

# Certificate Portal

Implementation

## Epics - Epics 1 - 5

Epics 1 - 5

#EPIC-6ab604d3 **Automated Reseller Certificate Portal** Defined

**Description**

Develop a secure, role-based Automated Reseller Certificate Portal to streamline certificate management for Admins, MDM Analysts, and Reviewers. Key functionalities include compliance dashboards, certificate review and approval workflows, expiration alerts, and automated email notifications. It integrates with SAP for real-time data synchronization, e-signature platforms for legal validations, and OCR for data extraction. This initiative improves compliance handling, automates workflows, and enhances operational efficiency.

**Details**

Status	Focus Area	Phases
Defined	Technology & Integration, User management & access, Business Rules & Logic, Other Features	1, 2

**Related Tasks**

1

#TASK-1 Finalize SAP, E-Signature, and Email Service Integration Requirements 2.0→1.5days Defined

2

#TASK-2 Implement Internal User Role Management System 3.0→0.8days Defined

#TASK-3 Define Multi-Jurisdictional Form Handling Process 3.5→1.8days Defined

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records 5.0→1.3days Defined

#TASK-5 Design and Implement OCR Integration for Certificate Data Extraction 4.0→0.4days Defined

#EPIC-0944aa15 **Certificate Campaign Management** Defined

**Description**

Enhance the certificate portal's functionality by enabling users to create campaigns for managing bulk certificate requests. Features include detailed audience filtering, customizable email templates, and batch email dispatch to customers. These tools streamline certificate requests, improve communication, and ensure efficient certificate renewals.

**Details**

Status	Focus Area	Phases
Defined	Certificate Campaign Management, User Journey Walkthrough, Creating a Campaign, 3. Database	1, 3, 4

**Related Tasks**

1

#TASK-10 Optimize Database Queries for Large-Scale Portal Operations 3.0→1.5days Defined

3

#TASK-6 Implement Bulk Certificate Request Campaign Management 4.0→1.0days Defined

#TASK-7 Implement Compliance Dashboard with Certificate Management Features 5.0→1.3days Defined

4

#TASK-8 Develop Multi-Campaign Certificate Request Functionality 4.0→1.0days Defined

#TASK-9 Implement Database Design for Portal-specific Data 3.0→1.5days Defined

#EPIC-f79bcf0b **Certificate Review and Approval Workflow** Defined

**Description**

Implement a certificate review system for handling certificates set to expire within a specified timeframe. Users can review incoming certificates, approve to update the SAP records with valid details, or reject with reasons. Automated notifications and compliance rules streamline this workflow, ensuring compliance accuracy and timely updates.

**Details**

Status	Focus Area	Phases
Defined	Certificate Review and Approval Workflow	3

**Related Tasks**

3

#TASK-11 Develop Features for Expiring Certificates Workflow 4.0→1.0days Defined

#TASK-12 Implement Rejection Workflow and Notifications for Invalid Certificates 3.0→0.8days Defined

#EPIC-c69b46b0 **Recurring Business Logic for State Compliance** Defined

**Description**

Implement logic to determine if customers have recurring business in states where reseller certificates have indefinite validity (e.g., Kansas, Utah, Oklahoma). The system will use SAP transaction data to ensure compliance with state-specific rules. This feature reinforces compliance and maintains accurate customer records.

**Details**

Status	Focus Area	Phases
Defined	Recurring Business Logic for State Compliance	3

**Related Tasks**

3

#TASK-13 Implement Recurring Business Validation Logic for State Compliance 3.5→0.9days Defined

#EPIC-3a2c6a6e **OCR Integration for Certificate Data Extraction** Defined

**Description**

Integrate OCR capabilities to extract data from submitted certificates. Leverage services like Amazon Textract or Google Tesseract to process certificate information, which will be securely stored in the portal database and synchronized with SAP. This feature reduces manual data entry, improves accuracy, and enhances operational efficiency.

**Details**

Status	Focus Area	Phases
Defined	3. Reviewing a Certificate (Certificates expiring within a set timeframe (e.g., 60 days)), Synchronize SAP records with certificate data extracted using OCR, If Approved: The user clicks 'Approve.' The certificate status changes to Valid, the expiration date is calculated based on state rules, and the SAP Customer Master is updated via the integration., If Rejected: The user clicks 'Reject,' provides a reason (e.g., 'Illegible Signature,' 'Incorrect Information'), and the status changes to Invalid. This may trigger a notification to the customer to resubmit. It should be manual not automatic.	1, 4

**Related Tasks**

1

#TASK-15 Configure SAP Integration for Certificate Data Synchronization 3.0→0.8days Defined

#TASK-16 Validate Certificate 'Approve' Logic and SAP Update Workflow 4.0→1.0days Defined

4

#TASK-14 Enhance Certificate Review Workflow with OCR Integration 4.0→0.4days Defined

#TASK-17 Implement Manual Rejection Workflow for Invalid Certificates 4.0→3.0days Defined

## Epics - Epics 6 - 10

Epics 6 - 10

#EPIC-b1eb2306 Customer Journey for Certificate Completion

Defined

**Description**

Design the end-to-end customer journey for completing reseller certificates. Steps include receiving a secure email, accessing a landing page, filling out required fields, digitally signing the document, and receiving confirmation upon submission. This seamless process ensures a user-friendly experience while maintaining legal and technical integrity.

