INTERESTS Module Specifications

# OVERVIEW

A module is needed to maintain ‘Interests’. The specs below outline the module requirements. They will be expanded upon with time.

Solution should be developed using C# .NET, SQL Server, Windows Forms.

# Tables

## TabLE ‘INTERESTS’:

* interest\_id INT
* ins\_code VARCHAR
* payment\_date DATETIME
* record\_date DATETIME
* status\_id INT

## table ‘INSTRUMENTS’:

* ins\_code VARCHAR
* description VARCHAR
* status\_id INT

## table ‘STATUS\_CODES’:

* status\_id INT
* status\_name VARCHAR

# VIEW INTERESTS Screen

1. This will be the main screen of the module
2. It will allow the user to see all records in the interests table
3. It will have two sections:
   1. Search Section
      1. Allows user to filter the records
      2. Should be able to search on the foll fields
         1. ins\_code
            1. Label: Instrument
            2. Dropdown showing all distinct ins\_codes in the interests table

Value: ins\_code

Displayed: description

* + - 1. payment\_date
         1. Two datepickers should be used
         2. Label1: Start Date
         3. Label2: End Date
      2. status\_id
         1. Label: Status
         2. Dropdown showing all distinct status\_ids in the interests table

Value: status\_id

Displayed: status\_name

* 1. Interests Section
     1. Displays the results in a tabular format
     2. The table should have the foll columns:
        1. ID
           1. interests.interest\_id
        2. Instrument
           1. instruments.description
        3. Payment Date
           1. interests.payment\_date formatted dd/mm/YYYY
        4. Status
           1. status\_codes.status\_name
        5. Actions
           1. Display links to following actions:

Edit

Only show for Pending records

Delete

Only show for Pending records

Approve

Only show for Pending records

Cancel

Only show for Active records

* + 1. Above the table of results, place a link labeled New that will go to the new interest screen

# New INTEREST SCREEN

1. The form should have the foll fields:
   1. ins\_code
      1. Label: Instrument
      2. Dropdown showing all ins\_codes in the instruments table
         1. Value: ins\_code
         2. Displayed: description
      3. Required
   2. Interest\_rate
      1. Label: Interest Rate
      2. Numeric/percentage value e.g. 10% = 0.10
      3. Required
   3. Effective\_date
      1. Label: Effective Date
      2. Date picker
      3. Required
2. Use proper input validation for the form
3. When the form is submitted
   1. The records should be added to the interests table
      1. interest\_id
         1. Autoincrement
      2. ins\_code
         1. User submitted
      3. Interest rate
         1. User submitted
      4. Effective date
         1. User submitted
      5. Record date
         1. Now()
      6. status\_id
         1. Set to Pending status
   2. A popup with a success or fail message should popup
   3. On success, the user should be returned to the View Interests screen

# EDIT INTEREST SCREEN

1. Use the same screen that was used for the New screen. Pass a flag to the screen to indicate whether it is a New screen or Edit screen
2. Populate the fields with values of the record being edited
3. On save, update the existing record in the table
4. Set record\_date = NOW()
5. A popup with a success or fail message should popup
6. On success, the user should be returned to the View Interests screen

# DELETING A INTEREST

1. When the Delete link is clicked under the Actions column
   1. Popup a confirm message asking user if he wants to continue
   2. If so, delete the record from the table
   3. A popup with a success or fail message should popup
   4. On success, the screen should be refreshed

# APPROVING A INTEREST

1. When the Approve link is clicked under the Actions column
   1. Popup a confirm message asking user if he wants to continue
   2. If so, set the status of the record to Active
   3. A popup with a success or fail message should popup
   4. On success, the screen should be refreshed

# CANCELLING A INTEREST

1. When the Cancel link is clicked under the Actions column
   1. Popup a confirm message asking user if he wants to continue
   2. If so, set the status of the record to Cancelled
   3. A popup with a success or fail message should popup
   4. On success, the screen should be refreshed