Weekly Status Report — Loan Management System

Version: 1.5
Date: 08/07/2025

Key Change

- Added a separate table structure for **business information** to better capture corporate loan applicants.

Project Overview

A Laravel-based application to streamline small-business loan workflows. Features include secure multi-role access (Receptionist, Loan Officer), region/zip-based data visibility, and end-to-end loan application handling.

Completed (Weeks 1–3)

Week 1 — Setup & Authentication

- Initialized Laravel project; configured `.env` and MySQL.
- Implemented authentication and seeded roles for **Receptionist** and **Loan Officer**.
- Role-based login redirection implemented.

Week 2 — Reception & Data Entry

- Built receptionist forms for efficient customer intake.
- Created ERD to model entities, attributes, and relationships.
- Implemented database tables based on ERD.

Week 3 — Loan Officer Dashboard

- Documented data schemas and model relationships.
- Implemented frontend (JS) and backend (PHP) validation + sanitization.
- Established clear table→model mappings and zip code filtering for officer territories.

Current Work (Week 4)

- Added a **clickable customer list** on the Loan Officer dashboard (summarized view).
- Implemented **customer detail retrieval**: click a summary → load full customer record.
- Laid out Loan Application module (backend logic + frontend component).
- Ongoing: adding a **signature input field** and finalizing loan application code.

Next Steps (Week 5)

- Finish backend and frontend logic for the **Loan Application** module (submission, validation, persistence).
- Begin design/implementation of **payment schedule** component for approved loans.
- QA pass: end-to-end test of application submission → approval → payment schedule.

Summary / Status at a Glance

- **Milestones achieved (Weeks 1–4):** Core system components are in place — authentication, data entry, dashboard, and clickable customer views.
- **In progress:** Signature capture and final loan application features.
- **Risks / Blockers:** None critical at present; will flag immediately if signature input or payment scheduling introduces integration issues.
- **Overall status:** On track to complete loan application functionality and start payment schedule work in Week 5.