

### ### 1. \*Login Page\*

#### - \*Fields:\*

- Username (Text Field)
- Password (Password Field)

#### - \*Actions:\*

- \*Submit (Button):\* Validates credentials and redirects to Home Page if correct; otherwise, shows an error message.

#### - \*Error Handling:\*

- Displays an error message if the username or password is incorrect.

Login	
Username:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Submit"/>	
[Error: Incorrect username or password.] (optional)	

## Home Page (Dashboard)

### Components:

#### 1. Navigation Bar:

- **Links:**
  - **Home:** Navigates to the Dashboard.
  - **Filter by Status:** Allows filtering of applications by their current status.
  - **Filter by Handler:** Allows filtering of applications by the assigned sales user.
  - **Log Out:** Logs the user out of the system.

#### 2. Table View:

- Displays all open CC application forms in a structured table format.
- **Columns:**
  - **Select:** Checkbox to select individual application forms for batch actions.
  - **Serial No.:** A unique serial number for each application.
  - **Application ID:** A unique identifier for each application form. This is hyperlinked to open the application page directly when clicked.
  - **Card Holder Name:** The name of the person applying for the credit card.
  - **Application Form Status:** The current status of the application (e.g., Pending, Approved, Rejected).
  - **Age of Application Form:** The time duration since the application was created.
  - **Handled By Sales User:** The name of the sales user managing the application.

#### 3. Actions:

- **View Form:** A button to open the details of selected applications for viewing. This is hyperlinked to open the **APPLICATION PAGE** directly when clicked.
- **Edit Form:** A button to open the details of selected applications for editing. This option is enabled only for the staff member who created/uploaded the application(s).
- **Delete Application:** A button to delete selected applications. This option is enabled only for the staff member who created/uploaded the application(s).
- **Create New Form:** A button to navigate to the "Create/Edit CC Application Form" page for adding new applications.
- **Download Report:** A button to export the data of selected application forms to an Excel report. Users can select multiple forms using the checkboxes for this action.

MODEL 1:

Menu							
Home	Filter by Status	Filter by Handler	Log Out				
Select	Serial No.	App. ID	Card Holder	Status	Age	Handled By	
[ ]	1	[001]	John Doe	Open	5d	Sales1	
[ ]	2	[002]	Jane Smith	Closed	10d	Sales2	
[ ]	...	...	...	...	...	...	
[View Form]	[Edit Form]	[Delete]	[Create New Form]	[Download Report]			

MODEL 2:

Menu								
Home	Filter by Status	Filter by Handler	Log Out					
Sel	Serial	App. ID	Card Holder	Status	Age	Handled By	Actions	
[ ]	1	[001]	John Doe	Open	5d	Sales1	[View] [Edit] [Del]	
[ ]	2	[002]	Jane Smith	Closed	10d	Sales2	[View] [Edit] [Del]	
[ ]	...	...	...	...	...	...	[View] [Edit] [Del]	
[Create New Form]				[Download Report]				

## Create/Edit CC Application Form Page

- **Sections:**
  - **Customer Details:**
    - **Fields:**
      - **Is Customer New or Existing?** (Dropdown: New / Existing)
        - **If Existing:**
          - **Bank Account Number** (Text Field, retrieved automatically)
        - **If New:**
          - **Full Name** (Text Field)
          - **Date of Birth** (Date Picker)
          - **Age** (Auto-calculated from DOB)
          - **Address** (Text Field)
          - **Contact Number** (Text Field)
          - **Nominee** (Text Field)
          - **Nominee Relationship** (Dropdown)
    - **Application Details:**
      - **Fields:**
        - **Product** (Dropdown: Silver, Gold, Platinum Card)
        - **ID Proof** (Attachment: File Upload for Passport)
        - **Address Proof** (Attachment: File Upload for Passport or Aadhar Card)
        - **Income Proof** (Attachment: File Upload for Latest Payslip and PAN Number)
        - **Profile** (Dropdown: New / Existing)
          - **Aadhar Number** (Text Field)
          - **PAN Number** (Text Field)
  - **Actions:**
    - **Submit:** Button to submit the form data.
    - **Save:** Option to save the form as a draft.
    - **Cancel:** Button to discard changes and return to the Home Page.
  - **Error Handling:**
    - Show error messages if mandatory fields are not filled.

GENERAL :

+-----+	
	Create/Edit CC Application
	(Black and White)
+-----+	
	Is Customer New or Existing?
	[Dropdown: New / Existing]
+-----+	
	Application Details:
	Product: [Dropdown: Silver, Gold, Platinum]
	ID Proof: [File Upload: Passport]
	Address Proof: [File Upload: Passport/Aadhar]
	Income Proof: [File Upload: Payslip/PAN]
	Aadhar Number: [Text Field]
	PAN Number: [Text Field]
	Profile: [Dropdown: New / Existing]
+-----+	
	[Submit] [Save] [Cancel]
+-----+	

EXISTING CUSTOMER :

+-----+	
	Create/Edit CC Application
	(Black and White)
+-----+	
	Is Customer New or Existing?
	[Existing]
+-----+	
	Bank Account Number: [Text Field]
+-----+	
	Application Details:
	Product: [Dropdown: Silver, Gold, Platinum]
	ID Proof: [File Upload: Passport]
	Address Proof: [File Upload: Passport/Aadhar]
	Income Proof: [File Upload: Payslip/PAN]
	Aadhar Number: [Text Field]
	PAN Number: [Text Field]
	Profile: [Dropdown: New / Existing]
+-----+	
	[Submit] [Save] [Cancel]
+-----+	