**Details**

Status	Focus Area	Phases
Defined	4. Expiring Certificates	1

**Related Tasks**

1

#TASK-18 Enable Email Template Generation for Expiring Certificates

3.0 → 0.8 days Defined

#EPIC-7c2c8365 Customer Certificate Request History Management

Defined

**Description**

Develop functionality to track and manage certificate request history within the portal. Users can view the status of past requests, apply filters, and identify compliance trends. This feature improves auditing processes and ensures adherence to compliance requirements.

**Details**

Status	Focus Area	Phases
Defined	5. Missing Certificates	4

**Related Tasks**

4

#TASK-19 Implement Email Template for Missing Certificates

3.0 → 0.8 days Defined

#EPIC-865853ca Internal User Management and Role-Based Permissions

Defined

**Description**

Implement an internal user management and role-based access control system. Features include account creation, role assignment for Admins, MDM Analysts, and Reviewers, and potential integration with identity providers like Azure Active Directory. This ensures secure access controls and efficient role-specific functionalities.

**Details**

Status	Focus Area	Phases
Defined	6. Customer Master	4

**Related Tasks**

4

#TASK-20 Implement Customer Master View and Filtering

3.0 → 0.8 days Defined

#EPIC-a14613aa Expiring Certificates Management System

Defined

**Description**

Create a system to manage certificates nearing expiration. Features include a specialized dashboard with filtering options, automated renewal reminders, and pre-filled email templates with e-signature links for customers. These features ensure timely certificate renewals and reduce compliance delays.

**Details**

Status	Focus Area	Phases
Defined	Customer Request History	1

**Related Tasks**

1

#TASK-21 Implement Customer Request History Feature with Filters

3.0 → 0.8 days Defined

#EPIC-abe5ebc9 New Customer Integration with SAP

Defined

**Description**

Develop real-time or scheduled batch integrations between the portal and SAP to streamline customer onboarding and updates. These integrations eliminate manual data entry, ensure accuracy, and enhance workflow automation by keeping customer data synchronized.

**Details**

Status	Focus Area	Phases
Defined	8. Certificate Request	1, 3, 4
	Template, Creating a Campaign	
	(Mass Request)	

**Related Tasks**

1

#TASK-24 Implement Batch Email Dispatch for Campaign Requests

4.0 → 1.0 days Defined

3

#TASK-22 Implement Customer Request Template for Email Generation

3.0 → 0.8 days Defined

4

#TASK-23 Enhance Campaign Functionality with Advanced Filters

3.0 → 0.8 days Defined

## Tasks - Tasks 1 - 5

Tasks 1 - 5

Tasks 24

#TASK-1 Finalize SAP, E-Signature, and Email Service Integration Requirements

2.0 → 1.5 days Defined

**Description**

Ensure clarity on integration requirements for SAP data synchronization, the chosen e-signature service (DocuSign/Adobe Acrobat Sign), and the email service provider (Amazon SES, SendGrid, or Mailgun).

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-6ab604d3	1	2.0 → 1.5 <span>AI Optimized</span>	25% STANDARD	Backend	Technology & Integration	Confirm technology stack and integration preferences for SAP, e-signature, and email services.

Feasibility  
✓ Feasible

**Subtasks**

- Confirm e-signature service preference and access to developer sandbox  
Backend 0.5 days
- Determine preferred SAP data synchronization method (API/Webhook or Scheduled Batch)  
Backend 0.5 days
- Select email service provider and obtain necessary access/keys  
Backend 1 days

**Technical Details**

Integration preferences will determine API endpoints and authentication methods required for external systems.

**Acceptance Criteria**

- Clear decision made on SAP synchronization method.
- E-signature platform (DocuSign/Adobe) selected and sandbox access confirmed.
- Email provider selected and integration access secured.

