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Action Plan

AIC Campus

Date 25. 40.2024

Functionalities

- **Leads Management Process:**

  When leads from Facebook and WhatsApp reach AIC Campus, they are promptly entered into our system as new leads. Each lead is then assigned to a designated counselor. These counselors have access to the system through their personal accounts, enabling them to add notes and update lead statuses accordingly. This streamlined process ensures efficient tracking and management of leads throughout their journey.

- **Student Registration Process:**

  Once the lead completion process is finalized by the counselor, they can generate or initiate a payment plan for the student. Upon completion, students will receive a payment link, allowing them to conveniently pay online or via bank transfer receipt upload. After successful payment, the student's registration process is deemed complete.

  Following registration, students are provided with a unique username and password by AIC Campus, granting them access to the system. Within four days, students are required to upload any pending documents. Failure to adhere to the payment plan will result in the student's access to the dashboard area being blocked.

  For cases where manual intervention is necessary, Finance or Academic administrators have the authority to re-activate student access as needed, ensuring smooth management of the registration process.

- **Student Portfolio Management:**

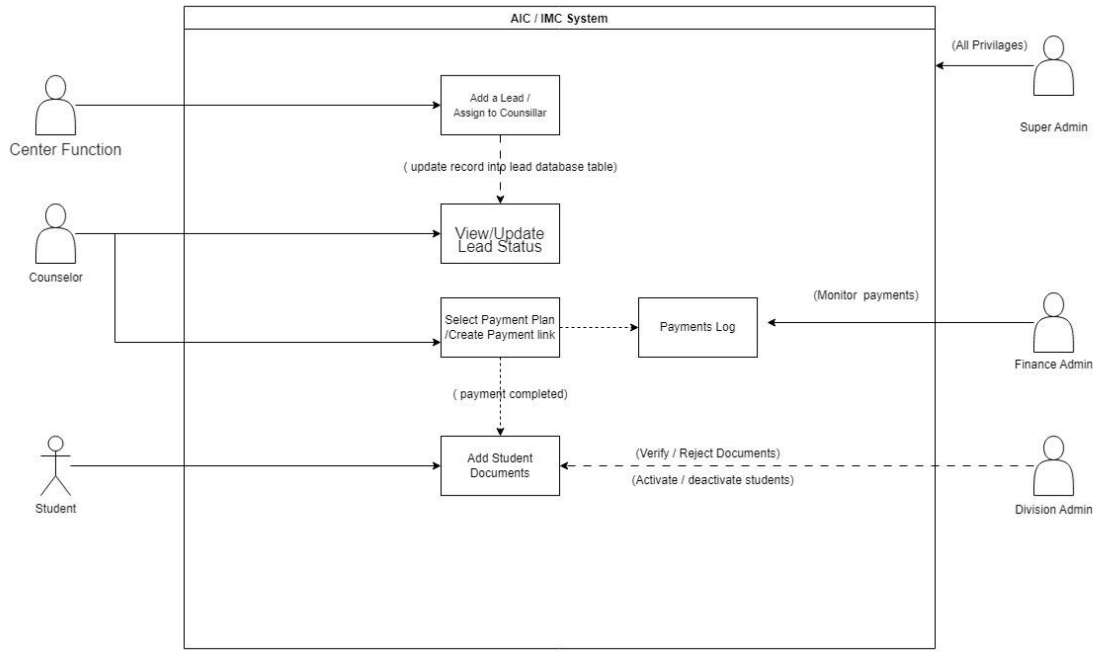
  Academic administrators possess the capability to construct student portfolios through a structured question-and-answer format based on interviews with the students. Counselors are responsible for inputting these questions and answers into the system, where the information is securely stored within the database. This systematic approach ensures the comprehensive documentation and management of student portfolios, facilitating efficient academic administration processes.

