

## HYRIND — Website Requirement Sheet

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### 1 - Project purpose & goals

**Purpose:** Build a responsive, secure web platform that onboards Master's students (especially F-1 OPT holders), approves/validates them via admin, creates resumes (Manually by Admin & role-based skill roadmaps, markets profiles monthly, charges a one-time setup fee + recurring monthly subscription, and provides reporting + CRM integration for follow-up and training scheduling.

**Primary success metrics (what product must deliver):**

- Candidate signups → Admin approvals → Onboarded candidates in CRM.
  - Automated recurring billing on candidate “marketing start date” (card).
  - Resume creation workflow + monthly marketing campaign launches.
  - Admin dashboard with candidate counts, MRR, upcoming charges, failed payments.
  - Candidate experience: clear CTAs, scheduling, notifications, training invites.
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### 2 - Users & roles

- **Visitor** - sees landing pages, blog, contact, interest form.
  - **Candidate (authenticated)** - complete intake form, upload documents required, view invoices for payments made, update payment method, book proxy training & screening call training.
  - **Admin (full)** - approve/reject, set marketing start date, manage billing, reports, build resume, build road maps, and upload in the portal and manual retry/refund.
  - **Recruiter / Operator** - view assigned candidates, upload resumes, log screening-call results.
  - **Finance** - view billing, refunds, payout reconciliation.
  - **System (worker/cron)** - background billing engine, retries, reporting jobs.
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### 3 -Core pages & components (MVP)

- Public: Home, About, Services, Blog listing & post, Contact, FAQ, Testimonials, Feedback / Reviews, Privacy/Terms, Accessibility.

- Candidate flows: Interest form (public) → Candidate profile (private) → Intake questionnaire → Documents (resume, transcripts) → Billing & payment UI → Dashboard (status, next billing date, invoices, training invites).
  - Admin portal: Candidate queue, candidate detail, Approve/Reject, set marketing date, upload resume, billing dashboard, reports, webhook logs, billing actions (pause/resume/retry/refund).
  - Shared UI components: Hero, CTA buttons, Value props, Testimonials carousel, Process timeline (4 steps), Blog CMS components.
  - Email templates & SMS templates for transactional communications.
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## **4 -Functional requirements (must-have)**

### **Onboarding & Approval**

- Interest form with required fields (name, email, phone, university, degree, major, visa status, graduation date, resume upload).
- Create candidate record: status = submitted.
- Admin queue: Approve / Reject with notes. Approval triggers onboarding email & booking link.
- Candidate intake questionnaire (JSON storage / or any) and ability to upload additional documents.

### **Resume & Roadmap**

- Workflow to create resume (upload or admin-built). Resume versioning and recruiter group sharing.
- Generate / attach Skills Roadmap (template + admin editable fields).

### **Billing & Payments (Xflow integration)**

- One-time setup charge at onboarding (charged immediately when candidate completes setup payment).
- Store payment tokens/mandates returned by Xflow; never store raw card PAN.
- Monthly recurring charge on candidate's marketing\_start\_date using stored mandate/token.
- Webhook handlers for Xflow events: mandate.created, payment.succeeded, payment.failed, refund.processed, settlement events.

- Billing retry policy and pause marketing on persistent failure.
- Invoice generation (PDF) and email delivery on successful payment.
- Candidate billing page: next\_billing\_date, payment method, billing history, ability to update payment method via Xflow-hosted flow.

## **Marketing & Training**

- Admin sets marketing\_start\_date and toggles marketing active/inactive.
- Trigger outbound marketing workflows (seed to CRM/ATS/outreach — webhook).
- Notifications to candidate when marketing starts, training invites, screening-call reminders.
- Ability to log screening calls & candidate feedback; push events to CRM (Salesforce/HubSpot).

## **Reporting & Admin**

- Dashboard widgets: total candidates, pending approvals, active subscriptions, MRR, revenue this month, upcoming charges, failed payments.
  - Exportable CSVs for finance (invoices, settlements).
  - Audit logs for admin/billing actions.
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## **5 - Non-functional requirements**

- **Responsive:** Mobile-first; support modern browsers.
- **Performance:** Candidate list loads within ~2s for normal dataset; pages optimized (CDN, image lazy-loading).
- **Security:** HTTPS only, HSTS, input validation, rate limiting, prepared statements (no SQL injection), CSRF protection.
- **Compliance:** PCI scope reduction via Xflow hosted checkout/tokenization; store tokens only. Data retention policy and DSR handling (GDPR/CCPA).
- **Accessibility:** WCAG 2.1 AA baseline for public & key flows (interest form, payment, intake).
- **Scalability:** Background job queue for billing; database indexing for candidate searches.
- **Observability:** Error tracking (Sentry), logs for webhooks & billing operations, basic metrics (counts, failures).

## 6 — Integrations

- **Payment aggregator:** Xflow — mandate/tokenization, webhooks, settlement & payouts.  
(Use Xflow sandbox for dev).
- **CRM:** Salesforce (or HubSpot) — webhook push on candidate approved, marketing started, payment events.
- **Calendar:** Google Calendar / Office 365 for scheduling consultations & training.
- **Email/SMS:** SendGrid / Amazon SES and Twilio (optional SMS).
- **Storage:** S3-compatible object store for resume/docs.
- **Search (optional):** Algolia for job search / fast candidate filtering (phase 2).

