Business Requirements Document (BRD)

Custom CRM for Natya Arts

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1. Executive Summary

This BRD defines the business requirements for a **Custom CRM** designed for: - Student lead capture & onboarding (Sales Module) - Batch creation and mentor/student assignment (Mentor Module) - Student self-service portal (Student Module) - View-only academic oversight (Academic Module) - Admin management + dynamic form/field builder (User/Admin Module)

The CRM will support multiple education programs: - **Natya** , **Natya Career Academy** - STED - AISECT (B.Voc / M.Voc)

The CRM will integrate with an existing **LMS** using APIs to fetch course, fee, dues, batch, and student learning details.

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2. Business Objectives

2.1 Primary Goals

1. Digitize and standardize student data collection.
2. Allow mentors to manage batches and assign students/mentors.
3. Provide students with a login portal to view:
   - Profile details
   - Course details
   - Fee paid/dues
4. Provide Academic team with view-only access to mentor/batch/student structure.
5. Allow Admin to dynamically create/edit the student onboarding form fields (App Creator style).
6. Support bulk upload of existing student data and batch mappings.

2.2 Success Metrics (KPIs)

- Reduction in manual student onboarding time.
- Increased completeness of student records.

- Ability to onboard 100+ students/day via bulk upload.
- Accurate mapping of students to batches and mentors.
- Seamless LMS sync for fee & course details.

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3. Scope

3.1 In-Scope

- Web-based CRM portal
- Role-based access control (RBAC)
- Sales module student data capture (dynamic form)
- Mentor module batch creation + assignment
- Student login portal
- Academic view-only portal
- Admin module (users + form builder)
- Bulk upload student records and batch assignments
- LMS integration via API

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4. Stakeholders

Stakeholder	Role	Responsibility
Admin	System Owner	User creation, field builder, configuration
Sales Team	Data Collection	Collect student details, onboard student
Mentors	Batch Owners	Create batches, assign mentors/students
Academic Team	Oversight	View-only monitoring
Students	End Users	View their profile, course, fee, dues
IT / Development	Implementation	Build CRM + integrate LMS

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5. User Roles & Access Levels

5.1 Roles

1. **Super Admin**
2. **Admin**
3. **Sales User**

4. **Mentor**
5. **Academic User**
6. **Student**

5.2 Permission Model (Granular)

The CRM must support a **section-wise permission system** where Admin can configure access per role and per module using actions like: - **View** - **Create** - **Edit/Update** - **Delete**

This permission structure should work each section has toggle switches for each permission type.

Permission Requirements

- Permissions must be configurable per **Role**.
- Permissions must be configurable per **Module Section** (e.g., Leads, Reports, Settings).
- Admin must have an option for **Select All / Unselect All** per section.
- Permissions should be enforced across:
    - Menu visibility
    - Page access
    - API access

5.3 Access Matrix (High Level)

Module	Admin	Sales	Mentor	Academic	Student
Sales Data Capture	✓	✓	✕	✕	✕
Bulk Upload	✓	✓ (optional)	✓	✕	✕
Mentor Module	✓	✕	✓	View	✕
Academic Module	✓	✕	✕	✓	✕
Student Portal	✓	✕	✕	✕	✓
User Management	✓	✕	✕	✕	✕
Field Builder	✓	✓	✓	✕	✕

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6. Functional Requirements

6.1 Sales Module (Student Data Collection)

6.1.1 Overview

Sales module will allow a mentor/admin/sales user to share a link with a student. The student fills a form based on program selection.

6.1.2 Form Entry Flow

Step 1: Student opens shared link

Step 2: Student selects dropdown: - Natya - Natya Career Academy

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6.1.3 If Student selects "Natya"

The system must show the following fields: 1. Full Name 2. Age 3. Place 4. Subject 5. Occupation 6. Contact Number 7. WhatsApp Number 8. Transaction Amount Link 9. Transaction ID

Validation Rules: - Contact number: numeric, 10 digits - WhatsApp number: numeric, 10 digits - Transaction ID: alphanumeric - All fields required (configurable by Admin)

6.1.4 If Student selects "Natya Career Academy"

The system must show a second dropdown: - STED - AISECT

6.1.5 If Student selects "STED"

The system must: 1. Display a list of courses (Admin configurable) 2. On selecting a course, show the following fields:

Student Data Fields (STED)

Personal Information - First Name - Last Name - Father or Husband Name - Mother Name - Date of Birth (dd-mm-yyyy) - Gender (dropdown) - Mobile - Marital Status (dropdown) - Email

Permanent Address - Perm Address - Perm City - Perm District - Perm State - Perm Pincode

Correspondence Address - Corr Address - Corr City - Corr District - Corr State - Corr Pincode

Upload Documents - Passport Photo (file) - Aadhar Card (file – PDF/Image)

Educational Qualifications - Qualification (dropdown) - Year of Passing (YYYY) - Percentage - Board/University - Marklist Upload

Validation Rules: - DOB must be valid date - Email format validation - Pincode numeric (6 digits) - Upload file size limit (configurable)

6.1.6 If Student selects "AISECT"

The system must show dropdown: - B.Voc - M.Voc

If B.Voc selected → show: - Carnatic Music - Bharathanatyam

If M.Voc selected → show: - Carnatic Music - Bharathanatyam

On selecting any course, show the same form fields as STED:

Student Data Fields (AISECT)

- Personal Information (same)
- Permanent Address (same)
- Correspondence Address (same)
- Upload Documents (same)
- Educational Qualifications (same)

6.1.7 Dynamic Field Builder (Admin Controlled)

The Admin must be able to: - Create new fields - Edit field labels - Set field type (text, number, date, dropdown, file upload) - Set field as required/optional - Define dropdown options - Define conditional visibility rules (e.g., show field only if AISECT → B.Voc) - Create multiple qualification blocks (Qualification 1, 2, 3...)

