

Capstone Proposal

Product Name

Collate

Product Overview

Collate is designed to work in conjunction with LendingQB, minimizing loan processing tasks in order to decrease redundancy & increase productivity. Simple tasks such as calculating income & modifying email templates made easy.

Specific Functionality

Minimum Feature Set

The main component of the application is the dashboard. The goal is to create a single-page app that utilizes AJAX & minimizes the need for navigation & page loading.

After the user logs in, they will be presented with an all-in-one dashboard. The **Navigation** area at the top of the screen will allow the user to go back to the main page of this dashboard via the **Home** link, allow any input data to be saved to the database via the **Save** link, and allow for the creation of a new file via the **New File** link.

Section One of the the dashboard contains fields for borrower name(s), loan account number, loan officer name, and type of loan.

Section Two of the dashboard will take borrower(s) income information (employer name, job start date, monthly income amount, paystub period end date, and pay schedule type), and will output a concatenated string for the user to input back into their main loan application.

example: B1: Employed with the Portland Trailblazers for 4 years, semi-monthly pay, \$40,000.00/mo, good through 11/01/2016

Section Two will also allow input of tax, insurance, and homeowner's association dues information (see Further Work section.)

Section Three will be a quick navigation area, which may not contain links until the MVP is completed.

[Splash Screen Wireframe](#)

Data Model

The relational database will be structured as follows:

User Table:

- Username
- Password (hashed)
- First Name
- Last Name
- User ID
- Email Address
- Date Account Created

File Table

- Loan (Account) Number
- User ID
- Member One First Name
- Member One Last Name
- Member Two First Name
- Member Two Last Name
- Employer Name
- Hire Date
- Paystub Amount
- Pay Cycle (bi-weekly, semi-monthly, etc.)
- Period Ending Date

Technical Components

Django framework will require modules that can preform the following tasks:

- Register a new user
- Allow user to log in
- Allow user to create a new file
- Allow user to to save, load, and delete file data
- Calculate income based on pay cycle

Further Work

- Implementing Email Templates
- Adding Tax, Insurance, & HOA elements