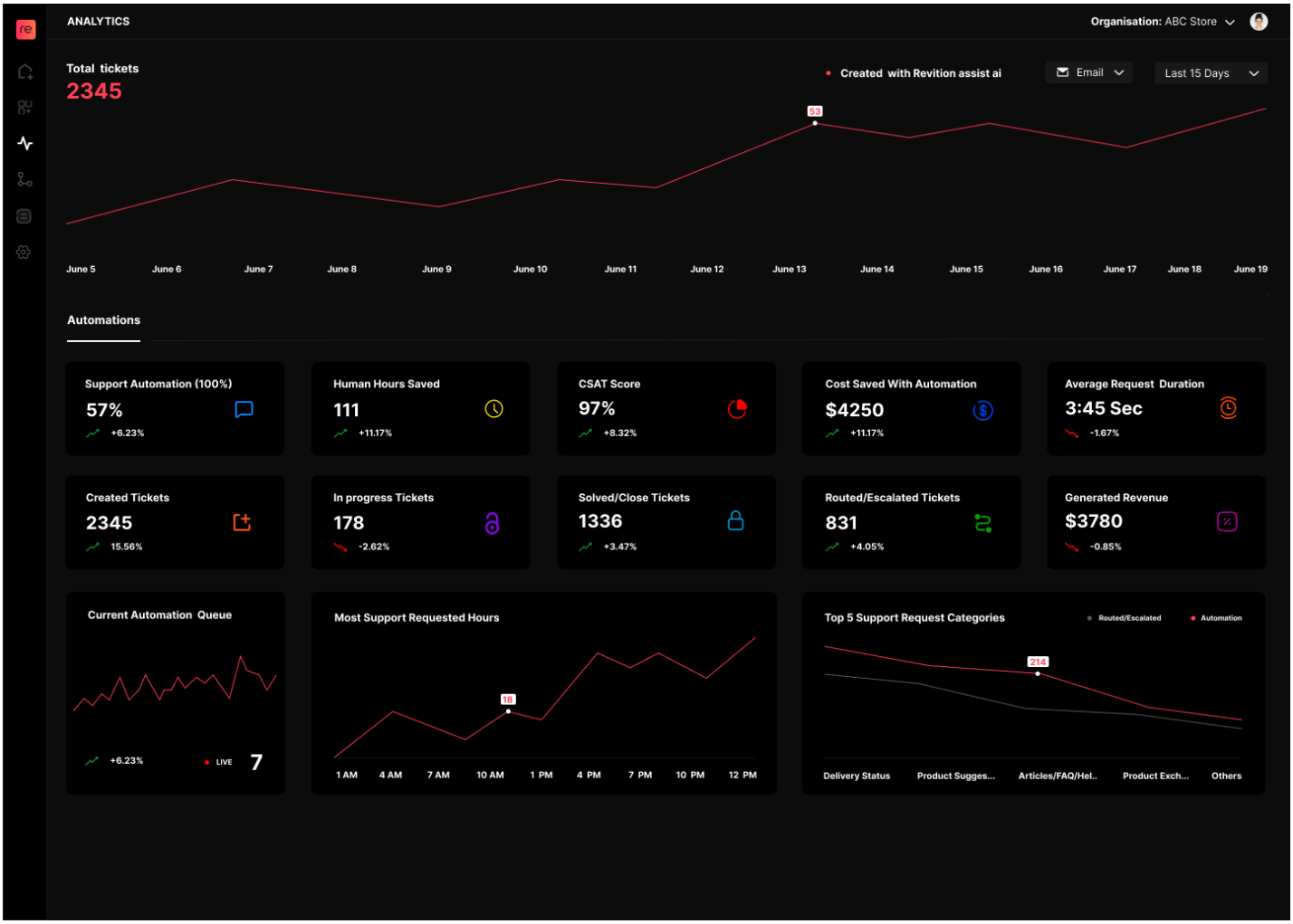
As I mentioned earlier, All ML tasks that are part of this project will be handled by an ML developer completely. However, you need to collaborate and work with ML Developer to integrate all those ML things with the system and app to achieve our requirements.

Code quality, Compatibility, and security are the most important part of the project. You do not need to use any services, apps, or code/repos from anywhere other than the official tools and services that we will approve to use for the project.

To save cost and time, We have postponed the mobile view for the admin/merchant view. We do not require a mobile view completely for now. When admin/merchant opens from mobile/tablets then it should simply display the message that this is not available on Mobile/tablets and need to open from Desktop/Laptop.

Analytics:



In general, we have hundreds of categories and types for analytics. But as I mentioned, we just need to do with only a very few basic and most important ones.

Total Tickets: Need to show the total ticket count which is the combination of all types (such as email) and statuses (including routed/escalated) tickets from the AI tool. This count changes based on the selected filters from the right side.

Right side filters: Automation Type and Date. We are going to have Email automation as well as automation with the Frontend page. So we will Have these 2 types along with the default type as “all” which is the combination of all types.

The date filter consists of “Last 90 days, Last 60 days, Last 30 days”, Last 15 days, Last week, Custom date range.

The whole page data will change according to the selected options from these filters.

The graph: this graph needs to show the period as selected from the filters. We need to show this graph with a line design exactly like I mentioned in the design. We do not need to mention anything on the y-axis. Just need to show the x-axis as mentioned in the design. The increase or decrease percentage is based on the selected date such as Selected date VS previous date (last 30 days VS previous 30 days)

Data blocks:

We need the following data as part of this section. Each section consists of a Title, number increase or decrease icon and percentage, and also the icon of automation.

| Support Automation: We need to show the percentage of the automation where the request by the customer was solved/provided 100% by AI response without any human involvement such as order status, delivery status, FAQ, Product suggestions, etc. So we should not include the tasks or responses which are routed/escalated to handle manually by humans.

| Human hours saved: Here we need to show the hours saved by the automation. For this, you need to consider only the tickets which are 100% solved by AI same as the first block. I am not sure about the criteria to calculate these hours. So I need suggestions on this to select the criteria to calculate saved hours.

| CSAT Score: This score is based on feedback from the customer. When a customer asks/request something and when AI handled that completely (does not apply to not routed/escalated tickets) then at the end of that response after the ticket has been closed/completed, we need to ask for feedback from the customer. We simply ask the customer to select one of the 2 options “Yes I'm satisfied’ or ‘No I’m not satisfied”. I will explain separately how this feedback system needs to work.

| Cost saved with automation: This is again based on the “Human hours saved” number. We need to convert those hours into currency based on per hour rate. This per-hour rate is a fixed rate that we need to consider. We need to select the rate for this based on the average rate per hour for customer support representatives in the US.

| Average request duration: This is simply the AVH duration of all the tickets that were handled by AI from start to end (Close/complete). Again here, we should not consider the routed/escalated tickets to calculate the average.

| Created tickets, In progress tickets, Solved/closed tickets, and Routed/escalated tickets:

The created tickets are tickets that are created by AI tools of all the types such as Email automation, Automation from the frontend page. When customers ask something, the AI tool needs to create a ticket in the main CRM system such as Zendesk. That customer request could be related to anything including the things that AI can not provide. But still, the AI creates a ticket immediately after the customer asks something.

The in-progress status tickets are those which are started by AI but not yet completed. For example, if a customer asks for something with incomplete details or clarity, then the AI requests the customer to provide those pending details or clarification to proceed further. So until the customer provides those details or clarification that ticket will be considered as an progress ticket or until the agent changes the status of the ticket manually from the main CRM system.

