**Project Name** : **FormsApp**

**Aim:**  To create Lead , Referral Source ( new Mortgage Application working on new changes ).

**Description:**This application is build to over come the issues of jotform old formsapp , this project created using playFramework , angularjs, bootstrap .

This project is to create leads when the user submited submitreferral form and create referral source when user submited referral source form .

We have one application **CrmSyncToCouchbaseApp** which listens trigger data for lead , referral Souce ,applicant tabel of postgrees DB, When the lead or referral surce data inserted or updated in OpenErp PostGress DB, lead and referral source trigger data store in the Cochbase , this data will used to prepopulate details of referral Source in Submitreferral form,

Project has three modules

1) Submit Referral form

2) Referral Source form

3) Mortgage Application form ( working on changes not yet Build).

**Submit Referral Form:**

1)when referrar use submitreferral link with his referralid,based on the given Referral id we fetch the triggerd data from Couchbase and prepolate referal detials on webpage .

2) if referral id is not given in the referrali Id in submitreferral link referrar has enter the referral details in the form ,

3)when the submitreferral form submited we creating lead in OpenErp using openErp api and storing lead details in Couchbase using couhcbase client.

4)we sending two mail 1)(Mortgage Application Mail) for lead and another 2)(SubmitReferrar Mail ) for referrar using send withus.

5)if referral not matching with existing details of Open Erp we sending mail to support mail id as referral missing for lead.

6)we make rest call to **Taskcreationapp** to create Todoist Project in Todoist application in this format “leadFristName\_leadLastName\_leadid” Ex:Brad\_Pitt\_439 .

7) the new changes is done( not deployed to production and still needed testing )

7.1) inserting the lead into DB using Hibernate Framework done

7.2) inserting lead data into couchbase using java Sdk clinet done

**Referral Source Form:**

1)When Referral Source form fisrt form submitted we create referral source in OpenErp using openErp api and we storing referral details into Couchbase using couhcbase client.

2) if referral already exist with enterd details will update the in Opern Erp

3)when second form submitted after agree condtion , we are updating opern with sign and agreement date,

4)In the code we creating pdf and we sending referral agreement mail to referral source mail Id at the second form ,

3) we make rest call to **TaskCreationapp** to create referral tasks in referral source todoist application.

**Mortgage Application form ( working on changes not yet Build ).**

This Mortgage Application is developed for both system(Laptop,desktop).

**Language :** Java 1.7

**FramWork :**  Servlet ,JSP,JDBC

**Database :** OpenERP , Couhcbase

**CRM :** OpenErp

**Web Script Language:** javaScript,Jotform

To access this application facility visdom team should have already email the LINK to the client.

e.g:=[http://localhost:9000/mortgagePage1?crmLeadId=2&referrerEmail=guy%40visdom.ca&referralName=Billy&role=C&expireDate=10/04/2016&utm\_swu=9551](http://localhost:9000/mortgagePage1?crmLeadId=2&referrerEmail=guy@visdom.ca&referralName=Billy&role=C&expireDate=10/04/2016&utm_swu=9551)

This Link must contains all the below data :

**crm\_leadId, referrerEmail, referralName, role and expireDate.**

**1st Page:(MortgageApplication1b.jsp)**

1) Here the Application will take the basic details like “First Name”,”Last Name”,”Email” for the Applicant creation and these information are the mandatory to provide.

2)The applicant and the email is the main information to create the applicant.

**2nd Page:(MortgageApplication1c.jsp)**

1)In this page the application will ask for some other important information from the user like

“are you canadian resident or not?” if answer will “no” then it will again ask for “mobile no”,”birthday”,”relationship status” if the answer will “yes” then it will ask additional inforamation like “work number”,”home number”,”social insurance number” “are you new to canada?” and for this question if answer will “yes” then it will ask for the “when he came to canada?”.

**3rd Page:(MortgageApplication2.jsp)**

->In this page application will take the address history of the applicant ,here the logic is the address history should be 36 month above, if not then it will not allow the application to move forward.

**4th Page:(MortgageApplication3.jsp)**

-> In this page the application ask for the property information.More than 1 property can be insert if applicant want.

**5th Page:(MortgageApplication4.jsp)**

->Here the Application will ask for income history of the applicant.

Application will provide some selection option for the type of income applicant has Like(“Employed”,”Self-employed”,”Commission”,”Bonus”,”Pension”,”vehicle”,”Interest”,”Dividend”,”Child tax credit”,”Child support”,”spousal support”,”Maternity”).

->For only “Employed”,”Self-Employed”,”Commission” and “bonus” the application will ask the 36 month income history and for the rest are simple selection option.

**6th Page:(MortgageApplication5.jsp)**

->Here the application will ask for the Asset information of the applicant.

->The application will provide the Type of Asset option field like (“Bank Account”,”RRSP/TSFA”,”Vehicle”,”Stock / Bonds”,”Mutual Funds”,”Households”,”Property”,”Deposit”,”Insurance”,”Other”)

->Multiple Property type can be select. And for specific Property type ,can add multiple property.

**7th Page:(MortgageApplication6.jsp)**

->This is the key page of this application.

->Here application will ask for the Lending Goal like “Pre-Approval”,”Rifinance”,”Purchase”

1) If OpenERP DB not running will get error

2) if couhbcase not running will get error

3) if taskcreation app not running will not able make rest call to taskcreation app , not create Tasks in Todoist

4) trigger data not prepopluated into the submitreferral page if referralid is wrong , not given , referral trigger data not exist in the couchbase

5) if pdf file not created in second page referral souce code mail will not sent to referral Source