

**Product Person Name:** Mohit Pinjani

**POD Name:** Product Delivery - Placements/Job Panel

**Closing Date:** 07th March 2022

**Version:** 01

**Impacted Apps:** T&P CRM Panel

**KPIs (Key Performance Indicator):** NA

**User Stories**

* As a career coach, I want to have an email sent to the aspirant as well as myself when a call has been requested by the aspirant.
* As a career coach, I want to have an email sent to the aspirant as well as myself when the requested call by the aspirant has been attended and the query is solved.
* As a career coach, I want to receive an automatic reminder email if the query is not resolved under the TAT time i.e. 3 hours.
* As a career coach, I want to receive an automatic reminder email if the query is not resolved after the TAT time is over i.e. after 3 hours.
* As a career coach, I want to have an email sent to the aspirant as well as myself when a call back has been placed to the requested aspirant but the aspirant is busy or could not pick up the call.
* As a career coach, when I place a call to the aspirant through CRM, I want to have an email sent to the aspirant as well as myself when the call is connected.
* As a career coach, I want to have an email sent to the aspirant as well as myself when I place a call to the aspirant through CRM and the aspirant does not pick up the call.
* As a career coach, I want the “Resolve” button to be enabled even when I make a call to the aspirant from the CRM.
* As a career coach, I want the “Recall” button to be enabled when I make a call to the aspirant from the CRM.

**Feature Details**

As a career coach, I want to have an email sent to the aspirant as well as myself when a call has been requested by the aspirant.

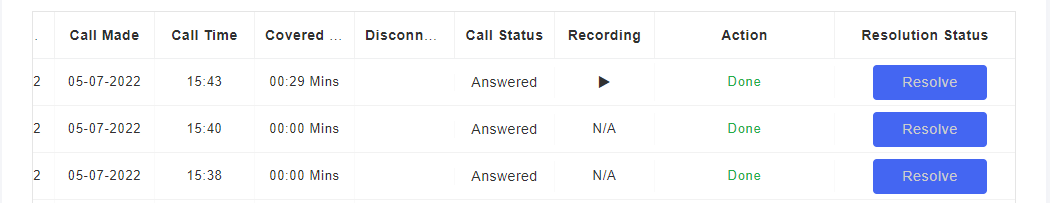
**Detailed Description**

1. When a call has been requested by the aspirant, there should be an email sent to the aspirant as well as to the career coach.
2. **Trigger -** Call Request visible in Coaches Call tab
3. **Communication instance to be triggered -** Email
4. **Email content link -** [Aspirant books call to CC](https://drive.google.com/file/d/15bp5QxBrHDrGTe8fpDdHTWV5KF-qdTEo/view?usp=sharing)
5. **Email to be tagged in CC -** [dhawal@expertrons.com](mailto:dhawal@expertrons.com), [kamran@expertrons.in](mailto:kamran@expertrons.in), [apurva@expertrons.com](mailto:apurva@expertrons.com)

**Feature Details**

As a career coach, I want to have an email sent to the aspirant as well as myself when the requested call by the aspirant has been attended and the query is solved.

**Detailed Description**

1. There should be an email sent to the aspirant as well as the career coach when the call has been attended by the coach and the query of the aspirant has been solved.
2. Email should be triggered once the career coach clicks on the “Resolved” button in the CRM as shown below. 
3. **Trigger -** Resolve Button gets blocked in front of the Request
4. **Communication instance to be triggered -** Email
5. **Email content link -** [CC resolved query through resolve - Aspirant](https://docs.google.com/document/d/11zoe8CeX-adIRZkicuANYRPGPL5F73zTgTJAyWAxmCY/edit)
6. **Email to be tagged in CC -** [dhawal@expertrons.com](mailto:dhawal@expertrons.com), [kamran@expertrons.in](mailto:kamran@expertrons.in), [apurva@expertrons.com](mailto:apurva@expertrons.com)

**Feature Details**

As a career coach, I want to receive an automatic reminder email if the query is not resolved under the TAT time i.e. 3 hours.