Solved tickets are those tickets that are handled and solved by AI completely without any human involvement.

Routed/Escalated tickets are those tickets that are created by AI, but assigned to agents. The customer will ask anything. If a customer asks for something that can be handled and solved by AI then the AI will do that. As I mentioned, When customers ask something, the AI tool will create a ticket immediately after the customer asks something irrespective of the category and support request type. But, if a customer asks something which AI cannot handle and is required to be handled by humans then the AI route/escalate those requests and will assign those tickets to the agent directly based on the selected routing settings in the APP admin panel.

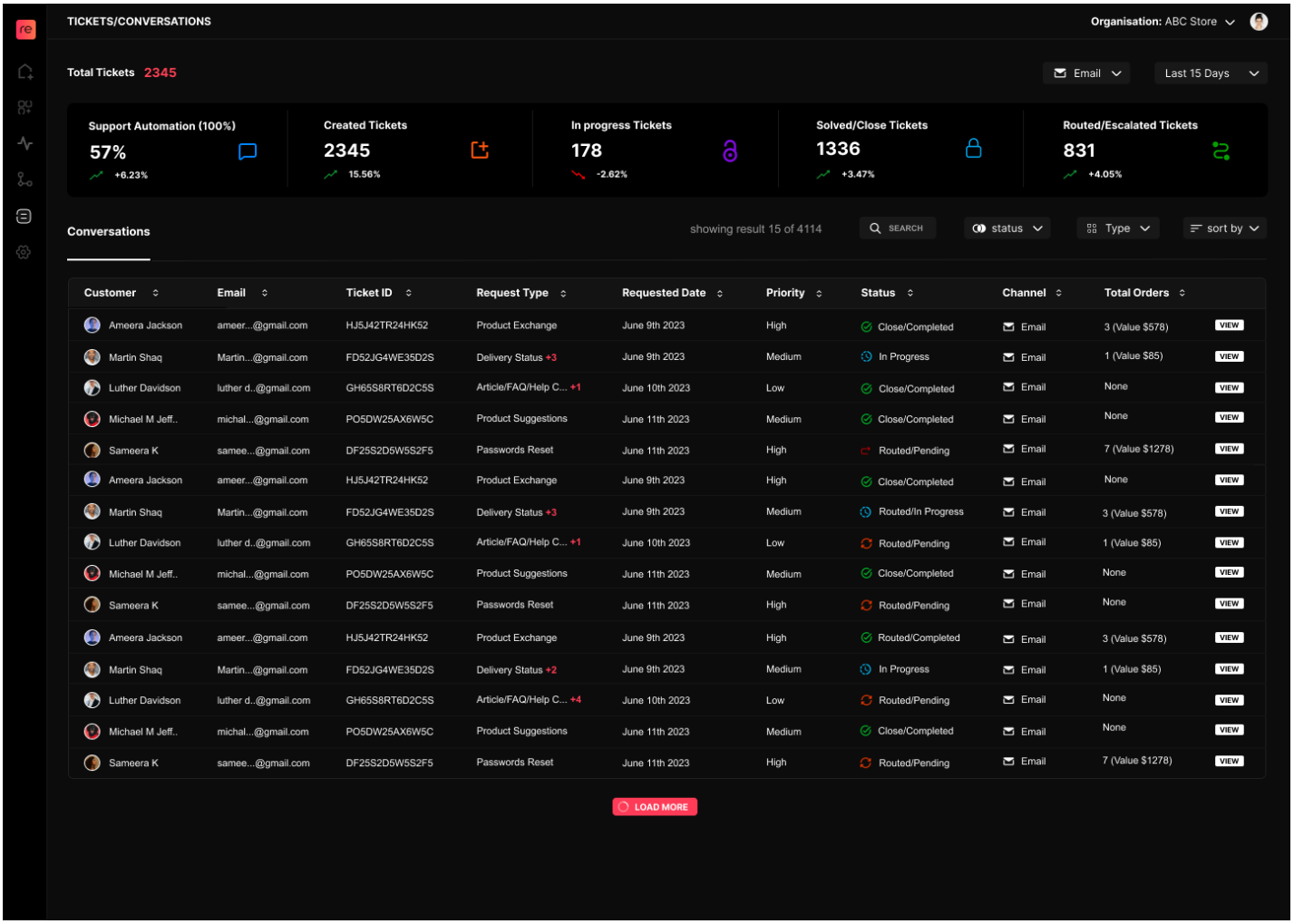
| Generated Revenue: This is the number that we got through tracking the sales from the automation responses/tickets. We have certain automation support types such as “Product suggestions’ where the AI suggests products to the customer through Email or the Frontend automation page. When customers make a purchase from those suggestions and links then we need to track sales from those links/tickets/responses and we need to show all those things as generated revenue through automation. We should also track the sales using browser cookies for 30 days period. Because the customer might not buy immediately and might buy the product later after a few days. So we need to track that as well.

| Current automation Queue: Here, we need to show the count of the live automation that has been handled by the AI tool in the system. The selected filters from the top do not apply to this. This works separately and the graph is a fixed criteria graph based on hours.

| Most support request hours: This needs to show the graph of the most requested hours based on the selected filters from the top. This needs to be 24 hours period graph.

| Top 5 support request categories: This needs to show the graph of the top 5 support request categories/type based on the selected filters from the top. This needs to be 24 hours period graph.

Tickets/Conversations:



On top, we need total tickets on the left side and we need filters on the right side. Below this we need to show the blocks for Support automation, created tickets, in progress, solved/completed, and routed/escalated tickets. All of These are exactly the same as the analytics page.

| Conversations: On the right side we need to show the filters that are specific to the conversations. The filters from the top apply to the whole page. But these filters apply to only the conversations section data.

These conversation filters are Search bar, Status, Type, and sort by.

The search bar is to search and filter the conversation directly.

Status is the status of the ticket such as Close/Completed, In-progress, Route/Pending, Route/Completed, Route, In progress. The route/pending status is for all the tickets which are routed/escalated to the CRM. When AI route/escalates a ticket but does not assign it to anyone then the ticket status in CRM should show as pending. But in our tool, it should show as Routed/Pending. Similarly, when AI route/escalates a ticket and also assigns the ticket to someone then the ticket status in CRM should show as in progress. But in our tool, it should show as Routed/in progress. The same thing applies to the completed status of routed/escalated tickets.

The type is the support request type such as order status, Product Suggestions, Articles/FAQ/Help center, etc.

Sort by option is to sort the conversations based on the requested date (ascending or descending order), Customer name (ascending or descending order), and Total orders (ascending or descending order).

The conversations section should show the following line items. Customer, Email, Ticket ID, Request Type (including showing the additional request types within the same ticket/conversation with + sign for the count), Requested Date, Priority, Status, Channel/type, and Total orders (including the total value of all orders).

When we click on the “VIEW” button then it should open that conversation directly in the CRM app. We do not need to open and have that option in this panel/app.

All these details all a combination of details from Shopify, CRM, and our AI tool.,

The “LOAD MORE” option is to load the next set of conversations. By default, we should show up to 25 line items for this conversation and also when we click on the load more button, it should show the next 25 sets of conversations.

Settings page:

The settings page should cover all settings from all categories and automation types including the merchant/admin-related settings, the integrated apps settings, and also the AI tool Email automation and frontend PWA app settings.

Super admin settings:

We need the option to reset admin/merchant account passwords and to see all kinds of data from all the merchants that we are offering to them (not sensitive data). We do not need a separate UI for this If we can get all this data through any of the cloud applications that are part of the project using simple methods. We need this for analysis and decision making purposes.

