Capstone Project Report

FinFlex

Financial Technology System

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Introduction

The FinFlex system is designed to revolutionize the management of loans, clients, and payments in financial institutions. By replacing traditional manual methods, this software aims to streamline processes, reduce human error, enhance efficiency, and improve customer service. FinFlex ensures faster computations, accurate tracking, and timely notifications, making it an indispensable tool for financial managers.

Scope

FinFlex is designed for financial institutions or managers involved in loan and payment management. Its key functionalities include:

- **Loan Management**: Approve or reject loans, track payments, and calculate revenue.
- **Client Management**: Maintain client details and streamline communication.
- **Payment Management**: Notify managers about upcoming payments and provide reporting tools.

With its modern, scalable, and user-friendly interface, FinFlex aims to enhance customer satisfaction and operational efficiency

Tech Stack

- React
- MySQL
- Tailwind.css
- MUI-material
- Emailjs

Features

Loan Management: Simplifies loan application, approval, and payment tracking.

- Create, view, and update loan details.
- Approve or reject loan applications.
- Shows comprehensive loan status reports.

Client Management: Stores client information and facilitates seamless communication.

- Maintain a database of client details.
- Add or update client information.
- Enable in-app messaging or email communication.

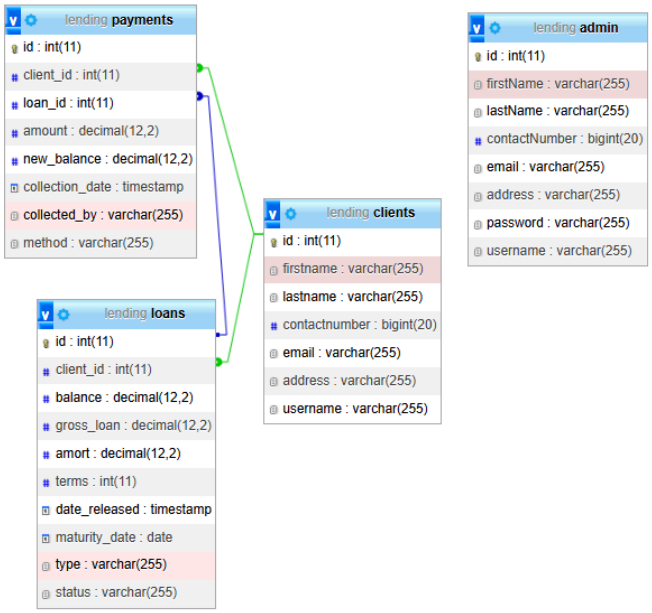
Payments Management: Automates payment tracking and reminders.

- Record and update payment transactions.
- Send reminders for upcoming payments.
- Shows comprehensive payment status reports.

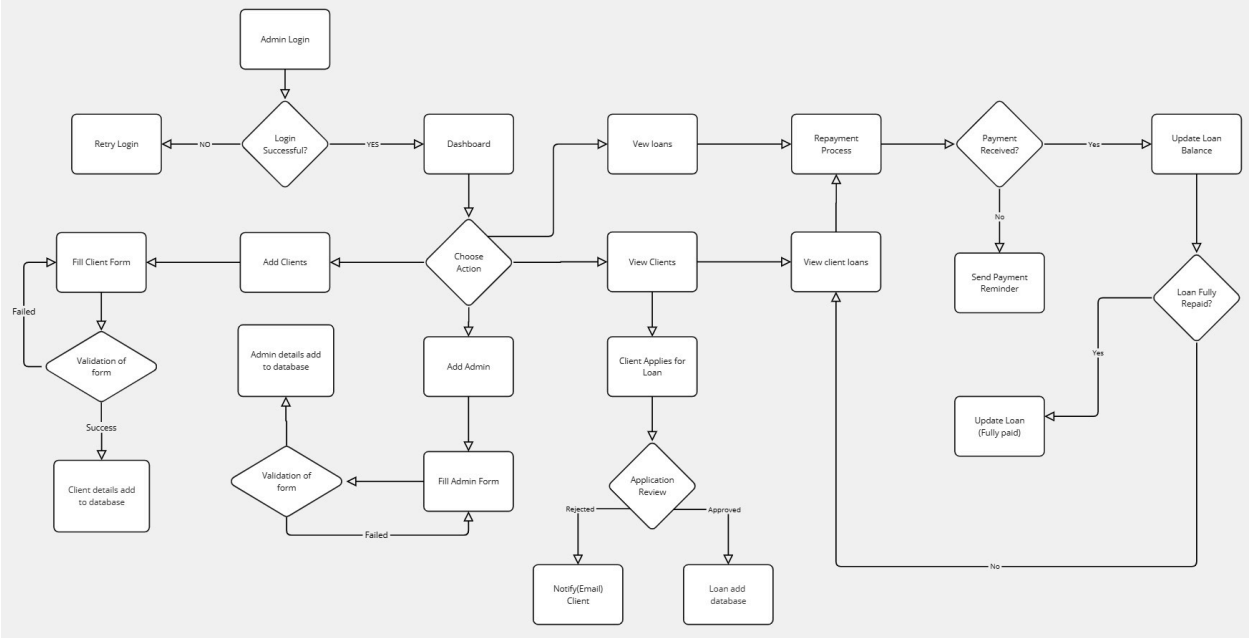
References

- Tailwind CSS Documentation
- React Documentation
- MySQL Database Guide
- MUI Material UI Library Guide

