TransferMate
GLOBAL PAYMENTS

Student Registrations Automate

TM Edu CRM

Jira issue	TE-288
Version	0.2
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PROBLEM STATEMENT.

What is the problem that the team is facing now?

The upload of new regs to existing files in the Student DB is a process which involves a lot of manual work. Hence, CS spends significant time implementing this.

What causes the need of a new solution?

Pick season Aug-Sep is supposed to bring 5x increase in payments. The CS team will not be able to handle the volumes if no improvements to the current system are done.

SOLUTION OVERVIEW.VISION

Brief overview of the solution (executive summary).

The Student DB is to be improved by automating the process of uploading Student Registrations. When a new registration comes in, the system will automatically check if there is an already existing Student file using matching criteria, and if there is, the system shall attach the reg/transaction to it.

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

The objective of this change is to improve the Student DB and automate this process so the job of the end-users - Customer Service, be easier and more efficient. The aim is to cut down the amount of manual work and time spend on uploading student regs especially with the pick season coming when around [redacted] transactions come in a day.

STUDENT REGISTRATIONS AUTOMATE

TM Edu CRM

PROJECT SCOPE

<u>**In Scope**</u>

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

- Automating Web Reg Upload process in Student DB
- Add logical function to find existing Student files in Student DB and attach matching regs
    - Matching criteria
    - Reg Type + First name + Last name + DOB + Email
- Indicators for automatically attached regs (color of fields)
    - Dark blue for automatically added regs
- Add timer for auto refresh of Student DB and limit of regs uploaded at each refresh
- Set 1 Admin User credentials for CRM

What will it affect?

- N/A

On what existing functionalities will the new product work?

- Uploading WEB payments/regs in the Student DB
- Showing transactions on the ISPS Student Button Grid
    - Color indicators
- Refreshing the ISPS Student Button Grid and showing new transactions
- Log in credentials for Admin User

<u>**Out of Scope**</u>

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

- Auto email follow-up
- Automatically create a new Student file
- System to Return and Check the regs again

FUNCTIONAL REQUIREMENTS

Any Requirement Which Specifies What <u>The</u> System Should/Should NOT Do.

- Attaching transactions to existing files
    - The system shall automatically attach new regs that come in the Student DB to an existing file if all fields in the matching criteria match with the Student file.

        - The system shall ONLY automatically attach new regs that are with [redacted]
    - The system shall NOT automatically attach new regs that that come in the Student DB to an existing file if 1 or more fields in the matching criteria does NOT match with the Student file.
    - The system shall NOT automatically attach new regs that come in the Student DB to an existing file if more than 1 matching Student file is found.
    - The system shall NOT automatically attach new regs that come in the Student DB to an existing file with status [redacted]
    - The system shall NOT create new Student file if no match is found.
    - The system shall automatically be refreshed every **1 Minute** with **max** [redacted]
- Color indicators
    - The system shall color ***dark blue*** the fields of transactions/regs (in ISPS Student button gird) that were automatically attached to an existing Student file.
    - The system shall leave the fields color ***white*** of transactions/regs (in ISPS Student button grid) that are not automatically attached to an existing Student file and no match was found / more than 1 matches.
    - The system shall color ***green*** (no changes required; already existing functionality) the fields of transactions/regs ([redacted]) that are manually attached to a Student file.
- Admin User Access
    - The system shall check if there is a person logged in as Admin User
    - The system shall show a pop-up message "[redacted]" when a person tries to log in using Admin Credentials and another user is using them.
    - The system shall NOT allow more than 1 person to be logged as Admin User.
    - The system shall keep activity log of the Admin User.

How will this solution work?

- Flowchart – **Automatic Upload and Attach, Color Indicators, and Automatic Refresh.**