We do not need any Workflow builder as part of this MVP as I mentioned in the earlier requirement. Since that will take time, we have postponed that completely to the future along with a few support request types (out of 10 types, we are going with only 3) from ML tasks which also take time to create.

Similarly, we do not need a separate home page. Let’s make “Total Tickets” the home page for this.

Frontend PWA: Assist AI

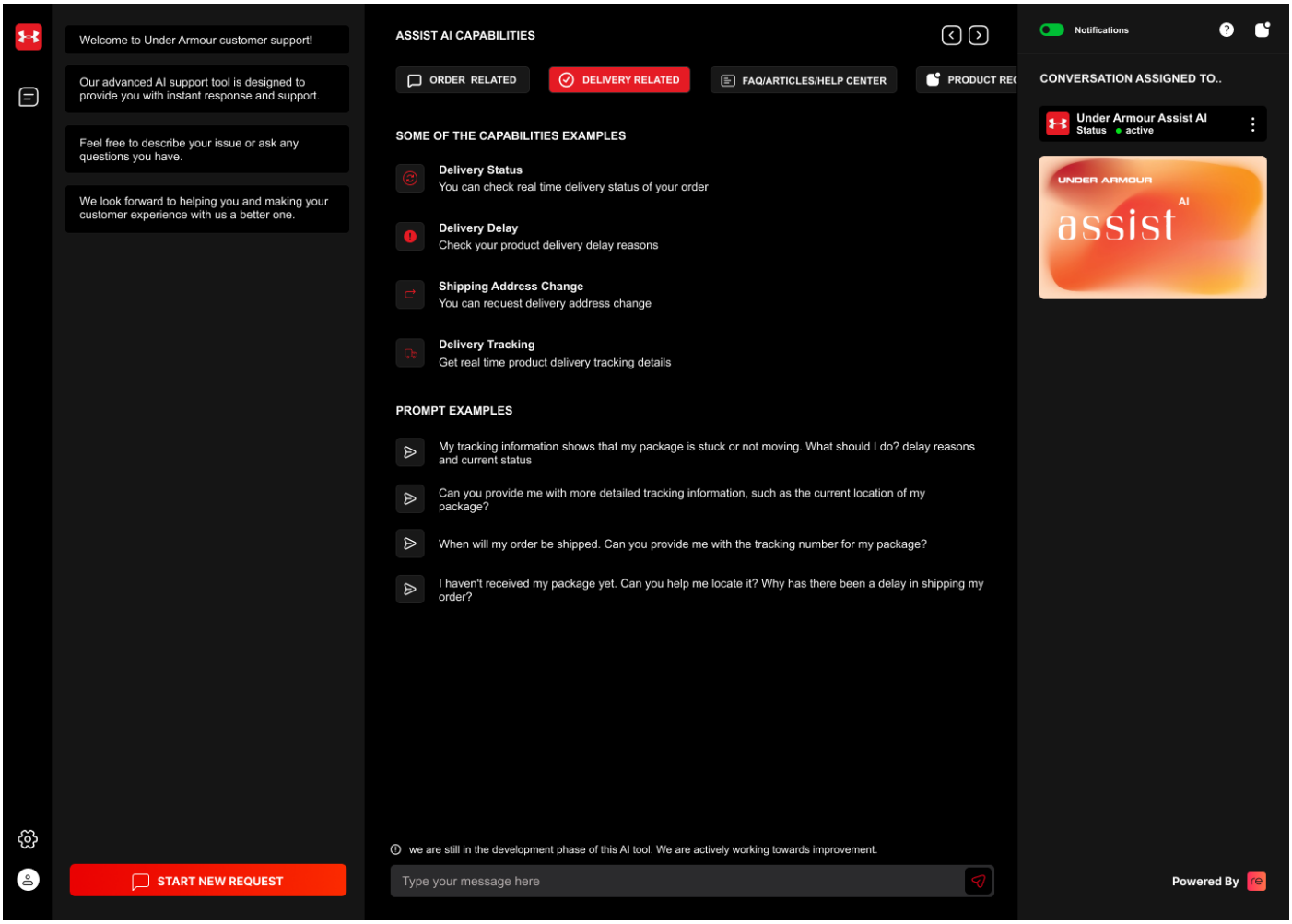
Assist AI is one of the automation types along with Email automation. This is going to be frontend PWA for customers to access and get support through a web browser. Whatever we cover to automate through Email will also be here through this frontend UI with slight changes in the way it function.

This frontend PWA consists of 4 sections/blocks as follows.

Section/block 1: Menu
Section/block 2: Default Welcome message, Conversations
Section/block 3: Default details about AI capabilities, Main conversation
Section/block 4: Default details, More details about the conversation.

This will be available through mobile view as well. The mobile view will be the same as this with few adjustments.

The below screen is the Default Home screen of this PWA when opened for the first time before login. All the details that are shown below are the default details in the respective section/block.



all these 4 sections' content should scroll, load, and work separately and accordingly. Not as a single fixed page.

Section 1: The details in section 1 are related to the merchant logo, icon at the top. At the bottom, it should have an icon for settings and a profile pic. After login, if the profile has any pic then it will show that. Otherwise, it should show this as the default even after login.

Section 2: By default, we need to show these details in Section 2 before login. Once the customer login to the account then the details in this section will be changed to show the conversations. You can check that on the next screens.
Section 3: By default, we need to show these AI capabilities when the customer opens this PWA for the first time and before login. In these details, on top, we need to show the main categories/support request types that we are providing with this AI tool to handle and solve requests by customers directly.

At the top right side, we need to show buttons to change the category types from left to right or left to right. Below the main category, we need to show the subcategories for the selected main category. Below those subcategories, we need to show prompt examples. For the main category and for sub category we need to use separate icons along with text. But for prompts, we just need to use the same icon.

These main categories should be changed from one main category to another automatically with a gap of 3 to 4 seconds. When we show the subcategory and problem examples content, we should show them with some motion effects such as typing text, fade effect, etc instead of just showing them.

At the bottom of the section, we need to show a text box to type and enter the prompt. The text above this text box should be displayed only when it shows the default content on top. Once the customer type and enter the problem then this text should not be displayed. You can check the next screens.

Section 4: This section shows this content by default before login as well as after login. On the top right side, We need 2 icons. One for notifications and one for with a link. The admin/merchant should have the option to add any link to this icon such as the contact us page link. The notification icon is to show the notifications regarding all conversations such as when they get a response or update for the ticket etc. All the notification-related things should be covered in this. At the top left side, We should have the option to turn on or off these notifications.

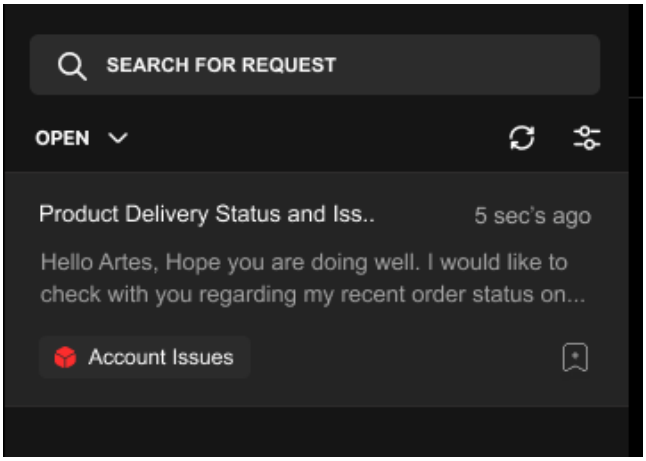
Below this, we need to show the details of the assignee. By default, it will always be AI, even after login. These assignee details change only when the conversation/ticket was assigned by AI to any of the agents then it will change these details and show the agent details from the CRM.

