RSOFT TECHNOLOGIES PRIVATE LIMITED

Important documents to refer

- Report
  - New Page
  - New Page

Report

Report

New Page

CRM

CRM stands for Customer Relationship Management. CRM software is designed to help business offer an impeccable customer experience, from the 1st prospect interaction to deal closure and beyond. The CRM system can give you a clear over view of the customer/client. One can see everything in one place. A simple customizable dashboard that can tell a customer's previous history, the status of their orders, any outstanding customer service issues and more. Marketers can use a CRM solution to manage and optimize campaigns and lead journeys with a data- driven approach. This helps to ensure that customer needs are at the forefront of business process and invocation cycles.

Though CRM systems have traditionally been used as sales and marketing tools, client service and support is a rising segment of CRM and a critical piece in managing a holistic client relationship. Today's client might have an issue in one channel-say Facebook, and then switch to email or telephone to resolve it in private. A CRM platform lets you manage the enquiry across channels without losing track and gives sales, service and marketing a single view of the customer to inform their activities.

ADVANTAGES OF USING RSOFT:

A Cloud Based CRM Platform offers-----

Faster Deployment.

Automatic software updates.

Cost-effective and scalability.

The ability to work from anywhere, on any device.

Increased collaboration.

ENQUIRY MODULE:

The enquiry module typically refers to a part of the system used for managing and tracking client inquiries. This helps the sales team to manage leads and provide better customer service.

- Enquiry is the first and streamlined process that confirms whether it is a lead that needs follow-ups or a duplicate lead.

- Once Enquiry enters the module it won't be missed at any point of time a quick response will be given without delay.

- Enquires are filtered with the help of CRM for good Lead tracking where the initial point of contact can confirm that.

LEAD MODULE:

Leads are people/client who are in the first stage of the sales process. If they clear the first stage, they become prospects and move on to the second stage of the process.

- When Lead reaches Dashboard, the Lead contact number or mail Id checked whether its New, Re-engaged, or junk lead.

- Leads are differentiated and extracted with various source, Medium.

- Once you start using CRM, leads won't be missed.

- An auto welcome message to the leads via WhatsApp, Email is sent. Also one can send project brochures and location this helps in building trust and increases customer interest.

- Manually adding the lead option and data import options are available.

- The sales team verifies whether each lead is a prospect or a lost lead, thus helping a filtration process.

- Multiple checks are performed to validate the lead, which are based on artificial intelligence.

- The dashboard is set-up with new lead notification and also with follow-up reminders for leads.

CALLS:

The priorities of calls are differentiated, with options being provided based on both incoming and outgoing communications.

Helps in Pre sales team to follow up customer promptly with accurate follow up time with the help of prompt notification.

Incoming call filtration is done based on status. i.e. RNR, CALL BACK, NUMBER BUSY.

Calls are tracked with incoming and Outgoing recordings if needed.

Calls are validated as either new or re engaged as per client requirement.

APPOINMENT:

The appointment management option is given in RSoft CRM dashboard and is flexible.

Automatic appointment remainders can be sent to customers either through Email or SMS.

Appointment gives us a clarity on how many times a client has interacted either online or virtual and same will be updated.

QUOTATION:

Approval will be required for every quote creation.

The quote module offers new options for creating quotes, based on client requirements.

In web and mobile app, quote can be exported in PDF format.

The final pdf can be viewed for quotes. Also a quote can be revised multiple times and tracked.

A predefined list of product details can be created, and options are given for adding new products.

TICKETS:

The option for creating tickets is available on the call ticket form or in an email.

Auto ticket creation Id’s will be sent to customers, either through WhatsApp or email.

The status or priority determines the validation of tickets.

REPORTS:

- Reports can be determined by productivity levels, whether daily, weekly, or monthly and can be viewed and taken source-wise or individual-wise.
- Customised type of report can be done based on client choice i.e. Pie chart or Bar chart.
- Reports can be automatically generated and sent on a daily, weekly, monthly and annual basis, including the financial year report.

STAGES IN LEAD MODULE

The Leads module plays a significant role in CRM software and is primarily responsible for boosting the sales of any organization that uses it. Leads come into the organisation from different medium. **Online medium** such as from Google paid adds, IVR Calls, API portals, Facebook accounts that has different forms to fill data.

Facebook àForms àChabot

àWhatsApp

àEnquiry form.

If there is campaign then it can be carried out in bulk àSMS

àWhatsApp

àEmail.

Offline medium such as hoardings, Broachers, Posters and Banners, News Papers, Pamphlets, Referrals.

Vhenever a NEW ENQUIRY comes the lead status will be NOT ATTEMPTED.

f the client Attends the Call, then the lead status will be FOLLOW-UP.

Once the Follow Up is completed then the lead status will be DEMO CONFIRMED.

Once Demo Completed and share prospect then the lead status will be PROPOSAL SENT.

f the order is taken, then lead status will be CLOSE TO WON.

f order not interested, then lead status will be CLOSE TO LOOSE.

t can be also said as some reasons for LOST LEAD are said as the sub status. They are

The fields given in our CRM are shared below in the pictorial representation. Fig1.1, Fig1.2, Fig1.3 are the images of fields given by RSoft for a lead module.

Fig1.1: Fields given in Lead Module

Fig1.2: Fields given in Lead Module

Fig:1.3: Fields given in Lead Module

NOTIFICATION:

Notification plays a vital role in the lead module. Any major event that takes place in lead module needs to be notified either to the tele-caller user as well as to the manager or admin. Some existing notification are as follows.

New Lead Notification

The purpose of a new lead notification is to ensure that the sales team can promptly follow up with the lead and begin the process of nurturing them through the sales funnel. It allows the team to respond quickly to the lead's inquiry or expression of interest, increasing the likelihood of converting them into a paying customer.

