

HYRIND — Website Requirement Sheet

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.
-

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.
-

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.
-

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.

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 \rightarrow set status = `past_due` \rightarrow pause marketing \rightarrow 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 \rightarrow bill on last day of month.
- Timezones: store dates in UTC; display in candidate timezone if needed.

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.

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.
-

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
-

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).
-

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.
-

- Candidate, Recruiter & Admin portals with advanced dashboards.

Google Forms link for CLIENT INTAKE SHEET :

<https://forms.gle/YjQWN4hpu1v4M67f6>

Google Forms link for CREDENTIALS INTAKE SHEET:

<https://forms.gle/L3pC5cKezEgRrC2D6>