Below that, we need to show the image. This image shows always like this even before and after login. We need to provide the option to the admin/merchant to select and upload the image of their choice.

Assist AI screen with request processing:

When a customer asks any question then the AI should start processing that request and in that situation, the content of this screen sections change and show the details like the below screen (second image).

Under section 2, In this situation, it should show the content like the below image.

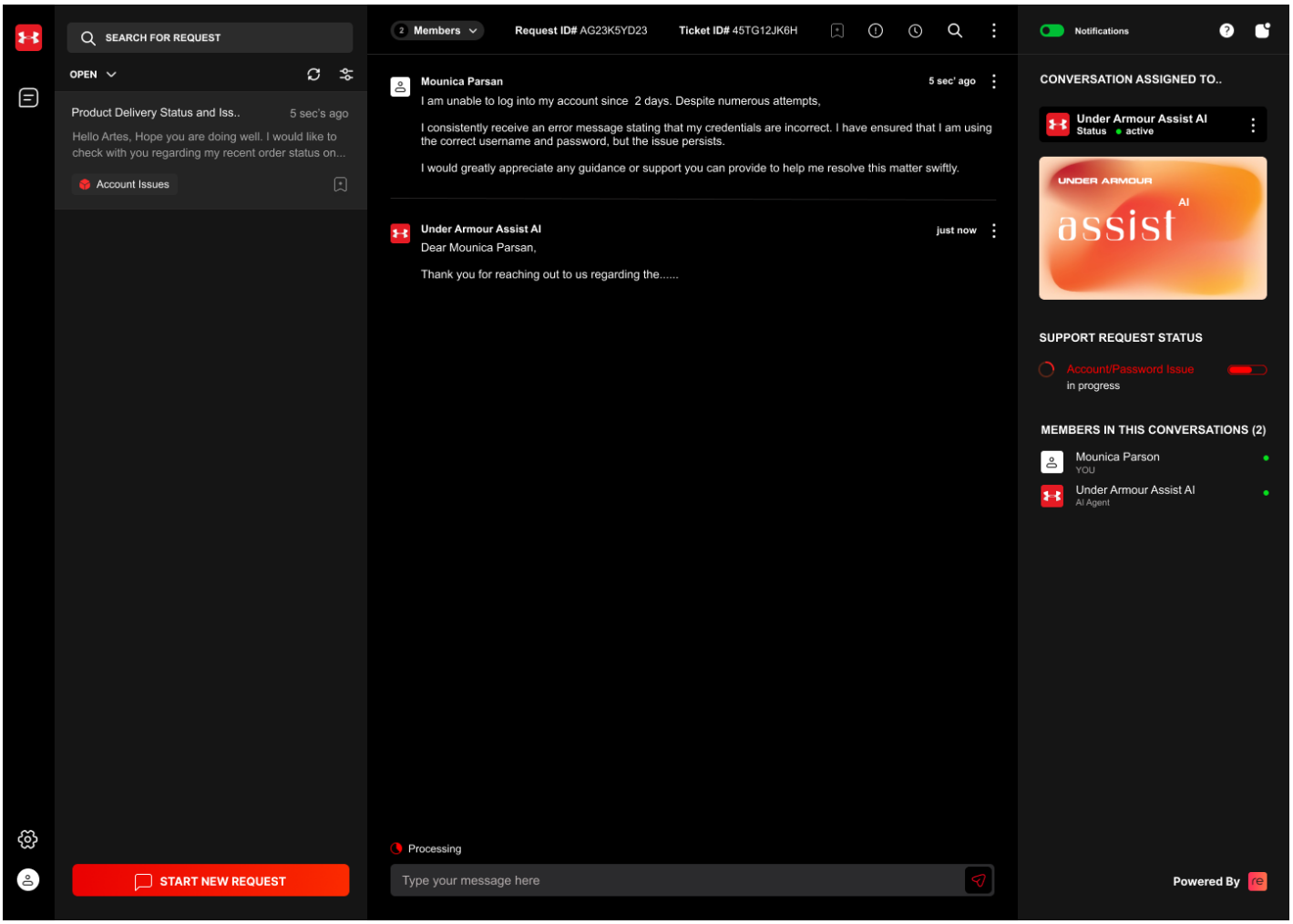


In this, we need to show the search bar, and below that, we need to show the drop-down to select the status of the conversation/ticket. At the right of this, we need to show the refresh and filter buttons. For filters, you can add very basic filters such as date selection, support request type selection, Snooze items, and Favorite items.

Under this, we need to show the conversation data. In this, we need to show the title of the conversation. This title of the conversation will be created automatically by AI based on the requested details. Along with this, we need to show the time, and the most recent details from that conversation with a max of 2 lines, and below that we need to show the support request type with an icon and text like a small button and also we need to show the favorite icon at the right side of this.

Under section 3, on top, we need to show the following things. Members in the conversation, Request ID, Ticket ID, Favorite, report, Snooze, and search icons. Besides the search icon, we need to show the icon for drop down to show the like, and dislike icons. The request ID is the ID that is unique to the AI tool for each conversation. The ticket ID is the ID that is created in CRM. All the main response generation things will be handled as part of ML.

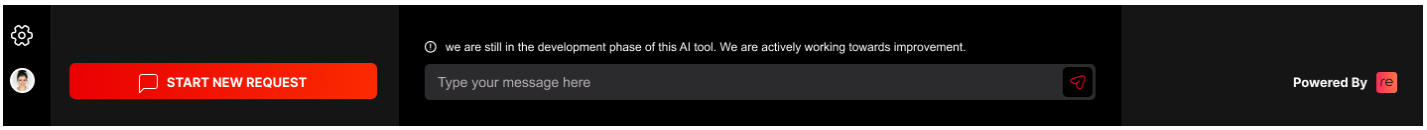
Under section 4, we need to show the details that are specific to the conversations. As I mentioned under the home screen before login details, the first 2 items (assignee and image) will be the same. Along with them, it should show the additional details for the active/selected conversation.



