### 1. \*Login Page\*

- \*Fields:\*

- Username (Text Field)

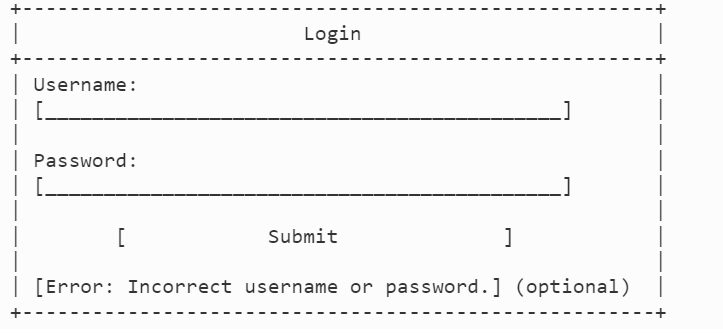
- Password (Password Field)

- \*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.



**Home Page (Dashboard)**

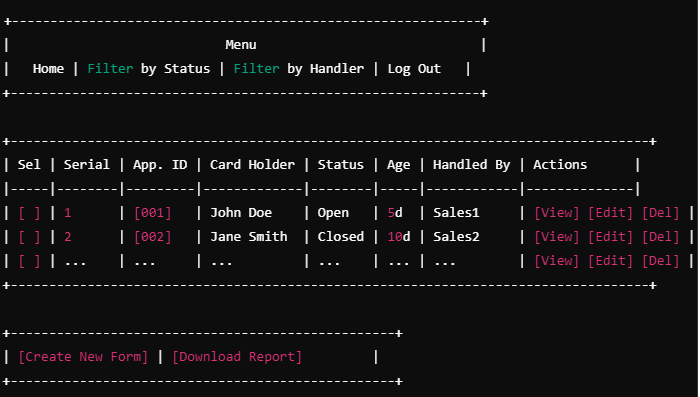
**Components:**

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:**



**MODEL 2:**



**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)

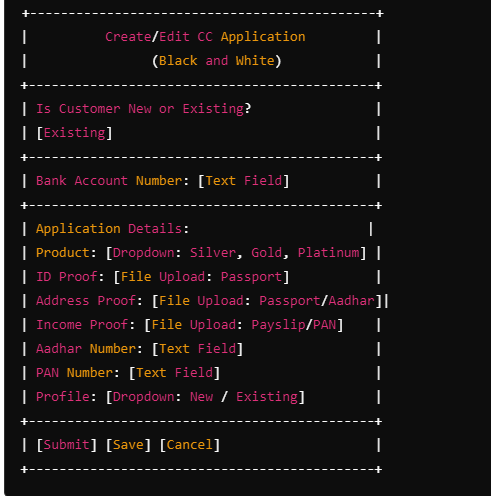
**Aadhar Number** (Text Field)

**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.

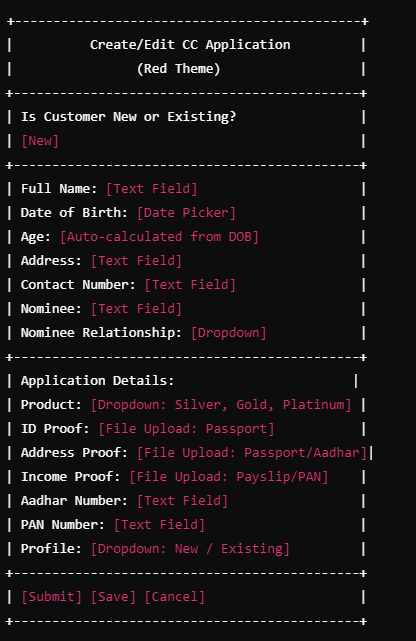


**GENERAL :**

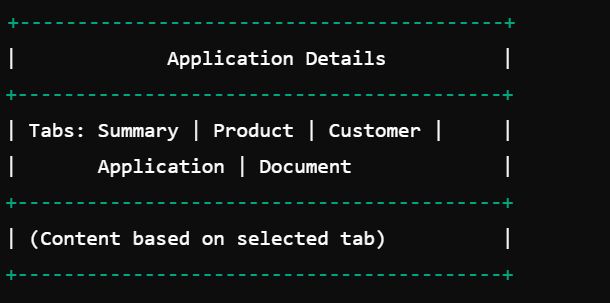


**EXISTING CUSTOMER :**

**NEW CUSTOMER:**

****

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



- \*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.