**Required Resources**

- SAP API/Webhook Access  
Access credentials or webhooks for real-time SAP integration.  
api\_key
- E-Signature Developer Environment  
Sandbox environment for DocuSign or Adobe Acrobat Sign.  
credentials
- Email Service Credentials  
Credentials and configuration details for selected email provider (Amazon SES, SendGrid, or Mailgun).  
credentials

#TASK-2 Implement Internal User Role Management System

3.0 → 0.8 days Defined

**Description**

Develop a system to manage Admin, MDM Analyst, and Reviewer accounts, including role-based permissions, account creation, and management within the portal.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-6ab604d3	2	3.0 → 0.8 <span>AI Optimized</span>	75% HIGH	Backend	User management & access	Internal User Management

Feasibility  
✓ Feasible

**Subtasks**

- Design database schema for user roles and permissions  
Backend 1 days
- Implement API for role-based account creation and management  
Backend 1 days
- Integrate role-based controls into the portal  
Backend 1 days

**Dependencies**

#TASK-1 Finalize SAP, E-Signature, and Email Service Integration Requirements

**Technical Details**

Use Django-Rest framework for backend implementation of role-based permissions and integrate with the existing authentication system.

**Acceptance Criteria**

- Admin can create and manage accounts for MDM Analysts and Reviewers.
- MDM Analysts and Reviewers have restricted role-based access to portal features.

**Required Resources**

- Azure Active Directory  
Determine if Single Sign-On (SSO) integration via Azure Active Directory is required.  
api\_documentation

#TASK-3 Define Multi-Jurisdictional Form Handling

3.5 → 1.8 days Defined

**Description**

Develop a feature to specify applicable states for multi-jurisdictional forms submitted by customers and integrate it into the certificate approval workflow.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-6ab604d3	2	3.5 → 1.8 <span>AI Optimized</span>	50% STANDARD	UI/UX	Business Rules & Logic	Multi-Jurisdictional Forms

Feasibility  
✓ Feasible

**Subtasks**

- Design UI for selecting applicable states for multi-jurisdictional forms  
UI/UX 1.5 days
- Develop database mappings for state-specific rules and forms  
Data Engineer 1 days
- Implement workflow integration of multi-jurisdictional forms  
Backend 1 days

**Technical Details**

Create modal-based UI for selecting applicable states and link this data to state-specific rules in the backend database.

**Acceptance Criteria**

- MDM Analysts can assign applicable states to submitted forms.
- Workflow updates reflect approvals based on state-specific forms.

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records

5.0 → 1.3 days Defined

**Description**

Set up real-time integration with SAP to onboard and update customer data using API/Webhook and Scheduled Batch Jobs as applicable.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-6ab604d3	2	5.0 → 1.3 <span>AI Optimized</span>	75% HIGH	Backend	Technology & Integration	SAP real-time integration will be implemented to onboard and update customer data. Two approaches can be considered: API/Webhook or Scheduled Batch Job.

Feasibility  
✓ Feasible

**Subtasks**

- Develop API endpoint for real-time customer data sync with SAP  
Backend 2 days
- Implement scheduled query system for batch updates from SAP  
Backend 1.5 days
- Create data transformation process for SAP response handling  
Backend 1.5 days

**Dependencies**

#TASK-1 Finalize SAP, E-Signature, and Email Service Integration Requirements

**Technical Details**

Use Django-Rest framework to implement API endpoints. Scheduled batch jobs to be configured with cron.

**Acceptance Criteria**

- Real-time SAP data sync is triggered via API/Webhook upon updates.
- Batch job processes customer records accurately at scheduled intervals.
- Data integration handles errors and logs exceptions correctly.

**Required Resources**

- API Access Key  
Access key for authenticating with the SAP API/Webhook.  
credentials
- SAP Schema Documentation  
Detailed schema documentation for SAP customer records.  
document

#TASK-5 Design and Implement OCR Integration for Certificate Approval

4.0 → 0.4 days Defined

## Tasks - Tasks 6 - 10

Tasks 6 - 10

Tasks 24

#TASK-6 Implement Bulk Certificate Request Campaign Management							🔍 4.0 → 1.0 days	Defined
Description								
Develop a feature to allow users to create campaigns for bulk certificate requests, including audience targeting, customizable email templates, and automated email dispatch.								
Details								
Epic EPIC-0944aa15	Phase 3	Effort (days) 4.0 → 1.0 <span>AI Optimized</span>	AI Assistance 75% <span>HIGH</span>	Role Backend	Document Focus Area Certificate Campaign Management	Client Requirement Enable users to manage bulk certificate requests efficiently by setting up campaigns.		
Feasibility								
✓ Feasible								
Subtasks								
Develop audience filtering API for campaign creation <span>Backend</span> 1.5 days								
Create database schema for campaigns and email logs <span>Backend</span> 1 days								
Integrate campaign endpoint with email services <span>Backend</span> 1.5 days								
Dependencies								
#TASK-2 Implement Internal User Role Management System								
Technical Details								
The campaign system will utilize backend APIs for audience filtering based on customer data and predefined criteria. Email dispatch will integrate with the chosen email service provider, ensuring robust delivery and tracking.								
Acceptance Criteria								
Analysts can define campaign criteria using filters. Campaign emails are sent according to defined templates. Campaign data is logged and can be tracked through the portal.								
Required Resources								
Email service API credentials Access credentials for the integrated email service provider (e.g., SendGrid, Amazon SES, Mailgun). <span>api_key</span>								

