Product Requirements Document (PRD)

Product Name

Career Counselling & Assessment Platform

Version

V1.0 (MVP)

Prepared By

Product & Solutions Team

1. Purpose of the Product

The purpose of this platform is to digitize and streamline the end-to-end career counselling process including:

- Lead capture and registration
- Payments (online & manual)
- Career assessment via third-party (CareerFutura)
- Report management and access control
- Slot booking for counselling (online/offline)
- Content distribution (free & paid)
- Automated reminders and notifications

The system aims to reduce manual work, improve tracking, enhance user experience for students and parents, and enable scalable operations for the counselling organization.

2. Goals & Objectives

Business Goals

- Centralize all counselling operations into one system
- Reduce dependency on manual follow-ups
- Improve payment and report control
- Create a scalable digital counselling model
- Convert free users into paid counselling customers

User Goals

- Easy registration and onboarding
- Clear understanding of next steps
- Simple access to exams, reports, and counselling
- Access to relevant career content

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3. Stakeholders

- Admin (Super Admin)
- Backend Employee / Executive
- Counsellor
- Student
- Parent

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4. User Roles & Permissions

4.1 Admin (Super Admin)

- Full system access
- Manage users and roles

- Configure payments and pricing
- Approve payments and exams
- Upload and manage reports
- Manage content library
- Configure slots and counsellors
- Send bulk notifications

4.2 Employee / Backend Executive

- Verify manual payments
- Approve exam completion
- Upload reports
- Manage bookings
- Send reminders

4.3 Counsellor

- View assigned students
- View reports (read-only)
- Add counselling notes
- Mark counselling sessions as completed

4.4 Student / Parent

- Register and login
- Make payments
- Access exams
- Book and manage slots
- View reports (after full payment)
- Access free and paid content

4.5 Free User

- Register and login
- Access free content only
- Download free resources

5. High-Level User Journey

1. Inquiry received (call / message / website)
2. User registers on platform
3. Login credentials generated
4. Payment initiated (online or manual)
5. Payment verification
6. Exam instructions shared
7. Exam taken on CareerFutura
8. Exam completion marked
9. Admin approval
10. Report uploaded
11. Slot booking enabled
12. Counselling session conducted
13. Full payment completed
14. Reports and documents unlocked
15. Continued content access

5A. Programs & Packages Module (NEW)

5A.1 Programs

The platform will support multiple **career programs**, such as:

- Engineering
- Medical
- Law
- Design
- PCB (ICR / NICR)
- Hotel Management
- BCA

- BBA
- Other custom programs (configurable by Admin)

Each student/user will be mapped to **one primary program** at the time of registration or later by admin.

5A.2 Packages / Offerings under Each Program

Each Program can have multiple **Packages (Courses)**:

Package Types

1. **Paid WhatsApp Group Only**
   - User added to program-specific WhatsApp group
   - No exam, no 1:1 session
2. **1:1 Session Only (Without Exam)**
   - Online or Offline
   - Slot booking enabled
   - No assessment required
3. **1:1 Session with Exam**
   - Includes CareerFutura assessment
   - Report + counselling session
4. **Full Program – Dedicated Support**
   - Dedicated WhatsApp group (1 student + counsellor)
   - Direct WhatsApp communication
   - Exam + report
   - Multiple 1:1 sessions
   - Priority support

5A.3 Program & Package Mapping Logic

- Each user will be mapped to:
  - Program (Engineering, Medical, etc.)

○ Package (one of the above)

System will automatically:

- Enable relevant modules (exam, slot booking, WhatsApp, reports)
- Restrict irrelevant modules

5A.4 Feature Availability by Package

Feature	WhatsApp Group	1:1 Only	1:1 + Exam	Full Program
Free Content	✅	✅	✅	✅
Paid Content	❌	✅	✅	✅
Exam	❌	❌	✅	✅
Report Access	❌	❌	✅	✅
Slot Booking	❌	✅	✅	✅
WhatsApp Group	✅	❌	❌	❌
Dedicated WhatsApp	❌	❌	❌	✅

