

CRM Agent's DB Improvements

Phase 2



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PROBLEM STATEMENT

What is the problem that the team is facing now?

Registrations (payments) uploaded on the [REDACTED] DB are added to one file for the Agent vs creating single file for each Student on the Student DB.

What causes the need of a new solution?

Pick season Aug-Sep is supposed to bring 5x increase in payments in the Agent DB. The CS team will not be able to handle the volumes if no improvements to the current system are done. Hence, the need for enhancement and scale-up of this CS process.

SOLUTION OVERVIEW.VISION

Brief overview of the solution (executive summary).

The [REDACTED] DB is to be improved by adding single files for the Students and a separate grid for Payers associated with each Student. These will be connected to the original XML file translating all changes made on them and vice-versa.

What problem will this solution solve? / What are the objectives for the product?

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The aim of the project is to improve the Agent's DB and add new functionality to it to ease the job of the end-users - Customer Service. The idea is to make the system functionality similar to the Student DB in order for the payments to be divided into each file of a Student so that CS can access information about the Agent without that much manual work.

PROJECT SCOPE

In Scope

What will be included in the scope of the new product?

- **Comment Grid**
 - Radio Buttons – Add Agent and Beneficiary (Agent Templates)
- **AgentStudent Grid**
 - Transfer student_country (Student Country of Residence) and student_city – Student City from WEB
 - Add fields student_country (Student Country of Residence) and student_city – Student City in CRM
 - Add WEB button under Payer button and show WEB Registrations
 - Add Reference, Ref. Num, Pmnt ID (Line ID) and Transaction ID as search fields in AgentStudent Grid Search tab
 - Add Save button
- **Payment Grid**
 - Add functionality of all buttons in Payment line (Student and Payer Grid)
 - Add Edit functionality in Payment Grid – changes to be translated to original XML file and vice-versa
 - Add shortcut functionalities for Manual Additional of Payment Line, Line Split, Sum Column from Payment line

What will it affect?

- TM [REDACTED] DB

On what existing functionalities will the new product work?

- Buttons within Payment line in new Student and Payer grids
 - Functionality
 - Showing details, etc.
 - Changes being transferred to the original XML file
- Student Grid fields

Out of Scope

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What will be out of the scope for the current project or phase?

- Re-work of the existing solution. The existing solution will remain as it is and will be usable following the same process.
- Functionality that will allow associating old payments to a newly created Agent Student File (e.g. if a Student has 5 payments, a file is being created on the 6th payment. The first 5 payments will not appear initially in the file. They could be searched as of how it works now.)
- Merge old and new records for the Agent Student files

FUNCTIONAL REQUIREMENTS

Any Requirement Which Specifies What the System Should Do.

AgentStudent Grid

- The system shall be able to show [REDACTED] API fields that are being transferred from WEB when the user opens the Student Grid in the Agent DB.
- The system shall open [REDACTED] screen containing all the regs for the selected AgentStudent when the user clicks on [REDACTED] Grid.

Comments Grid

- The system shall display Agent and Beneficiary Radio button options in the Comments Grid.
 - The system shall display Agent email/reminder templates.

Payment Line on [REDACTED] Grid

- The system shall allow the user to click on [REDACTED] window containing the necessary dates for transaction (same as Student DB file).
 - The system shall automatically input dates in the [REDACTED] window when the user makes Status Change on the Payment line.
- The system shall allow the user to interact/use/click all buttons within the [REDACTED]
 - The system shall have the same button functionality within the [REDACTED] as a Student DB file.
 - The system shall display the button related windows with information (where applicable), e.g. Beneficiary details, Payment By, etc.
- The system shall translate all changes made on the Payment line in the [REDACTED] to the original XML file once the [REDACTED] has been clicked, e.g. Notes, Comments, Status, etc.

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- The system shall translate all changes made on the [REDACTED] Grid to the original XML file once the Save button has been clicked, e.g. Notes, Comments, Status, etc.
- The system shall be able to transfer the user from the Student Grid to the original XML file using [REDACTED] Grid's Payment line.
- The system shall display Save button once a change has been made.
- The system shall save all changes when the Save button has been clicked.
- The system shall split a selected line in the Payment Grid when the user clicks F5.
- The system shall show a pop-up message "[REDACTED]?" with options Yes/No, and the system shall add a new line in the Payment Grid when the user clicks Yes. If the user clicks No, the system shall close the pop-up message.
- The system shall display pop-up window Select type with Drop-down menu ([REDACTED]).
 - The system shall split the line with the selected option once the user clicks Select in the pop-up window.
 - The system shall close the pop-up window once the user selects Select or Cancel.
- The system shall display a pop-up window with total of sum column from payment line when the user clicks F12.

