**1. Problem Statement**

Our current assignment submission process lacks a controlled mechanism to manage the number of assignments a user can submit under clients that operate in the **SPOC Approval Model**. Several competitors have implemented systems to track submission counts, and we need to introduce a similar feature. This feature will enable us to configure a **threshold** for the number of Assignments keeping the number of inquiries (INQ) as a base basis which a user can submit under the **NEIP form** based on the client’s contractual requirements. Once the inquiry threshold is reached, users will be prompted to submit inquiries through their **individual accounts** instead of the Group ID.

**2. Objective**

The objective of this project is to:

* Track the number of assignments availed by users under a **Group ID**.
* Prevent users from exceeding the **configured Assignment threshold** based on the count of inquiries a user submits as per the client’s requirements.
* Adjust the inquiry count based on **SPOC rejections** and display the updated count on the NEIP form.
* Provide users with a seamless transition from Group ID submissions to **individual submissions** when their limit is exhausted.
* Ensure smooth approval processes for **SPOC-based clients** who have opted into this feature.

Initially, this feature will be enabled for **KNU’s KIMCHI and BINGSU**, with plans to expand it to other B2B clients based on contract terms.

**3. Scope**

**3.1 In-Scope**

* **Backend Configuration Table**: A new table to track assignment submission limits for each user, identified by their **IC Code** and **Email ID**.
* **NEIP Form Updates**:
  + The **account selection popup** will display the **inquiry count** for users, adjusting based on **SPOC rejections**..
  + If the limit is reached, the **Group ID selection** will be disabled.
  + Users will be informed when transitioning to individual accounts after reaching the inquiry threshold.

**3.2 Out-Scope**

* No modifications to the **existing SPOC Approval Model workflow**.
* Not applicable to **B2C** clients or **SPOC in CC** models.
* This feature will **not** be available on the old form.

**4. Requirement**

**4.1 Configuration Table**

The configuration of the threshold limit will be based on the following fields:

| **Website** | **IC Code** | **ASN Count** | **From Date** | **To Date** |
| --- | --- | --- | --- | --- |
| KNU | BINGSU | 10 | 1st March 2025 | 28th Feb 2026 |

This table is provided for illustrative purposes only. Developers should follow the existing database structure and workflows in their implementation..

Once any action has taken place on any inquiry, the data will be saved against the user’s record in the database. This will be used to **track and display inquiry counts** on the NEIP form.

**4.2 Logic**

The following logic will govern the behavior of the assignment submission and group selection process, based on the user’s submission history and configured limits:

* **Inquiry Limit Per User**

A set number of inquiries (INQ) will be allowed per user (identified by Email ID), based on the website, IC Code, and calendar days. Each **new inquiry** increments the counter by **1**.

* **Inquiry Outcome Impact**:
  + **If the Inquiry is converted into an Assignment (ASN)**, the inquiry count will **remain at 1**.
  + **If the Inquiry is canceled or rejected by the SPOC**, the inquiry count will **decrease** by 1.
  + **If the Inquiry is neither converted to an Assignment nor canceled/rejected**, the inquiry count will **remain at 1** until either one of the above condition is met.
* **Adjustment for SPOC Rejections**:
  + The inquiry count displayed on the NEIP form will reflect **only the inquiries approved by the SPOC**. If the client submits 5 inquiries, and the SPOC rejects 3 of them, the count will be adjusted down to **2** (since only 2 inquiries are approved).
  + **The inquiry count on the NEIP form will decrease as SPOC rejects inquiries**, and this updated count will control whether the user can select the **Group ID** or must proceed with an **Individual Account**.

**NEIP Form Behavior Based on Inquiry Count**:

* **If the allowed inquiry count is greater than the current inquiry count**, the user will be able to proceed with selecting a **Group ID**.
* **If the allowed inquiry count is less than the current inquiry count**, the **Group ID** option will be greyed out, and the user will be prompted to select an **Individual Account**.
* **For New Clients** operating under the SPOC Approval Model, the flow will be as per the existing process. Once the Inquiry turns into an assignment, the data will be saved in the newly created table.

**4.3 NEIP Form**

When a User submits an inquiry on the Form, the system will identify if the User is an existing user or a new user.

In the case of an existing user, the system fetches the number of confirmed inquiries listed against the email ID. The account selection popup on the NEIP form will display the **updated count of approved inquiries**, factoring in any rejections by the SPOC.

**Scenario 1: Existing Client & Inquiry Threshold Available**

* **User**: [Allan@test.com](mailto:Allan@test.com)
* **Client Type**: Existing Client
* **Model**: SPOC Approval
* **Inquiry Status**: Allowed Inquiry Count > Current Inquiry Count
* **Action**: User is allowed to proceed with selecting **Group ID**.

When the assignment limit is exhausted for an existing client, the account selection popup on the NEIP form will grey out the group account option and an Info button besides the assignment count will open up a dialogue box when hovered upon that will contain additional details with regards to the Exhaustion of Assignments allowed.

**Scenario 2: Existing Client & Inquiry Threshold Exhausted**

* **User**: [Allan@test.com](mailto:Allan@test.com)
* **Client Type**: Existing Client
* **Model**: SPOC Approval
* **Inquiry Status**: Allowed Inquiry Count < Current Inquiry Count (after SPOC rejections)
* **Action**: **Group ID** option is greyed out, and the user is prompted to proceed with an **Individual Account**.

In this case, the inquiry count is reduced by 3 (for 3 rejected inquiries), leaving the user with 2 approved inquiries.

For a New user the system will directly add the MEM ID to the Group and allow the user to proceed with the inquiry submission as per the existing SPOC Approval flow and the data will then be added to the new table created in the database.

**Scenario 3: New Client/First Time User**

* **User**: [Allan@test.com](mailto:Allan@test.com)
* **Client Type**: New Client
* **Model**: SPOC Approval
* **Action**: User is allowed to proceed with selecting **Group ID**.

**4.4 Risk.**

* **Limited Scope**: This feature will only be applicable to clients operating under the **SPOC Approval Model** and will not apply to **B2C** clients or **SPOC in CC** models.
* **Form Exclusion:** This feature will not be available on the Old form, meaning users on old forms may not have access to the functionality unless they are migrated to the NEIP form.

**5. Flowchart**

**6. Future Scope**

* The current threshold will be based on **Assignment Count**, but future enhancements may include additional thresholds such as:
  + **Word Count**: Limiting the total word count for submissions.
  + **Budget**: Restricting submissions based on allocated budget amounts.
* All data captured in the **configurable table** will be stored for future use in creating a **dashboard** on the **CP Dashboard** to track and report user assignment activity.