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| Page | URL | What happens here? | |
| Lenders – Welcome page after first time signup. | http://localhost/finreq/lenders/ | | After Registration, very first time Lender will land up here. On this page Lender can defined criteria for proposal to receive. | |
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| Lenders Registration | http://localhost/finreq/lenders/registration | | In This page, lender will be able to register. After this page, it will come to welcome page (<http://localhost/finreq/lenders/>) – first time define criteria and after first time each time , it will take to the dashboard ( <http://localhost/finreq/lenders/dashboard>) | |
| Account Verification | This is common page for account verification for all three roles. | | account\_verification.php | |
| Verify Thankyou | This is common page for after Verification successfully done. Thank you page. | | verify\_thankyou.php | |
| Lenders Define Criteria | http://localhost/finreq/lenders/lender\_define\_criteria | | In this page, lender will define criteria to receive proposals of defined criteria. After submitting, it will take to the dashboard directly. Also, lenders can edit criteria anytime and proposal will received with the fresh criteria after that base on the new criteria. | |
| Lenders Dashboard | http://localhost/finreq/lenders/dashboard | | Lenders Dashboard, where lender can see, Proposal stats, filters, and list of proposal listed from criterial defined and actions various he can perform. There will be pagination as well.  Click on View button in second row, where lender can see proposal in detail.  <http://localhost/finreq/user/view_proposal> | |
| Proposal View | http://localhost/finreq/user/view\_proposal | | Both User and Lender can see same proposal in html format which they have created. AT the top there will be actions which will person differently for both of them.  Stats – All those stats will   1. Download PDF (Proposal) 2. Reject action – here he will see that its rejected. 3. Express Interest – On this page, Lenders will show that he is interested and put all details. | |
| Express Interest | http://localhost/finreq/lenders/express\_interest | | Lenders will express interest and all values of his interest that will get seen to the user and for the further process. | |

Lender / Banker

User

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| Page | URL | What happens here? |
| Dashboard | http://localhost/finreq/user/dashboard | User Complete dashboard   1. Stats 2. Filters 3. User dashboard 4. Create Proposal, My profile, Payments & invoices 5. All Proposals - List of All proposal – Latest first 6. Create Duplicate – Will clone proposal with another ID keeping all data same and user can edit that. 7. Proposal List – Latest proposal will come first 8. View Proposal - <http://localhost/finreq/user/view_proposal> 9. Offers – User received from banker/Lender (if any) will be listed in this page.   <http://localhost/finreq/user/proposal_offers>   1. Status – **Incomplete** – Clickable where he can make that proposal complete. |
| View Proposal | <http://localhost/finreq/user/view_proposal> | This page will be accessed by everyone with their roles defined.   1. Completed proposal will get viewed here in html format. 2. Same proposal will be set for download in PDF format 3. In Document section – User can view and download documents he has uploaded. 4. **Express interest (top and bottom) is only for the bankers – and not for the user.** 5. View offers – is set for the Borrower, who can see what offers he received from Lender. |
| Offers received for this proposal. | http://localhost/finreq/user/proposal\_offers | In this page, All offers received from various banks will show here.   1. Clicking on Lenders details will open popup, Where user can see bank details and offers in details. 2. This is provided is user has done payment or not? 3. If payment done, user can see all details. otherwise he will not able to 4. In this, Only two or three columns will be visible if new offers comes then..   For eg. If 3838 proposal   1. Case 1 – Made Payment 2. If user received offer and make payment to see offers, then user will see full details along with “Lenders Details” Button. 3. Case 2 – Just offers received – not made payment 4. In this case, user will only see, Product, and Lender Type, and in rest of the column, it will be blank. And at the last column (Action), it will say. Make payment 5. Make payment will lead to the cart page where he will pay for that offer to see details.   Of if you want you can create two blocks in this page.   1. Already paid offers. 2. And new offers for the same proposal which needs to make payment.   Let me know if this is fine with you. |
| Payment / Cart page | http://localhost/finreq/user/cart | In this page, user will make payment for the offers he received  Whatever offers he has selected, will be come here to make payment.  Please read headings – for eg. If public sectors |
| All Invoices/Payments | <http://localhost/finreq/user/payments> | All payments done by the users will get to see here with detail mentioned here.  **View offers** – all offers only for that invoice will see in that page  **Print** will enable to print invoice. |
| My Account | http://localhost/finreq/user/myaccount\_new | My profile – View and Edit both in one.  If click on Edit profile, where user will be able to edit profile and update |
| Change Password | <http://localhost/finreq/user/change_password> | User can change password. |
| Register Popup | Register Popup | This will enable all three – User, lender, and channel partner to register with their fields. It will have radio button to switch from different roles and their fields |
| Login Popup | Login Page – Popup | Where again everyone will be able to login with their roles and details. |
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Advisor / Channel Partner

**Most of the functionality will revolve as Channel Partners and its clients.**

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| Page | URL | What happens here? |
| Channel Partner’s Dashboard | http://localhost/finreq/advisors/dashboard\_channel\_partner | This is the same dashboard for the Channel Partner.  All functionality will revolve as channel partner and its client.   1. Filter 2. List of proposal of various clients along with its offers and other details. |
| Select and Create Proposal for Client | <http://localhost/finreq/advisors/create_borrowers_proposal> | From this page, Channel partner will be able to create proposal for **their client**   1. Select existing client   In this, channel partner will be able to select their existing client list in dropdown, and can create proposal for him.  In this case, if someone started with the existing client, it will be start from step 1 with data already filled up. So if channel partners want, he can edit data and go further to create proposal. This means that existing data will be overwritten till Existing banks – step 3.  In step 4, “Loan Requirement” will be fresh for every proposal.  In step 5 – Documents required – All existing document will be there, and “view” will be able to view document which is already existed. If user wanted to change, they can add up new documents.   1. Start with New Client – If this option selected, then it will start create proposal process, but this proposal will be under the channel partner and not in the individual / user.   Majorly functionality will revolve the same manner as user but it will be more under Channel partners. |
| Rest pages | Change passwords, my profile, invoices, offers for individual clients. | Rest pages like. My profile, change password and others will be same as users. |