DB Diagram

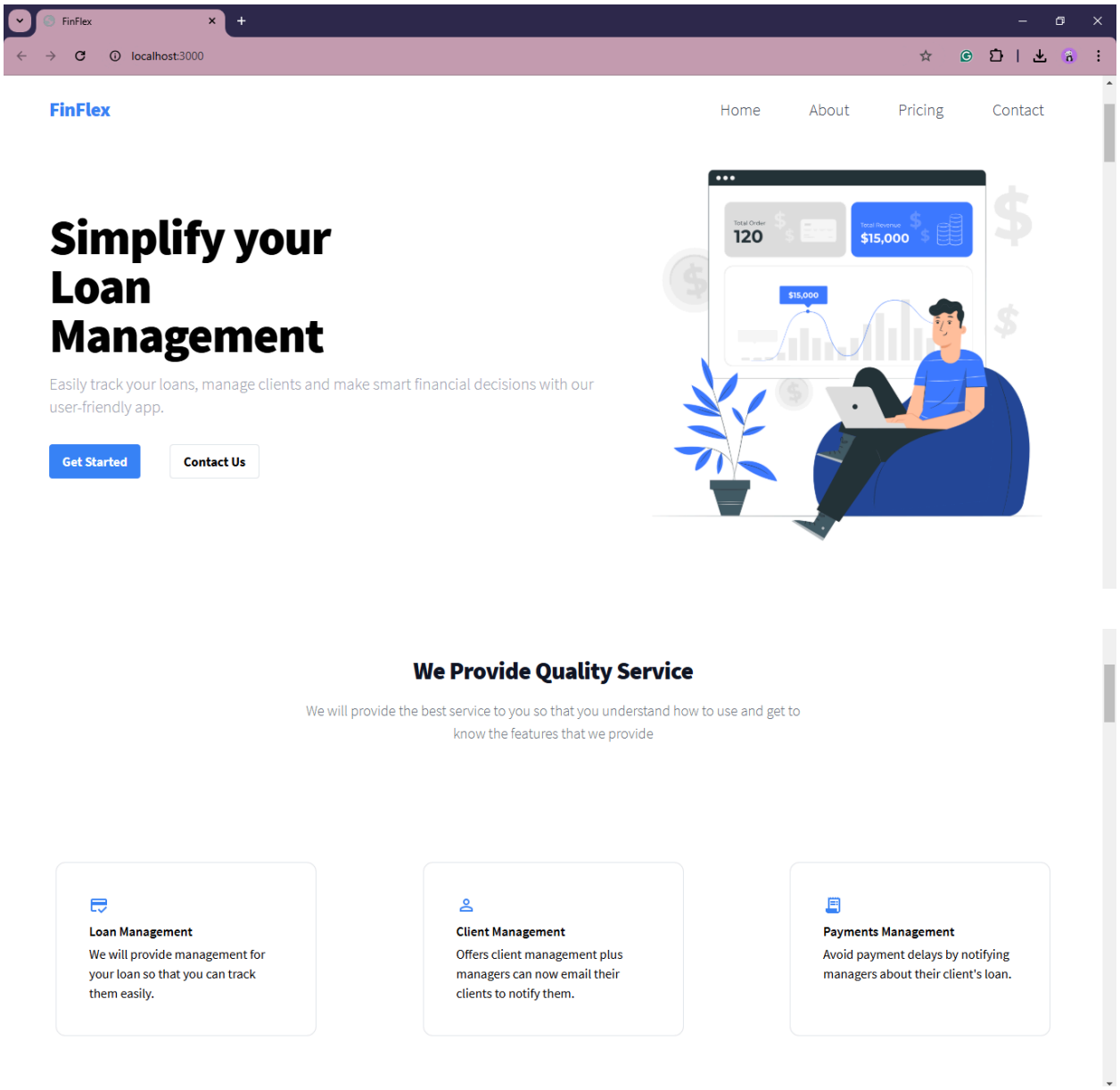


DFD Diagram



Application Output -

Home Page



With FinFlex, see how loans are released and Succeed.

You can create loans, update their amounts and approve pending loans.

- **Continuous integration and deployment**
- **Development workflow**
- **Loan management**

Lorem ipsum dolor, sit amet consectetur adipisicing elit. Quod dicta aut, quasi ullam aliquid sed nostrum nesciunt iusto quae incidunt.

FinFlex

Home About Pricing Contact

Communicate with your clients through the app.

Instantly notify your clients with their upcoming loan payments. Update them with their balance or tell them that their loan has been approved and ready for disbursement.

- **Send Email**
- **Notify clients**
- **Send Loan Status / Approvals**

Lorem ipsum dolor sit, amet consectetur adipisicing elit. Facilis repudiandae quis commodi odio excepturi exercitationem ipsum et sed nesciunt facere.

Designed for business teams like yours

Here at FinFlex we focus on markets where technology, financing, and capital can unlock long-term value and drive economic growth.

Starter

Best option for personal use & for your next project.

₹ 15k /month

- Individual configuration
- No setup, or hidden fees
- Premium support: **6 months**
- Free updates: **6 months**

Get started

Company

Relevant for multiple users, extended & premium support.

₹35k /month

- Individual configuration
- No setup, or hidden fees
- Premium support: **24 months**
- Free updates: **24 months**

Get started

Enterprise

Best for large scale users and extended redistribution rights.

₹70k /month

- Individual configuration
- No setup, or hidden fees
- Premium support: **36 months**
- Free updates: **36 months**

Get started

Contact Us

Got a technical issue? Want to send feedback about a beta feature? Need details about our Business plan? Let us know.

Your email

FinFlex@gmail.com

Subject

Let us know how we can help you

Your message

Leave a comment...

Send

FinFlex.