## NEW CUSTOMER:

+-----+	
Create/Edit CC Application	
(Red Theme)	
+-----+	
Is Customer New or Existing?	
[New]	
+-----+	
Full Name: [Text Field]	
Date of Birth: [Date Picker]	
Age: [Auto-calculated from DOB]	
Address: [Text Field]	
Contact Number: [Text Field]	
Nominee: [Text Field]	
Nominee Relationship: [Dropdown]	
+-----+	
Application Details:	
Product: [Dropdown: Silver, Gold, Platinum]	
ID Proof: [File Upload: Passport]	
Address Proof: [File Upload: Passport/Aadhar]	
Income Proof: [File Upload: Payslip/PAN]	
Aadhar Number: [Text Field]	
PAN Number: [Text Field]	
Profile: [Dropdown: New / Existing]	
+-----+	
[Submit] [Save] [Cancel]	
+-----+	

#### ### 4. \*Application Details Page\*

Application Details			
Tabs: Summary	Product	Customer	
Application	Document		
(Content based on selected tab)			

##### - \*Tabs:\*

- \*Summary:\* Displays overall details about the application.

- \*Fields:\* Application ID, Application Date, Approval Status, Staff Details

- \*Product:\* Displays requested and approved product details.

- \*Fields:\* Requested Product, Approved Product, Credit Score Check, Manual Approval Option

- \*Customer:\* Displays customer details.

- \*Fields:\* Name, Address, Email, Contact Number, Date of Birth, Age, Nominee Details, etc.

- \*Application:\* Reflects application status and related actions.

- \*Fields:\* Application Status, Actions (Edit, Delete)

- \*Document:\* Manages customer documents.

- \*Fields:\* ID Proof, Address Proof, Income Proof

- \*Actions:\* View/Download documents



```
+-----+
|           Application Details           |
+-----+
| Tabs: Summary | Product | Customer |   |
|           Application | Document       |
+-----+
| Summary:                                     |
+-----+
| Application ID: 001                         |
| Application Date: 2023-10-03               |
| Approval Status: Pending                   |
| Staff Details: John Doe                   |
+-----+
```

```
+-----+
|           Application Details           |
+-----+
| Tabs: Summary | Product | Customer |   |
|           Application | Document       |
+-----+
| Product:                                     |
+-----+
| Requested Product: Gold                     |
| Approved Product: [To be filled upon approval] |
| Credit Score Check: Pending                 |
| Manual Approval Option: [Checkbox]         |
+-----+
```

```
+-----+
|           Application Details           |
+-----+
| Tabs: Summary | Product | Customer |   |
|           Application | Document       |
+-----+
| Customer:                                     |
+-----+
| Name: John Doe                             |
| Address: 123 Main St                       |
| Email: john@example.com                   |
| Contact Number: 123-456-7890              |
| Date of Birth: 1985-05-15                 |
| Age: 38                                   |
| Nominee: Jane Doe                         |
| Nominee Relationship: Spouse               |
+-----+
```

```
+-----+
|           Application Details           |
+-----+
| Tabs: Summary | Product | Customer |   |
|           Application | Document       |
+-----+
| Document:                                     |
+-----+
| ID Proof: [View] [Download]                |
| Address Proof: [View] [Download]            |
| Income Proof: [View] [Download]            |
+-----+
```

### ### 5. \*Flow of Pages\*

1. \*Login Page\* → User enters credentials → \*Home Page\*.
2. \*Home Page\*:
  - Selects "Create New Form" → \*Create/Edit CC Application Form Page\*.
  - Clicks on an application from the table → \*Application Details Page\*.
  - Clicks "Delete Application" (enabled only if created by the logged-in Sales User) → Confirmation prompt before deletion.
3. \*Create/Edit CC Application Form Page\*:
  - User specifies if the customer is New or Existing.
  - If New, user fills in all mandatory customer details.
  - User fills in application details and submits the form.
4. \*Application Details Page\*:
  - Navigation between tabs (Summary, Product, Customer, Application, Document).
  - Option to "Accept Offer" or "Request Approval" triggers back-end processes (e.g., Bureau Credit Checks, notifying the Transaction Processing System).
5. \*Home Page\*:
  - Option to download Excel report.

### ### 6. \*Detailed Inputs and Attributes for Each Page\*

- \*Login Page\*:
  - Username: Required
  - Password: Required
  - Submit Button: Triggers login validation
- \*Home Page\*:
  - Table Columns (Serial No., Application ID, etc.): Display data fetched from the database
  - View/Edit Form Button: Opens application form in editable mode
  - Delete Application Button: Deletes the application (enabled only for the creator of the application)
  - Create New Form Button: Opens a new form for data input
- \*Create/Edit CC Application Form Page\*:
  - Customer Section:
    - Is Customer New or Existing: Required
    - For New Customers: Full Name, DOB, Address, Contact Number, Nominee Details: Required

- Application Section:
  - Product, ID Proof, Address Proof, Income Proof, Profile: Required fields
  - Attach File Buttons: For uploading required documents
  - Submit Button: Submits form data to back-end for processing
  - Save Button: Saves form as a draft
- \*Application Details Page:\*
- Summary Tab: Displays general application information
- Product Tab: Displays requested and approved product details
- Customer Tab: Displays customer contact and identification details
- Application Tab: Reflects the current state of the application
- Document Tab: Manages uploaded documents with view/download options

### ### 7. \*Connections and Flow\*

- \*Login Validation\*: Login Page validates against user database.
- \*Dashboard Data\*: Home Page fetches open applications from the server.
- \*Form Submission\*: Create/Edit Form Page submits data to the back-end, triggering document management and credit checks.
- \*Application Details\*: Application Details Page fetches and displays data based on user actions (e.g., viewing an application).
- \*Notifications\*: System sends notifications to different systems (e.g., Mail Manager, PrintShop) based on form actions.