Sales Team Caller

Admin/ Manager

New Lead

New Lead
Notification

New Lead Notification

Whenever a New lead enters into the system a notification will be sent to the sales team tele caller and also to the admin. The notification to admin can be removed based on the requirement.

Duplicate Lead Notification

plicate Lead Notification

Sales Team
Caller

Duplicate Lead
Notification

The purpose of a duplicate lead notification is to prevent redundancy and ensure data accuracy within the company's CRM (Customer Relationship Management) system or lead database. Whenever a Duplicate lead enters into the system a notification will be sent to the sales team caller and also to the admin. The notification to admin can be removed based on the client requirement.

Upon receiving a duplicate lead notification, the appropriate team member can review the existing record and compare it with the new lead's information to determine if they are indeed duplicates. If confirmed, they can merge the duplicate records, update any relevant details, and ensure that all interactions and communications with the lead are consolidated under a single, accurate record.

Re-Engage Lead Notification

Re-engage typically involves reaching out to those inactive leads with targeted efforts to reignite their interest and encourage them to re-engage with company's products or services. Once a lead has been successfully re-engaged, then they can be moved back into the active pipeline, where sales team efforts can continue to nurture them towards conversion. Re-engaging with leads can be a valuable strategy for maximizing the potential of your existing lead database and converting previously overlooked opportunities into customers.

Re-engage Lead Notification

Sales Team Caller

Re-engage Lead
Notification

Sales team want a re-engaged notification to be popped up to the respective sales tele caller team member.

Not Attempted Notification

Leads are often distinguished based on their stage in the sales pipeline. A lead in "not attempted" status signifies that no effort has been put forth to initiate contact with the lead through methods such as phone calls, email, or other communication channels, with the intention of converting them into a customer.

Not-Attempted Notification

Not attempted lead suggest an opportunity for the sales team to engage and nurture the leads through sales funnel. The lead may be contacted with personalised messages, giving information about the product or service that is relevant to them, and eventually encouraged to become a paying customer.

Not Attempted Notification

Sales Team Caller

Not Attempted notification need to be triggered when a not-attempted lead enters the lead module. Here the sales team want to get notification for the not attempted lead from the online to the assigned user of sales team for further actions.

Follow up Lead Notification

Effective follow-up with leads requires persistence, patience, and a personalized approach tailored to the individual needs and preferences of each prospect. Follow up leads can be converted into satisfied customers if sales representatives stay engaged and responsive throughout the sales process.

Follow up Notification
(date & Time)

Follow up
Message

Sales Team Caller

Whenever a lead needs to be follow up with the help of scheduler we can set reminder via work flow. A notification will be popped up for the sales tele caller with a message that follow up lead at respective time and date. Based on the desired condition the notification can be set either before 15min, or 1hr or day.

Lost Lead Notification

Lost lead notification is triggered when a lead reaches a point in the sales process where it becomes evident that the opportunity to convert them into a customer has been lost.

Lost Lead Notification
(Online & IVR)

Lost Lead
Message

Sales Team Manager

Here the **sales team Manager** want to get a lost lead notification on losing the lead that are coming from **ONLINE and IVR**.

Upon receiving a lost lead notification, the sales team may conduct post-mortem analysis to evaluate what factors contributed to losing the lead and determine if there are any lessons to be learned or adjustments to be made in their approach. This analysis can help refine sales tactics, improve customer engagement strategies, and ultimately increase its conversion rates in the future. By effectively managing lost lead notification and learning from them, company can turn what might initially seem like a setback into an opportunity for growth and continues improvement in their sales and marketing efforts.

Demo Confirmed notification

Demo Confirmed
Notification

Once all the stages of sales are completed it means it is in last stage of sales i.e. close to won. Here the confirmed lead books for demo of the application to use for further discussion.

Demo Confirmed
Message

Sales Team Manager

Here the sales team manager wants a notification to be triggered once the demo is confirmed from the client.

Dash Board Filters for Lead Module

The Dashboard filter is a feature within a CRM system that allows users to refine the data displayed on their dashboard. It's an essential tool for managing and analysing customer data effectively. Users can customize filters according to their specific needs. It refers to a functionality that allows users to refine and customize the data displayed on their CRM dashboards. These filters are critical tools for users to gain specific insights, focus on relevant information, and make informed decisions based on segmented data. They enhance usability and flexibility, enabling users to extract meaningful insights from complex datasets more efficiently.

Fig 1.4: Pictorial representation of dash board filters**.**

The sales team dashboard filters need the following filter fields to be display on their dash board.

All Leads: This gives the number of leads available.

Hot Leads (Website and Google): "Hot leads" typically refer to potential customers or prospects who are highly likely to convert into paying customers in the near future. Here Sales team want hot leads from google and website to be monitored.

Previous Month Leads: This gives the number of leads we had in the last month.

Not Attempted Leads: "Not Attempted leads" refers to potential customers or prospects who have not yet been contacted or engaged by the sales or marketing teams. These leads may have been generated through various channels. By having an easy to access count the team can make necessary actions to make it into hot lead.

Lost Leads: "Lost leads" refer to potential customers or prospects who were initially engaged by the sales or marketing teams but did not ultimately make a purchase or take the desired action, resulting in the loss of the opportunity. Here The team want to know the count and detail about the lead lost and to take necessary action so that the count of lead lost can be reduced.

Today’s Follow Up: Following up with leads is a critical step in the sales process to nurture relationships, build trust, and ultimately convert prospects into customers. Having this filter on dashboard helps to track about follow ups and take valid actions to make them hot lead.