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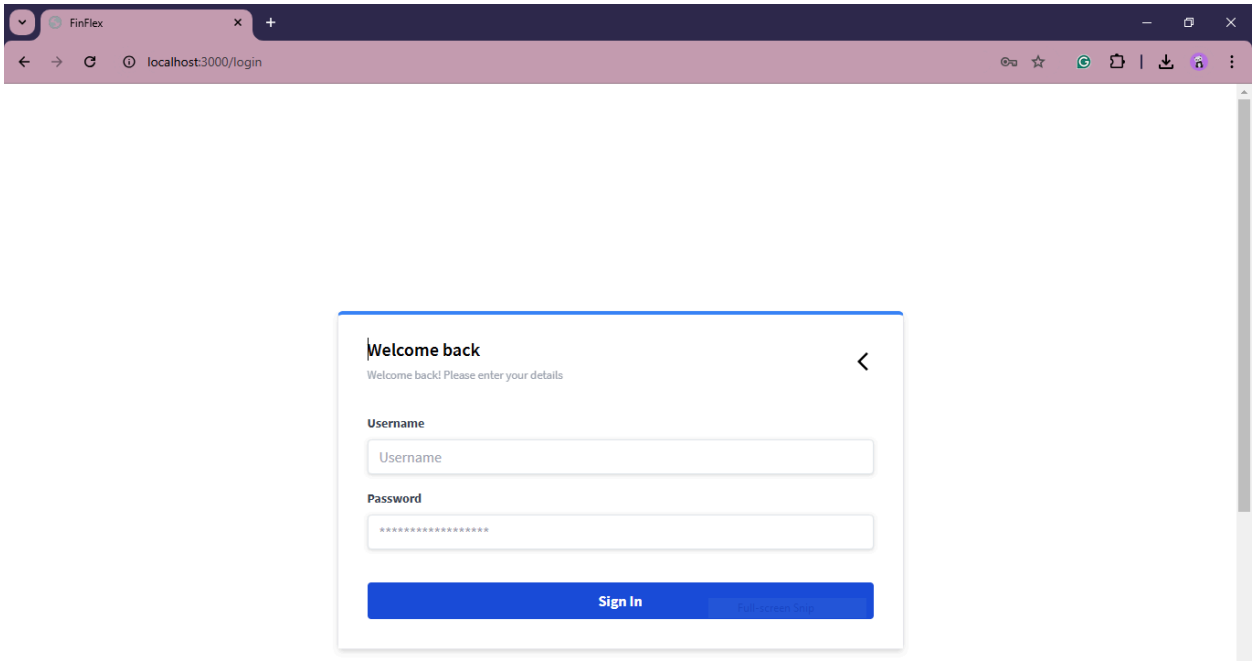
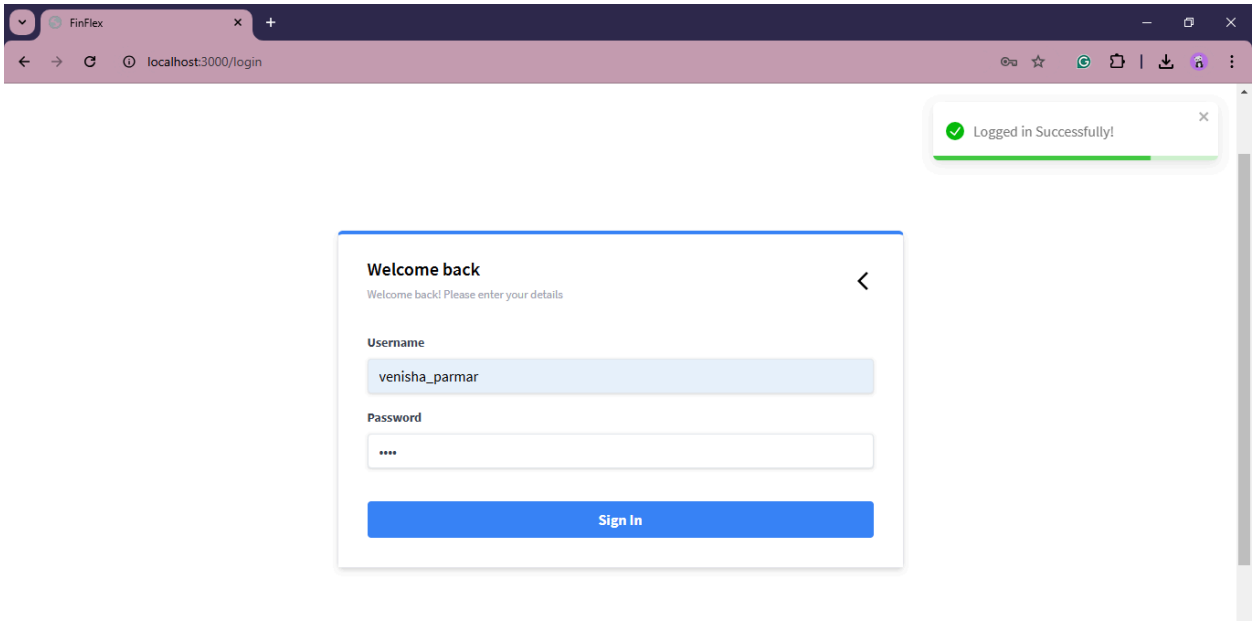