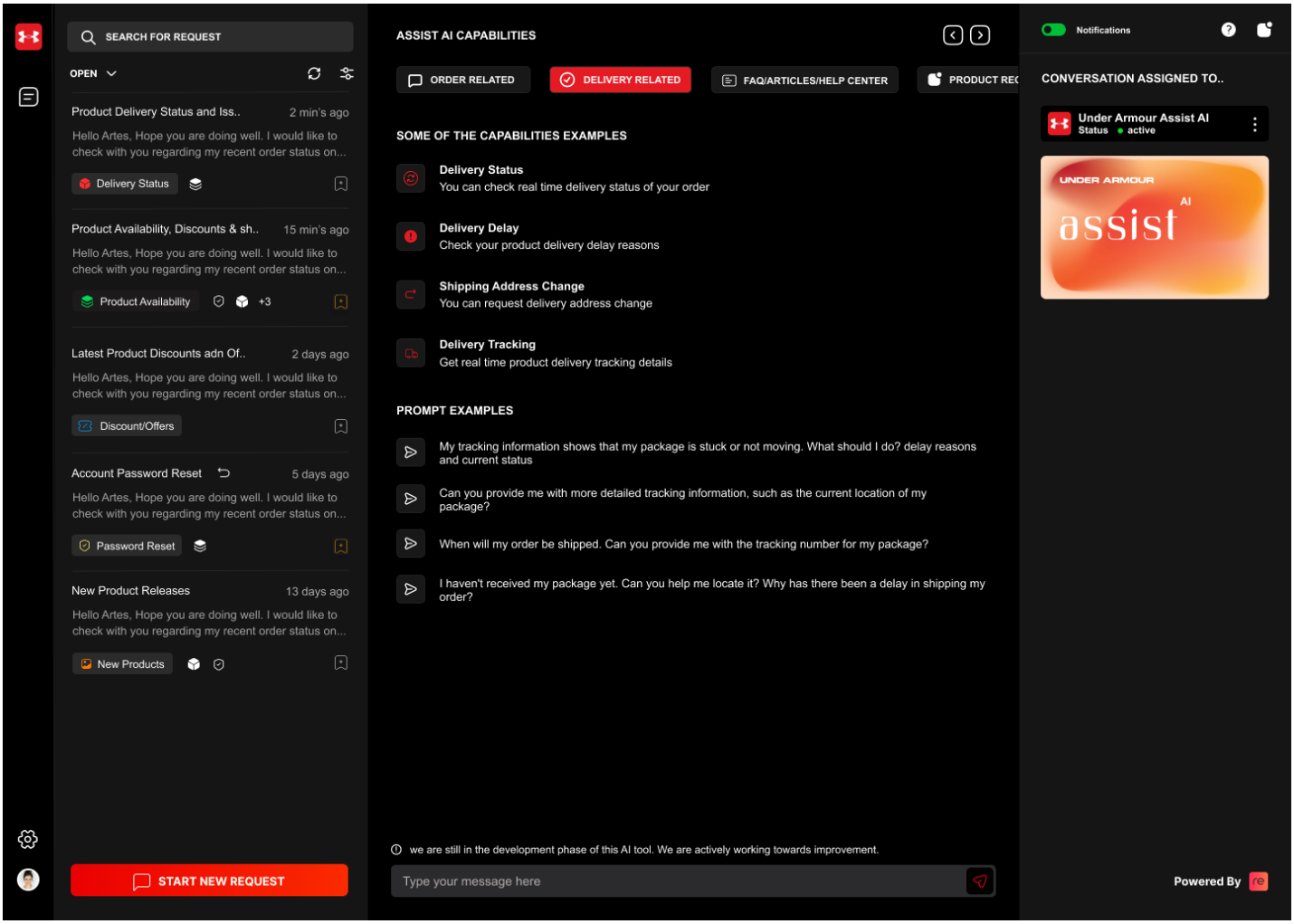
Here, we need to show the support request status and members in this conversation. When AI processes the request and when the conversation/ticket is in progress then it should show the status as mentioned in the above image with an icon at the left side and text and again icon at the right side. These icons should be motion/animated icons, not static icons. Under members, we need to show the pic, name, and online status. For AI, we should show as Assist AI, For agents, we should show their title from the CRM, and for customers, we should show as “YOU”. If the online status is active, we need to show green and if the online status is not active, we need to show red or yellow if the online status is

away. At the end right side of this section 4, we need to show the “powered by” banner. This is a fixed banner always at the end right side.

This bottom side content from all 4 sections should be at the bottom on all screen sizes by adjusting the height of panel.

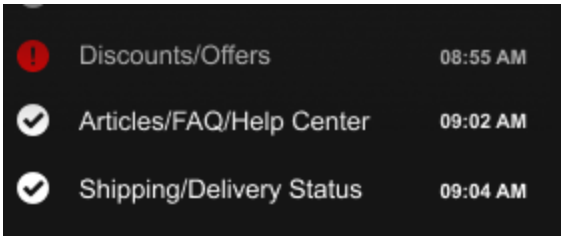


When the customer clicks on the “Start New Request button” when another conversation is active then it should show like the below image. In this situation, sections 3 and 4 will be displayed with the details which I mentioned above under the default content for these 3 and 4 sections. If the customer asks something again then it will show like the assist ai request processing image.



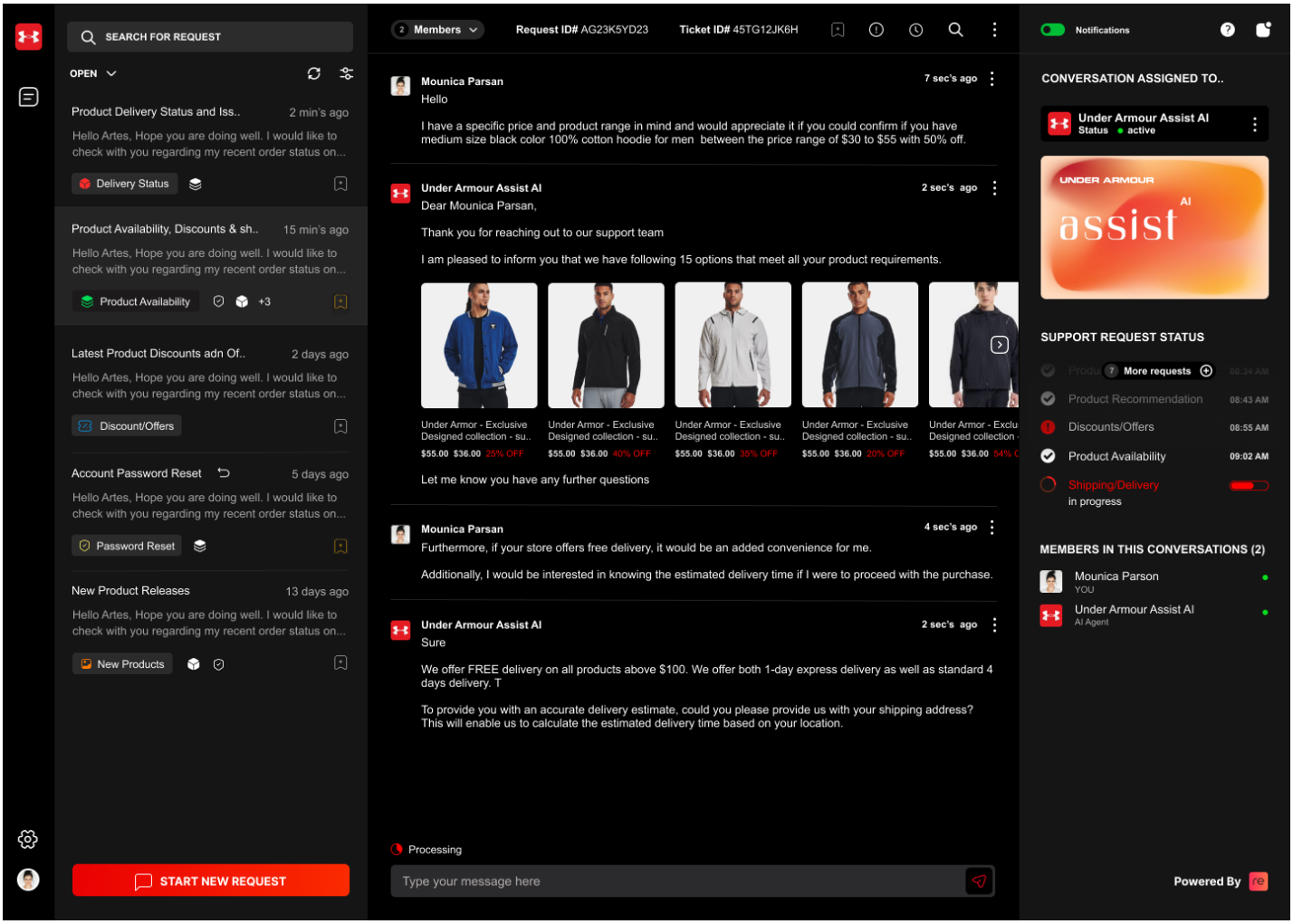
If customers have more conversations then these conversations should be displayed like the above. When the customer selects any specific conversation or when any conversation is currently processing and active then that conversation BG color will be different as mentioned in the assist ai request processing image.