Missed Follow Up: Missed follow-ups occur when sales or marketing teams fail to engage with leads in a timely or effective manner. This can happen due to various reasons, such as oversight, lack of resources, or inefficient processes. This filter helps to track the missed follow ups and also to take necessary actions so that the count can be made as 0 and to have a strong sales team.

User Rules:

In a sales team, tele callers play a crucial role in reaching out to potential customers, nurturing leads, and driving sales. Establishing clear rules and guidelines for tele callers helps ensure consistency, professionalism, and effectiveness in their interactions with prospects. One such rule is no visibility of leads of tele caller to other.

This can be achieved in roles.

Fig 1.5: Screen shot of user viewing Rule. The arrow points at option to choose.

Go to CRM Settings ·àRoles·àClick on particular Tele caller role created à In Can assign records to choose as Subordinate role. By doing so one tele caller leads won’t be visible for other caller.

REPORTS

Sales reports provide valuable insights into the performance of a sales team, helping managers understand key metrics, identify trends, and make informed decisions to improve sales effectiveness. The sales team want to get the following reports for better understanding and to improve in performance.

1. **Daily Data Report:** The sales team manager should get report on today how many leads came within the system. This report he should get tele caller wise.

2. **Daily Report Source Wise:** The team manager should get report regarding the leads coming from different source.

3. **Daily Status Wise Report:** The team manager should get report based upon the lead status.

4. **Hourly Performance Report User Wise:** The manager should get report about the tele caller based upon the hourly performance. This helps the manager to monitor User Wise insights into the sales activities and performance of individual sales team members on an hourly basis. This may include key performance metrics such as:

   - **Number of calls made.**
   - **Number of emails sent.**
   - **Number of meetings scheduled.**
   - **Number of deals closed.**
   - **Total revenue generated.**

   By providing users with insights into their hourly performance, this report can help sales team members optimize their time management, identify peak productivity hours, and make data-driven decisions to drive better results.

Appointment Module

An appointment module is a component of a software system, often found in customer relationship management (CRM) platforms, designed to facilitate the scheduling and management of appointments or meetings. The appointment module typically offers features to streamline the process of booking, organizing, and tracking appointments between individuals or groups.

Fig 2.1: Pictorial representation of Attendance module fields given.

Features and Functionalities of an Appointment Module:

- Ø **Appointment Scheduling:** Users can schedule appointments or meetings with clients, customers, colleagues, or other stakeholders. They can specify the date, time, duration, location, and participants for each appointment.

- Ø **Automated Reminders:** Automated reminders are sent to participants prior to scheduled appointments to ensure they are aware of the upcoming meeting and reduce the likelihood of no-shows or missed appointments. Reminders can be sent via email, SMS, or in-app notifications.

- Ø **Appointment Confirmation:**Confirmation messages or notifications are sent to participants once appointments are successfully booked. Participants may be required to confirm their attendance or reschedule if necessary.

- Ø

- Ø

- Ø **User Access Control:** Role-based access control ensures that only authorized users have permission to schedule, modify, or cancel appointments. This helps maintain data security and prevent unauthorized access or tampering.

Overall, an appointment module streamlines the appointment scheduling process, improves coordination and communication between stakeholders, and enhances the overall efficiency and productivity of an organization.

Notifications

1. Demo Confirmed Notification:

Whenever a demo is confirmed from the client side a notification to be sent to client, sales manager and also to the assigned to caller with the following msg.

“Thank you for confirming the demo with RSoft

ON Date: _______________ and Time: ______________”

Demo Confirmed Notification

Sales Team Manager

Client

Sales Tele Caller

Notification message

Notification message

Notification message

2. Demo Completed Notification:

A "Demo Completed Notification" is a communication sent to relevant parties within an organization to inform them that a product or service demonstration has been successfully conducted with a client or prospect. This notification serves as an important milestone in the sales process and ensures that all stakeholders are aware of the progress made in engaging with potential customers. Once the demo is completed from sales team and to the client then a notification need to be sent to the manager, client and the assigned caller with the following msg.

“Thank you for completing the demo with RSoft

ON Date: _______________ and Time: ______________”

Demo Completed Notification

Sales Team Manager

Client

Sales Tele Caller

Notification message

Notification message

Notification message

3. Appointment Date and Time Notification:

An "Appointment Date and Time Notification" is a communication sent to individuals involved in an appointment to confirm the scheduled date, time, and details of the appointment. This notification serves as a reminder and ensures that all parties are aware of the upcoming appointment. The message should go in the morning by 7 A.M. The message is as follows-

"Your Appointment with RSOFT

ON Date: _______________ and Time: ______________"

Appointment Notification

Client

Sales Tele Caller

Notification message at 7A.M

Notification message at 7A.M

By sending an appointment date and time notification, you ensure that all parties involved are informed, prepared, and ready to participate in the scheduled appointment, thereby facilitating effective communication and collaboration.

4. Demo Date and Time Notification:

Demo Date and Time Notification can be given for various purposes, including:

Training Sessions: For training programs or workshops conducted online or in person, setting a demo date and time notification can help participants remember when sessions are scheduled to begin.

Meetings and Appointments: Individuals or teams can set demo date and time notifications to remind them of important meetings, appointments, or deadlines.

Personal Reminders: Individuals can use demo date and time notifications as personal reminders for tasks, events, or activities they don't want to forget.

Product Demonstration: In software development or product showcases, a demo date and time notification can be set to remind developers or presenters of when they need to showcase their work to clients, stakeholders, or the public.

Demo Date &Time
Notification Before 1Hr

Sales Team
Manager

Client

Sales Tele Caller

Notification message

Notification message

Notification message

. This notification serves as a reminder and ensures that all parties are aware of the upcoming appointment. The message should go Before 1Hr of the meeting. The message is as follows-

“Your Appointment with RSOFT

ON Date: _______________ and Time: ______________”

Dash Board Filters for Appointment Module:

Dashboard filters can provide users with greater flexibility and control over managing appointments, leading to improved productivity and user satisfaction.