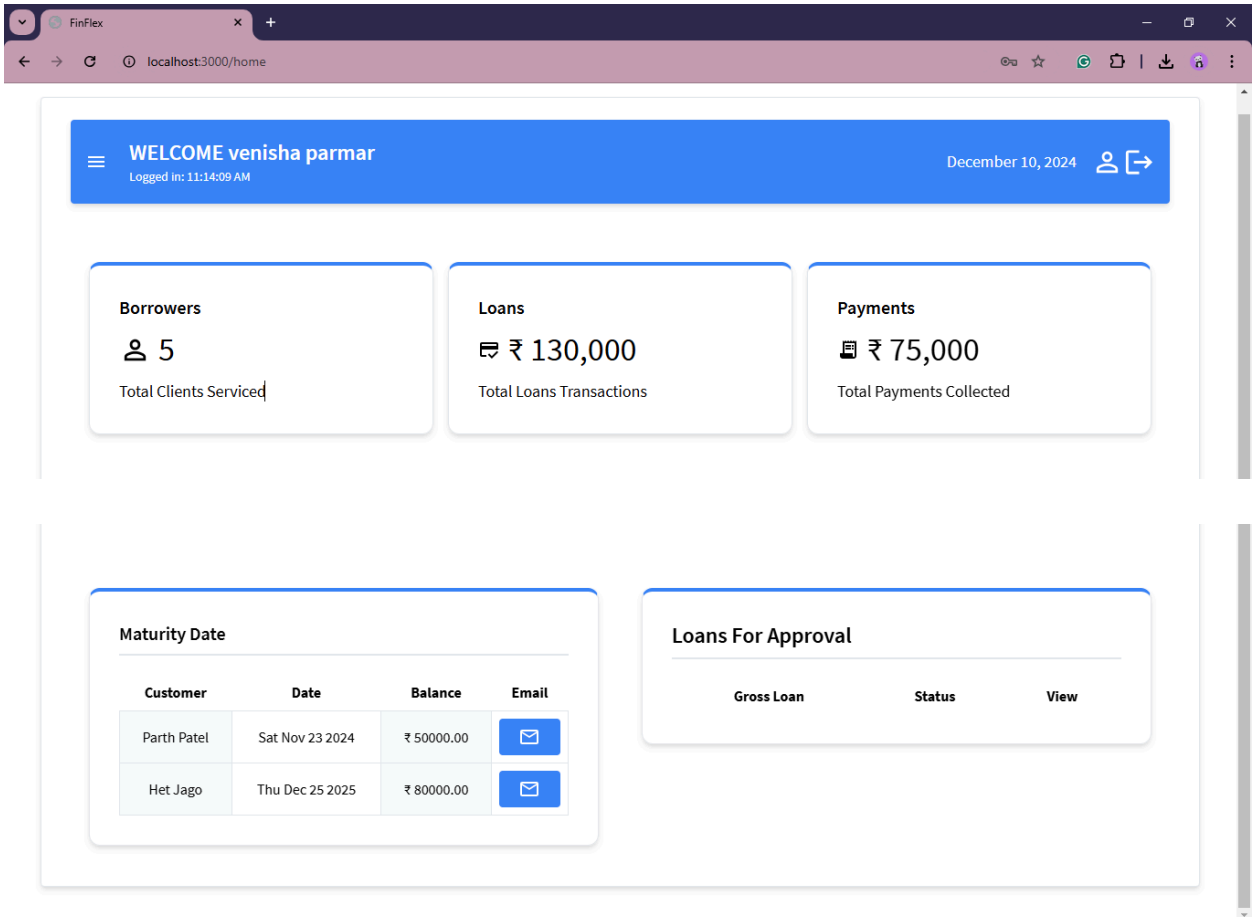
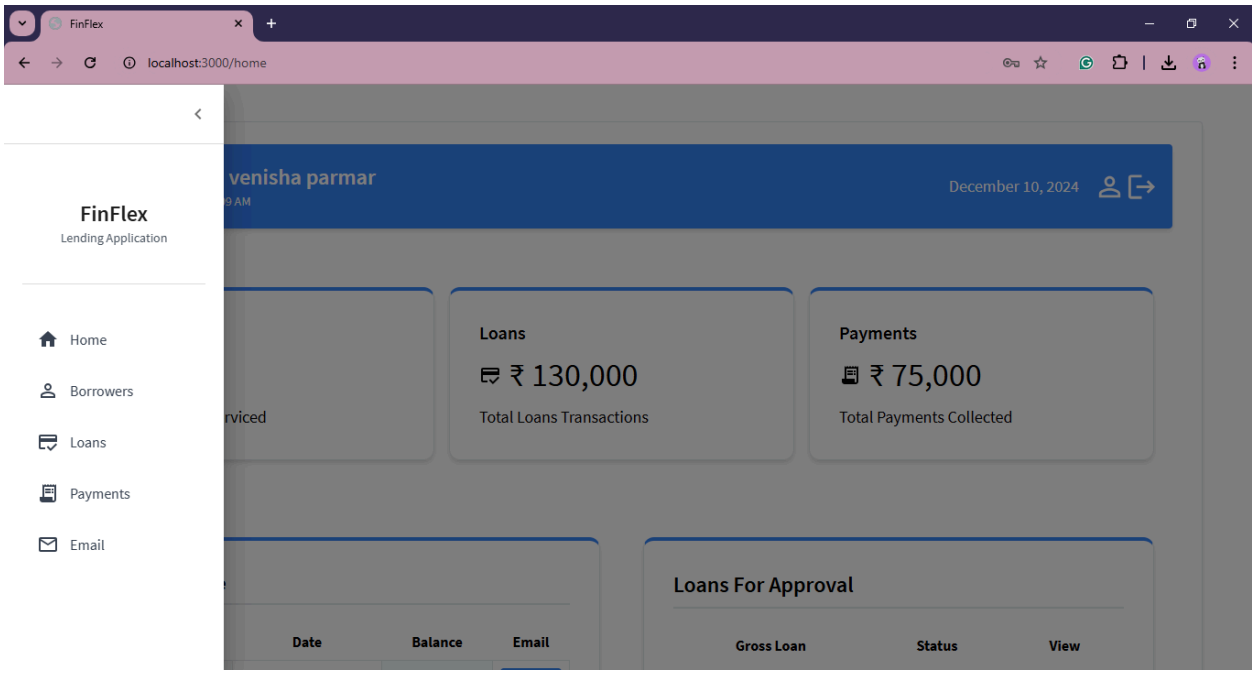
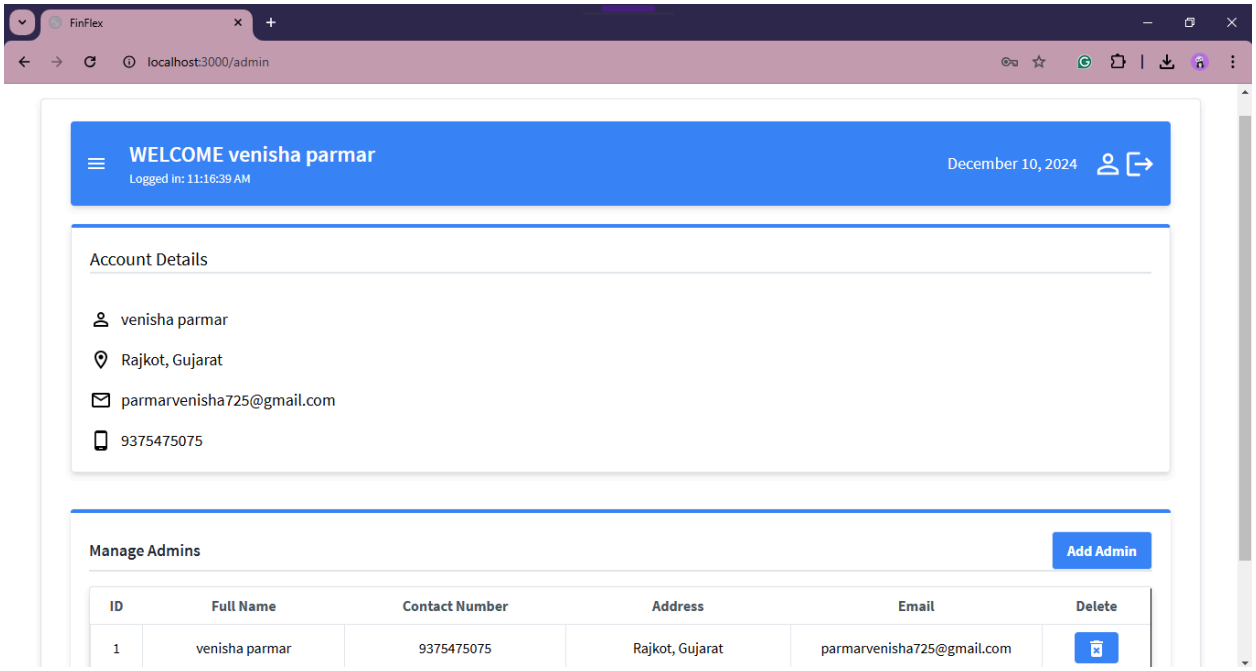
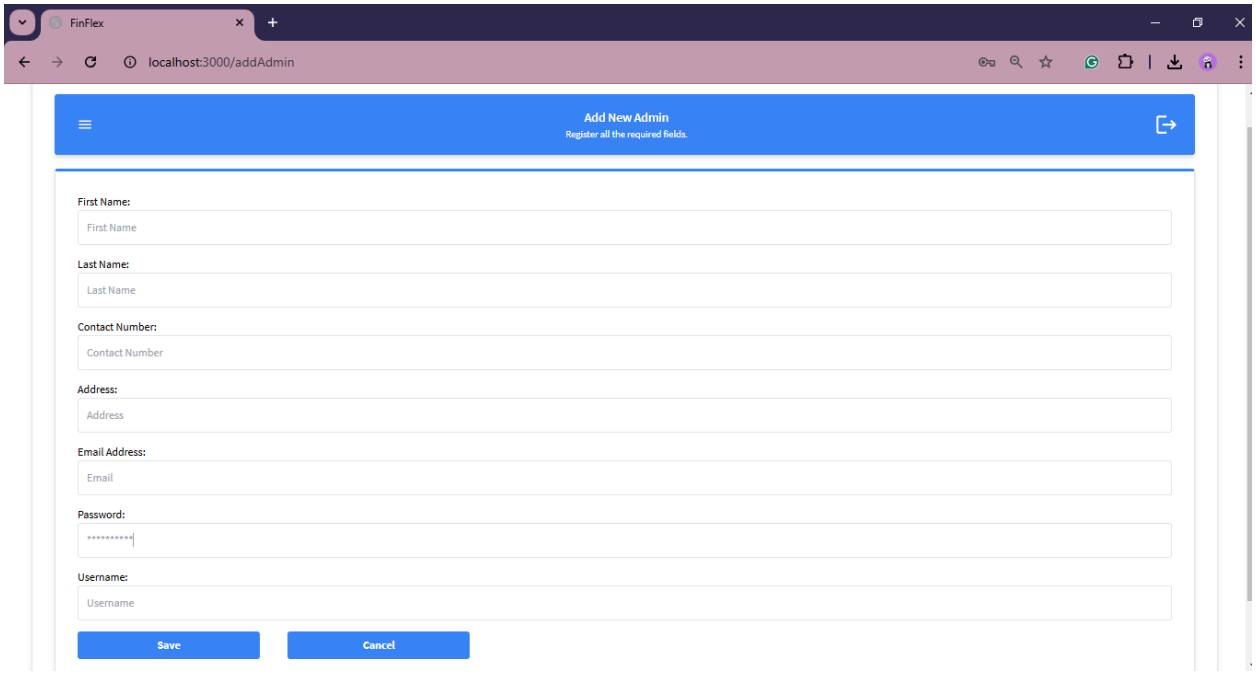

