Call Centre Agent App - PRD

Platform Commons

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Version 0.5

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Screen Design: <https://xd.adobe.com/view/24355ab7-55f1-4cfb-9b2b-bbb8a049a4ff-7166/>

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# Introduction

## Purpose of the document

This document outlines the feature list for the Saajha caller app. It briefly covers the user-personas and features within each portal.

The purpose of creating the app is to digitize the connection between callers with parents to assist Saajha’s educational initiatives.

## Project Summary

| Project Name: | Saajha |
| --- | --- |
| Project Team: | Prashant - Project Lead  Utkarsha - Business Analyst  Aashish - Tech Architect  Amit - Design Lead |
|  |  |
|  |  |

## User Personas

| Persona | Who are these? | Needs | Expectations |
| --- | --- | --- | --- |
| Call Center Agent  (Volunteers, Hired Staff) | Volunteers appointed as Call Center Agents.  Call Center Agents hired to support the parent ecosystem. | Call parents usually with an agenda, educate them on their areas of interest, fill forms/notes, add new parent phone numbers(if any), view work done | Quick ways to make calls, find relevant information quickly before/during/after calls, easily view work done and what’s upcoming up |
| Project Manager | Project Managers who manage callers/ volunteers from team Saajha | Create parent roster for callers/volunteers to call, review work done, and assign upcoming work | Fast, reliable ways to create and assign work, dashboards to view work done/pending. (Not expected from the caller app ) |
| Admin | Leadership at Saajha / Leadership at Platform Commons | Provide access to the app to new callers/volunteers/project managers/parents, review work done and work pending, view reports such as parent outreach, expenditure overtime, etc | Easy ways to manage callers/volunteers/project managers/parents and track parent outreach and expenditure |

# Functional Objectives

| **Epic** | **Feature Name** | **User Story** |
| --- | --- | --- |
| **Sign Up** | Admin registers caller | As an admin, I should be able to create an account for an Agent so that the caller can log in to the app. |
| Caller self registers | As a caller, I should be able to create an account for myself, and wait for admin approval. |
| Admin approval | Admin should be able to view pending registrations of call center agents and approve, reject their applications.  This should trigger a Congratulations, or Sorry mail to the respective user. |
| **Login** | Login | As a caller, I should be able to login after an account is created on the app so that I can perform daily tasks |
| **Parent Directory** | Parent Index List | As a caller, I will be able to view a complete list of parents assigned to me which can be filtered on different parameters like Gender, Age, Status, Areas of Interest etc. |
| **Roster** | Call Roster: randomly generated list | As a caller, I should be able to see a list of phone numbers, parent names, and child/children names so that I can click on the parent name to view the parent’s profile |
| Tags with parents | The tags should identify parents in the list that help in knowing more about the call, and the parent. These could be   * ‘nth call’ today * Lower than average rating * Didn’t pick (n) |
|  | Call Roster: system assigned list | The system should assign parents to me based on.   * Algorithm * Manual Mapping done by admin using the admin portal |
|  | Call Roaster, quantum of work | * A minimum of 30 parents on any given full working day, and 15 for half working day. * A maximum of 40 parents on any given full-time working day. * Any reassignment by the admin should publish to the Call Center Agent app on an immediate basis and this change to go as a notification ring. |
|  | Roaster Algorithm | Refer admin PRD |
| **Parent Onboarding** | Home Visit | As a caller, I should be able to take notes, fill form, etc when doing a home visit (in person) so that I’m able to log the information and refer it later |
| **Call** | Call a parent | As a caller, I should be able to call a parent from the parent profile so that I can talk to the parent about the area of interest. |
| Discover area of interest | As a caller, I should be able to discover a parent’s area of interest so that I’m able to learn and talk about it in the current or next call |
| **Forms** | Fill a form | As a caller. I should be able to fill a form during and after a call so that I’m able to store the information for later reference |
| **Notes** | Add notes | As a caller, I should be able to add notes during and after a call so that I am able to reference these notes at a later date |
| **Learn** | Access content | As a caller, I should be able to access app content (videos/blogs) during and after the call so that I’m able to answer any quick queries or learn more on the area of interest |
| **Dashboard** | Caller dashboard | As a caller, I should be able to see my caller dashboard so that I can see the status of my call so far |
| **Settings** | Language support | As a caller, I should be able to set the language of the app (English/Hindi) so that I can see the caller app text in the language selected |

# Epics & User Stories

## Epic: Sign Up

### Title: Admin registers caller

User story: As an admin, I should be able to create an account for a caller so that the caller can login to the app.