Total Number of Appointment: This filter helps to easily access the total count of appoint done.

This month Demo Completed: This gives the user a count on demo completed for the respective month.

Previous Month Demo Completed: This gives the user a count on demo completed for the respective Previous month.

Today Demo Confirmed: This gives the count to the user about number of demo completed for the day.

Total Demo Completed: This filter gives easy access to count and details on the completed demo.

Reports:

Daily Report on Today Demo Completed:

"Today Demo Completed Report" provides real-time insights into the performance and effectiveness of demo presentations, facilitating data-driven decision-making and continuous improvement efforts within the organization.

This report needs to be generated daily in the evening 7P.M. This report to be sent to the sales team Manager only.

Daily Report on Tomorrow Demo Confirmed:

"Tomorrow Demo Confirmed Report" helps streamline logistical planning, improve time management, enhance customer engagement, mitigate risks, and facilitate data-driven decision-making for organizations conducting demo presentations.

This report needs to be generated daily in the evening 7P.M. This report to be sent to the sales team Manager only.

Report

New Page

	Related Comments In Mobile App
nent Prepared by	Jeevarathinam
nent Prepared on	19/03/2026
nent Designed by	Ranjith
nent Reviewed by	Ashok

Business Case:

- View related comments instantly in mobile
- Add comments quickly for tagged record
- Improves team communication
- Saves time with quick access
- Better tracking of activities

Design:

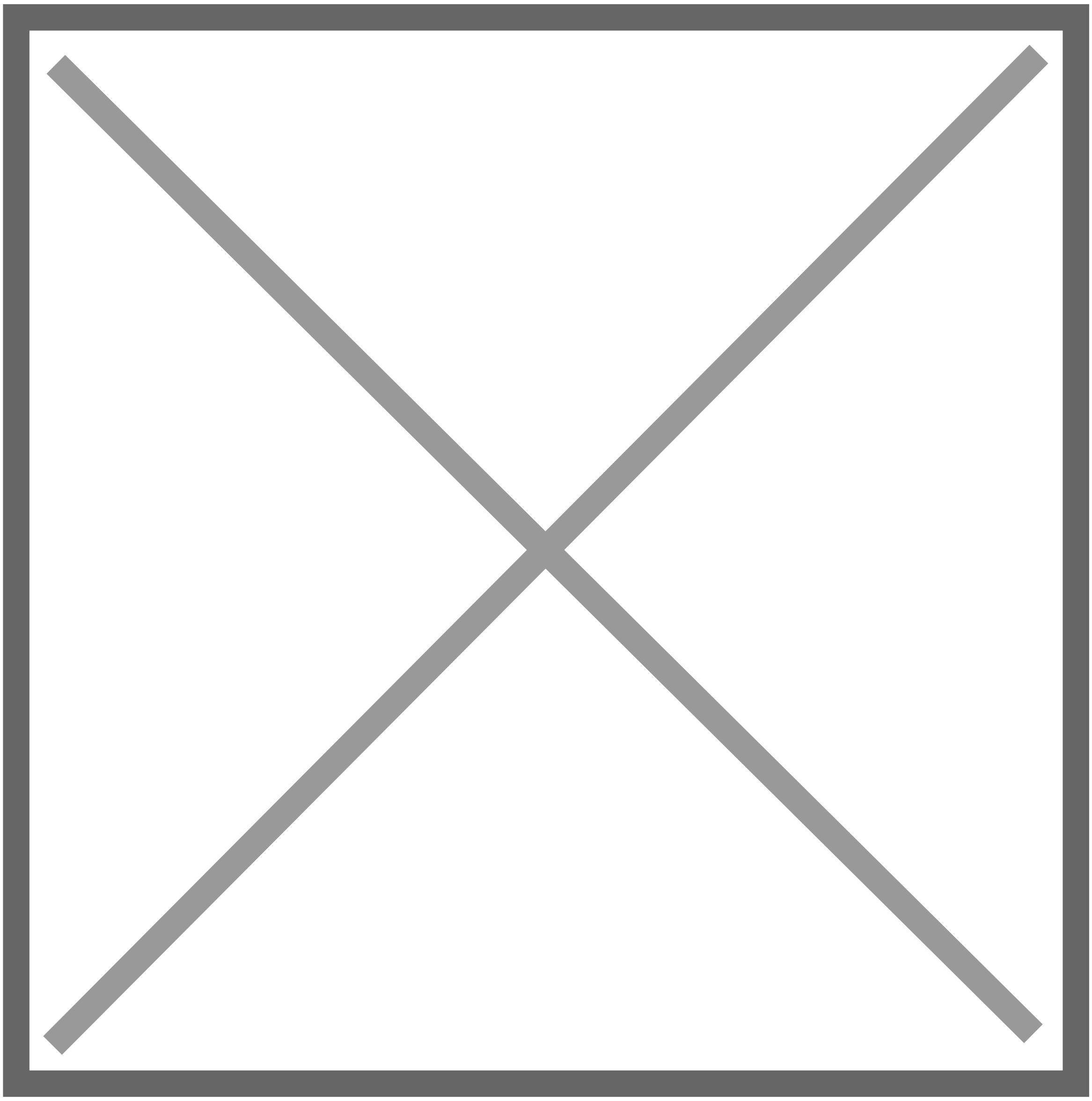
https://www.figma.com/proto/ppnUqjCd91WwzSkCNA5Q8l/Related-Module-Mobile?page-id=0%3A1&node-id=62-3...

