📄 Request for Proposal (RFP)

Project Title: Lean Audio Recording & IVR Platform (MVP Deployment – Budget ~₹1 Lakh)
Prepared by: [Your Company Name]
Date: [Insert Date]

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1. Objective

To design, develop, and deploy a **lean MVP audio recording platform** within a budget of ~₹1L.
The system should:

- Allow proposers to upload recipient lists.
- Enable outbound IVR calls (default).
- Allow inbound fallback via **campaign code** on a shared IVR number.
- Capture recordings with self-approval (preview/re-record/submit).
- Store files securely (limited retention).
- Provide MIS and billing automation.
- Run on a **Google-style simple UI (fast, minimal, white/blue design)**.

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2. Functional Scope

2.1 User Management

- **Single role:** Campaign Proposer (Organization).
- Login via OTP.
- KYC: PAN, GST, Bank Details (basic form).

2.2 Recipient Management

- Upload CSV/Excel list (≤1,000 records per campaign).
- Fields: Name, Designation, Organization, City, Mobile, Email, Language, DurationSec, ScheduledDateTime.
- System validates mobile + email format.

2.3 Outbound IVR Flow (Default)

1. System triggers outbound IVR via Exotel/Knowlarity API.
2. Script:
    - Greeting: “Dear [Name], you have received this call as part of [Campaign Name] by [Sponsor Org] on [Date].”
    - Purpose: Reads **Question text** (stored in DB).
    - Instructions: “You may record for 60 seconds, up to 120 seconds. You can preview and re-record.”
    - Options:
        - Press 1 to start recording.

        - Press 2 to hear instructions again.
        - Press 3 to reschedule call.
3. Recipient records → system saves audio.
4. Post-recording options:
    - Press 1 to listen.
    - Press 2 to re-record.
    - Press 3 to submit.
5. Confirmation message played.

2.4 Inbound IVR Flow (Optional)

1. Professional dials **shared IVR number** (1 rented number).
2. Enters **campaign code** → DB validates.
3. Enters **registered mobile number** → DB cross-checks recipient list.
4. Same flow: Consent → Context → Question → Recording → Submit.

2.5 File Storage & Retention

- Recordings stored in AWS S3/Firebase bucket.
- File naming: `Name_City_DateTime.wav`.
- Encrypted at rest (AES-256).
- Auto-delete after **30 days**.

2.6 MIS Dashboard

- Metrics: Pending, Completed, Failed, Rescheduled.
- CSV/PDF export.
- Basic charts (calls placed, successful recordings).

2.7 Billing & Invoicing

- Razorpay/PayU integration.
- Subscription (X calls/month) + cost-per-call.
- Auto-invoice with GST details.
- Quota enforcement (block when consumed).

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3. Technical Requirements

Frontend

- React.js PWA (mobile + desktop).
- Google-style design: clean white, blue CTAs, Roboto font.
- 3–4 screens: Login/KYC, Dashboard, Recipient Upload, MIS/Invoices.

Backend

- Node.js/Express (lean stack).
- REST APIs for upload, scheduling, MIS, billing.

- Hosted on Firebase Functions or AWS Lightsail (cost-effective).

Database

- MySQL/Postgres.
- Tables: User, Campaign, Recipient, Recording, Invoice, Payment.

Storage

- AWS S3 or Firebase bucket.
- Encrypted, lifecycle policy for 30 days retention.

APIs to Integrate

- IVR: Exotel/Knowlarity (outbound/inbound).
- Payment: Razorpay/PayU.
- Optional SMS/Email: Twilio/SendGrid.

Security

- HTTPS (SSL/TLS).
- OTP login.
- AES-256 encryption for audio files.
- Role-based access: Admin vs Operator.
- Audit log: consent + timestamps.

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4. Deployment & Hosting

- Cloud deployment: Firebase Hosting or AWS Lightsail.
- SSL enabled.
- DB backups: daily snapshot.
- Documentation: setup & API guide.

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5. Maintenance & Support

- Included: 1-month post-deployment bug-fix support.
- Optional AMC: vendors to quote separately.

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6. Deliverables

- Fully deployed MVP (PWA + backend).
- Functional outbound IVR (default) + inbound campaign code flow (optional).
- MIS dashboard.

- Payment & invoicing module.
- Documentation (admin + API).
- 1 pilot campaign (up to 500–1,000 calls).

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7. Implementation Timeline

- **Week 1:** Setup hosting + DB schema.
- **Weeks 2–3:** Login/KYC + Dashboard + Upload module.
- **Week 4:** Outbound IVR integration.
- **Week 5:** Storage + MIS.
- **Week 6:** Billing & invoices.
- **Week 7:** Testing + deployment.

Total: **6–7 weeks**

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8. Cost Expectation (Lean MVP)

- Development & deployment: **₹_____**
- Excludes:
  - IVR minutes (₹1–1.5/call).
  - SMS charges.
  - Payment gateway fees.
  - Hosting rental (_____/month).

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9. Evaluation Criteria

- Prior IVR/API integration experience.
- Commitment to **____ budget**.
- Delivery within **6–7 weeks**.
- Post-deployment support quality.

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10. Appendices

Appendix A – Sample CSV Schema

Field	Example
Name	Ramesh Sharma
Designation	Cardiologist
Organization	ABC Hospital
City	Mumbai

Field	Example
Mobile	9876543210
Email	ramesh@abc.com
Language	Hindi
DurationSec	60
DateTime	2025-09-29 10:30:00

Appendix B – Sample IVR Script (Dynamic)

“Dear [Name], you have received this call as part of the [Campaign Name] by [Sponsor Org] on [Date].

This is a recorded call.
Please respond to the question: [Question Text].

You may speak for up to 60 seconds, maximum 120 seconds.

- Press 1 to start recording.
- Press 2 to repeat instructions.
- Press 3 to reschedule.

After recording, press # to stop.
Then:

- Press 1 to listen.
- Press 2 to re-record.
- Press 3 to submit.”

Appendix C – UAT Checklist

- Login & KYC works.
- Upload CSV (≤1,000 records).
- Outbound IVR calls trigger correctly.
- Inbound campaign code flow works.
- Consent recorded & saved.
- Recording saved with correct filename.
- MIS reflects status.
- Invoices generated.
