Business Requirement Document (BRD)

Project: PRO Services Management Web Application

1. Introduction

This project aims to build a web-based application to replace the existing Excel-based workflow used by a UAE-based PRO / Typing Center. The system will centralize client management, service requests, employee compliance tracking, invoicing, and payments to improve efficiency, scalability, and visibility across operations.

2. Business Objectives

• Increase daily service processing capacity. • Reduce manual and Excel-based tracking. • Improve visibility of document expiries and service status. • Centralize billing and payment tracking. • Enable role-based control over business operations.

3. In-Scope

• Individual and Company client management. • Service catalog and service request tracking. • Employee compliance and document expiry monitoring. • Invoicing, grouped billing, and partial payment tracking. • Role-based access control. • Dashboard and reports.

4. Out of Scope

• Direct integration with government APIs. • Native mobile applications. • Automated payment gateway integration (phase dependent).

5. Client Types

Individual Clients: Temporary service-based clients whose personal data and documents are deleted after service completion. Company Clients: Long-term clients with company records, multiple employees, compliance tracking, and grouped billing.

6. Employee Compliance (Company Clients)

The system shall maintain employee records under each company, including documents such as passport, visa, labour card, insurance, and Emirates ID. Expiry dates shall be monitored and prioritized based on urgency.

7. Service Management

Admins can define service types and standard charges. Staff can create service requests linked to clients and employees. Services move through predefined statuses such as Pending, In Process, Approved, and Completed.

8. Billing & Payments

Each service generates an internal billable record. For company clients, multiple services may be grouped into a single Statement of Work for client-facing invoicing. Payments may be partial and are applied sequentially to the oldest unpaid services first.

9. User Roles

Admin: Full system access. Operations: Create and manage service requests. Compliance: Manage employee documents and expiry tracking. Finance: Manage invoices, payments, and financial reports. Viewer: Read-only access.

10. Expiry & Priority Rules

Expired documents are marked urgent. Documents expiring within 30 days are high priority. Documents expiring within 31–60 days are medium priority.

11. Success Metrics

• Reduced manual tracking. • Improved turnaround time. • Accurate expiry alerts. • Clear financial visibility.