Related Comments In Mobile App:

whenever User use the “Related Module Comments- view”, then User can easily to see the tagged records comment in the popup.

And when User use the “Related Module Comments- Add, then User can easily to add the comments in the popup,

- so, based on this Related Module Comments- view and Related Module Comments- Add already this functionality worked and completed in Web Application.
- So, same above mentioned functionality should worked Mobile Application – So please refer this Ticket No- RSINDIA11344.



v In profile Mobile Actions Section two new option, “**Related Module Comments- View”** “**Related Module Comments- Add” is added.**

- Both fields should follow the toggle button UI.
- By default, the ‘**Related module Comments- View’ option** should be **disabled** and displayed.
- By default, **‘Related module comments- Add’** should be **disabled** and displayed.

RELATED MODULE COMMENTS – FUNCTIONALITY :

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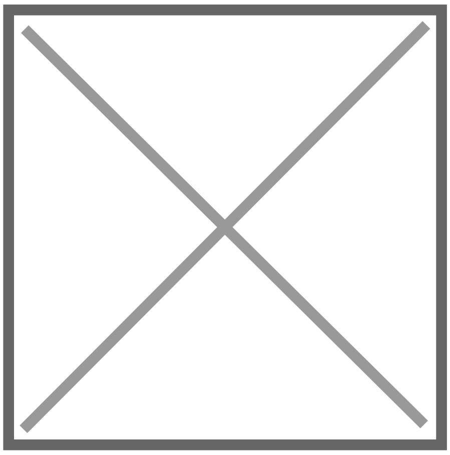
‘Related Module Comments-View’:



n Mobile Actions Section, When the **Related Module Comments – View** option is enabled in the profile for a specific module, whenever that specific module is tagged, then only **Comments icon** should be displayed in the tagged record, otherwise it should not be displayed.

- **Comments icon** should be displayed in the Detail view, Submodule Detail View and Global Search in Mobile App.
- Related Module Comments- view is enabled for the profile
- The Comments module is enabled for the profile
- A tagged record is present for the module, then only a new icon- ‘ **comments icon’**, should be displayed in the tagged record’s related field value in the Detail View, otherwise it should not be displayed.
- But when related module is disabled in mobile view or profile, then also “Related Module Comments – view” icon should be displayed.

Example

Main Module**- Leads**

Tagged Module**- Appointments**

1. If **Related Module Comments – View** permission is enabled for the **Appointments module** in the profile

2. The **comments icon** should be displayed in the **Leads module related field** (where the Appointments module is tagged records).

‘Related Module Comments-Add’:

- When the **Related Module Comments – Add** option is enabled in the profile for a specific module, whenever that specific module is tagged, the **Comments icon** should be displayed in the tagged record, otherwise it should not be displayed.
- **Comments icon** should be displayed in the Detail view, Submodule Detail View and Global Search in Mobile App.
- Related Module Comments-Add is enabled for the profile
- The Comments module is enabled for the profile **A** tagged record is present for the module Then, only a new icon- ‘ **comments icon’**, should be displayed in the tagged record’s related field value, otherwise it should not be displayed.
- But when related module is disabled in mobile view or profile, then also “Related Module Comments – Add” icon should be displayed.

Example

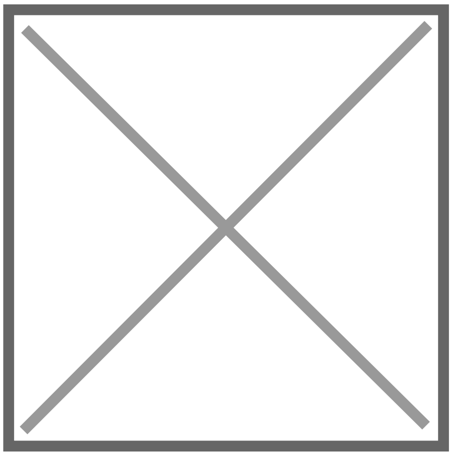
Main Module**- Leads**

Tagged Module**- Appointments**

1. If **Related Module Comments – Add** permission is enabled for the **Appointments module** in the profile

2. The **comments icon** should be displayed in the **Leads module's related field** (where the Appointments module is tagged) .

COMMENTS ICON FUNCTIONALITY



v When the Comments icon is clicked, then Comments pop-up should be open from bottom to upwards and displayed.

Header Section:

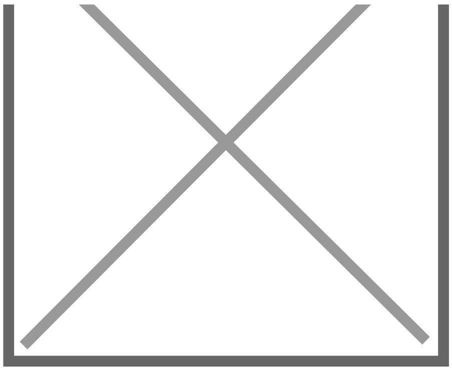
Comments label name text along with Close Icon should be displayed.

When close icon is clicked, then respective comments popup should be closed and no action should be performed.

Comments Section:

- Displays the comments of the tagged record based on the 'Related Comments' field value set in the Configuration Editor. (Refer to Requirement 2).
- But when any comments is not there for this tagged records, then "NO Comments" should be displayed

Comment Display Order:



The comments should be displayed in descending order based on the Comment created time.

Whenever user scroll the content should be scroll vertically.

In that all comments, User profile set image should be displayed but when User not have profile set image, then Avatar icon should be displayed.

When scrolled, the previous comments should be displayed.

Comment Format:

- User’s Profile Icon, User’s First & Last Name, Date & Time, Comment Text should be displayed in order.