Payment Line on XML File

- The system shall translate all changes made on the original XML file to the [REDACTED]
- The system shall be able to transfer the user from the original XML file to the [REDACTED] on the XML file's Payment line

How will this solution work?

- Flowchart diagram – **WEB button**



WEB_Button.png

- Flowchart diagram – **Agent and Student button**



AgentStudent_Button.png

- Flowchart diagram – **Data translation between Student Grid and Original XML File**

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DataTranslation.png

Note:

What will be its services and functionalities in order to facilitate the user and meet their business needs?

- Connecting the original XML File with the Student/Payer Grid of the AgentStudent will ease CS in finding the exact file/student and will save time.
- The translation of the data changes between the XML file and the Student Grid will ease the job for CS in terms of not implementing so much manual and repeatable work and will prevent from missing or inputting incorrect data.
- This will be critical when during August-September when the payments that will be coming in are likely to be 5x more.
- The new solution will have similar to the Student DB functionalities and interface so the users will not need additional time for training using the system.

What its responses will be when interacting with the user?

- Diagram NOT needed at this time.

Template

Feature 1 – AgentStudent Grid – WEB button

Given that the user wants to access all the registrations for the selected AgentStudent

When he clicks on the WEB button in the Student Grid within the Agent DB

Then 1.0.1 the system opens new WEB Registrations screen

WF1 – Agent DB Student Grid

WF2 – Screenshot from Student DB WEB button

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with records where the user can check all Payment/regs for the Student.

Note: The WEB button in the Student Grid should be under Payers button.

	Date	Reg Type	First Name	Surname	COB	Email	Country	Released by	Released	Status
1	16/02/2018 21:18:01	Student Login	Eve Test	Student 2018	21/02/02	evab@ukg.com	United States		No	No
2	16/02/2018 21:18:01	Student Login	Eve Test	Student 2018	21/02/02	evab@ukg.com	United States		No	No
3	20/02/2018 22:30:32	Student Login	Eve Test	Student 2018	20/02/01	evab@ukg.com	China		No	No
4	20/02/2018 22:30:32	Student Login	Eve Test	Student 2018	20/02/01	evab@ukg.com	China		No	No
5	20/02/2018 22:30:32	Student Login	Eve Test	Student 2018	20/02/01	evab@ukg.com	China		No	No
6	20/02/2018 22:30:32	Student Login	Eve Test	Student 2018	20/02/01	evab@ukg.com	China		No	No
7	27/02/2018 23:35:03	Student Login	Eve Test	Student 2018	21/02/02	evab@ukg.com	United States		No	No
8	27/02/2018 23:35:03	Student Login	Eve Test	Student 2018	21/02/02	evab@ukg.com	China		No	No
9	04/02/2018 01:21:18	Student Login	Eve Test	Student 2018	21/02/02	evab@ukg.com	China		No	No
10	04/02/2018 01:21:18	Student Login	Eve Test	Student 2018	21/02/02	evab@ukg.com	China		No	No
11	04/02/2018 23:35:03	Student Login	Eve Test	Student 2018	21/02/01	evab@ukg.com	China		No	No

Feature 2 – Comments Grid – Radio Buttons and Email Templates

Given that the user wants to set a Reminder/Email to AgentStudent

When the user double clicks on the Comment section in the Student File tab within the Student Grid

Then 2.0.1 the system opens the Comments Grid (same as in the Agent DB Agent File) where the user can select type of comment to leave

And 2.0.2 can select between Agent or Beneficiary for the email template

WF3 – Comments Grid Agent DB

Comments

New Registration

- New ready to pay registration uploaded, sent email
- New Agent registration uploaded, passed to BDM
- New INF registration uploaded-exp. update from EbitCash
- New INF Barclay registration uploaded
- New BRL registration uploaded-passed to LTS/FRM/DMU
- New CNY registration uploaded- emailed for docs
- New Inchr registration uploaded, sent email
- New CC OK registration uploaded
- New CC Pending registration uploaded
- New CC failed registration uploaded
- New CC CNY OK registration uploaded

Phone Correspondence

Email / Chat Correspondence

Uploaded Docs

Finance

Rem: Days: []

Reminder for: []

Time: []

Letter: []

1st Contact D4 Local Agent

1st Contact D4 Local CLP Agent

1st Contact India Ready to Pay

1st Contact Ready to Pay/AML CNY

1st Contact Ready to Pay/AML NO DC

Rapid Confirmation

Global Partner/Deport/Received No dc

WF4 – Comment Grid Agent File

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And 2.0.3 once a Comment is saved on the Student Grid, the system shall translate it to the original XML file.