FinFlex
localhost:3000/login
Welcome back
Welcome back! Please enter your details
Username
Username
Password
Sign In

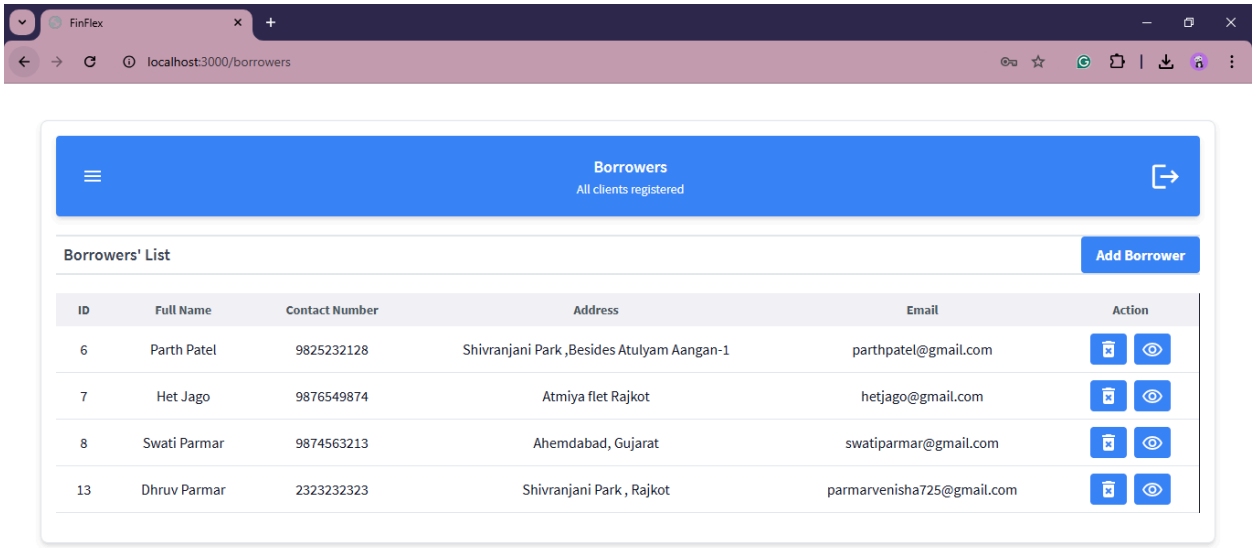

FinFlex
localhost:3000/login
Logged in Successfully!
Welcome back
Welcome back! Please enter your details
Username
venisha_parmar
Password
Sign In

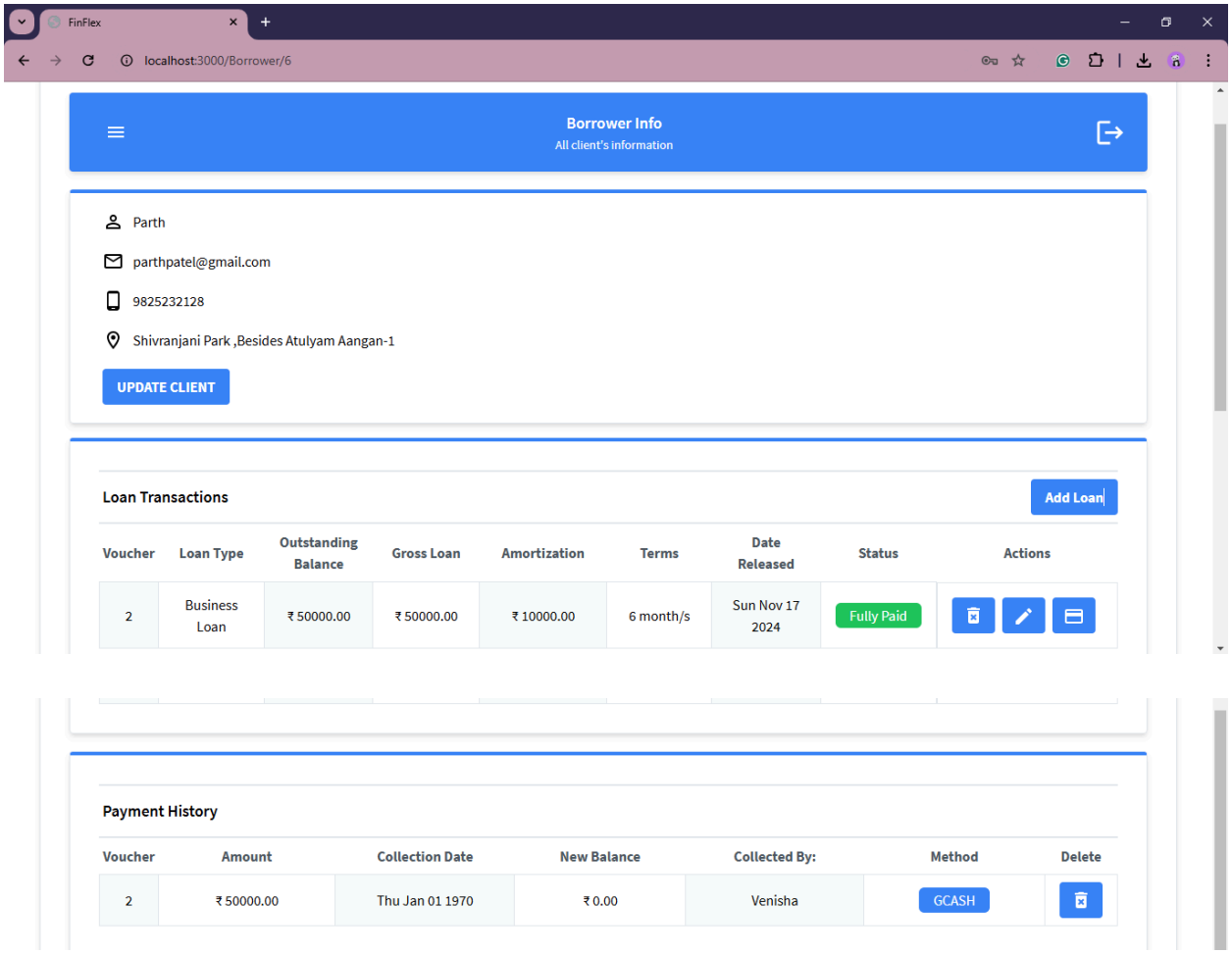

FinFlex
localhost:3000/home
WELCOME venisha parmar
Logged in: 11:14:09 AM
December 10, 2024
Borrowers
5
Total Clients Serviced
Loans
₹ 130,000
Total Loans Transactions
Payments
₹ 75,000
Total Payments Collected
Maturity Date
Customer
Date
Balance
Email
Parth Patel
Sat Nov 23 2024
₹ 50000.00
Het Jago
Thu Dec 25 2025
₹ 80000.00
Loans For Approval
Gross Loan
Status
View