**Description:**

1. Admin logs into the admin app
2. Admin clicks "User Management"
3. On the "User Management" page, admin clicks "Create new user"
4. Admin fills the:

* user first name (\*): textbox,
* last name (\*): textbox,
* phone number (\*): textbox with numbers only,
* designation (\*): single-select dropdown with options: Leadership, Admin, Project Manager and Caller,
* temporary password (\*): password validated textbox,
* confirm password (\*): password validated textbox,
* email id: email id validated textbox,
* Fields marked (\*) are mandatory.

1. Admin clicks the "Save" button to save the user. Admin clicks the "Cancel" button to cancel any changes made.
2. On click of "Cancel", show popup "Changes not saved. Are you sure you want to cancel?" with 2 buttons: "Yes" and "No". On click of "Yes", no changes saved and main page is loaded. On click of "No", the "Create new user" page is displayed with the changes as is. These changes are not saved until the admin clicks the "Save" button

**Acceptance criteria:**

1. Mandatory fields should be validated
2. "Save", "Cancel" buttons should function as mentioned in the description
3. The popup should function as mentioned in the description

**Business Rules:**

1. BR1. Admin can register one caller through one unique email ID only.

### Title: Caller self-registers

**User story**: As a caller, I should be able to create an account for myself so that I can login to the app.

**Description:**

1. Caller downloads the caller app from the playstore
2. Admin sees "Register" on the screen
3. Caller clicks "Register"
4. A new screen shows where the caller fills the:

* first name (\*): textbox,
* last name(\*): textbox,
* phone number (\*): textbox with numbers only,
* designation (\*): single-select dropdown with options: Leadership, Admin, Project Manager and Caller,
* password (\*): password validated textbox,
* confirm password (\*): password validated textbox,
* email id: email id validated textbox,
* Fields marked (\*) are mandatory.

1. Caller clicks the "Register" button to create an account.
2. On click of "Back", the caller is directed to the main page that shows login and register options

**Acceptance criteria:**

1. Mandatory fields should be validated
2. Click of "Register" button should create an account on the app.

**Business Rules:**

1. BR2. Caller can self-register one caller through one unique email ID only.

## Epic: Login

### Title: Login

**User story**: As a caller, I should be able to login after an account is created on the app so that I can perform daily tasks

**Description**:

1. Caller can either login with Email/OTP
2. In case the caller chooses to login with Email, the app will ask for caller’s email id (\*) and password (\*). Fields marked (\*) are mandatory.
3. The caller will enter the email id and password into the app.
4. If correct, the caller will log into the app and see the parent’s roster.
5. If incorrect, the app flushes the existing email id and password and shows the message “Email/password incorrect. Please retry.”
6. There’s no limit to how many times a caller can retry login via email back-to-back.
7. In case the caller chooses to login with OTP, the app will send a 6-digit OTP to the caller’s registered phone number.
8. The caller will enter the OTP received on the caller’s registered phone number into the app. This is a mandatory step.
9. The caller will see a resend OTP that resends the OTP to the caller’s registered phone number. 5 attempts to resend OTP will be allowed back-to-back.
10. Each time the caller clicks “Resend OTP”, the app shows a message “OTP has been sent to your registered mobile number. You’ve <#number\_of\_attempts\_left> attempts left to login via OTP”.
11. The <#number\_of\_attempts\_left> will be dynamically calculated based on the number of resend attempts left out of 5. e
12. When <#number\_of\_attempts\_left> reaches 0, the app should show a message “Your limit to send OTP has expired. Please login after 15 mins”
13. If an account already exists, the app will display the message “Account already exists. Please login.”
14. Access will be denied until the account details are authenticated.

**Acceptance criteria:**

1. Caller should either login with Email/OTP
2. The app should allow/deny access as mentioned in the description
3. The reattempts should be calculated dynamically as mentioned in the description
4. All other cases should work appropriately as mentioned in the description.