The screenshot shows a web application interface for CRM Agent's DB Improvements. It features a 'Student Grid' with various columns for student information. A red box highlights a comment field in the grid, and another red box highlights a 'Save' button. The interface includes a top navigation bar with links like 'Home', 'Student Grid', 'Comments', 'Reports', and 'Settings'. The main content area displays the student grid with a table of student records.

Feature 3 – Payment Line Functionality (e.g. Date button) – AgentStudent Grid

Given that the user wants to change Status for AgentStudent transaction

When the user navigates to the Student Grid's Payment line and clicks on Status drop-down menu

Then 3.0.1 the user can select one of the Status options

And 3.0.2 after the user clicks Save, the system shall automatically input the Date and Time of this action in the Status Change table which the user can access through the Dates button

WF5 – Payment line – Student Grid – buttons

The screenshot shows a web application interface for CRM Agent's DB Improvements. It features a 'Student Grid' with various columns for student information. A red box highlights a 'Status' dropdown menu, and another red box highlights a 'Save' button. The interface includes a top navigation bar with links like 'Home', 'Student Grid', 'Comments', 'Reports', and 'Settings'. The main content area displays the student grid with a table of student records.

WF6 – Status – Dropdown menu

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And 3.0.3 once a change is done on the Payment line here, it should be translated to the original XML File (Status and Dates).

Note: All available buttons on the Payment Line should have the necessary functionality, Status Change is given as example.

Note: All edits/changes on the Student Grid Payment line should be transferred/mirrored to the XML file, e.g. Payment Method, Notes, etc.

The screenshot shows the 'AgentStudents' form with a search bar containing 'Test John'. Below the search bar, there are fields for 'File ID' (10), 'Agent ID' (3678), 'Postal Code' (4001), 'Student Number' (5946), 'Date of birth' (02/07/2000), 'Phone Number' (1111111111), 'Name' (Test John), 'Email' (jdoe@2@stan.demose.com), 'Home Address' (Student Address), 'Agent Name' (TEST Radixen XML API 2), 'Extens Unique Id' (000), and 'Student CIN'. Below these fields is a table with columns: Allocation, Dates, S, LineID, F, TransID, T, Case, Link To, Yellow(DK), Purple(End), RFD, Payment Method, CC issuer, Status, and Processed. The table contains three rows of data. A dropdown menu is open for the 'Status' column of the first row, showing options: Set-up, Set-up, Recd, Paid, Unsuccessful, Pending, and Sent for Paid.

WF7 – Date button – Status Chg

The screenshot shows the 'WF7 Status Chg' dialog box. It has a title bar with 'WF7 Status Chg' and a close button. Inside the dialog, there are several input fields: 'Status' (with a dropdown menu), 'Recd' (with a date/time picker), 'Paid' (with a date/time picker), 'Unsuccessful' (with a date/time picker), 'Pending' (with a date/time picker), 'Sent for paid' (with a date/time picker), and 'Cancelled' (with a date/time picker). There are also checkboxes for 'Status' and 'Recd'.

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Feature 4 – Payment line Functionality – Agent Grid

Given that the user wants to change Status for AgentStudent transaction in the XML file

When the user navigates to the original XML file Payment line and clicks on Status drop-down menu of one of the Transactions

Then 4.0.1 the user can select one of the Status options

And 4.0.2 after the user clicks Save, the system shall automatically input the Date and Time of this action in the Status

No WF needed here, refer to Feature 3.

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Change table which the user can access through the Dates button

And 4.0.3 once a change is done on the Payment line here, it should be translated to the selected AgentStudent Student Grid's Payment line.

Note: All edits/changes on the XML File Payment line should be transferred/mirrored to the Agent DB Student Grid, e.g. Payment Method, Notes, etc.

Feature 5 – Payment line – Student/Agent button

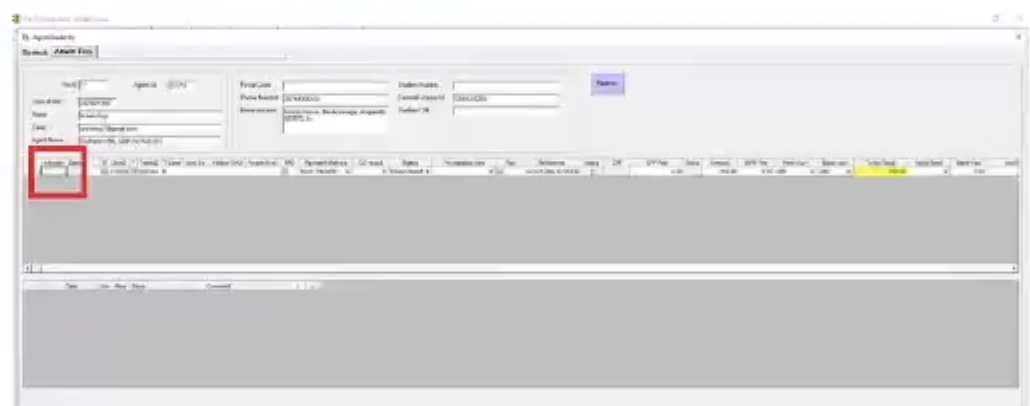
Given that the user wants to go directly to the original XML File while being in the Agent DB Student Grid and vice-versa