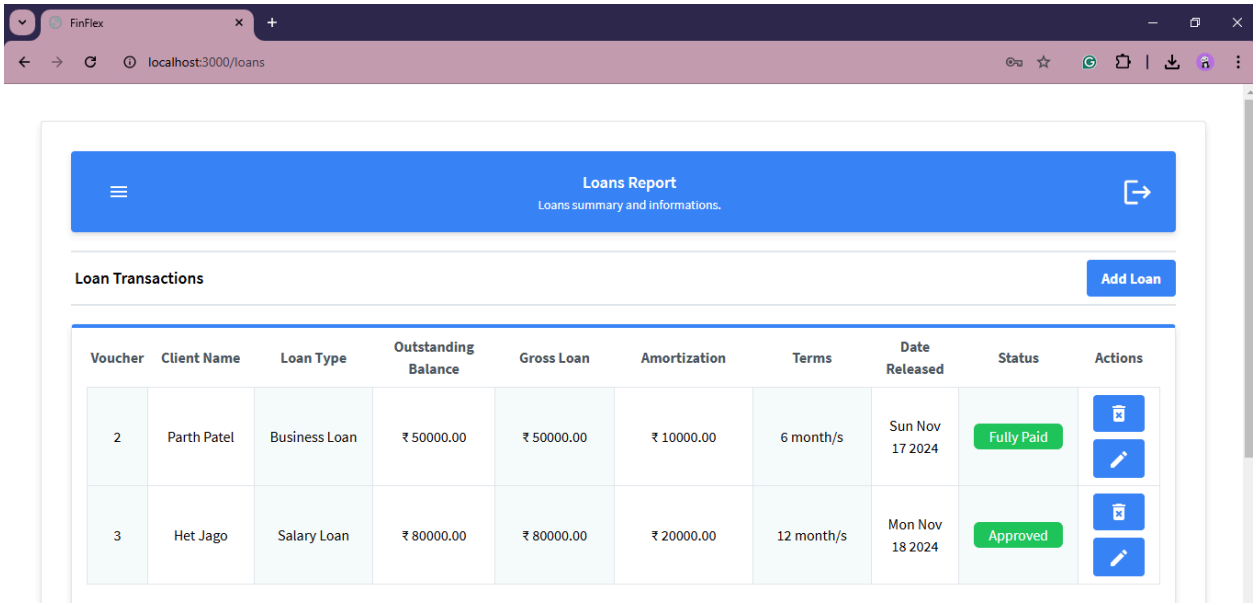

FinFlex
localhost:3000/home
FinFlex
Lending Application
Home
Borrowers
Loans
Payments
Email
December 10, 2024
Loans
₹ 130,000
Total Loans Transactions
Payments
₹ 75,000
Total Payments Collected
Loans For Approval
Date
Balance
Email
Gross Loan
Status
View

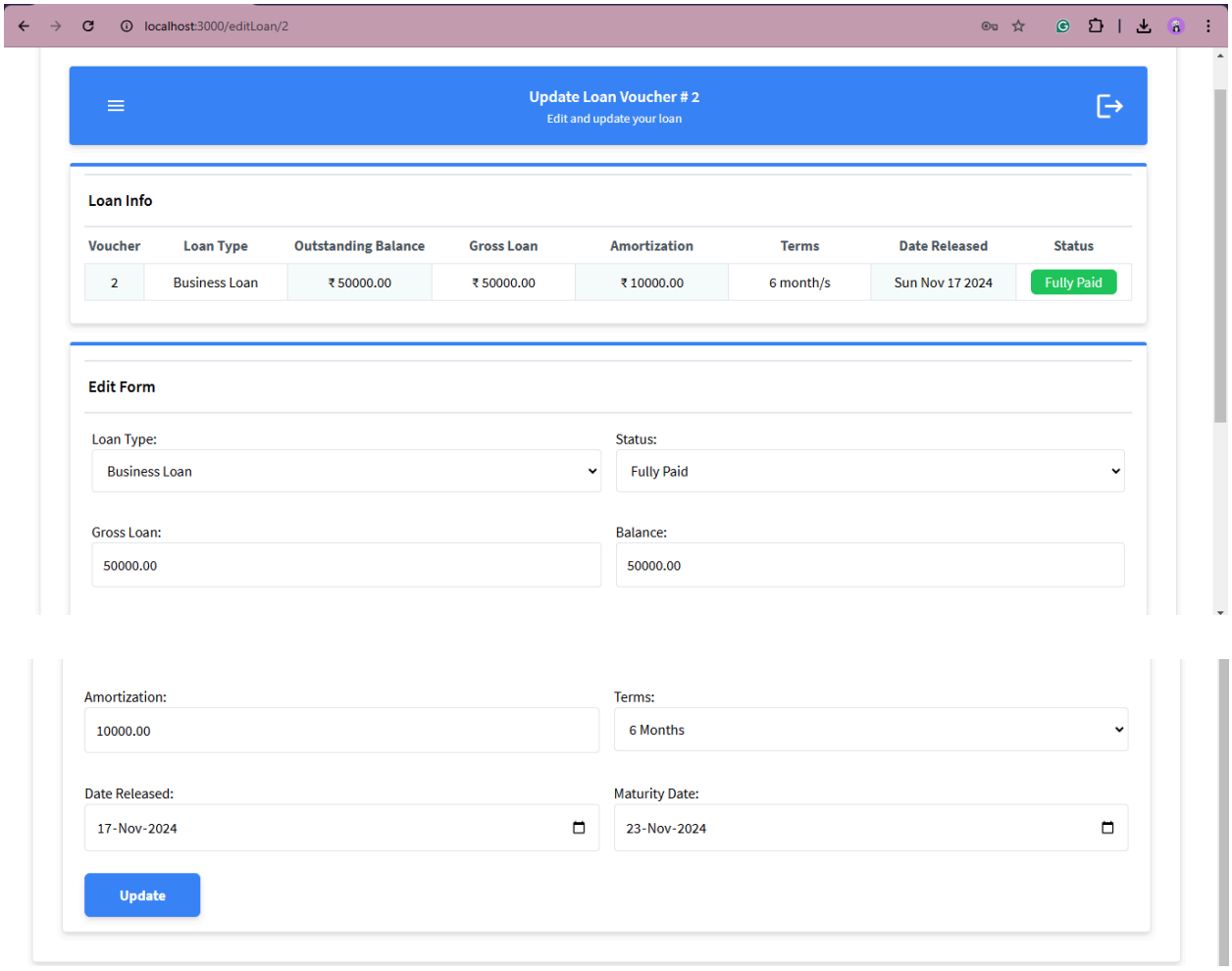

FinFlex
localhost:3000/admin
WELCOME venisha parmar
Logged in: 11:16:39 AM
December 10, 2024
Account Details
venisha parmar
Rajkot, Gujarat
parmarvenisha725@gmail.com
9375475075
Manage Admins
Add Admin
ID
Full Name
Contact Number
Address
Email
Delete
1
venisha parmar
9375475075
Rajkot, Gujarat
parmarvenisha725@gmail.com