Under the support request type in section 4, We need to show all the request types one after another. The customer might ask the AI for various kinds of details within the same conversation/ticket that are related to multiple support request types. So we need to show all those things separately. For example, When customers ask about delivery status then this request type will show as in progress until completed by AI by responding to that request. After this, the customer might ask about some FAQ-related questions or after that some product suggestion questions. So all these things we need to show in this as I mentioned in the below image.



If you look at the section 2 conversations bottom left side, we are showing support requires type and if you besides that, we have icons. These are related to the above section. All those request types we are showing in the form of icons. If the count of these items is more than 3 then we should show that in the number with + sign as mentioned in the image.

The below image is the screen with all the details from all sections and also with active/selected conversation. Please note that we need to show a different color icon for the support request type under section 2 conversations like below.

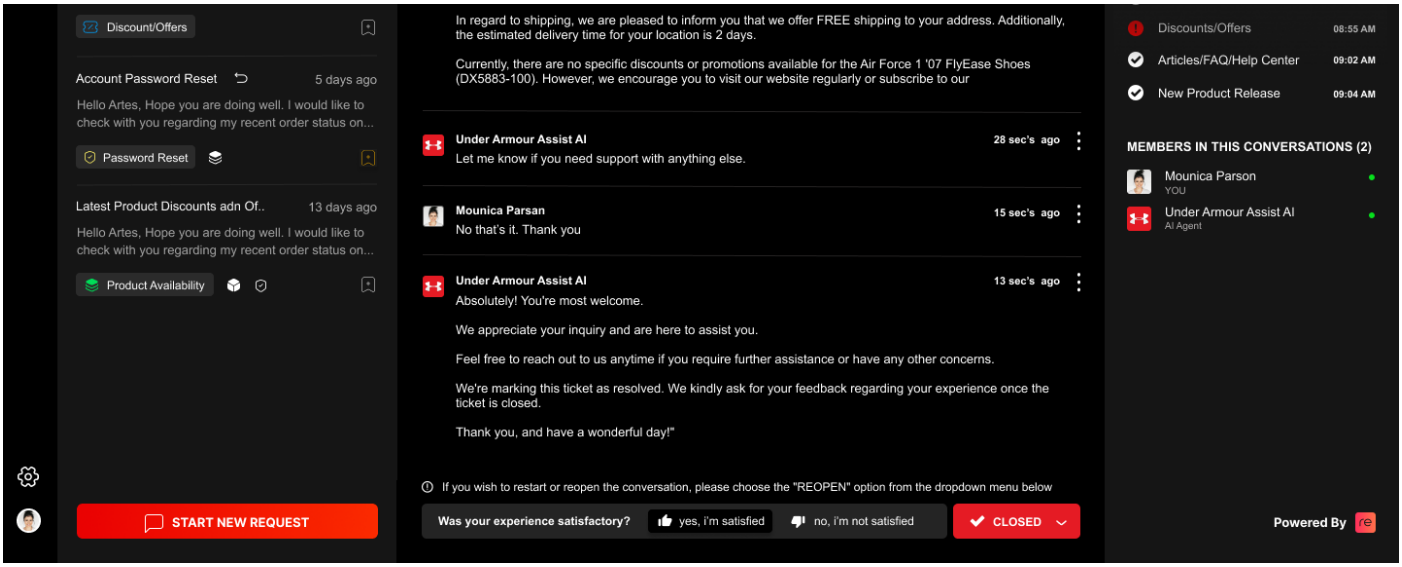


When AI processes the request, it should show the icon and text above the text box in section 3 as mentioned in the above image.

Conversation Feedback and Remainders:

After completing each conversation by AI, we should show the feedback form as the below image in the place of the text box. This form should be displayed only after the conversation has been ended and completed by AI as below image. It should have 2 options to select by customer. If the customer selects yes then the system should consider that as satisfied for that conversation. But if the customer selects no then AI should reopen that conversation/ticket automatically

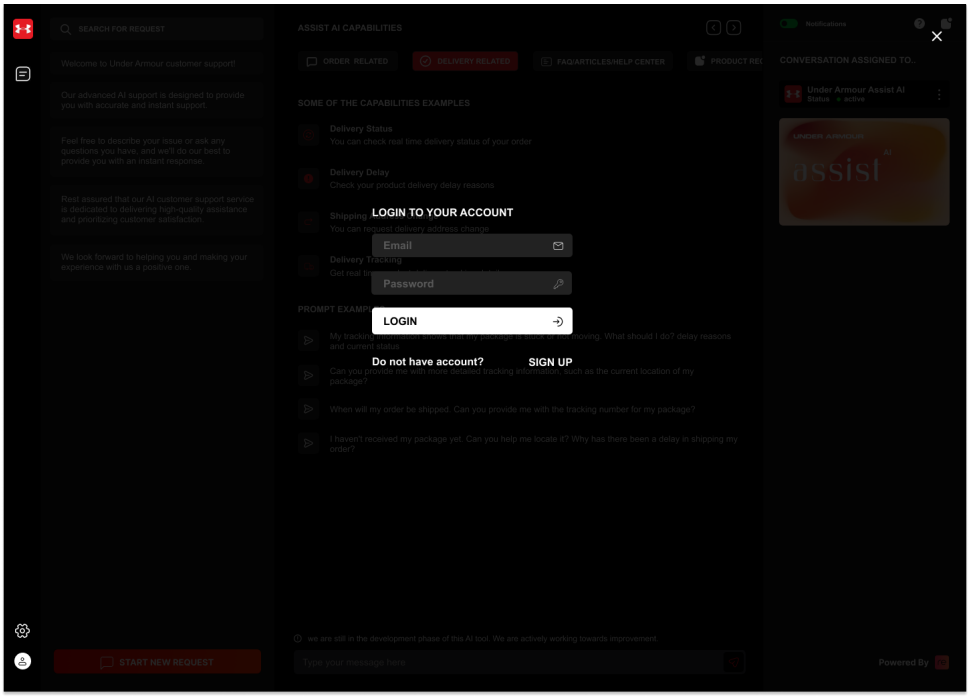
and should ask the customer accordingly for the same to know the reason for “no’ and to handle that situation accordingly. If the customer does not respond to anything then the system should not consider anything.



If the customer wants to reopen the conversation after it has been closed then they can select that from the drop-down to reopen that ticket again and to reinitiate that conversation again and the AI will handle that situation accordingly. This similar feedback system applies to Email automation implementation as well in the form of Email responses.

For certain conversation statuses and situations where AI awaits a response from the customer to process or proceed further and if the customer does not respond to that then the AI should send reminders to the customer for that response to check about the status. If there is no response even after sending remainders at multiple intervals, then the AI should close the conversation or should route/escalate that ticket to be handled by humans manually. The AI close or route/escalate the ticket based on the requested details and situation. This ML-related point is only for info. We need these remainder settings for merchants/admin to select the number of remainders and interval for remainders for various situations. I will provide all those situations list for you to add under this. This remainder system should work along with the AI system to perform actions accordingly. This applied to Email automation as well.