When the user clicks on **Agent** button within the Student Grid Payment Line or **Student** button within the XML File Payment Line

Then 5.0.1 the system closes the Student Grid and opens the marked XML file in the Agent tab/ **OR** directly opens the Student Grid of the selected Student

Note: The Agent/Student button should be placed between Allocated and Dates in the Payment line for both the Student Grid and the XML File.

WF8 – Student Grid for File 31779



WF9 – Agent File 31779



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Feature 6 – AgentStudent Grid – Search fields

Given that the user wants to search for a particular transaction by **Reference, Ref. Num, Pmnt ID (Line ID) or Transaction ID** within the Student Grid

When the user clicks on **Student Search** in the Agent Search tab

Then 6.0.1 the system shall show the Student Grid Search where the user can input **Reference, Ref. Num, Pmnt ID (Line ID) or Transaction ID** in the fields

And 6.0.2 after clicking the Search Button, the system shall show results filtered by the given parameters in the fields.

WF10 – Agent Search tab

The screenshot shows the 'WF10 – Agent Search tab' interface. It features a search form with fields for 'Name', 'Email', and 'Date of birth'. A red box highlights the 'Student Search' button, which is located next to the 'Date of birth' field. The interface also includes a 'Search' button and a 'Clear' button.

WF11 – Student Grid

The screenshot shows the 'WF11 – Student Grid' interface. It features a search form with fields for 'Name', 'Email', and 'Date of birth'. A red box highlights the search fields and the 'Search' button. Below the search form is a table with columns for 'AgentID', 'Name', 'Email', and 'Date of birth'. The table is currently empty.

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Feature 7 – Payment line – Shortcut for Manual Addition of Payment line	No WF needed.
<p>Given that the user wants to manually add a new Payment <u>line</u></p> <p>When the user right-clicks on the Payment Grid</p> <p>Then 7.0.1 the system shall show a pop-up message "Add new manual payment line?" with buttons Yes/No</p> <p><i>Scenario 1: The user selects <u>Yes</u></i></p> <p>And 7.1.1 if the user clicks Yes, the system shall create a new line within the Payment Grid and close the pop-up window.</p> <p><i>Scenario 2: The user selects No</i></p> <p>And 7.1.2 if the user clicks No, the system shall NOT create a new line within the Payment Grid and the system shall close the pop-up window.</p>	

Feature 8 – Payment line – Shortcut for Line Split	No WF needed.
<p>Given that the user wants to split a line within the <u>AgentStudent grid</u></p> <p>When the user selects a line in the Payment Grid and clicks on F5</p> <p>Then 8.0.1 the system shall display pop-up window Select type with Drop-down menu (Regular/Add Transfer In/Add Transfer Out/Bounce Back/Fee/Refund) with Select/Cancel.</p> <p><i>Scenario 1: The user selects an option</i></p> <p>And 8.1.1 if the user selects Regular and clicks Select, the system shall split the selected line by the selected option and close the pop-up window.</p> <p><i>Scenario 2: The user clicks Cancel</i></p> <p>And 8.1.2 if the user clicks on Cancel, the system shall close the pop-up window without splitting the line.</p>	

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No WF needed.

Then 9.0.1 the system shall sum column from payment line and show a pop-up message with Total and the sum as a number.

Fields for Student Grid

[illegible]

The **Student button** should be placed between Allocate button and Dates button on the Payment Line in the XML file.

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Agent Button

The **Agent button** should be placed between Allocate button and Dates button on the Payment Line in the Student Grid.

Security

- Technically secure from external breaches and attacks

Sustainability

- Technically sustainable solution in the long run.

ADDITIONAL REQUIREMENTS

Usability: TM Edu Customer Service and Treasury teams

Responsibility: CRM Team

Supportability: The functionalities should be amendable to future changes of its scope or operations.

Other requirements: No

VERSION HISTORY

Version Number	Date	Author/Owner	Description of Change
0.1	19/05/2022	Zhilber Baev	Scope, Requirements, Acceptance Criteria, Diagrams
0.2	15/06/2022	Zhilber Baev	New Requirements for Shortcuts and Acceptance Criteria
0.3			