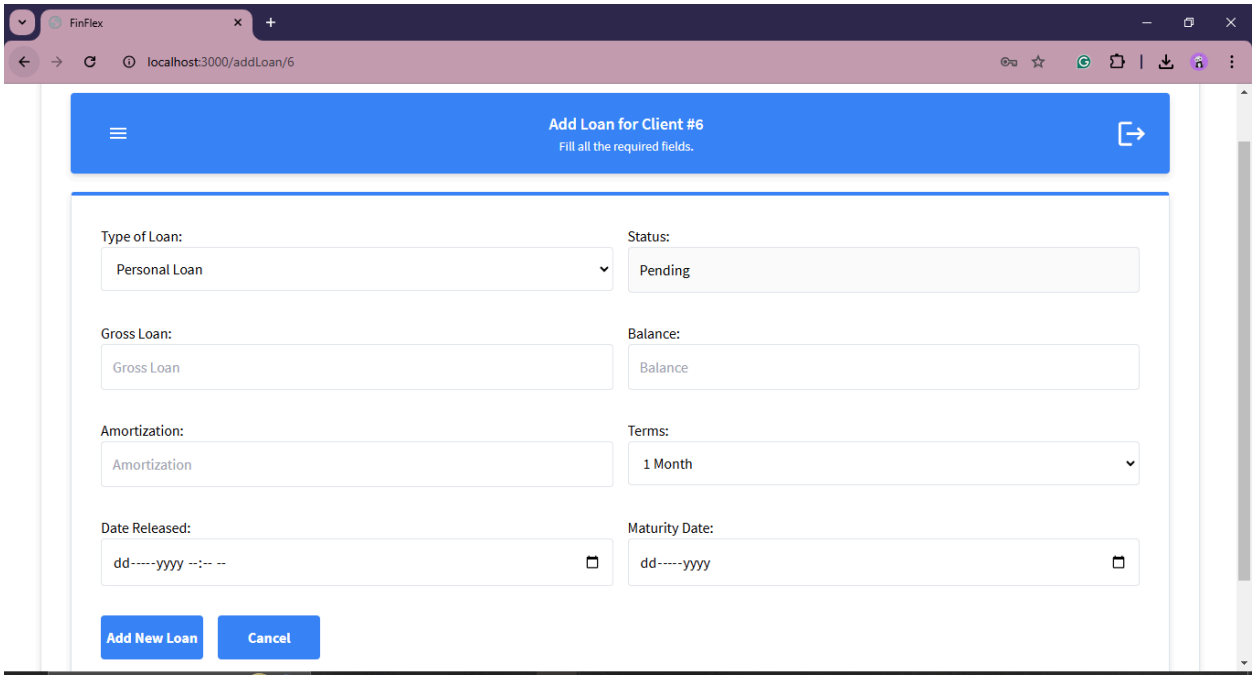

FinFlex
localhost:3000/addAdmin
Add New Admin
Register all the required fields.
First Name:
First Name
Last Name:
Last Name
Contact Number:
Contact Number
Address:
Address
Email Address:
Email
Password:
Username:
Username
Save
Cancel

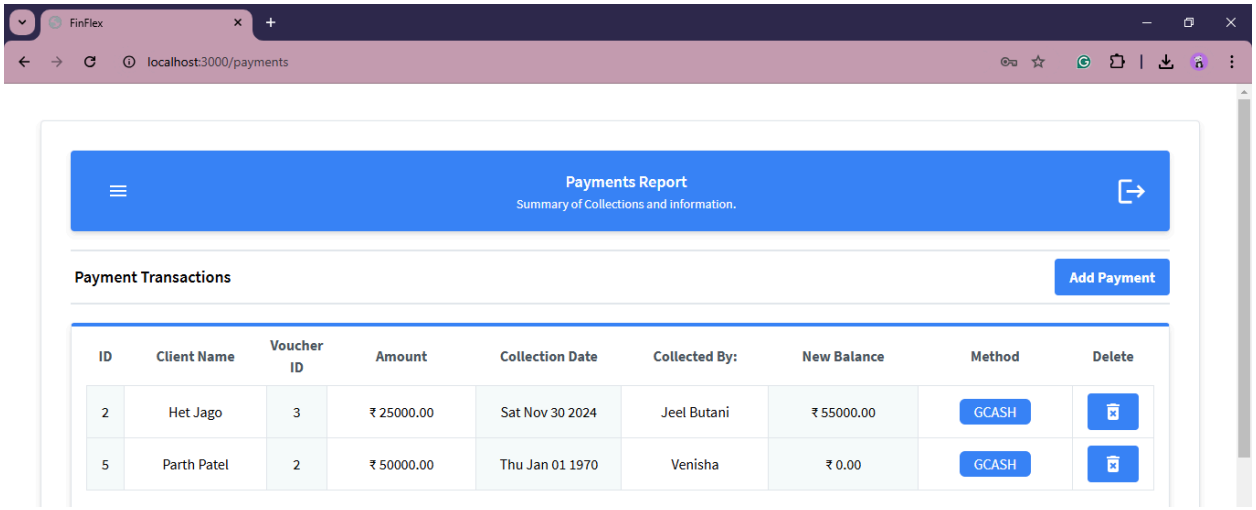

FinFlex
localhost:3000/borrowers
Borrowers
All clients registered
Borrowers' List
Add Borrower
ID
Full Name
Contact Number
Address
Email
Action
6
Parth Patel
9825232128
Shivranjani Park ,Besides Atulyam Aangan-1
parthpatel@gmail.com
7
Het Jago
9876549874
Atmiya flet Rajkot
hetjago@gmail.com
8
Swati Parmar
9874563213
Ahemdabad, Gujarat
swatiparmar@gmail.com
13
Dhruv Parmar
2323232323
Shivranjani Park , Rajkot
parmarvenisha725@gmail.com