#TASK-7 Implement Compliance Dashboard with Certificate Management							🔍 5.0 → 1.3 days	Defined
Description								
Develop a dashboard to view compliance metrics and certificate management functionalities including 'Certificates Expiring', 'Customer Missing Certificates', 'Incoming Certificates to Review', and others. Ensure filters like Certificate Status, State, and Expiry Date are operational.								
Details								
Epic EPIC-0944aa15	Phase 3	Effort (days) 5.0 → 1.3 <span>AI Optimized</span>	AI Assistance 75% <span>HIGH</span>	Role Frontend	Document Focus Area User Journey Walkthrough	Client Requirement Provide compliance overview and certificate management tools		
Feasibility								
✓ Feasible								
Subtasks								
Develop filterable certificate queues <span>Frontend</span> 2 days								
Create compliance metrics UI components <span>Frontend</span> 2 days								
Integrate certificate approval/rejection workflows <span>Frontend</span> 1 days								
Dependencies								
#TASK-1 Finalize SAP, E-Signature, and Email Service Integration Requirements								
#TASK-2 Implement Internal User Role Management System								
Technical Details								
Use React for frontend development. Ensure integration with backend APIs for certificate status and compliance data retrieval.								
Acceptance Criteria								
Compliance metrics are displayed accurately on the dashboard. Filters for certificate queues function correctly. Certificate approval and rejection workflows are seamless.								

#TASK-8 Develop Multi-Campaign Certificate Request Management							🔍 4.0 → 1.0 days	Defined
Description								
Enable users to create and manage multiple campaigns for bulk certificate requests. Include functionalities for audience targeting, customizable email templates, and batch dispatch.								
Details								
Epic EPIC-0944aa15	Phase 4	Effort (days) 4.0 → 1.0 <span>AI Optimized</span>	AI Assistance 75% <span>HIGH</span>	Role Backend	Document Focus Area Creating a Campaign	Client Requirement Campaign creation for bulk certificate requests		
Feasibility								
✓ Feasible								
Subtasks								
Develop API for campaign creation and audience targeting <span>Backend</span> 2 days								
Integrate customizable email templates <span>Backend</span> 1 days								
Implement batch email dispatch functionality <span>Backend</span> 1 days								
Dependencies								
#TASK-6 Implement Bulk Certificate Request Campaign Management								
Technical Details								
Using Django-Rest for backend API development, integrate email services (SendGrid/Amazon SES) for bulk dispatch.								
Acceptance Criteria								
Users can define audience targeting criteria for campaigns. Customizable email templates work as expected. Emails are successfully sent in batch based on campaigns.								

#TASK-9 Implement Database Design for Portal-specific Data							🔍 3.0 → 1.5 days	Defined
Description								
Design and implement the database schema to store portal-specific data such as customer certificate status, request history, audit logs, and state-specific compliance rules.								
Details								
Epic EPIC-0944aa15	Phase 4	Effort (days) 3.0 → 1.5 <span>AI Optimized</span>	AI Assistance 50% <span>STANDARD</span>	Role Data Engineer	Document Focus Area 3. Database	Client Requirement Dedicated database to support portal functionalities.		
Feasibility								
✓ Feasible								
Subtasks								
Design schema for certificate information storage <span>Data Engineer</span> 1 days								
Create audit log table for certificate operations <span>Data Engineer</span> 1 days								
Implement state-specific compliance rules table <span>Data Engineer</span> 1 days								
Dependencies								
#TASK-5 Design and Implement OCR Integration for Certificate Data Extraction								
Technical Details								
Use PostgreSQL to implement database schema with relations among certificates, logs, and compliance rules.								
Acceptance Criteria								
Database contains correct schema to store certificates, logs, and compliance rules. Data integrity is maintained for all relational constraints. Database schema supports high-performance queries for certificate filtering and compliance checks.								

#TASK-10 Optimize Database Queries for Large-Scale Data Processing		
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## Tasks - Tasks 11 - 15

Tasks 11 - 15

Tasks 24

#TASK-11 Develop Features for Expiring Certificates...

🔍 4.0 → 1.0 days Defined

**Description**

Enable users to review certificates nearing expiration, providing functionality to approve and update SAP records or reject with reasons. Include automated notifications for expiring certificates and compliance rule enforcement.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-f79bcf0b	3	4.0 → 1.0 <span>AI Optimized</span>	75% <span>HIGH</span>	Backend	Certificate Review and Approval Workflow	Implement features for handling certificates expiring within 60 days.