**Detailed Description**

1. An automatic reminder email should be sent to the career coach if the query of the aspirant is not solved under the given TAT time i.e. 3 hours.
2. This reminder email should be sent within 2 hours of the given TAT time.
3. **Trigger -** Call request is still visible in Recent Calls Tab after 2 hours of Call Request time
4. **Communication instance to be triggered -** Email
5. **Email content link -** [Career Call Not Resolved Query in 2 hours](https://docs.google.com/document/d/1M99e5B0SMwuojIbKTXgw27ydWGw98mbY5mEOR6qTnZE/edit)
6. **Email to be tagged in CC -** [dhawal@expertrons.com](mailto:dhawal@expertrons.com), [kamran@expertrons.in](mailto:kamran@expertrons.in), [apurva@expertrons.com](mailto:apurva@expertrons.com)

**Feature Details**

As a career coach, I want to receive an automatic reminder email if the query is not resolved after the TAT time is over i.e. after 3 hours.

**Detailed Description**

1. An automatic reminder email should be sent to the career coach if the query of the aspirant is not solved even after the TAT time is over i.e. 3 hours.
2. This reminder email should be sent after the TAT time is over.
3. **Trigger -** Call request is still visible in Recent Calls Tab after 3 hours of Call Request time
4. **Communication instance to be triggered -** Email
5. **Email content link -** [Career Coach Not Resolved Query after 3 hours](https://docs.google.com/document/d/1RGKHdx9JHSaVWvH7zoYIljD3R9h3y9JqCIsoHhJliXQ/edit)
6. **Email to be tagged in CC -** [dhawal@expertrons.com](mailto:dhawal@expertrons.com), [kamran@expertrons.in](mailto:kamran@expertrons.in), [apurva@expertrons.com](mailto:apurva@expertrons.com)

**Feature Details**

As a career coach, I want to have an email sent to the aspirant as well as myself when a call back has been placed to the requested aspirant but the aspirant is busy or could not pick up the call.

**Detailed Description**

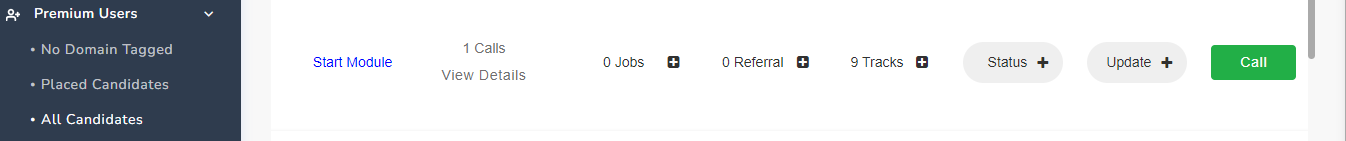
1. There should be an email sent to the career coach as well as the aspirant when a career coach calls back to the aspirant and the aspirant does not pick up the call.
2. In this case, the call has been first requested by the aspirant.
3. **Trigger -** Call is visible in Recent Calls tab and marked as "Not Answered"
4. **Communication instance to be triggered -** Email
5. **Email content link -** [CC call missed by aspirant - aspirant](https://docs.google.com/document/d/113l6dLlBm7eD5YDZl9SegJSh01srdZ0-bV6ywsMXMPc/edit)
6. **Email to be tagged in CC -** [dhawal@expertrons.com](mailto:dhawal@expertrons.com), [kamran@expertrons.in](mailto:kamran@expertrons.in), [apurva@expertrons.com](mailto:apurva@expertrons.com)

**Feature Details**

As a career coach, when I place a call to the aspirant through CRM, I want to have an email sent to the aspirant as well as myself when the call is connected.

**Detailed Description**

1. An automatic email should be sent to career coach and aspirant when the career coach has placed a call to the aspirant through CRM by going into the “All Candidates” tab as shown below.



