Admin Portal Capabilities Document

Purpose

A centralized platform for managing and monitoring field operations, communication, and accounting - integrated seamlessly with WhatsApp for ease of use.

Modules Overview

View All Form Submissions - Access all disability data submitted by surveyors via WhatsApp.

Upload/Manage Knowledge Base - Upload PDFs, DOCs, or manually add entries to build a dynamic knowledge base.

View Team Conversations - Track conversations between surveyors and individuals.

Expense Approval Dashboard - Manage and approve/reject travel, meal, and ticket expenses.

Send Announcements - Push bulk alerts, reminders, or updates to surveyors.

Export Data to Excel/PDF - Export form responses and expenses for reports and audits.

Sync with Tally - Seamless sync of approved expenses with Tally for accounting.

1. Overview of the System

A WhatsApp-based solution enabling surveyors and organization staff to:

- Collect disability-related data from Persons with Disabilities (PWDs) or their caregivers.

- Automatically suggest equipment or treatment based on the disability type.

- Submit expenses for reimbursement directly via WhatsApp.

- Use a web-based Admin Portal for managing forms, expenses, and communications.

- Integrate approved expenses with Tally for automated accounting.

2. Surveyor Interaction via WhatsApp

Surveyor starts a WhatsApp chat using a predefined script that guides step-by-step data collection. Responses can be text, audio (converted to text), or multiple-choice simulated through quick replies.

3. Smart Recommendations

Based on responses like disability type, age, and severity:

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- The system searches the knowledge base provided by APD.
- Suggests appropriate equipment/treatment (e.g., wheelchair, hearing aid).
- Automatically translates suggestions into the user's preferred language.

4. Expense Submission Flow
Surveyor selects 'Submit Expense' on WhatsApp, uploads bills/images.
- Admin can approve/reject, add comments.
- Approved entries sync with Tally for processing.
5. WhatsApp Announcements
Admin selects recipients, drafts message (text/image/audio), and sends in bulk via WhatsApp.
- Surveyors receive the update in real-time.
6. Key Benefits
 Simple Data Collection - via WhatsApp; no training required
 Accessible - suitable for remote areas
 Multilingual Interaction - local language support
 Smart Suggestions - reduce manual recommendation effort
 Admin Monitoring - real-time visibility and approval
 Expense Integration - sync with Tally for seamless processing