5A.5 WhatsApp Integration Rules

- **Group WhatsApp**: Manual / API-based addition
- **Dedicated WhatsApp Support**:
  ○ One-to-one WhatsApp chat
  ○ Counsellor assigned
  ○ Chat history tracked externally (WhatsApp)

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6. Functional Requirements

6.1 Lead & Registration Module

- Capture inquiries from multiple sources
- Registration form with student & parent details
- Auto-generate login credentials
- Status tracking (Inquiry, Registered, Payment Pending)

6.2 Authentication & User Management

- Email/mobile-based login
- Role-based access control
- Password reset functionality

6.3 Payment Module

Payment Options

- Option A: Online payment gateway (UPI/Card/NetBanking)
- Option B: Manual payment (QR/Bank transfer + screenshot upload)

Payment Types

- Registration / Exam fee
- Advance payment (online counselling)
- Full payment (offline counselling)

Payment Statuses

- Payment Pending
- Verification Pending
- Partial Paid
- Fully Paid

6.4 Exam Management Module

- Display exam instructions
- Redirect to CareerFutura exam link
- Status updates:
  - Exam Not Started
  - Exam In Progress
  - Exam Completion Submitted
  - Exam Completed
- Student can mark exam completed
- Admin approval required
- Admin override allowed

6.5 Report Management Module

- Manual upload of CareerFutura reports (PDF)
- Attach report to student profile
- Report locking/unlocking based on payment
- Secure document viewer

6.6 Slot Booking & Counselling Module

- Slot configuration by admin
- Counsellor assignment
- Online & offline counselling options
- Google Meet / Zoom integration (online)
- Slot booking, rescheduling, cancellation
- Counselling status tracking

Payment Timing Rules for Counselling

- For **Online Counselling**:
  - Advance payment may be taken before the session

- ○ Remaining amount can be paid after the session
- For **Offline Counselling**:
  - ○ Payment can be taken either before or after the session (as configured by admin)

Document & Report Access Rule (Global)

- **Reports, documents, and paid resources will be unlocked ONLY after full payment is completed**
- Until full payment:
  - ○ Reports remain locked
  - ○ Download is disabled
  - ○ Only session booking/status is visible

6.7 Content Library Module

Content Types

- Free content
- Paid content

Content Categories

- Class-wise
- Stream-wise
- Domain-wise
- Package-wise

Access Control

- Guest: Public content
- Free user: Free content
- Paid user: Free + Paid content
- Content can be read online or downloaded

6.8 Notification & Reminder Module

Events

- Registration confirmation
- Payment reminders
- Exam reminders
- Slot booking confirmation
- Session reminders
- Report unlocked

Channels

- WhatsApp
- Email
- SMS (optional)
- Bulk reminders based on filters

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7. Non-Functional Requirements

- Secure authentication
- Role-based authorization
- Scalable architecture
- Mobile-friendly UI
- Data privacy & access control
- Reliable file storage

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8. Integrations

- Payment Gateway (Razorpay / Cashfree)
- WhatsApp API
- Email service

- CareerFutura (manual initially, API later)
- Google Calendar / Meet

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9. Assumptions

- CareerFutura reports will be provided manually in phase 1
- Admin verification is acceptable initially
- Internet access is available to users

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10. Out of Scope (Phase 1)

- Automated CareerFutura API sync
- AI-based recommendations
- Advanced analytics dashboards
- Mobile applications

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11. Success Metrics

- Registration to payment conversion rate
- Exam completion rate
- Counselling completion rate
- Free user to paid user conversion
- Reduction in manual follow-ups

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12. Phase-wise Delivery Plan

Phase 1 (MVP)

- Registration & login
- Payments
- Exam tracking
- Manual report upload
- Slot booking
- Content library
- Notifications

Phase 2

- API integrations
- Advanced reporting
- Automation improvements

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13. Risks & Mitigation

Risk	Mitigation
Manual dependency	Admin override workflows
Payment failures	Dual payment options
Third-party delays	Manual upload support

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14. Approval

This PRD defines the functional and non-functional scope for Phase 1 development of the Career Counselling Platform.