Feasibility ✓ Feasible

**Subtasks**

- Integrate Notification System for Expiring Certificates Backend 1 days
- Implement Certificate Approval Workflow Backend 2 days
- Update SAP Records Post Approval Backend 1 days

**Dependencies**

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records

#TASK-5 Design and Implement OCR Integration for Certificate Data Extraction

**Technical Details**

Use Django REST Framework for API development and SAP integration. Implement logic to check for certificate expiry and trigger notifications using preselected email service.

**Acceptance Criteria**

- Admin users can view certificates nearing expiration.
- Approval updates SAP records immediately.
- Rejected certificates prompt a reason before status update.

**Required Resources**

SAP API Key  
API key to securely update SAP customer records post-approval.  
api\_key

Email Service Access  
Access credentials for the configured email service (e.g., Amazon SES).  
cloud\_access

#TASK-12 Implement Rejection Workflow and Notificat...

🔍 3.0 → 0.8 days Defined

**Description**

Develop functionalities allowing users to reject certificates with reasons, triggering manual notifications for customers to resubmit corrected information.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-f79bcf0b	3	3.0 → 0.8 <span>AI Optimized</span>	75% <span>HIGH</span>	Backend	Certificate Review and Approval Workflow	Handle rejected certificates with clear workflows, including customer notifications.

Feasibility ✓ Feasible

**Subtasks**

- Build Functionality for Rejecting Certificates Backend 1.5 days
- Implement Manual Notification Trigger for Customers Backend 1 days
- Design Rejection Reason List and UI Integration UI/UX 0.5 days

**Dependencies**

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records

**Technical Details**

Integrate logic to change the certificate status to Invalid upon rejection. Notifications will use the chosen email service, allowing users to attach rejection reasons in predefined templates.

**Acceptance Criteria**

- Reviewer can reject certificates and specify reasons from a predefined list.
- Rejected certificates trigger notification emails to customers for resubmission.
- Rejection workflow is manual and configurable.

**Required Resources**

Email Service Access  
Credentials for the email service used to send notifications.  
credentials

#TASK-13 Implement Recurring Business Validation Lo...

🔍 3.5 → 0.9 days Defined

**Description**

Develop backend functionality to validate recurring business compliance for states like Kansas, Utah, and Oklahoma where reseller certificates have indefinite validity. The system will use SAP transaction data to check for gaps exceeding 12 months.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-c69b46b0	3	3.5 → 0.9 <span>AI Optimized</span>	75% <span>HIGH</span>	Backend	Recurring Business Logic for State Compliance	Recurring business validation logic for states with indefinite certificate validity (e.g., Kansas, Utah, Oklahoma).

Feasibility ✓ Feasible

**Subtasks**

- Design Database Schema to Store Recurring Business Data Backend 1 days
- Develop API Endpoint for SAP Transaction Data Integration Backend 1 days
- Implement Business Logic to Validate Compliance Based on Transaction Gaps Backend 1 days
- Create Reports for Recurring Business Compliance Metrics Backend 0.5 days

**Dependencies**

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records

**Technical Details**

Integrate with SAP transaction tables using API endpoints to fetch customer activity data, and apply business rules to detect gaps exceeding 12 months. Store validation results in PostgreSQL DB.

**Acceptance Criteria**

- The system uses SAP transaction data to determine recurring business gaps exceeding 12 months.
- Validation results are stored and displayed in the compliance dashboard.
- Administrators are alerted if recurring business compliance is violated.

**Required Resources**

API Key for SAP Data Access  
Access key for SAP transaction data API to fetch the customer activity history.  
api\_key

SAP Transaction Data Access  
Access to the SAP transaction tables that provide customer activity data.  
cloud\_access

#TASK-14 Enhance Certificate Review Workflow with O...

🔍 4.0 → 0.4 days Defined

**Description**

Develop functionality to allow internal users to review certificates expiring within a set timeframe and integrate OCR technology for automatic data extraction. Include filters for Certificate Status and State, and support viewing captured data.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-3a2c6a6e	4	4.0 → 0.4 <span>AI Optimized</span>	90% <span>HIGH</span>	Backend	3. Reviewing a Certificate (Certificates expiring within a set timeframe (e.g., 60 days))	Automated data extraction for certificates expiring within a specified timeframe.

Feasibility ✓ Feasible

**Subtasks**

- Implement OCR Data Extraction API Backend 1 days
- Develop Certificate Review Queue with Filters Frontend 1.5 days
- Integrate OCR Processing with Certificate Workflow Backend 1 days
- Design User Interface to View Captured Certificate Data UI/UX 0.5 days

**Dependencies**

#TASK-5 Design and Implement OCR Integration for Certificate Data Extraction

**Technical Details**

Use Amazon Textract for OCR processing. Integrate OCR capability into backend certificate approval workflow. Create frontend filters and UI for queue management and data verification.

