Problem 1:

Your client Amrutvahini Bank is a financial investment advisory firm. The firm wants to revamp its new account opening process. They want to simplify the forms they use and clean up the flow to prevent duplicate work.

The new system must allow for the following roles and capabilities:

| **Role** | **Required Capabilities** |
| --- | --- |
| Relationship Manager | * Input information on behalf of a client. * Have the ability to see and review applications on a dashboard. |
| Operations Manager | * Review submitted applications. * Approve or decline applications. * Have the ability to see, review, and delete applications on a dashboard. |

**Customer Information Page**

The Customer Information Page collects information on the individual applying for a new account.

Begin by creating fields to collect the following information:

* Relationship Manager Name
* Customer Name
* Address
* PAN (Use Input Masking)
* Adhar Number (Use Input Masking)
* DOB (Date of birth)
* Email
* Phone Number (Use Input Masking)

Next Button in order to move the application to Product Selection page.

**Product Selection Page**

This page allows for dynamic product selection. Product selection must work in the following way:

1. When the page loads, the list of products must populate in your Product Selection module.
2. The set of products must populate into a field for the Relationship Manager to choose from.
3. The Relationship Manager must be able to choose multiple products.

Cancel and Next buttons should be displayed on this page.

If user clicks on cancel, data entered on Customer Information Page should be saved.

If user clicks on Next button, move the application to Summary Page.

## Summary Page

* The summary pages display the information captured in your application.
* The Relationship Managers summary page lets them review everything they entered before submitting.
* Button to submit the application.

## Dashboard Requirements

The dashboard lets your end-user view a list of all applications. When choosing what information you want your end-user to see, think about the most valuable data to review in a Viewgrid, Chart, and KPI (key performance indicator).

The dashboard must:

* Display all applications submitted.
* Display application status (draft, submitted, approved or denied).
* Let the Relationship and Operations Managers view more details about each submission through a modal.
* Let the Operations Manager delete applications.

## ANNEXURE

List of products are:

1. Saving Account with minimum 10k
2. Premium Saving Account with minimum 80K
3. Salary Account
4. Student Account
5. Minor Account
6. Current Account
7. Special Pension Scheme