**Product Requirements Document (PRD)**

**Product Name:** Customer Number Change Verification Tool  
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### **Overview**

This web-based tool will be used by agents to initiate and track verification for customer phone number change requests. Depending on the customer’s access to their original number or WhatsApp account, the workflow varies. The app will allow OTP generation, multi-channel message dispatch (Push, SMS, WhatsApp), and activity logging.

### **Goals & Objectives**

* Provide agents a single interface to initiate phone number change verification
* Enable sending OTPs across channels securely
* Track all attempts in a centralized log
* Handle cases where customers do not have access to their old SIM
* Allow admin-level access control and logging

### **User Roles**

* **Agent:** Uses the form to send messages and generate OTPs
* **Admin:** Manages agent accounts, monitors logs, and controls access
* **System:** Handles OTP generation, API integration, local log update

### **Admin Panel Requirements**

* Admin login with authentication (username/password)
* Capability to **create** and **delete agent accounts** (name, ID, password)
* Ability to **view logs** of all messages sent:
  + Agent Name, Agent ID
  + Channel (Push, SMS, WA)
  + Message Type (OTP, Form)
  + Timestamp
* Logs screen should include a **date filter** to view logs for specific periods
* Admin can **download all logs as a CSV file**
* When agents log in, their **name and ID should auto-fill** in the main interface (but remain editable)
* Agent login required to access the main OTP/Form portal

### **Pages & Flows**

#### **1. Home Page (Form Page)** *(Login-protected for agents)*

**Fields:**

* Agent Name *(Auto-filled from login, editable)*
* Agent ID *(Auto-filled from login, editable)*
* Customer’s Original Phone Number *(Phone)*
* Customer’s New Phone Number *(Phone)*
* Customer ID / KB ID *(Text)*
* Does the customer have access to the old SIM / WhatsApp account? *(Radio Button: Yes / No)*

##### **If YES selected:**

1. **OTP Generation**
   * Button: “Generate OTP”
   * Action: Generates 4-digit random OTP and displays it on screen
2. **Send OTP Buttons**
   * Push Notification (sent to KB ID)
   * SMS (sent to old phone number)
   * WhatsApp (sent to old phone number)

* **Message Template:**
* Your OTP for confirming phone number change is: {{OTP}}. If this wasn’t requested by you, please ignore.
* **APIs to be called:**
  + **Push Notification (CleverTap External Trigger API):**
  + POST https://api.clevertap.com/1/send/externaltrigger.json  
    Headers:  
     X-CleverTap-Account-Id: R9Z-4RW-855Z  
     X-CleverTap-Passcode: ERK-ASE-CPKL  
     Content-Type: application/json  
    Body:  
    {  
     "to": { "identity": ["<KB\_ID>"] },  
     "campaign\_id": "1747039170",  
     "ExternalTrigger": {"OTP" : "<OTP>"}  
    }
  + **SMS (Gupshup):**
  + GET https://enterprise.smsgupshup.com/GatewayAPI/rest?userid=2000193891&password=x394F4ge&send\_to=91<OLD\_PHONE>&msg=Your%20Khatabook%20verification%20OTP%20is%20<OTP>&method=SendMessage&format=JSON&v=1.1&auth\_scheme=Plain&msg\_type=Text&principalEntityId=1601100000000000654&dltTemplateId=1007194642344586649
  + **WhatsApp (Gupshup):**
  + GET https://mediaapi.smsgupshup.com/GatewayAPI/rest?userid=2000186106&password=F4EUan&send\_to=<OLD\_PHONE>&v=1.1&format=json&msg\_type=TEXT&method=SENDMESSAGE&msg=<OTP>+is+your+verification+code.&isTemplate=true&footer=This+code+expires+in+10+minute.

1. **Feedback & Logging**
   * Show success/failure message for each channel
   * Log the following locally:
     + Timestamp
     + Agent Name, Agent ID
     + KB ID, Old Phone, New Phone
     + OTP
     + Channel used (Push/SMS/WA)
     + Message Type (“OTP”)
     + Send success/failure

##### **If NO selected:**

* Show buttons:
  + Send WhatsApp message in **English**
  + Send WhatsApp message in **Hindi**
  + Send SMS message in **English**
  + Send SMS message in **Hindi**
* All four options should trigger respective template-based APIs
* Log these actions with channel, language, and message type (“Form”)

### **Backend Components**

* OTP Generator (4-digit random number)
* API Integrations:
  + Push Notification (CleverTap)
  + SMS (Gupshup)
  + WhatsApp (Gupshup)
* Authentication System (Admin + Agent Login)
* Local log persistence (downloadable as CSV)

### **Tech Stack (Proposed)**

* Frontend: HTML, JavaScript, TailwindCSS or basic UI kit
* Backend: Netlify Functions / Node.js
* Data Logging: JSON file-based or lightweight storage
* Hosting: Netlify or Vercel

### **Success Metrics**

* 100% message logging in downloadable CSV
* <3 seconds end-to-end send time
* 95%+ message send success rate
* No access to OTP/Portal without login
* Admin dashboard supports full filtering and logging

### **Next Steps**

1. Design frontend UI and login screen
2. Build admin dashboard for agent management and logs
3. Set up backend functions (OTP, channel APIs, logging)
4. Integrate CSV download/export and date filtering