User’s Profile Icon

- The profile icon of the comment-provided user should be displayed.
- If there is no profile icon set for the corresponding user, then the avatar icon should be displayed.

User’s First & Last Name

- The First name and last name of the comment-provided user should be displayed.
- If the First name or last name of the comment-provided user is present, then the corresponding First

name or last name should be displayed.

- If there is no First name and last name, then the user ID should be displayed.

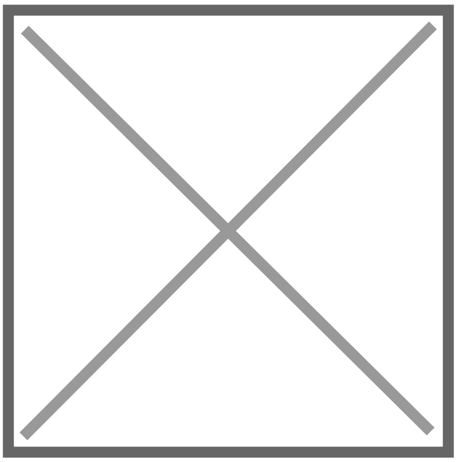
Date & Time

- The comment-provided date and Time should be displayed.
- It should be displayed based on the configured date and time format of the login user.
- The **Ago time** should be displayed, showing the duration since the comment was posted.

Format: Date Time (Ago time)

Example: 7/29/2024 05:17 PM (4 secs)

Comment Text



v It should display the entire comment entered by the user.

v The comment text should be wrapped and displayed, and should not be displayed as overlap.

CASE 2: Related module Comments-View: Disabled

- When the Related Module Comments- View is Disabled, then the **comments icon** should not be displayed in the tagged record’s related field value of the basic list view.

RELATED MODULE COMMENTS-ADD:

CASE 1: Related Module Comments- Add: Enabled

- When, Related Module Comments- Add is enabled for the profile

The Comments module is enabled for the profile

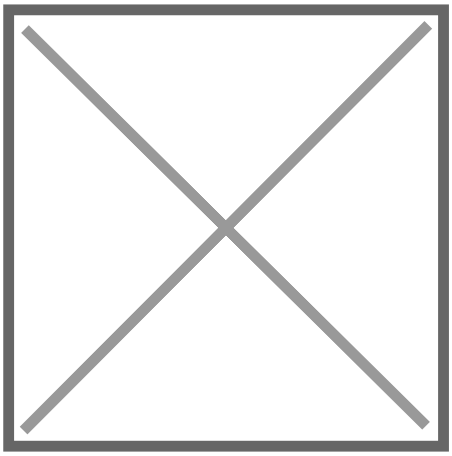
When tagged record is present for the module,

Then, only a new icon- ‘**comments icon’**, should be displayed in the tagged record’s related field values in the Detail view in the Mobile App.

If any of the above-mentioned options are disabled, then the **comments icon** should not be displayed.

If no tagged record is present for the corresponding module, then also Comments icon should not be displayed in the Mobile App.

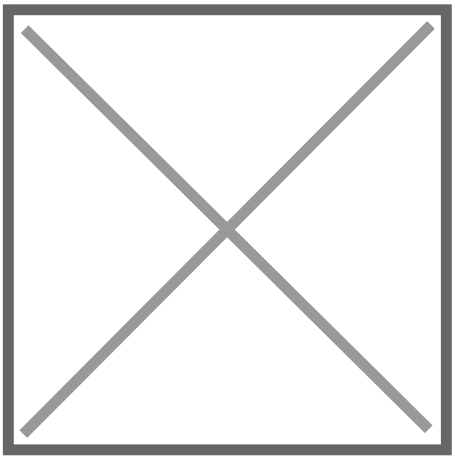
COMMENTS ICON FUNCTIONALITY:



v When the Comments icon is clicked, the Add Comments pop-up should be displayed.

v In that Already Entered Users comments should be displayed.

v Bottom of this popup, Respective login User profile icon along with Text input box should be displayed.



v In the Text input box “+ Add Comments” text and “**Send”** icon should be displayed.

v When “Related module comments- Add” is enabled in profile, then only “+Add comments” input should be displayed, otherwise it should not be displayed.

v When clicked the “Text” input box, then respective mobile keypad should be displayed.

v In the “Text” input box, when entered any value and send icon is clicked, then respective comment should be post in the comment section.

v While typing the value in the text input box, then also user can possible to scroll and see the User comments.

- When comments are entered in the input box and the Close Icon is clicked, the pop-up should close and no actions should be performed. When the Comments icon is clicked again, the input box should open in a fresh/empty state.

Send icon

- When comments are entered in the input box and the ‘Send’ icon is clicked, the provided comment should be displayed in the Previous comment section as the last comment
- Comments can be sended any number of times.
- Every time, the last sended comment should be displayed as the Last comment in the Previous Comments Section.

2. Previous Comments Section

- Displays the comments of the tagged record based on the ‘Related Comments’ field value set in the Configuration Editor. (Refer to Requirement 2).

Comment Display Order

- The comments should be displayed in descending order based on the Comment created time.
- Inner scroll should be implemented in the comments section.
- When scrolled, the previous comments should be displayed.

Comment Format:

- User’s Profile Icon, User’s First & Last Name, Date & Time, Comment Text should be displayed in order

User’s Profile Icon

- The profile icon of the comment-provided user should be displayed.

- If there is no profile icon set for the corresponding user, then the avatar icon should be displayed.

<u>User's First & Last Name</u>

- The First name and last name of the comment-provided user should be displayed.
- If the First name or last name of the comment-provided user is present, then the corresponding First name or last name should be displayed.
- If there is no First name and last name, then the user ID should be displayed.

