**Product Requirements Document (PRD)**

**Project Name:** TPRC Client Portal  
**Version:** v1.0  
**Prepared by:** Tim Schibli  
**Date:** 26/06/2025

**1. Project Overview**

Build a TPRC-branded client portal using HubSpot Memberships to provide clients access to their job orders, view and manage candidates, submit selection decisions, upload sponsorship and nomination documents, and track post-selection statuses.

**2. Goals & Objectives**

* Provide clients with real-time visibility into job orders and applicant statuses.
* Streamline applicant review, interview, and selection of workflows.
* Collect standard business sponsorship and nomination documents directly from clients.
* Reduce email overhead with automated notifications and milestone updates.
* Promote TPRC branding and improve client experience.
* Enable data capture on applicant rejections to improve recruitment processes.

**3. Core Features & Functionality**

**🔐 Authentication & Access**

* Login via **HubSpot Memberships** using associated HubSpot Contact records.
* Access is limited to job orders and applicants associated with the user's company.
* Support multiple user roles (admin, HR, hiring manager) **[pending HubSpot capability]**.
* Onboarding follows HubSpot best practices, including any available email verification.

**📁 Data Model**

* **Custom HubSpot Objects** used:
  + Job Orders: associated with Company
  + Applications: associated with Job Orders and Candidates
  + Assessments: associated with Applications (used to record Client Scorecards)
  + Provisions: associated with Company (holds sponsorship/nomination docs)
* Associations:
  + One job order → many applications
  + One application → one assessment
  + One applicant may have application history viewable via assessment records
* Association Labels
  + Application to Job Order
    - Reserved – one application has one job order
    - Selected – one application has one job order
    - Recommended – one application has many job orders
    - Rejected – one application has many job orders

**Portal Sections**

**📄 Company Details**

* Company Details
  + Allow client to see Company Details where they can update their details
* Sponsorship/Nomination:
  + Clients can upload up to 5 documents + answer 20 questions **[integrate FileInvite?]**
  + Storage in HubSpot and/or SharePoint/AWS
  + Statuses shown to client for transparency
* Job Orders:
  + See all Job Orders inside the company. Properties are non-editable

**👤 Applicant Management (Inside Job Order)**

* Clients can view for each applicant:
  + Full name, Age, Location
  + CV File (branded TPRC)
  + Test scores (or URL to results)
  + Documentary evidence (images/videos)
* Applicant Actions:
  + Reserve/Schedule Interview (via HubSpot scheduling)
  + Approve (with reason + notes)
  + Reject (with reason + notes)
* Client Assessment (Scorecard):
  + Created automatically when applicant reaches "Line-up Ready" of Client Job Order
  + Editable form embedded from HubSpot
  + Used to approve or reject applicant
* Actions trigger workflows:
  + **Approve:** Send applicant to Letter of Offer stage
  + **Reject:** Return applicant to previous pooling Job Order and disassociate from job order

**📄 Post-Selection View**

* Visibility into post-selection pipeline:
  + Sub-stages include visa processing, medical, COE, deployment prep, etc.
  + Presented via **checklist view**

**📬 Notifications & Automation**

* Real-time alerts for key events (e.g., selection made, interview scheduled)
* Fortnightly email digest with:
  + Changes in applicant status
  + Summary of document uploads pending
* Clients only receive updates for their own associated data

**📊 Reporting (Out of Scope for MVP)**

* Insights on whether client has viewed
* Rejection Insights Dashboard (internal use):
  + View rejection reason categories and free text notes
  + Not part of initial portal build

**🎨 Branding & Support**

* Follows existing **TPRC brand guidelines**
* Visual consistency with TPRC public site
* Access to:
  + HubSpot Knowledgebase articles
  + Support ticket submission via form

**4. Tech Stack**

* **Front-end**: HubSpot CMS Custom Modules (HubL, HTML/CSS, JS)
* **Authentication**: HubSpot Memberships
* **Back-end/Logic**: HubSpot Workflows + Custom Object APIs
* **Storage**: HubSpot File Manager, AWS/SharePoint (to be confirmed)

**5. MVP Scope & Timeline**

**MVP Deliverables (2 Weeks?):**

* Portal login via HubSpot Memberships
* Company view with:
  + Job Order list
  + Job Order detail with associated applicants
* Ability to:
  + View applicant info
  + Submit sponsorship/nomination documents
* TPRC branding applied
* Client support access (knowledgebase + ticket form)

**Post-MVP Phases:**

* Phase 2: Interview scheduling, Assessment Scorecard, real-time workflows
* Phase 3: Post-selection tracking, checklists, notification system
* Phase 4: Dashboards and advanced analytics (internal use)

**6. Open Questions / To Be Finalized**

* Exact scorecard fields for Client Assessment
* Document checklist for sponsorship/nominations
* Role-based permission nuances in HubSpot Memberships

Estimation MVP 2 weeks

**Week 1**

1. **Day 1 – Kick‑off & Setup**
   1. Finalize scope: login, job‑order list/detail, applicant view, document upload, support
   2. Enable Memberships and define Member Type in HubSpot
2. **Day 2 – CRM Modeling & Permissions**
   1. Confirm “Job Order” object and “Applicant” association
   2. Configure portal‑page access rules
3. **Day 3 – Branding & Templates**
   1. Select or scaffold CMS templates
   2. Apply TPRC styles (logo, colors, fonts)
4. **Day 4 – Job Order List Page (Dev)**
   1. Query current company’s Job Orders
   2. Build list layout with CSV‑style table/cards
5. **Day 5 – Job Order Detail + Applicants (Dev)**
   1. Pull Job Order record and associated Applicants
   2. Show key applicant fields

**Week 2**

1. **Day 1– UX Polish**
   1. Add filtering and search on lists
   2. Ensure mobile responsiveness
2. **Day 2 – Internal Testing**
   1. Verify login flows, data isolation, and file uploads
   2. Perform cross‑browser checks
3. **Day 3– Pilot Deploy**
   1. Create a pilot portal account for one client
   2. Collect early feedback
4. **Day 4– Fixes & Enhancements**
   1. Triage pilot‑reported issues
   2. Implement quick UI/UX tweaks
5. **Day 5 – Go‑Live & Handover**
   1. Swap DNS or share the portal link with clients
   2. Deliver the client guide and support contacts