Functional Requirement Of Banking Application For Loan Recommendation

Objective

The primary objective of the banking application is to provide personalized loan recommendations to users based on their transaction history and financial profile. The application aims to assist users in making informed decisions about loan products that align with their financial needs and capabilities

Features Supported in Application

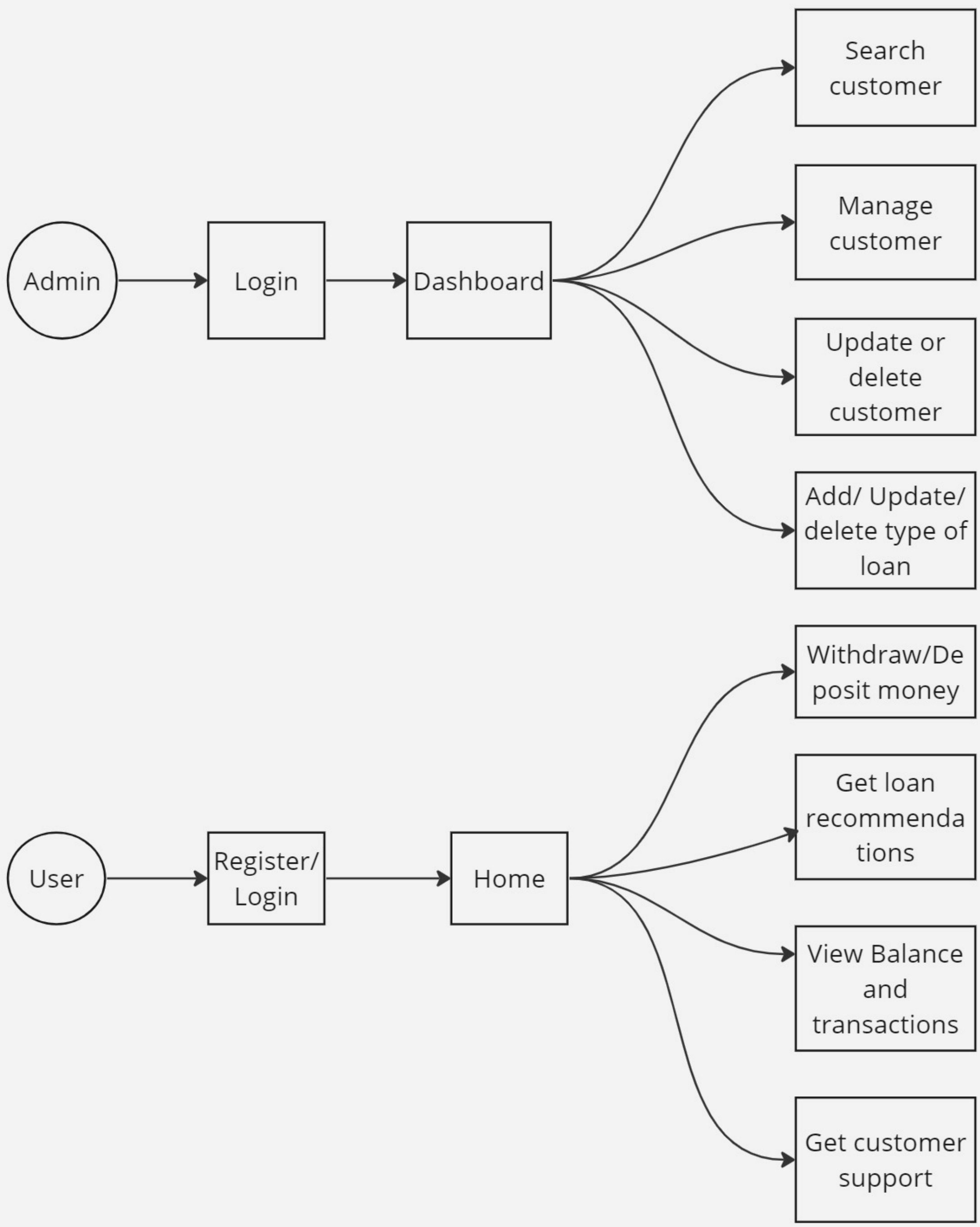
Functions available for Admins are as follows:

1. Search Customer.
2. Manage Customer.
3. Update/delete Customer record.
4. Add/update/delete type of loan.

Functions available for Users are as follows:

1. Withdraw/deposit money.
2. Get loan recommendations.
3. View account balance and transaction history.
4. Get customer support.

Loan Recommendation Dashboard Workflow



Features for Admin:

Login > Dashboard > Customer Specific Information.

OR

Login > Dashboard >Manage Customer.

OR

Login > Dashboard > Update/ Delete Customer record.

OR

Login>Dashboard>add/update/delete type of loan.

On the dashboard page provided for the admins, the admin can view customer specific information, manage customers and here admins can add and update the customers.

Field Name	Description
Manage customer	Allows the admins to manage customers.
Update/ Delete customers	Allow the admin to update or delete the customer information.
Search customer	Search a particular customer.
Add/update/delete type of loan.	Allow admin to add/update/delete type of loan available.

To Operate on the type of loan and customers:

1. To Add/update/delete a type of loan, select the Add/update/delete option in the dashboard. All the related fields will appear on the screen as a form which has to be filled.

2. To Update/ Delete a customer, select the options filed with respect to the customer in the dashboard. OR Click the Customer to Update/Delete then click the options filed in that page.
3. Manage Customer – the above function helps admin to manage customer.
4. Search customer .
   Detailed information about the customer will be displayed as a table having name, email, starting and ending date of loan, amount paid/ remaining, date of next amount to be paid will be displayed.

Click Back to Dashboard to navigate back to the dashboard

Features for Users:

Register/Login > Home > Deposit/withdraw money.

OR

Register/Login >Home > Get loan recommendations

OR

Register/Login >Home > View account balance > Transaction history.

OR

Register/Login >Home > Get customer support.

When the user logs in to the application, user will be displayed with the home page. From here user can find different options available and can deposit/withdraw money or also can get recommended loans. From the home page user can go to his/her dashboard to view account balance and past transactions. Where different fields related to it will be displayed. Customer will be also be provided with form to get support.

Field Name	Description
View Dashboard	Display a list of options for that user.
Deposit /withdraw money.	Allow user to add or remove money.

Loan Specific Page.	Display all the information about the loan.
View account balance.	Display account balance and transaction history.
Get customer support	Allow user to purchase the loan and fill feedback forms.

User's Interactions:

1. To View the Dashboard, click Dashboard option. This will take the user to dashboard, where list of options and their respective fields will be displayed.
2. To deposit /withdraw money.
3. Click the specific loan type to View Detailed information about the loan.
4. User can view account balance and past transaction history.
5. To avail the customer support, user need to click Get support button, which will display a form.

Loan specific page will contain all the necessary information as entered by the admin will be displayed.
Click Back to Home to navigate back to the Home.
Click Logout to logout.