**Business Rules:**

1. BR3. Caller can login only via one device at a time
2. BR4. Caller should be able to login via email in case there are issues with receiving OTP
3. BR5. Caller should receive the OTP only on the registered mobile number entered by the admin/caller during resgistration

## Epic: Roster

### Title: Call Roster: randomly generated list

**User story**: As a caller, I should be able to see a list of phone numbers, parent names and child/children names so that I can click on the parent name to view the parent’s profile

**Description:**

1. Caller logs into the caller app
2. Caller sees a list of phone numbers to call. Each phone number also contains:
3. Parent name, Number of child/children, Name of child/children
4. Parent name and Name of child/children are clickable
5. Caller clicks the parent name and sees the parent profile
6. Caller clicks the child name and sees the child profile

**Acceptance criteria:**

1. Caller should be able to navigate across the list of phone numbers.
2. Parent name and Name of child/children are clickable
3. Caller clicks the parent name and sees the parent profile
4. Caller clicks the child name and sees the child profile

**Business Rules:**

1. BR6. The app should not allow the caller/admin/project manager to add the same roster record again
2. BR7. Until the record is saved, the parent/child profiles will not be clickable since it’ll only be a record with a phone number

### Title: Call Roster: system assigned list

**User story**: As a caller, I should be able to receive parent’s with similarities such as language, age group etc so that I’m able to build rapport with the parent faster

**Description:**

1. Caller logs into the caller app
2. Caller sees a list of phone numbers to call.
3. This list of phone numbers is auto-generated by the app based on “sticky” criteria such as state, language etc
4. Each phone number also contains: Parent name, Number of child/children, Name of child/children
5. Parent name and Name of child/children are clickable
6. Caller clicks the parent name and sees the parent profile
7. Caller clicks the child name and sees the child profile

**Acceptance criteria:**

1. Caller should be able to navigate across the list of phone numbers.
2. Parent name and Name of child/children are clickable
3. Caller clicks the parent name and sees the parent profile
4. Caller clicks the child name and sees the child profile

**Business Rules:**

1. BR8. The app should have a logic that creates parent roster based on "sticky" criteria such as state, language etc
2. BR9. The app should not assign the same record to multiple callers at the same time
3. BR10. Until the record is saved, the parent/child profiles will not be clickable since it’ll only be a record with a phone number
4. BR11. The app will auto-assign records to the caller once the roster is empty such that there are atleast 50 phone numbers for the caller to call

## Epic: Parent Onboarding

### Title: Home Visit

**User story:** As a caller, I should be able to take notes, fill form, etc when doing a home visit (in person) so that I’m able to log the information and refer it later

**Description:**

1. Caller clicks the parent name and sees the parent profile from the roster during a home visit
2. The parent profile shows:

* Parent profile photo
* First name
* Last name
* Age
* Residence
* Gender
* Area of interest
* Number of children
* Parent status (active / opt out)
* Call history
* Forms
* Notes

1. Caller is able to click on the parent profile, notes, fill form, area of interest to modify the information during the home visit.

**Acceptance criteria:**

1. Caller is able to click on the parent profile, notes, fill form, area of interest to modify the information during the home visit.

**Business Rules:**

1. BR12. The app will maintain a change/activity log that tracks who made what changes and when.

## Epic: Call

### Title: Call a parent

**User story:** As a caller, I should be able to call a parent from the parent profile so that I can talk to the parent about the area of interest (2 ways to call: app-app; app-phone, as Saajha)

**Description:**

1. Caller clicks area of interest (such as admissions, report, PTA etc) from the parent profile
2. Caller sees the ability to call the parent and talk about the area of interest clicked in step 1
3. Caller clicks the "call" button to make a call
4. Caller calls the parent either via app-to-app ot app-to-phone

**Acceptance criteria:**

1. Caller should be able to make a call (either app-to-app or app-to-phone) from the area of interest section of parent's profile

**Business Rules:**

1. BR13. The caller can call one parent at a time.
2. BR14. The caller can call the same parent multiple times
3. BR15. The app should be able to ring the phone/app of the parent when the caller calls

## Epic: Discover area of interest

### Title: Call a parent

**User story**: As a caller, I should be able to discover a parent’s area of interest so that I’m able to learn and talk about it in the current or next call

**Description:**

1. Caller clicks the parent name and sees the parent profile from the roster during a home visit or while on call
2. Caller is able to click on the parent profile, search, add and save more areas of interest for the parent

