| **Product: Mutual Fund** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **Process Title:  Branch Setup** | | | | | | **Screen Code :** |
| **Menu Location: Master Setup>General Setup>Branch Setup** | | | | | |  |
| **Purpose** | | | | | | |
| The Purpose of this screen is to manage Branch Setup. | | | | | | |
| **Screen Designs** | | | | | | |
| **Screen #1 | Branch setup List**    **Screen #2 | Add Branch** | | | | | | |
| **ER Diagram** | | | | | | |
|  | | | | | | |
| **Pre-Condition** | | | | | | |
|  | The user must be registered as an internal user. | | | | | |
| **Post Condition** | | | | | | |
|  | A new branch is added or an existing branch is edited. | | | | | |
| **Global Validations** | | | | | | |
|  |  | | | | | |
| **Global Variables** | | | | | | |
|  |  | | | | | |
| **UI Layout** | | | | | | |
| **Field ID** | **Attribute Label** | **Input**  **Object Type** | **Open/Enum/Source of Options** | | **Action Description** | **Validation/Description** |
| **Screen #1 | Branch setup List**  Should populate 10 latest entries from the branch setup table. | | | | | | |
| 1F1 | Search | TB | Open | | Any entry on the field should filter the displayed list of Branch setups. | **Navigable:** Yes  **Read Only**: No  **Mandatory:** No  **Datatype:** Varchar  **Validation:** N/A  **Population:** N/A |
| If clicking on “Add” button, the system should redirect the user to screen #2. | | | | | | |
| **Screen #2 | Create Branch** | | | | | | |
| 2F1 | Parent Entity Type | LV | List of options:   * Bank * Broker | | - | **Navigable:** Yes  **Read Only**: No  **Mandatory:** Yes  **Datatype:** Integer  **Validation:** N/A  **Population:** N/A |
| 2F2 | Parent Entity | TB | Source of options:  Obtain a list of designations from the *Designation* table. | | - | **Navigable:** Yes  **Read Only**: No  **Mandatory:** Yes  **Datatype:** Varchar  **Validation:** N/A  **Population:** N/A |
| 2F3 | Branch Code | TB | Open | | - | **Navigable:** Yes  **Read Only**: No  **Mandatory:** Yes  **Datatype:** Varchar  **Validation:** N/A  **Population:** N/A |
| 2F4 | Branch Name | TB | Open | | - | **Navigable:** Yes  **Read Only**: No  **Mandatory:** Yes  **Datatype:** Varchar  **Validation:** N/A  **Population:** N/A |
| If clicked on “Save and Add New” button, the system should add a new branch and remain on the same form. | | | | | | |
| If clicked on “Save” button, the system should add a new branch and redirect the user to screen #1. | | | | | | |
| **Table: Branch** | | | | | | |
|  | **Attribute** | | | **Value** | | **Remarks** |
| PK | id | | | Auto-Populated | |  |
|  | Parent Entity Type | | | 2F1 | |  |
|  | Parent Entity | | | 2F2 | |  |
|  | Branch Code | | | 2F3 | |  |
|  | Branch Name | | | 2F4 | |  |
|  |  | | |  | |  |
| **Invisible Attributes and Update** | | | | | | |
| 1 |  | | |  | | |
| 2 |  | | |  | | |
| **API details (To be added by backend developer)** | | | | | | |
| 1 |  | | | | | |
| 2 |  | | | | | |

| **Effort Required** |  |
| --- | --- |
| Approved: | Signature |
| Name |