<u>Date & Time</u>

- The comment-provided date and Time should be displayed.
- It should be displayed based on the configured date and time format of the login user.
- The **Ago time** should be displayed, showing the duration since the comment was posted.

  Format: Date   Time (Ago time)

  Example "7/29/2024 05:17 PM (4 secs)".

<u>Comment Text</u>

- It should display the entire comment entered by the user.
- The comment text should be wrapped and displayed, and should not be displayed as overlap.

CASE 2: Related module Comments- Add: Disabled

- When the Related Module Comments- Add is Disabled, then the **comments icon** should not be displayed in the record’s related field value of the Detail view

NOTE

- If Related module comments- view or Related module comments –Add is enabled and no tagged record is present for the corresponding module, then the Comments icon should not be displayed in the tagged record.

S.NO	**Comments Icon displayed**	**Comments icon not displayed**
1	Related Module Comments View **or** Related Module Comments Add- Enabled	Related Module Comments View **and** Related Module Comments Add- Disabled
2	Profile Permission for Comments Module- Enabled	Profile Permission for Comments Module- Disabled
3	The tagged record should be present	The tagged record should not be present

- If all the above-mentioned conditions are true, then only the Comments icon should be displayed in the tagged record. Otherwise, the Comments icon should not be displayed.

NEGATIVE SCENARIO

1. DELETE CASE

- When the tagged module is made inactive **in the module manager**, then the comments icon should not be displayed.
- When the tagged module is deleted, the comments icon should not be displayed.
- When the related field is made inactive or deleted, then the comment icon should not be displayed.
- When the related field is made inactive and active, then the comment icon should be displayed.
- when related module is disabled in mobile view or profile, then also (“Related Module Comments – view”, “Related Module Comments—Add”) icon should be displayed.
- And function should be still continue to work.

2. TAGGED MODULE IS CHANGED

- When a module is tagged to a main module, clicking the comments icon should display the comments of that tagged module.
- If the tagged module is changed, and then the Comments icon is clicked,
  - For old records → comments from the **previously tagged module** should be displayed.
  - For new records → comments from the **newly tagged module** should be displayed

v So, above mentioned Functionality should be follow in Mobile App for Detail View, Sub Module Detail view and Global Search.

3. NO COMMENTS IN PREVIOUS COMMENTS SECTION

- When comments are not there for the particular tagged record, then the comment should not be displayed in the Previous comments section.

v Above mentioned functionality should be followed for Mobile App—Detail View, Sub Module Detail view and Global Search.

<u>REQUIREMENT 2</u>

- In the Configuration Editor- "Related comments" functionality already worked in the Web Application, so based on this same functionality should follow to work for Mobile Application so please refer the ticket no: RSINDIA11344.

- In Configuration Editor, a new field, **Related Comments**, should be displayed.
- This field should follow the picklist UI type.
- When the Related Comments input box is clicked, the search box and dropdown list should be displayed.

- The dropdown list contains the following options:
  - Last 3 Comments
  - Last 5 Comments
  - Last 10 Comments
  - All Comments
  - Future Comments
- Inner scroll should be implemented in the dropdown list.
- When the necessary value is entered in the Search box, the matching value should be filtered and displayed.
- In that "Related Comments" field default- "Last 3 Comments" should be selected and displayed.

- Related module comments of the tagged record should be displayed based on the options selected from the Related Comments dropdown list for all modules.
- When any of the above-mentioned options are selected in the ‘Related Comments’ field in Configuration Editor, on clicking the Comments icon, the comments should display in the following manner:

LAST 3 COMMENTS:

- Only the last 3 comments should be displayed in the Previous comments section.

LAST 5 COMMENTS:

- Only the last 5 comments should be displayed in the Previous comments section.

LAST 10 COMMENTS:

- Only the last 10 comments should be displayed in the Previous comments section.

ALL COMMENTS:

- All comments should be displayed in the Previous comments section.

FUTURE COMMENTS

- Show only the comments added **after** the module was tagged to the main module.
- Do not show comments added **before** the module was tagged.

Example:

Main Module: Enquiry

Tagged Module: Leads

1. Initially Leads module is not tagged to the Enquiry module
2. Before the Leads module is tagged.

Comments in the Leads module**: Welcome**

2. Leads module tagged to Enquiry module

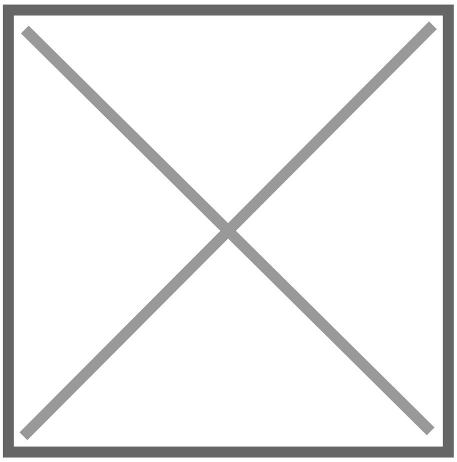
3. After the Lead module is tagged.

Comments in the Leads module**: Lead generated.**

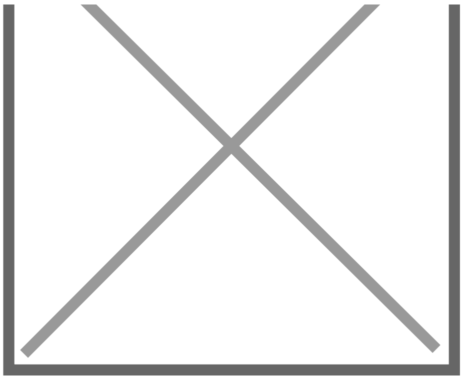
- When the Comments icon in the related field is clicked, then only the **Lead Generated** Comment should

Recording –voice to Automate comments:

_



When “Record Mic” icon is clicked, then **default** it select in “ **English”** Language and change the “Record Mic” colour to “Red” colour.