**Acceptance Criteria**

- User can navigate to the 'Incoming Certificates to Review' queue.
- Filters for Certificate Status and State are operational.
- OCR successfully extracts relevant certificate data upon user review.
- Captured certificate data is displayed in a user-friendly format.

**Required Resources**

OCR API Key  
Access to the OCR API service (e.g., Amazon Textract).  
api\_key

## Tasks - Tasks 16 - 20

Tasks 16 - 20

Tasks 24

### #TASK-16 Validate Certificate 'Approve' Logic and S...

4.0 → 1.0 days

Defined

#### Description

Ensure proper functionality for updating certificates to 'Valid' status, calculating expiry dates based on state-specific rules, and synchronizing updates with SAP Customer Master. Include workflow testing and error handling.

#### Details

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-3a2c6a6e	1	4.0 → 1.0 <span>AI Optimized</span>	75% <span>HIGH</span>	Backend	If Approved: The user clicks 'Approve.' The certificate status changes to Valid, the expiration date is calculated based on state rules, and the SAP Customer Master is updated via the integration.	The certificate status changes to Valid, the expiration date is calculated based on state rules, and the SAP Customer Master is updated via the integration.

#### Feasibility

✓ Feasible

#### Subtasks

##### Develop Logic for State-Specific Expiry Calculation

Backend 1.5 days

##### Integrate Certificate Status Update Workflow with SAP API

Backend 1 days

##### Implement Error Handling for SAP Update Failures

Backend 0.5 days

##### Design Unit Tests for 'Approve' Functionality

QA 1 days

#### Dependencies

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records

#TASK-15 Configure SAP Integration for Certificate Data Synchronization

#### Technical Details

Use SAP API/Webhook for real-time updates. Implement expiry date calculations as per state rules stored in the database schema. Ensure workflow retries for SAP errors.

#### Acceptance Criteria

- Certificate status is updated to 'Valid' upon approval.
- Expiry date is calculated correctly based on state-specific rules.
- SAP Customer Master is updated without errors.
- System logs all workflow actions and errors for manual review.

#### Required Resources

##### SAP API Access

Access credentials and sandbox environment for testing integration.

api\_key

### #TASK-17 Implement Manual Rejection Workflow for In...

4.0 → 3.0 days

Defined

#### Description

Develop functionality allowing internal users to manually reject submitted certificates by providing a reason (e.g., 'Illegible Signature', 'Incorrect Information'). Ensure status changes to 'Invalid'. Notifications for certificate resubmission must be triggered manually.

#### Details

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-3a2c6a6e	4	4.0 → 3.0 <span>AI Optimized</span>	25% <span>STANDARD</span>	Backend	If Rejected: The user clicks 'Reject,' provides a reason (e.g., 'Illegible Signature,' 'Incorrect Information'), and the status changes to Invalid. This may trigger a notification to the customer to resubmit. It should be manual not automatic.	Manual rejection process for invalid certificates without automatic notification

#### Feasibility

✓ Feasible

#### Subtasks

##### Create database logic for certificate status updates

Backend 2 days

##### Develop manual notification triggering functionality

Backend 1 days

##### Integrate reason input field with rejection workflow

Frontend 1 days

#### Dependencies

#TASK-12 Implement Rejection Workflow and Notifications for Invalid Certificates

#### Technical Details

Use existing rejection status handling logic and extend it to include manual notification triggers. Modify frontend UI to include rejection reason input field.

#### Acceptance Criteria

- User can reject certificates by providing a specific reason.
- Status of rejected certificates changes to 'Invalid'.
- Manual trigger for customer notifications is available after rejection.

### #TASK-18 Enable Email Template Generation for Expir...

3.0 → 0.8 days

Defined

#### Description

Implement functionality to open and populate an email template containing a DocuSign link for customers whose certificates are expiring within 60 days. Ensure filters such as Certificate Status, State, Customer Name, and Expiry Date can be applied before generating the email.

#### Details

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-b1eb2306	1	3.0 → 0.8 <span>AI Optimized</span>	75% <span>HIGH</span>	Backend	4. Expiring Certificates	Automated notification for expiring certificates using templates and DocuSign integration.

#### Feasibility

✓ Feasible

#### Subtasks

##### Filter Data for Certificates Expiring in 60 Days

Backend 1 days

##### Implement Email Template Generator with DocuSign Integration

Backend 1.5 days

##### Add Unit Tests for Email Template Generation Logic

QA 0.5 days

#### Dependencies

#TASK-11 Develop Features for Expiring Certificates Workflow

#TASK-15 Configure SAP Integration for Certificate Data Synchronization

#### Technical Details

Send fully populated emails using the selected email service provider, ensuring DocuSign links are included based on the filtered data.