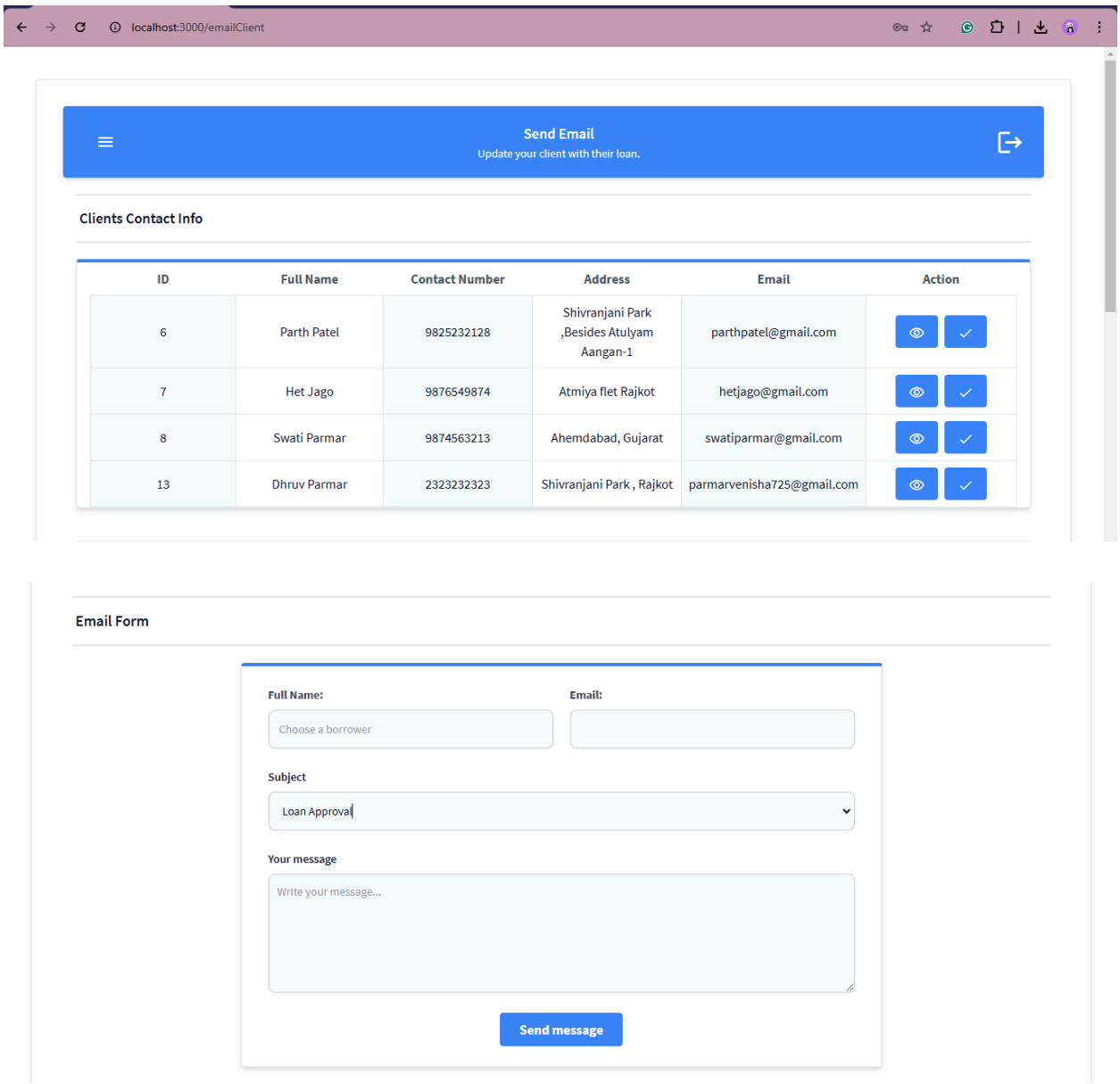

FinFlex
localhost:3000/Borrower/6
Borrower Info
All client's information
Parth
parthpatel@gmail.com
9825232128
Shivranjani Park ,Besides Atulyam Aangan-1
UPDATE CLIENT
Loan Transactions
Add Loan
Voucher
Loan Type
Outstanding Balance
Gross Loan
Amortization
Terms
Date Released
Status
Actions
2
Business Loan
₹ 50000.00
₹ 50000.00
₹ 10000.00
6 month/s
Sun Nov 17 2024
Fully Paid
Payment History
Voucher
Amount
Collection Date
New Balance
Collected By:
Method
Delete
2
₹ 50000.00
Thu Jan 01 1970
₹ 0.00
Venisha
GCASH


FinFlex
localhost:3000/loans
Loans Report
Loans summary and informations.
Loan Transactions
Add Loan
Voucher
Client Name
Loan Type
Outstanding Balance
Gross Loan
Amortization
Terms
Date Released
Status
Actions
2
Parth Patel
Business Loan
₹ 50000.00
₹ 50000.00
₹ 10000.00
6 month/s
Sun Nov 17 2024
Fully Paid
3
Het Jago
Salary Loan
₹ 80000.00
₹ 80000.00
₹ 20000.00
12 month/s
Mon Nov 18 2024
Approved


localhost:3000/editLoan/2
Update Loan Voucher # 2
Edit and update your loan
Loan Info
Voucher
Loan Type
Outstanding Balance
Gross Loan
Amortization
Terms
Date Released
Status
2
Business Loan
₹ 50000.00
₹ 50000.00
₹ 10000.00
6 month/s
Sun Nov 17 2024
Fully Paid
Edit Form
Loan Type:
Business Loan
Status:
Fully Paid
Gross Loan:
50000.00
Balance:
50000.00
Amortization:
10000.00
Terms:
6 Months
Date Released:
17-Nov-2024
Maturity Date:
23-Nov-2024
Update


FinFlex
localhost:3000/addLoan/6
Add Loan for Client #6
Fill all the required fields.
Type of Loan:
Personal Loan
Status:
Pending
Gross Loan:
Gross Loan
Balance:
Balance
Amortization:
Amortization
Terms:
1 Month
Date Released:
dd-----yyyy --:-- --
Maturity Date:
dd-----yyyy
Add New Loan
Cancel


FinFlex
localhost:3000/payments
Payments Report
Summary of Collections and information.
Payment Transactions
Add Payment
ID
Client Name
Voucher ID
Amount
Collection Date
Collected By:
New Balance
Method
Delete
2
Het Jago
3
₹ 25000.00
Sat Nov 30 2024
Jeel Butani
₹ 55000.00
GCASH
5
Parth Patel
2
₹ 50000.00
Thu Jan 01 1970
Venisha
₹ 0.00
GCASH



Conclusion

FinFlex provides a comprehensive solution for financial institutions to efficiently manage loans, clients, and payments. By leveraging cutting-edge technologies like React and MySQL, it ensures scalability, user-friendliness, and reliability, making it a vital tool for modern financial operations.