This should behave like an **Application Creator / App Builder** inside the CRM.

6.1.8 Student Record Creation

When student submits the form: - A student record must be created in CRM - Student must be assigned a unique CRM Student ID - Student record must store program type (Natya/STED/AISECT etc.)

6.1.9 Bulk Upload Requirement

CRM must support bulk upload of: - Existing student data - Existing batches - Student-to-batch mapping - Mentor-to-batch mapping (optional)

Supported upload format: Excel (.xlsx) / CSV.

Bulk upload must support: - Validation before import - Error log download - Duplicate handling rules

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6.2 Mentor Module

6.2.1 Overview

Mentors manage batches and assign students and other mentors.

6.2.2 Batch Management

Mentor must be able to: - Create batch - Edit batch details - Add students to batch - Remove students from batch - Assign other mentors to the batch

Batch fields (minimum): - Batch Name - Program Type - Course - Start Date - End Date (optional) - Primary Mentor - Secondary Mentors - Student List

6.2.3 Mentor Permissions

Mentor can only: - View and edit batches they own or are assigned to - View student details for students in their batches

Mentor cannot: - Edit admin settings - Create new users - Change form fields

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6.3 Student Module (Student Portal)

6.3.1 Overview

Students must have login access to view their information.

6.3.2 Student Login

Students must: - Login using mobile/email + OTP OR password (final method to be decided) - View their profile details submitted in CRM - View assigned batch details

6.3.3 LMS API Integration

Student portal must fetch from LMS: - Course details - Fee details - Fee paid - Fee dues - Any additional LMS fields available (progress, attendance etc.)

CRM should store LMS identifiers for mapping: - LMS Student ID - LMS Course ID - LMS Batch ID (if applicable)

6.4 Academic Module

6.4.1 Overview

Academic team requires view-only access.

Academic user must be able to: - View all batches - View mentor assignments - View student lists in each batch - View student fee status (via LMS)

Academic user must NOT: - Edit batches - Assign students - Create mentors

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6.5 User Module (Admin)

6.5.1 User Management

Admin must be able to: - Create users - Assign roles - Activate/deactivate users - Reset passwords

6.5.2 Role-Based Permissions

Admin must be able to: - Configure role permissions (optional in Phase 1) - Assign role-based access per module

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7. Data Requirements

7.1 Core Entities

1. Student
2. Batch
3. Mentor
4. Course
5. Program/Institute
6. Transactions (captured manually)
7. Documents

7.2 Student Entity – Common Fields

- CRM Student ID
- Program Type (Natya / Career Academy)

- Sub Program (STED / AISECT)
- Course Name
- Personal details
- Address details
- Uploaded documents
- Education qualification(s)
- Assigned batch
- Assigned mentor(s)
- LMS mapping IDs

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8. Integrations

8.1 LMS Integration

CRM must integrate with LMS for: - Student profile sync (optional) - Course mapping - Fee and dues

Integration type: - REST API (assumed)

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9. Non-Functional Requirements

9.1 Security

- Role-based access control
- Encrypted password storage
- Secure file uploads

9.2 Performance

- Must support 500+ concurrent student form submissions
- Bulk upload up to 10,000 records

9.3 Audit Logs

System should log: - User logins - Student record updates - Batch changes - Field builder changes

9.4 Backup & Recovery

- Daily backup
- Ability to restore data

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10. Reporting Requirements

10.1 Sales Reports

- Students onboarded per day/week/month
- Students by program/course
- Missing data fields

10.2 Mentor Reports

- Students per batch
- Mentor assignment list

10.3 Academic Reports

- Batch overview
- Fee due summary

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11. Assumptions

- LMS APIs are available and documented.
- Student records can be mapped uniquely to LMS using mobile/email.
- Admin will maintain course lists.

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12. Risks & Dependencies

12.1 Risks

- LMS API limitations may restrict fee/dues visibility.
- Field builder complexity may increase development time.
- Data duplication issues during bulk upload.

12.2 Dependencies

- LMS team support for API access.
- Finalization of login method (OTP/password).

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13. Acceptance Criteria

Sales Module

- Student can complete the correct form based on dropdown selection.
- Submitted student record is stored correctly.

Mentor Module

- Mentor can create batches and assign students.

Student Portal

- Student can login and view course + fee details from LMS.

Academic Module

- Academic user can view mentor module data without editing.

Admin Module

- Admin can create users and create/edit fields in the form builder.