**Acceptance criteria:**

1. Caller is able to click on the parent profile, search, add and save more areas of interest for the parent

**Business Rules:**

1. BR16. The app should show a list of areas of interest for the caller to choose from
2. BR17. The caller can assign one or more areas of interest at a time during a home visit or while on call

## Epic: Forms

### Title: Fill a form

**User story:** As a caller. I should be able to fill a form during and after a call so that I’m able to store the information for later reference

**Description:**

1. Caller is either on-call with the parent or has completed the call
2. Caller sees a "Fill a form" button during and after the call
3. Caller clicks the "Fill a form" button during or after the call
4. Caller sees the primary form (as provided by Saajha). These would be a set of questions which the caller can fill during or after the call.
5. Caller saves the filled form
6. The form is saved against the phone number record

**Acceptance criteria:**

1. Caller can fill multiple forms across a phone number record
2. Caller should be able to fill a form during and after the call

**Business Rules:**

1. BR18. The app should be able to create multiple forms for the same phone number in succession
2. BR19. The app should record change/activity log associated with each form

## Epic: Notes

### Title: Add notes

**User story:** As a caller, I should be able to add notes during and after a call so that I am able to reference these notes at a later date

**Description:**

1. Caller is either on-call with the parent or has completed the call
2. Caller sees a "Notes" button during and after the call
3. Caller clicks the "Notes" button during or after the call
4. Caller is able to add notes during or after the call
5. Notes are autosaved (as long as they're not blank)
6. The notes are saved against the phone number record

**Acceptance criteria:**

1. Caller can fill mutliple notes across a phone number record
2. Caller should be able to add notes during and after the call

**Business Rules:**

1. BR20. The app should be able to create multiple notes for the same phone number in succession
2. BR21. The app should record change/activity log associated with each form

## Epic: Learn

### Title: Access content

**User story:** As a caller, I should be able to access app content (videos/blogs) during and after the call so that I’m able to answer any quick queries or learn more about the area of interest

**Description:**

1. Caller is either on-call with the parent or has completed the call
2. Caller sees a "Content" button during and after the call
3. Caller clicks the "Content" button during or after the call
4. Caller is able to access blogs/videos during or after the call
5. The content (videos/blogs) is centred to the area of interest of the call
6. Caller can upvote/downvote content (videos/blogs)

**Acceptance criteria:**

1. Caller can access mutliple content across an area of interest
2. Caller should be able to access content (videos/blogs) during and after the call
3. Caller can upvote/downvote any content on the app

**Business Rules:**

1. BR22. The app should show a list of content for the caller to refer

## Epic: Dashboard

### Title: Caller dashboard

**User story:** As a caller, I should be able to see my caller dashboard so that I can see the status of my call so far

**Description**:

1. Once the call is done, the caller clicks the End Call button on the app to end the call
2. The app assigns the call one of the following call status:

* Call connected: If the parent picks the call, it'll be call connected. The caller will assign one of the status manually:
  + Active: The parent is interested in Saajha's program.
  + Reschedule: The parent asked for the call to be rescheduled. The caller will be able to add the date-time when to call the parent.
  + Opt out: The parent is not interested in Saajha's program.
* Call not connected: If the parent does not pick the call, it'll be call not connected. The caller will assign one of the status manually:
  + DND: The parent's phone number is in DND.
  + Wrong number : The parent's phone number is incorrect.
  + Failed: The parent did not pick the call

1. Phone numbers that are in active/reschedule/failed status should be added to the roster again
2. Phone numbers that are in opt out/ DND status should not be added to the roster again

**Acceptance criteria:**

1. The app will assign either "Call connected" or "Call not connected" status as mentioned in the description
2. The caller will assign either "active","reschedule",failed", "opt out","DND", "wrong number" status manually as mentioned in the description
3. Phone numbers that are in active/reschedule/failed status should be added to the roster again
4. Phone numbers that are in opt out/ DND status should not be added to the roster again

**Business Rules:**

1. BR23. The caller should be able to change any manual status at any point in time
2. BR24. The app should record change/activity log associated with each status change
3. BR25. One record should only have one status at any point in time

## Epic: Settings

### Title: Language support

**User story:** As a caller, I should be able to set the language of the app (English/Hindi) so that I can see the caller app text in the language selected