## 7 — Data model (summary)

Core tables (Postgres recommended):

- candidates (uuid, name, email, phone, university, degree, major, visa\_status, opt\_end\_date, status, marketing\_start\_date, created\_at, updated\_at)
- intake\_forms (id, candidate\_id, json\_answers, completed\_at)
- candidate\_documents (id, candidate\_id, type, file\_url, version, uploaded\_at)
- payments (id, candidate\_id, provider, provider\_customer\_id, payment\_method\_token, status, amount\_cents, currency, next\_billing\_date, last\_billed\_at, retry\_count)
- invoices (id, invoice\_number, candidate\_id, amount, currency, status, pdf\_url, provider\_id, due\_date, paid\_at)
- admin\_actions / audit\_log (id, user\_id, action\_type, details, timestamp)
- webhook\_events (id, provider\_event\_id, raw\_payload, processed\_at)

## 8 - Billing engine & retry policy (worker)

- Daily worker finds payments where status = active and next\_billing\_date <= today.
- Charge via Xflow using payment\_method\_token.
- On success: create invoice (paid), update last\_billed\_at, next\_billing\_date += 1 month.

- On failure: increment retry\_count, schedule retries: +1 day, +3 days, +7 days. If retry\_count >= 3 → set status = past\_due → pause marketing → create finance ticket + notify candidate/admin.
- Admin may manually retry or pause/resume via admin UI.

Edge rules:

- If marketing\_start\_date is 29/30/31 and month shorter → bill on last day of month.
  - Timezones: store dates in UTC; display in candidate timezone if needed.
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## **9 -Content & assets required from product/design (to deliver before dev)**

- Brand assets: SVG logo, color palette, fonts, hero images, headshots.
  - Exact pricing: setup fee amount, monthly subscription fee (currency by region).
  - Copy: hero headline/subhead, 3 value props, services descriptions, About Us (300 words), FAQ list (final), testimonials (with permissions).
  - Calendly/booking link or calendar account for scheduling integration.
  - CRM webhook endpoint and auth credentials (or dev/test endpoints).
  - Xflow sandbox credentials (API key, webhook secret).
  - SMTP details for transactional emails.
  - Legal: privacy policy, refund policy, terms of service, consent text for sharing resumes.
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## **10 -Acceptance criteria (QA)**

Functional:

- Interest form creates candidate and triggers confirmation email.
- Admin can Approve/Reject candidate; Approve triggers onboarding flow + payment setup link.
- Candidate can pay setup fee in Xflow sandbox; payment creates invoice and saved token.
- Billing worker charges active subscriptions on next\_billing\_date and webhooks update invoices.
- Failed payments follow retry policy and pause marketing when limit hit.

- Admin dashboard numbers match computed MRR based on invoices.
- Security & compliance:
- No raw PAN or sensitive card data stored.
  - Webhook signature verification in place.
  - All public pages served over HTTPS.
- Accessibility:
- Candidate list paginated; page responds under target thresholds on test dataset.
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## 11 — QA test matrix / checklist

- Interest form submission (valid & invalid data)
  - Admin approve → onboarding email → booking link
  - Setup charge success (card & UPI test)
  - Mandate/token creation & storage
  - Recurring charge flow (simulate webhook success)
  - Recurring charge failure → retry policy → marketing pause
  - Update payment method flow (token swap)
  - Refund flow (partial/full)
  - Duplicate webhook idempotency test
  - Invoice PDF generation & download
  - RBAC: Admin vs Recruiter vs Finance access tests
  - Security scans & OWASP quick test
  - Accessibility checks on interest form & checkout
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## 12 — Deliverables to hand to devs (ticket-ready)

For each feature/epic include:

- API contract (OpenAPI/Swagger).
- DB migration SQL and ER diagram.
- Figma screens/wireframes or component specs.

- Mock Xflow sandbox credentials and webhook samples.
  - Acceptance criteria & test cases.
  - Email templates (subject + body) and SMS templates.
  - Environment & secrets list.
  - Priority list: Must-have (MVP) vs Phase 2 (nice-to-have).
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### **13 — Deployment & infra notes**

- Environments: dev / staging / prod. Use feature flags for billing.
  - Secrets in vault (AWS Secrets Manager / HashiCorp).
  - Use S3 for documents; CDN for static assets.
  - Background workers: Sidekiq / Celery / AWS Lambda + EventBridge.
  - Monitoring: Sentry, basic metrics for billing success/fails, uptime checks.
  - Backups: daily DB backups, restore tested monthly.
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- Candidate, Recruiter & Admin portals with advanced dashboards.

Google Forms link for CLIENT INTAKE SHEET :

<https://forms.gle/YjQWN4hpu1v4M67f6>

Google Forms link for CREDENTIALIA INTAKE SHEET:

<https://forms.gle/L3pC5cKezEgRrC2D6>