Login page:



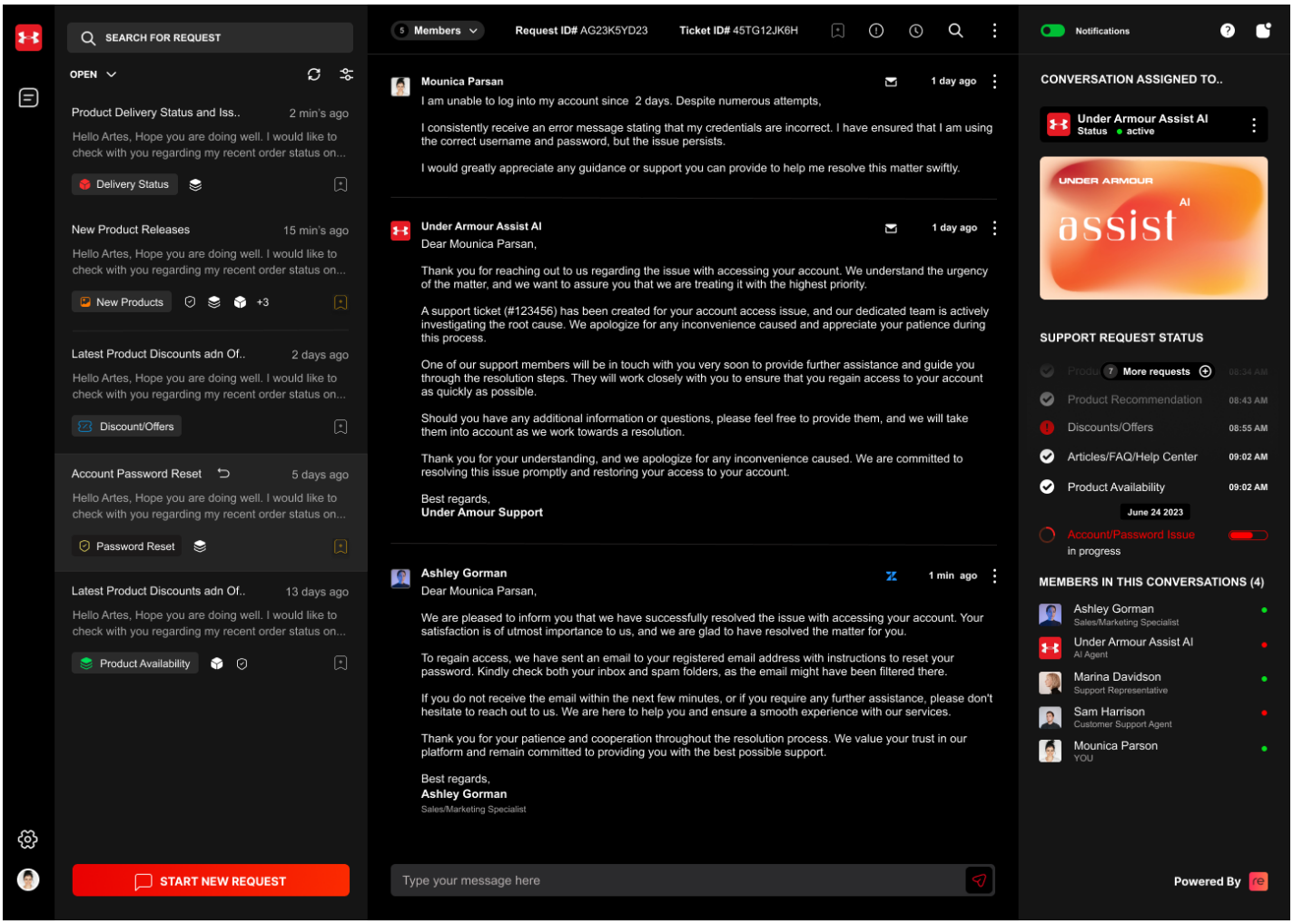
The AI can process certain support requests without the requirement for the customer to log in to the account such as product suggestions, FAQ/Articles/Help Center, Product Info, etc.

But for certain support request types such as order status or delivery status, the login to the account is mandatory to proceed and process the request by AI. Along with this, when a customer clicks on something or does something within the page that requires the customer to log in to the account such as notifications, snooze, favorites, etc then it should automatically display the login page/popup as I mentioned in the above image.

The admin should have settings for these to select the login option as optional or mandatory. If set as mandatory then it should show the popup immediately after opening the app. If set as “not required” then it should not ask or show this login popup except for the mandatory things to confirm the account such as delivery status. If set as “optional” then it should show this popup to log in along with the button to continue as “GUEST”. In general, these ‘not required’ and ‘optional” login conditions apply to only those support request types for which an account login is not required to provide details such as product suggestions, FAQ, etc. But for support requests where the system should confirm the customer identity in order to process the requested details then this login is mandatory for those things such as delivery status.

This login system is the Shopify site login system. The user uses their store/site login credentials here to log in. Sign-up text is just a link to the store's original signup page. We do not offer a signup option.

Ticket routing/escalation and agent responses:



When a customer asks about something which requires to be handled by a human manually then it will create a ticket for that automatically in the CRM and will share the details in the response. This ticket is the same as the ticket created for the conversations. Not a different or separate ticket. The status of these routed/escalated tickets works the same as I mentioned under the admin/merchant tickets/conversations page details.

When an agent replies to that request in that CRM such as zendesk then an email should be sent to the customer with the response which is exactly how the existing CRM apps work in general. at the same time, the response should also be there in the conversation of that specific ticket as a response from the agent as I mentioned in the above image.
The responses created by AI before route/escalation and the responses created and sent by the agent in CRM after escalation should be there in this portal directly. Similarly, all those responses should be there in CRM as well.

Most importantly, the AI should not reply and create any responses to any of the agent responses from the CRM when responding to the created ticket messages. the AI should only respond to the customer responses based on the content of the customer response. Not for agent messages. This applies to Email automation messages as well. We will handle this criteria as part of the ML requirement. This point is just for your info.

Until the escalation has been completed and closed by the agent manually in the CRM, it will show that conversation/ticket in the app as in progress as mentioned in the above image.

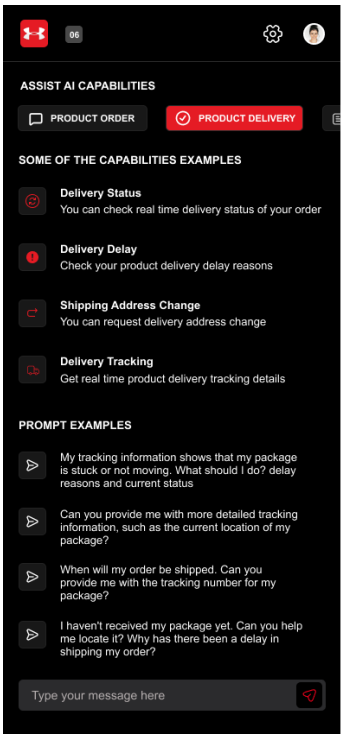
The feedback for the conversation/ticket system does not apply to all the escalated/routed tickets. The system/ai should show that to any of these tickets even when that ticket was marked as completed by the agent in the CRM.