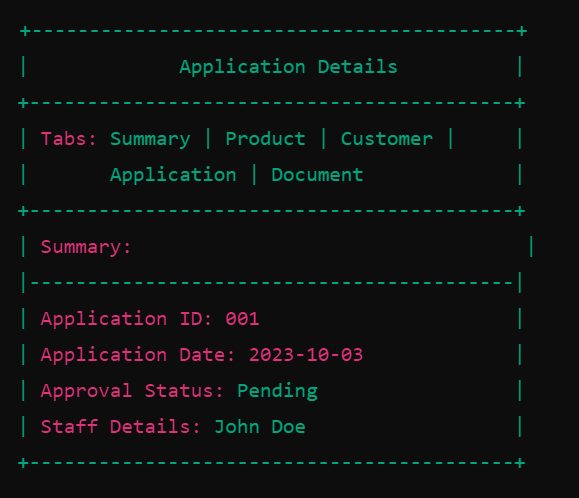
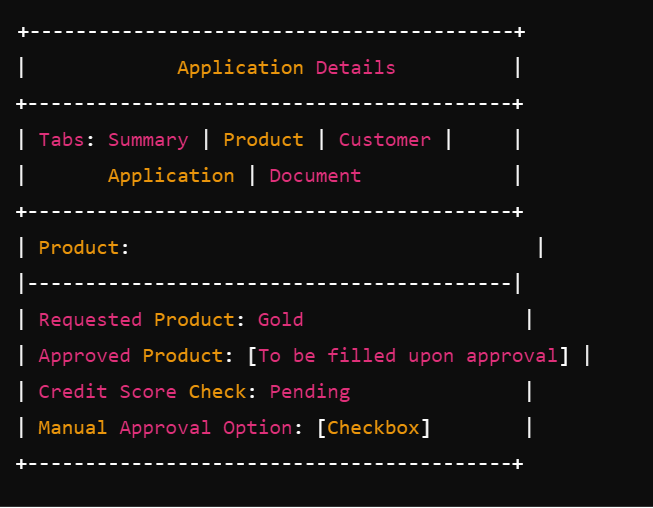
- \*Application:\* Reflects application status and related actions.

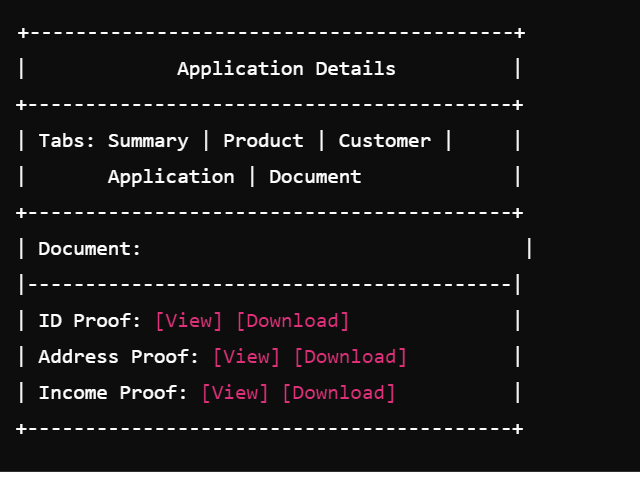
- \*Fields:\* Application Status, Actions (Edit, Delete)

- \*Document:\* Manages customer documents.

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

- \*Actions:\* View/Download documents







### 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.