#### Acceptance Criteria

- Administrators can apply filters like Certificate Status, State, Customer Name, and Expiry Date.

- System generates an email template containing a DocuSign link for each filtered customer.

- Email templates include appropriate placeholders for customer information obtained via filters.

- Unit tests to validate template generation logic and integration with DocuSign.

#### Required Resources

##### DocuSign API Access

API credentials and sandbox access for testing email template generation and DocuSign integration.

api\_key

##### Email Service Credentials

Credentials for the selected email service provider, such as Amazon SES or SendGrid.

credentials

### #TASK-19 Implement Email Template for Missing Certi...

3.0 → 0.8 days

Defined

#### Description

Develop a functionality for the 'Customer Missing Certificates' section, where users can open an editable email template containing a DocuSign link to notify customers to submit their missing certificates.

#### Details

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-7c2c8365	4	3.0 → 0.8 <span>AI Optimized</span>	75% <span>HIGH</span>	Frontend	5. Missing Certificates	Allow internal users to send notifications for missing certificates via an editable email template, facilitating compliance management.

#### Feasibility

✓ Feasible

#### Subtasks

##### Design Editable Email Template UI

UI/UX 1 days

##### Implement Frontend Functionality to Generate DocuSign Link

Frontend 1.5 days

##### Connect Email Template UI to Backend API

Frontend 0.5 days

#### Dependencies

#TASK-7 Implement Compliance Dashboard with Certificate Management Features

#TASK-15 Configure SAP Integration for Certificate Data Synchronization

#### Technical Details

The email template will leverage dynamic data filters (Certificate Status, State, Customer Name) and include functionality to insert a secure DocuSign link generated from the backend.

#### Acceptance Criteria

- Users can view missing certificates filtered by Certificate Status, State, and Customer Name.

- Users can open an editable email template pre-populated with relevant customer data.

- Email templates include appropriate placeholders for customer information obtained via filters.

- Unit tests to validate template generation logic and integration with DocuSign.

#### Required Resources

##### DocuSign API Access

API access for generating and managing DocuSign links.

api\_key

##### Email Service Credentials

Credentials for the selected email service provider (e.g., Amazon SES, SendGrid, Mailgun).

credentials

### #TASK-20 Implement Customer Master View and Filter...

3.0 → 0.8 days

Defined

#### Description

Develop a functionality for internal users to access the 'Customer Master' section that lists all SAP portal customers. Include filter options like Certificate Status, State, Customer Name, and Expiry Date. Ensure users can view certificates for customers whose status is not Missing or Pending.

#### Details

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-8653ca	4	3.0 → 0.8 <span>AI Optimized</span>	75% <span>HIGH</span>	Frontend	6. Customer Master	Allow internal users to manage and filter Customer Master data including certificate viewing.

#### Feasibility

✓ Feasible

#### Subtasks

##### Design UI for Customer Master View

UI/UX 1 days

##### Integrate Filters for Customer Master

Frontend 1 days

##### Ensure Certificate Viewing Functionality

Frontend 1 days

#### Dependencies

#TASK-9 Implement Database Design for Portal-specific Data

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records

#### Technical Details

Use React for creating the frontend interface. Map filtering criteria to back-end query APIs to fetch the required data dynamically.

#### Acceptance Criteria

- Users can view a paginated list of customers from the SAP portal.

## Tasks - Tasks 21 - 24

Tasks 21 - 24

Tasks 24

#TASK-21 Implement Customer Request History Feature...

🔍 3.0 → 0.8 days Defined

**Description**

Develop functionality for the 'Customer Request History' section that lists all customers where a request for a signed certificate was sent. Implement filters for Certificate Status, State, Customer Name, and Expiry Date.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-a14613aa	1	3.0 → 0.8 <span>AI Optimized</span>	75% HIGH	Backend	Customer Request History	Enable users to browse and filter customer request history based on specified criteria.

Feasibility ✓ Feasible

Subtasks

- Design Database Schema for Customer Request History  
Backend 1 days
- Develop API Endpoint to Fetch Customer Request Records with Filters  
Backend 1 days
- Optimize Query Performance for Large Data Retrieval  
Backend 1 days

Dependencies

#TASK-9 Implement Database Design for Portal-specific Data

Technical Details

Use Django to create the API endpoint. Filters should be implemented via query parameters and validated in the backend. Ensure optimal SQL queries for performance on large datasets.

Acceptance Criteria

- Users can see a list of customers with signed certificate requests.
- Users can apply filters by Certificate Status, State, Customer Name, and Expiry Date.
- System ensures efficient query performance even with large datasets.