**Description:**

1. Caller logs in to the app and goes to settings
2. Caller sees a language option.
3. Caller clicks the language option and is able to select one of the 2 languages: English (default) and Hindi
4. Selecting the language should change all text in the app to the selected language

**Acceptance criteria:**

1. The caller can select only one of the 2 languages: English (default) and Hindi
2. Selecting the language should change all text in the app to the selected language

**Business Rules:**

1. Caller can change the language at any point in time
2. There’s no change to the input keyboard in spite of a language change. For example, selecting Hindi as the language does not change the input keyboard layout to Hindi. The default keyboard set by the caller in the smartphone shows up

# Non-Functional Objectives

## Reliability

* The website will be operational 99.9% of the time
* Downtime for maintenance or due to failure will not exceed more than 4 hours

## Usability

* Users should be able to find appropriate information in less than 3 clicks, wherever possible
* Users should be able to use the app immediately after installing

## Performance

* The app should be able to support at least 50,000 simultaneous callers.
* The load time for any page should not exceed 3 seconds on an 10-18 Mbps connection

## Security

* The app shall provide secure access (https) to its callers, with each caller seeing only their information post login.
* Certain admin will be able to see some caller data
* Passwords should be encrypted
* Caller will be able to access pages depending on the roles and permissions assigned

## Supportability

* The app should have responsive UIs that’ll allow viewing them on iPhones, Android phones, iPads, desktops and laptops
* The app will support Mozilla versions 3.0 or later, Chrome 84.0.4147 or later, Safari 13.1.2 or later.

# Wireframes

Access the wireframes for the Call Centre App [here](https://xd.adobe.com/view/24355ab7-55f1-4cfb-9b2b-bbb8a049a4ff-7166/).

# Link to Call Notes

Access the call notes [here](https://docs.google.com/spreadsheets/d/1dheE9UuqWZgFAQ4e6uq2ZYtHTah_FjsBQDxsYAOyVq0/edit?usp=sharing).

# Revision History

| Name | Date | Reason For Changes | Version |
| --- | --- | --- | --- |
| Utkarsha Saswadkar | Aug 27, 2021 | Creation of SRS | 0.1 |
| Utkarsha Saswadkar | Sept 06, 2021 | Updates | 0.2 |
| Utkarsha Saswadkar | Sept 09, 2021 | Updates to the feature list | 0.3 |
| Satyam Gambhir | October 20, 2021 | Add more features | 0.4 |

**Questions**

1. Are we building a new app altogether or do we want to modify the existing app?

**Notes - SM:**

* Can Saajha Connect be improved instead of creating a new app?
* Learn Feature - couldn’t understand
* Dialing a call -
  + A better method to save caller’s time - e.g. when call gets patched, Fac gets notified and she picks up the phone
  + Dial timer?
  + To maintain privacy, numbers are not visible to Facs on screen (screen 13)
* Screen 14 - Active/Successful instead of Resolved category
* Pending calls sections :
* Rescheduled calls segregation
* Notification for rescheduled calls
* Date filters in pending rescheduled and current calls.
* Reschedule call screen 16 -
  + *One parent shouldn’t be called more than once on the same date. So the reschedule date should be on the next day*
  + Notification popup - when a call is scheduled, a caller gets a notification to call the parent
  + No two calls to be rescheduled for the same time+date
* Opt-out
  + More reasons to be added
  + DND, wrong numbers
  + Parent has no queries - can be removed as an option
* Productivity
  + How is this helping the Facts
  + Point of contention?

Notes - Overall

Dashboard:

1. In Summary - if we can see the total target and targets achieved. Also, can add datewise targets and targets achieved data table with Date filter
2. Performance - only my feedback, rest can be removed. As it’s not that helpful for the callers
3. Productivity- It would not be helpful for parents. We can add total dialed numbers here only.

Rosters

1. Call status could be- Active, Reschedule and opt-out
2. The status of each call should be shown with the respective numbers.
3. Notes format can be changed
4. We can remove inbound but inbound calls detail can add in the call history. Would be great if we can link with the WhatsApp bot and IVRS so that we can see how many times we have communicated with these users.

Call on 23 Sep 2021:

* On what criteria will calls be assigned to another Fac?
* Think on overdue pending calls - if overdue is more than 10, calls get assigned to another Fac
* What has to be removed from the Notes feature?
* Share the new apk and code base with the platform commons