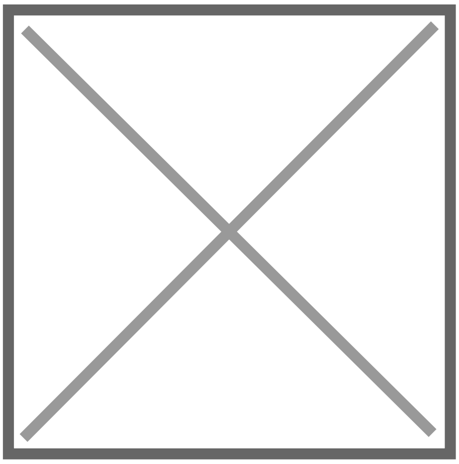


When “Record Mic” icon changed as “Red” colour, then only System should start to catch the User speech words and System automatically convert them into text in the respective input box, otherwise system should not catch the User speaking words.

When System start to catch the User Speech words, then only close icon should be displayed in Comments-input box, otherwise it should not have displayed.

Once User finish to spoke, then clicked the “Record Mic” icon then System should stop to catch the User speaking words and change “Record Mic” icon as previous state and when send icon is clicked, then respective Comment should be post.

When User again open the Comments Section popup, then previously posted comments should be displayed.

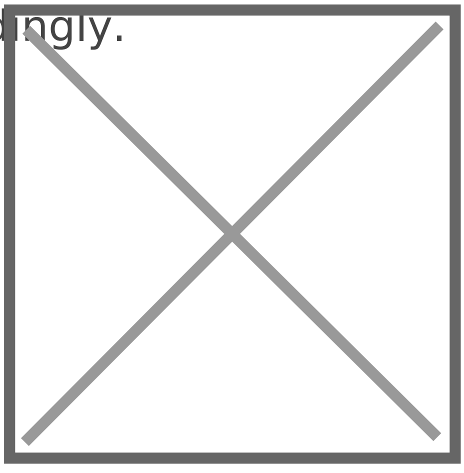


But when close icon is clicked, then Entire “Comments” content should be removed in the Comments -input box.

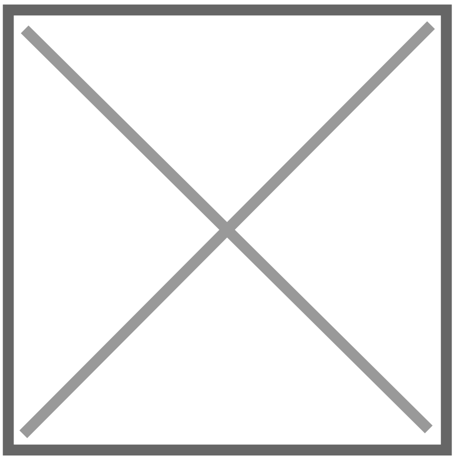
When User is Spoked by Using “Record Mic”, then without clicked the “send” icon button and when comments section popup close icon is clicked, then respective popup should be closed.

When again clicked the “Comments” Icon, then respective spoked “Comments” content should be removed in the Comments Section popup.

If the content exceeds the input box, then input box should expand accordingly.



Whenever User Speaking in the Voice Record, then “language” icon should become read only format.



When User clicked the “Language” icon, then respective popup should be displayed.

The respective “Language” select popup should be slides to open from bottom to upwards.

Header Section:

In that popup, “Choose Language” Text and “close” icon should be displayed.

When close icon is clicked, then respective popup should be closed and no action should be performed.

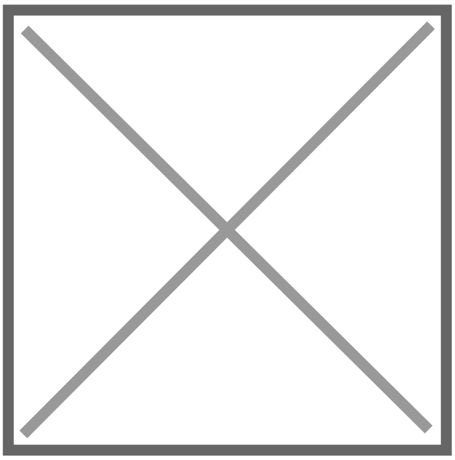
Body Section:

Below the header section, Search input box should be displayed.

In that Search input box, Search “icon” and “Search here” text should be displayed and when search any value in the input box that respective value system should be search and displayed.

Below the Search input box, given options “English, Hindi, Tamil” should be displayed but in that **“English”** should be selected and displayed by default.

And it should follow the **picklist UI type**, So, System should allow the User to select only one option at the time.



So, whenever any option is change and select, then system only should follow the User selected option

Eg:

previous select- English

Current select – Tamil

System should follow now- Tamil language.

n the Comments section, when the user starts to speaking using the “Record Mic” icon, the system should convert the speech into text in the input box.

If the user clicks the “Record Mic” icon again, the system should stop to capturing speech and the mic icon should revert to its previous colour/state.

Once the mic icon returns to its previous state, the Language icon should no longer remain in read-only mode.

The user can then click the Language icon and change the language.

When the user clicks the “Record Mic” icon again, The icon should turn red color, and speech recording should resume.

The previously recorded text (from the earlier language) should remain unchanged.

The system should now capture and store speech based on the newly selected language.

Example:

User starts recording in English using the Record Mic icon → speech is converted to text in English.

User clicks the Record Mic icon again → recording stops.

User changes the language to Tamil.

User clicks the Record Mic icon again → recording starts (icon turns red).

Now, new speech is converted into Tamil text, while the previously recorded English text remains unchanged