#TASK-22 Implement Customer Request Template for Em...

🔍 3.0 → 0.8 days Defined

**Description**

Develop functionality for 'Customer Request Template' to open an editable email template. Ensure integration with filters like Certificate Status, State, Customer Name, and Expiry Date. The email should include a DocuSign link.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-abe5ebc9	3	3.0 → 0.8 <span>AI Optimized</span>	75% HIGH	Backend	8. Certificate Request Template	Enable internal users to generate customizable email templates for certificate requests.

Feasibility ✓ Feasible

Subtasks

- Create API to generate editable email templates  
Backend 1 days
- Implement frontend functionality for email template editing  
Frontend 1 days
- Integrate DocuSign API into email templates  
Backend 1 days

Dependencies

#TASK-1 Finalize SAP, E-Signature, and Email Service Integration Requirements

#TASK-4 Implement SAP Real-Time Data Integration for Customer Master Records

Technical Details

Use the existing email service integration to dispatch emails. Integrate with DocuSign API for secure and trackable links. Ensure filter options operate correctly to refine the customer list.

Acceptance Criteria

- Users can navigate to 'Customer Request Template' section.
- Users can generate, edit, and preview email templates.
- Emails contain a secure DocuSign link.
- Filters like Certificate Status, State, Customer Name, and Expiry Date are functional.

Required Resources

DocuSign API Key  
Access to the DocuSign sandbox for integration and testing purposes.  
api\_key

Email Service Credentials  
Credentials for the selected email service provider (SendGrid, Amazon SES, or Mailgun).  
credentials

#TASK-23 Enhance Campaign Functionality with Advanc...

🔍 3.0 → 0.8 days Defined

**Description**

Expand the existing campaign functionality to include advanced filtering options (e.g., by Campaign Name, Certificate Status, State, Customer Name, etc.) and provide a preview list of matched customers before sending requests.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-abe5ebc9	4	3.0 → 0.8 <span>AI Optimized</span>	75% HIGH	Frontend	Creating a Campaign (Mass Request)	Enable advanced filtering for mass certificate requests during campaign creation.

Feasibility ✓ Feasible

Subtasks

- Implement API for advanced filtering in campaign creation  
Backend 1 days
- Enhance UI components for the new filtering options  
Frontend 1 days
- Test filtering functionalities and customer preview list  
QA 1 days

Dependencies

#TASK-6 Implement Bulk Certificate Request Campaign Management

Technical Details

Design advanced filter options including multi-select dropdowns and custom input fields. Ensure backend scalability with large datasets and implement API endpoints for filtering.

Acceptance Criteria

- Admin can define campaign filters with Certificate Status, State, Customer Name, and Campaign Name.
- System displays a preview list of customers matching the filters.
- Admin can confirm the list and send mass requests successfully.

Required Resources

API Documentation for SAP Integration  
Detailed API documentation for real-time customer data syncing to ensure filters are built accurately.  
documentation

Dev Access to Email Service  
Access credentials to the chosen Email Service (Amazon SES, SendGrid, or Mailgun) for integration testing.  
credentials

#TASK-24 Implement Batch Email Dispatch for Campaig...

🔍 4.0 → 1.0 days Defined

**Description**

Develop backend logic to handle batch email dispatch for campaign requests, ensuring scalability and performance optimization.

**Details**

Epic	Phase	Effort (days)	AI Assistance	Role	Document Focus Area	Client Requirement
EPIC-abe5ebc9	1	4.0 → 1.0 <span>AI Optimized</span>	75% HIGH	Backend	Creating a Campaign (Mass Request)	Send mass certificate requests effectively through batch email dispatch.

Feasibility ✓ Feasible

Subtasks

- Design batch email processing with optimized query handling  
Backend 2 days
- Ensure secure email dispatch with GDPR-compliance measures  
Security 1 days
- Validate batch email dispatch functionality for large requests  
QA 1 days

Dependencies

#TASK-6 Implement Bulk Certificate Request Campaign Management

#TASK-23 Enhance Campaign Functionality with Advanced Filters

Technical Details

Use asynchronous job processing (e.g., Celery) for scalable batch email dispatch. Integrate API endpoints for batch operations and leverage retry mechanisms for failed deliveries.

Acceptance Criteria

- Mass requests via batch dispatch execute efficiently without timeout issues.
- Failed email deliveries are retried automatically with logging.
- Users receive certificates request emails successfully.

Required Resources

Email Service Sandbox Credentials  
Access to the sandbox environment for testing batch email dispatch.  
credentials

Performance Metrics  
Benchmark targets for email dispatch performance (e.g., X emails/sec).  
documentation

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Project ID: cdbe4cf3-209b-4732-8ea8-5098fe1e752d