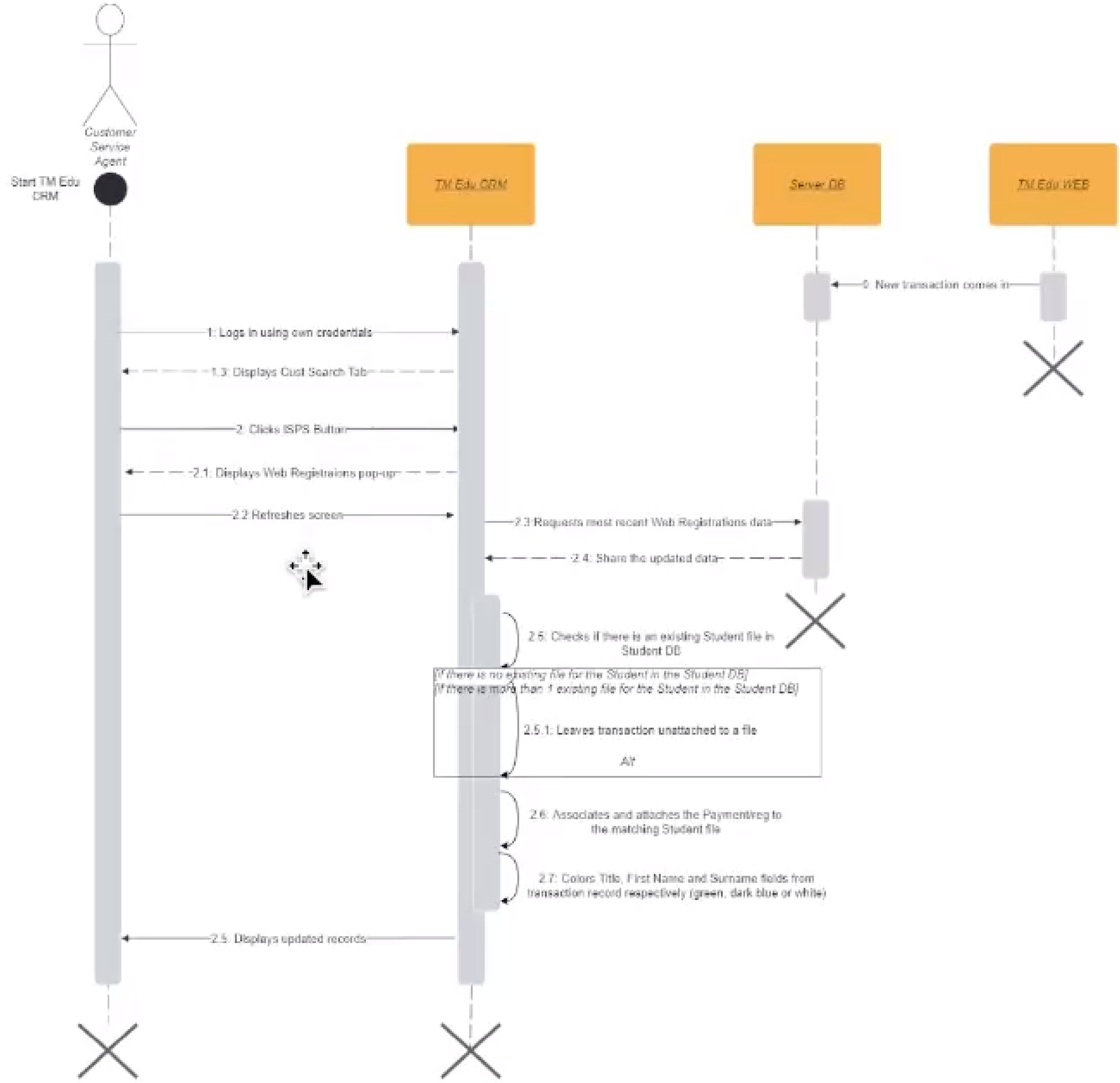
1.png

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

- Adding automation to this uploading WEB regs process will cut significant time and manual activity in the workload of CS.
- With more registrations coming down the line, it will be easier for CS to manage them.
- Having 1 Admin User Credentials will prevent from duplicate actions on same regs.
- Adding additional color indicator for the automatically uploaded regs fields will ease the work for CS in terms of identifying when an error occurs if it is from an employee or the system.

What its responses will be when interacting with the user?

Note: This is given when the CS employee has already logged in as Admin User.



Template

Feature 1 – Automatic Upload and Attach of Transaction/Reg to existing file	**No WF needed. Functions to be added on the back end of the CRM.**
Given that a new transaction has been transferred in the WEB **When** the transaction comes in the CRM Student DB **Then 1.0.1** the system shall check if there is an already existing Student file in the Student DB with the same Reg Type + First name + Last name + DOB + Email that were recorded in the payment *Scenario 1:* **And 1.1.1** if a matching Student file is found, the system shall *automatically* attach the transaction to it. *Scenario 2:* **And 1.2.1** if no matching Student file is found, the system shall NOT attach the transaction to a file. *Scenario 3:* **And 1.3.1** if more than 1 matching Student file is found, the system shall NOT attach the transaction to any of the files. **And 1.3.2** the system shall automatically be refreshed every 1 minute with maximum of new 10 transactions to be checked for matching fie.	