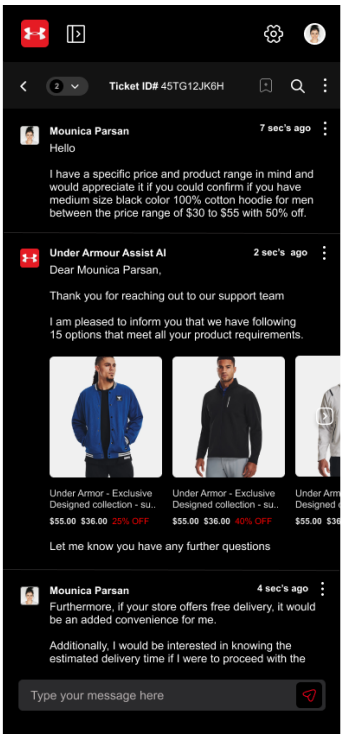
Need to show the icon accordingly for the respective response as I mentioned in the above images such as showing the email icon for responses that are created through Email automation and showing the icon of the CRM for responses that are sent by agents from the CRM such as zendesk.

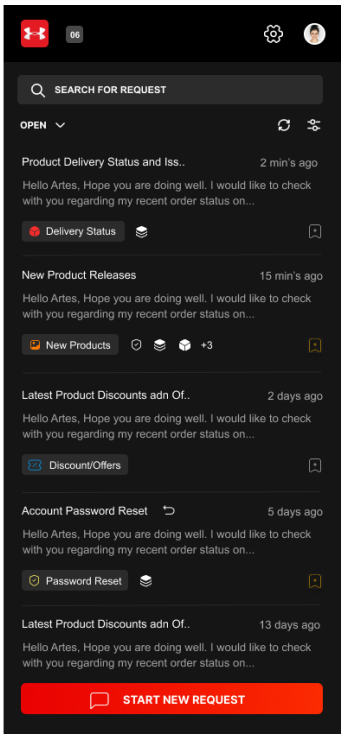
CRM, Frontend app, and Email sync for all the tickets/responses/replies by AI/customer and agents:

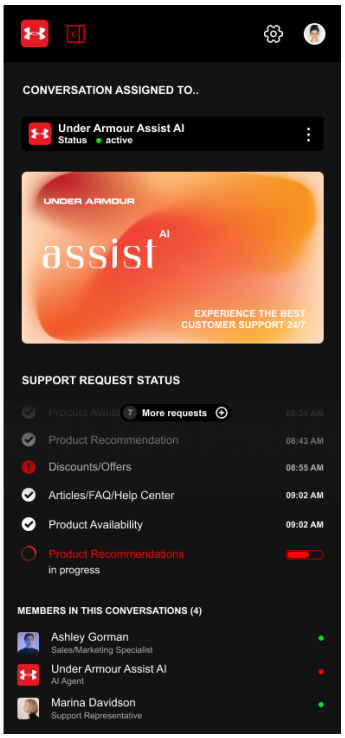
When a customer sends an email to the merchant for any support from their email account, that will be handled and completed by AI automation accordingly or if AI is not capable to handle the requested details then AI will create a ticket in CRM and a response will be sent to the customer regarding the same as I mentioned in the above image. In both of these situations, irrespective of the status, the ticket will be created in the CRM in that customer's name/account. So all these conversations which were created by AI with email automation through email should also be there in this assist ai frontend app under that customer account. This applies to all the responses from the customer side through email (including attachments, forwards, replies, and links) as well as responses from the agent side through CRM. The ML part of this point is just for your info.

Mobile view: The mobile view will be exactly the same as the desktop view with a few adjustments.









The 4 sections of the total page will be shown on the mobile view by showing only 1 section of content at a time as mentioned in the above screen. On mobile view, we need a few additional buttons to open and close these sections.

Brand settings:

We should also provide customization settings for frontend PWA for admin/merchant to select the color and site icon to match their brand requirements.

We do not need to provide options to change the color of each element and the BG color of the app. We simply need to provide a single option to select one primary color and that color will be used across the application as a brand identity color and also for AI response elements such as the delivery tracking bar. For example, if you look at the below PWA app images from above, you can see a few icons, text, and button colors in red under all 4 sections. Only those things will be changed as per the selected primary color. All other colors will be constant and fixed.

Upload button in frontend PWA:

In frontend PWA, by default, we should not have any button or option to allow the customer to upload anything as part of the response. We allow the customer to ask by text. But We need to show and provide that option to upload a file or image when there is a response/reply to the ticket from an agent. Then the app should automatically show an upload button beside the message icon within the text box of section 3 to allow the customer to upload an image/file in the response. Also, when there is a need to upload anything from the customer's side while having a conversation then the AI will activate that option automatically based on the requested details by the customer or based on the request to activate that option from the customer to upload files/images. This ML part of the point is just for your info.

E-COMMERCE PLATFORM INTEGRATION:
Shopify

PRIMARY CUSTOMER SUPPORT/CRM APPLICATION INTEGRATIONS:
Gorgias, Zendesk, Freshdesk (We select any 1 or any 2 or all 3 based on the cost estimations)

Other 3rd PARTY APP INTEGRATION:
AfterShip Tracking (for real-time product delivery tracking in responses)

REQUIRED CHANNELS FOR AUTOMATION:
Email and Frontend PWA app.

APP LAUNCH:
Need to launch the app on the Shopify app store with external payment processing for subscriptions.

PAYMENT PROCESSING INTEGRATION:
Stripe.

Important note: We need to launch this app exactly like the Zendesk app which is there on the Shopify app store as well as a direct option from their website. But the payment processing for subscriptions will happen directly on their website/app, not through Shopify. We need to charge the customer through our own choice of payment processing which is Stripe in our case. Because, if we want to launch the app on the Shopify app store with built-in internal payment processing (such as Gorgias) then we have only one option to use here called PayPal, and also Shopify takes a certain percentage of the generated revenue. Which is not an ideal option for us. So we need to plan this exactly like Zendesk to launch this app on the Shopify app store with an external payment processing option through our own website/app. You can check the Shopify app here https://apps.shopify.com/zendesk and zendesk.com for more details on how this works. With this method, the customer can search and install the app from the Shopify app store, or the customer can come to our website and install the app from our own website/app by subscribing directly to our website. So that we are not dependent entirely on Shopify and no need to pay anything from revenue to Shopify.

TECH STACK:

MERN stack.

Need to use AWS or/and Azure, or/and Google Cloud, and other tools and technologies accordingly. We should use only the best available tools and services for various things. We will approve the use of any tool or service before using it with the project. Need to use only after approval.

PRICE::

We offer this tool with a subscription plan starting from $50 per month based on usage limits such as the number of automation requests handled by the tool. We should also provide 14 days trial option.

THE DOMAIN NAME AND USE SETTINGS:

We should also provide the option and settings to use their store domain as a custom domain for frontend PWA. By default, it will show the domain as the following www.StoreName.revition.com. But if the merchant uses their domain for this then it should show as follows www.name.storename.com. They should have the option to select the name for a subdomain when they use their store domain as a custom domain for this frontend PWA app.

DESIGN FILES:

I will provide Figma design files to you. These are not responsive and interactive designs. These are only static designs with 1440*1024 resolution for desktops and mobile designs for frontend PWA.

Both the admin/merchant app (desktop view), as well as frontend PWA (Desktop and Mobile view), need to be designed as a responsive design.

ONBOARDING PROCESS:

We will have a few steps as part of this onboarding process where we gather details from the customer along with approvals for access-related things, app integration, etc. I will provide all the required things and steps to be added as part of the customer onboarding process.