

Loan App Editor - Specific Features

The basic requirement is to be able to create/edit a loan application. See the existing screenshot (below).

Some improvements we would like to see:

- Have pre-defined "Group" block that can be dragged into the app to be pre-populated. These might be defined in a separate table.
- Update attributes automatically so user doesn't forget to update. Alternatively, don't let the user switch to a different record until the changes are updated.
- Pop-up tooltips to document for field meetings. The content of the tooltip doesn't have to be sensical - we just want to see the proof of concept to how it would work.
- A better UI than the tabbed attributes at the bottom of the screen. Possibly a right side of the screen that shows up when the row is being edited (i.e. is clicked on), and all the data shown in visible sections instead of tabbed sections.

Some bonus feature/improvements, if there is time. We can cover specifics if get to this point.

- Loan app configuration option templates that have a different configuration based on CU type.
- Be able to "deactivate" a group so it doesn't show up on the actual loan app. It would be some kind of flag - don't need to show it actually in use in a loan app.

Existing screenshot

The screenshot displays the Loan App Editor interface. The top section shows a list of groups, each with a dropdown menu and a text field. The groups are:

- Group (with a close button)
- Section Header (dropdown: Loan General Information)
- General Entry (dropdown: Loan Type)
- General Entry (dropdown: Loan App Type ID)
- General Entry (dropdown: Loan Description)
- General Entry (dropdown: Reason for Loan)
- General Entry (dropdown: Loan App Date)
- General Entry (dropdown: Briefly describe the property)

The bottom section shows a configuration panel for the selected group. It has tabs for Core, Attributes, Validation, and Extra. The Core tab is active, showing the following fields:

- Core Record Index: P
- Core Field Name: loan_type
- Always Send to Core: ☐
- Skip Combining if Blank: ☐
- Select List: NOT SET (dropdown)
- Response Core Table Field: (text field)
- Combine Local Fields: (text field)
- Delimiter: (text field)
- Auto Fill Value From Core: NOT SET (dropdown)

An Update button is located at the bottom left of the configuration panel.