Feature 2 – Admin User	**No WF needed.**
Given that a CS employee wants to log in as Admin User **When** the Admin User credentials are input, and OK button is clicked **Then 1.0.1** the system shall check if there is already someone logged in as Admin User *Scenario 1:* **And 1.1.1** if the Admin User credentials are being used at this time, the system shall open a pop-up message "Another person is logged in as Admin User" which has button OK **And 1.1.2** after the OK button is clicked by the user, the system shall return to Login screen *Scenario 2:* **And 1.2.1** if the Admin User credentials are NOT being used at this time, the system shall log in the CS employee and minimize the window. **And 1.2.2** the user should open the CRM system again and log in with own credentials	*Note: WF for pop-up message might be required (to be discussed with developers).*

Feature 3 – Colour indicators for manually/automatically attached transactions

Given that the user wants to register new Payment/reg in the Student DB or wants to check the Payments/regs that have come from WEB for selected date

When the user clicks on ISPS Student in the Cust Search tab

Then 1.0.1 the system opens new Web Registrations screen with records where the user can see all Payments/regs for the selected date after refreshing the page using the Refresh button

Scenario 1:

And 1.0.2 the Title, First Name and Surname columns of transactions that have been *manually* attached to a file shall be colored *green*

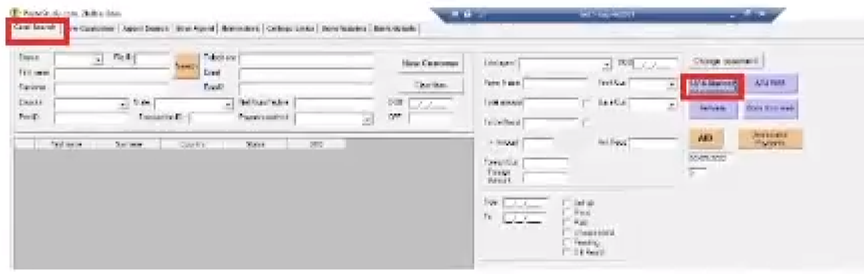
Scenario 2:

And 1.0.3 the Title, First Name and Surname columns of transactions that have been *automatically* attached to a file shall be colored *dark blue*

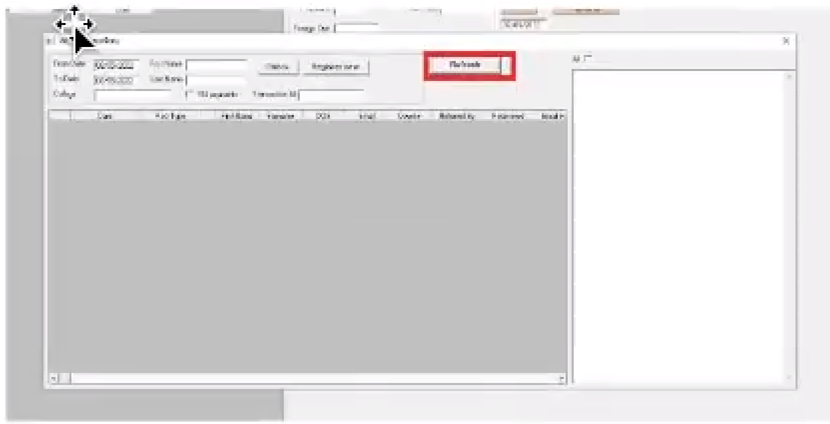
Scenario 3:

And 1.0.4 the Title, First Name and Surname columns of transactions that have not been attached yet stay *white*.

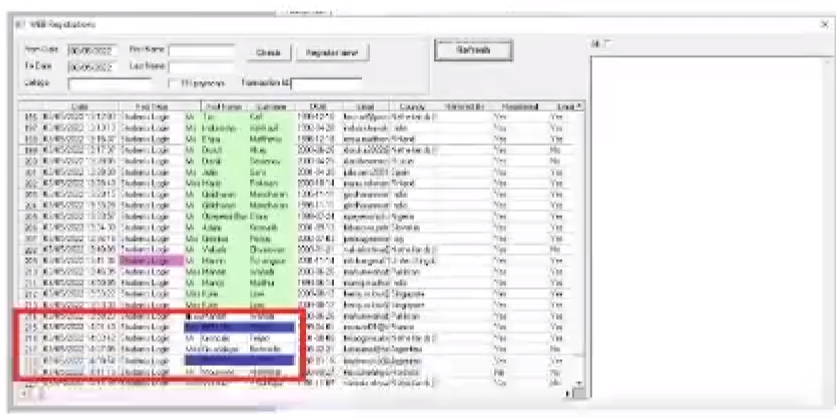
WF1



WF2



WF3



Note: The dark blue colored transactions shall not change even if the user interacts with them.	

NON-FUNCTIONAL REQUIREMENTS

What constraints and non-functionalities will be needed in order to get the services of the product work?

Could be product non-functional requirements, organizational non-functional requirements, and external non-functional requirements.

Security
- Technically secure from external breaches and attacks

Sustainability
- Technically sustainable solution in the long run.

ADDITIONAL REQUIREMENTS

Usability: TM Edu Customer Service

Responsibility: CRM Team

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

Other requirements: N/A

VERSION HISTORY

Version Number	Date	Author/Owner	Description of Change
0.1	29/04/2022	Zhilber Baev	Problem, Solution, Scope, Requirements, Diagrams
0.2	12/05/2022	Zhilber Baev	Requirements and Diagrams
0.3			