1. This call that has been placed by the career coach will not necessarily have a query because this call has been placed by the career coach to the aspirant.
2. After the call is picked by the aspirant and the call is connected, an email should be triggered after the call gets over.
3. **Trigger -** Call visible in Recent Calls but Resolve button is already blocked and it is marked as "Answered"
4. **Communication instance to be triggered -** Email
5. **Email content link -** [CC called aspirant without query - Aspirant](https://docs.google.com/document/d/1k0_5gjEaZdsKrqmTXH9S3wGDjWNaUTZ0wKvWRo-SEFs/edit)
6. **Email to be tagged in CC -** [dhawal@expertrons.com](mailto:dhawal@expertrons.com), [kamran@expertrons.in](mailto:kamran@expertrons.in), [apurva@expertrons.com](mailto:apurva@expertrons.com)

**Feature Details**

As a career coach, I want to have an email sent to the aspirant as well as myself when I place a call to the aspirant through CRM and the aspirant does not pick up the call.

**Detailed Description**

1. An automatic email should be sent to career coach and aspirant when the career coach has tried calling back the aspirant but the aspirant has not picked up the call.
2. In this scenario , the call has been placed by the career coach to the aspirant through CRM under the “All Candidates” tab.
3. **Trigger -** Call is visible in Recent Calls tab and marked as "Not Answered"
4. **Communication instance to be triggered -** Email
5. **Email content link -** [CC call missed by aspirant - aspirant](https://docs.google.com/document/d/113l6dLlBm7eD5YDZl9SegJSh01srdZ0-bV6ywsMXMPc/edit)
6. **Email to be tagged in CC -** [dhawal@expertrons.com](mailto:dhawal@expertrons.com), [kamran@expertrons.in](mailto:kamran@expertrons.in), [apurva@expertrons.com](mailto:apurva@expertrons.com)

**Acceptance Criteria**

1. The calls can be done consecutive number of times irrespective of the day and date,
2. If the aspirant does not pick up the call on the first time, the call status will be marked as “Not Answered”.
3. If the aspirant does not pick up the call on the second time, the call status will still be marked as “Not Answered”.
4. This can go up to “N” number of times till the aspirant does not pick up the call.
5. New call entries will be dynamic depending on the number of times the career coach has made a call to the aspirant.
6. New call log/entries will be saved along with the other call logs under “Recent Calls”.

**Feature Details**

As a career coach, I want the “Resolve” button to be enabled even when I make a call to the aspirant from the CRM.

**Detailed Description**

1. Currently, when a career coach makes a call to the aspirant from CRM, whether the call is answered or not, it directly gets stored under the “Recent Calls” tab in “Coaches Call” like every other entry.
2. The “Resolve” button is disabled right now when the call has been made from the CRM to the aspirant.
3. We want to have the “Resolve” button enabled even when the career coach makes a call to the aspirant from the CRM even without a query request.
4. The “Action” status will be marked as “Done" when the career coach clicks on the “Resolve” button and updates the comment box.
5. Currently as soon as the “Resolve” button is clicked, there is already an email that is being automatically triggered.
6. Now, the comment that has been updated by the career coach in the comment box will be mapped to this email and will be sent in the body content of the email.
7. Along with the email, this comment will also be updated and shown in the “Track Activities” tab.

**Acceptance Criteria**

1. The “Action” status will not be marked as “Done” until unless the career coach has clicked on the “Resolve” button and updated the comment box and saved it.

**Feature Details**

As a career coach, I want the “Recall” button to be enabled when I make a call to the aspirant from the CRM.

**Detailed Description**

1. Currently, when there is no call requested by the aspirant, there is no “Recall” button in the “Coaches Calls” tab.
2. We want to add a “Recall” button besides “Resolve” button even without a query request by the aspirant.
3. As soon as the career coach clicks on the “Recall” button, the call will be placed again to the aspirant.
4. There will be no new entry made of the call that has been placed again to the aspirant. Instead, it will update in the same entry.
5. The “Action” status will be marked as “Done" when the career coach clicks on the “Resolve” button and updates the comment box.
6. We will show the “Recall” button till the time the career coach has clicked on the “Resolve” button and updated the comment box.