

## Overall Workflow Algorithm

### 1. System Initialization

Start

Connect to MySQL database

Load login page

### 2. User Login

User inputs username and password

Check credentials against 'staff' table

IF credentials valid THEN

    Get user role

    IF role = 'receptionist' THEN

        Redirect to receptionist dashboard

    ELSE IF role = 'loan\_officer' THEN

        Redirect to loan officer dashboard

    END IF

ELSE

    Show login error

END IF

### 3. Receptionist Adds a New Customer

User fills out form with customer info:

- Name, DOB, Business type

- Business address, phone, zip code

Set status = 'new'

Insert into 'customer' table

Display success message

#### 4. Loan Officer Dashboard

On page load:

Get current loan officer's zip zone

Fetch customers from 'customer' table where:

- status in ['new', 'pending', 'agreed', 'disagreed', 'paid\_off']
- zip\_code matches officer's zone

Display categories:

- New Customers
- Pending Customers
- Agreed Customers
- Disagreed Customers
- Paid-Off Customers

User clicks on a category:

Fetch customers by status

Display list of customers with summary

#### 5. View Customer Detail

Loan officer clicks on customer name

Open detail page

Fetch all customer fields by ID

Display full details

Options:

1. Print Page (trigger JavaScript print)

2. Change Status:

- To Pending
- To Agreed
- To Disagreed
- To Paid Off

IF status updated THEN

Update 'customer' record

Assign loan\_officer\_id if not set

Redirect back to corresponding list

END IF

## 6. Security and Validation

All pages:

Check if user is logged in

Verify role-based access:

- Receptionist cannot access loan officer pages
- Officers can only view customers in their zone

All form submissions:

Sanitize inputs

Use prepared statements to avoid SQL injection

## ● 7. System Logout

User clicks logout

Destroy session

Redirect to login page

### 📋 Summary of Key Algorithms:

Feature	Algorithm Summary
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Login	Check staff credentials → Redirect by role
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Add Customer	Insert customer record with status = 'new'
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View by Status	Filter by status + zip_code for officer
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View Detail / Print	Fetch by id, show full data, allow status update
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Update Status	Change status, optionally assign officer ID
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Security	Sessions + Role-based access + Sanitization
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