



9.Scope Of Work

1. We will provide you a dashboard portal for VRM pool monitoring.
2. The dashboard will display the call relation information of the pool Relationship Managers.
3. Filters such as from date time, to date time, agent number/name will be available on the dashboard. Sort option will be available and data would be displayed in pagination in tabular form.
4. The dashboard will display the following Relationship Manager call details : Username, Mobile Number, Status, Available Timer, On Call Timer, Not Available Timer, Received Calls, Missed Calls, Email Id.
5. Using the pool monitoring dashboard Supervisors can login and check the call details of their mapped Relationship Managers.
6. Every 30 minutes Exotel will push a csv url to our middleware api.
7. After receiving the csv file url the middleware will consume the url and update the data in the middleware database.
8. This data will be used to display the call details on the dashboard.
9. One record per Relationship Manager will be shown during the selected time duration.
10. If required the Supervisor can see one record per 30 mins for each Relationship Manager by selecting relevant option in the filter.



11. There will be a provision ONLY for the Super Admin to add/remove/update Supervisor and the Relationship Managers and their mapping via a bulk file upload (We will work on the file template at the time of development). Last 5 uploaded files will be available for reporting purpose. Log file will also be available to show the Supervisor and the Relationship Managers which got successfully updated and the ones which failed along with the reason for failure.
12. Any new Supervisor when created will receive an email with the login details
13. There will be provisions for supervisors to change Password on login or request for new password incase he forgets the password. The password would be emailed to him.
14. Supervisor can only view data of the mapped pool relationship managers.
15. Superadmin can view all the data of all pool Relationship Managers. He can select a specific Supervisor and then see the data of all the Relationship Managers under him.
16. Superadmin can change(reset) the password for any particular user by entering the user number.
17. Expected Scales/volumes: 3 Super Admin access will be provided and this would be a pre-created user from the backend. Approx 50+ Supervisors are required who will be accessing the system, up to 500+ pool Relationship Manager data will be maintained in the dashboard and they will not have login access to the portal. Data needs to be maintained for 6 months post which it would get archived.