**Project Name** : **FormsPlayApp**

**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) and Smart Phone users.

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.

Entry Phase :

1.Project Flow For System and Smart Phone user is, If user access link through the mobile browser then the application will present the Smart phone specific web pages or if user accress link through the system(Laptop,desktop) then it will show the System specific web Pages.

2.For role C(Client) if the expiredDate is true then it will render the expired\_page if false then move further.

3.Then Check already visited or not .if visited then go to the corresponding page i.e last interrupted page or else if finished the application then show the completed\_application\_page.

4.For role B(Broker) the expiredDate condition is not allowed. Except this rule everything is same for B as C(Client).

Page1:

In the firstPage we are taking applicant information like “applicant name”,”email”,”moble”,”relationship status”,”dependents” ,”Lending goal” information.

Based on lending goal it will render the corresponding page2.

Database Operation :

1)Here the applicant information will inserted into applicant\_record,and the Lending goal will be updated on crm\_lead.

1)All the data will insert into couchbase as a key name “***OPPORUTUNITY\_FORM\_DATA\_COUCHBASEKEY+crmLeadId”***

\*There are 3 Lending Goal like

i)Pre-Approval

ii)Purchase

iii)Refinance

Page2:Pre-Approval

For this path it will direct render to the 4th page , it will not move to 3rd page.

Page2:Purchase

For this path if mlsListed selected as private then only it will move to the 4th page directly otherewise it will move to 3rd page then 4th and so on.

Page2:Refinance

For this path it will must move to the 3rd page and then 4th and so on.

Database Operation:

All the information of page2, for any lending goal, it will update on crm\_lead table of current crmLeadId in PostgresDB.

And also update in couchbase DB with previously created key

All the page3,page4,page5a,page5b,page6 data will simply update on postgressdb as well as couchbase.

Page7:

Here, the address history should be greater than 36 months otherwise it will show two address history and this is same for both applicant and as well as coapplicant .

Page8 and Page9:

This page is rechanged according to the new requirement and in under developement.

Page10 and Page11:

These both page are taking Asset And property details.

**Language :** Java 1.7

**FramWork :** Play ,Hibernate

**Database :** PostGress , Couhcbase

**CRM :** OpenErp

**Web Script Language:** javaScript, angular js, BootStrap

**Error May occur:**

1) If postgrees 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

On Click SubmitReferral Link

Referral ID Is provided

no

Yes

Get Referral Details from

Couchbase using Referral

id

Prepolute Referral details on

Webpage

Redirect Webpage

After entering referrar details

Submit the form and validate

Referral ID is exist

No

yes

Check

Referral Source

With mail Id Exits or not

Check Lead Exist

With entred details

yes Exist

Yes

Display Lead

Alreday Exist

No

Call Task Creation App

To created lead project and

Tasks Todosit Application

Created Lead with Referral Sorce

and send mail to

Lead , referrel, stored data couchbase

Create Lead without Referral Source

And send mail lead , referral and send

Mail to Support of referral missing ,stored

Data cocuhbase

**Referral Source Flow Daigarm**

Select Role and

Enter the all feild details

Submit

Form Fisrt Page

Get all forms fieds details

Check Referral with enterd

Details exist or Not

Create Referral Sorce , Store

Details into couchbase

**validated**

**exist**

Udpate in openerp and Couchabse

Details

**not Exist**

Second Referral Page

Agree Condtions and write

Sign on form and submit

form

Update referal with agreement Date

Upodate couchbase with new details

Create of Agreement pdf send agreement To referral Source

Call taskcreation app to Create Referral

Source Tasks

Thank You Message

Error message on the

form