managing **customer data, loan details, and financial documents** manually is inefficient, error-prone, and insecure.
2. The absence of a **centralized, role-based system** leads to **data loss, unauthorized access, and delays** in loan processing.



Problem Statement

Why is it important?

1. Data Security & Integrity
2. Operational Efficiency
3. Better Customer Experience
4. Regulatory Compliance



Problem Statement

Expected impact of solving this problem

1. Secure & Efficient Data Management
2. Role-Based Access Control
3. Faster Loan Processing



Objectives

The FinDOC application is a secure and user-friendly platform designed to facilitate seamless access to financial documents for users. It serves as a centralized repository where users can download all their financial documents, such as bank statements, investment reports, tax filings, and other essential records, which are uploaded by the firm or the designated administrator.



Methodology, Tools, and Techniques

- Improved Accessibility – Users can easily download their financial documents anytime, reducing manual requests.
- Efficiency & Time-Saving – Automates document management, reducing administrative workload for firms.
- Transparency & Trust – Ensures users have quick access to their financial records, improving communication and trust.
- User Convenience – Simple interface makes document retrieval hassle-free.



Expected Results & Impact

1. User Convenience – Simple interface makes document retrieval hassle-free.
2. Reduced Paperwork – Digital document handling minimizes paper usage, contributing to eco-friendly practices.



THANK YOU