User Roles Identified for the System:

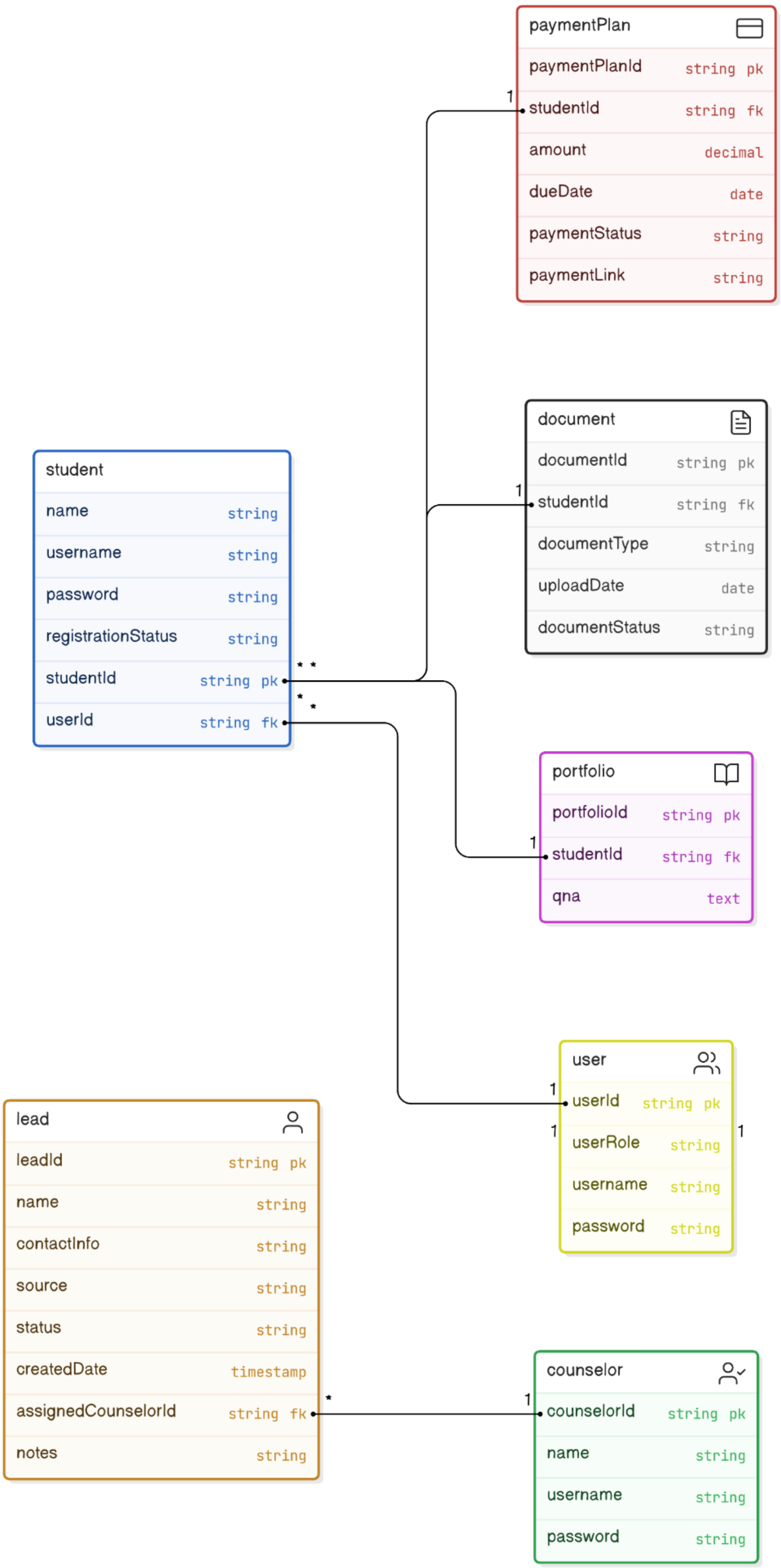
- Center Function
- Counselor
- Student
- Finance Admin
- Academic Admin

Each role carries specific responsibilities and permissions within the system to ensure smooth operation and efficient management of various functions.

Conceptual Diagram



ER Diagram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documentStatus string
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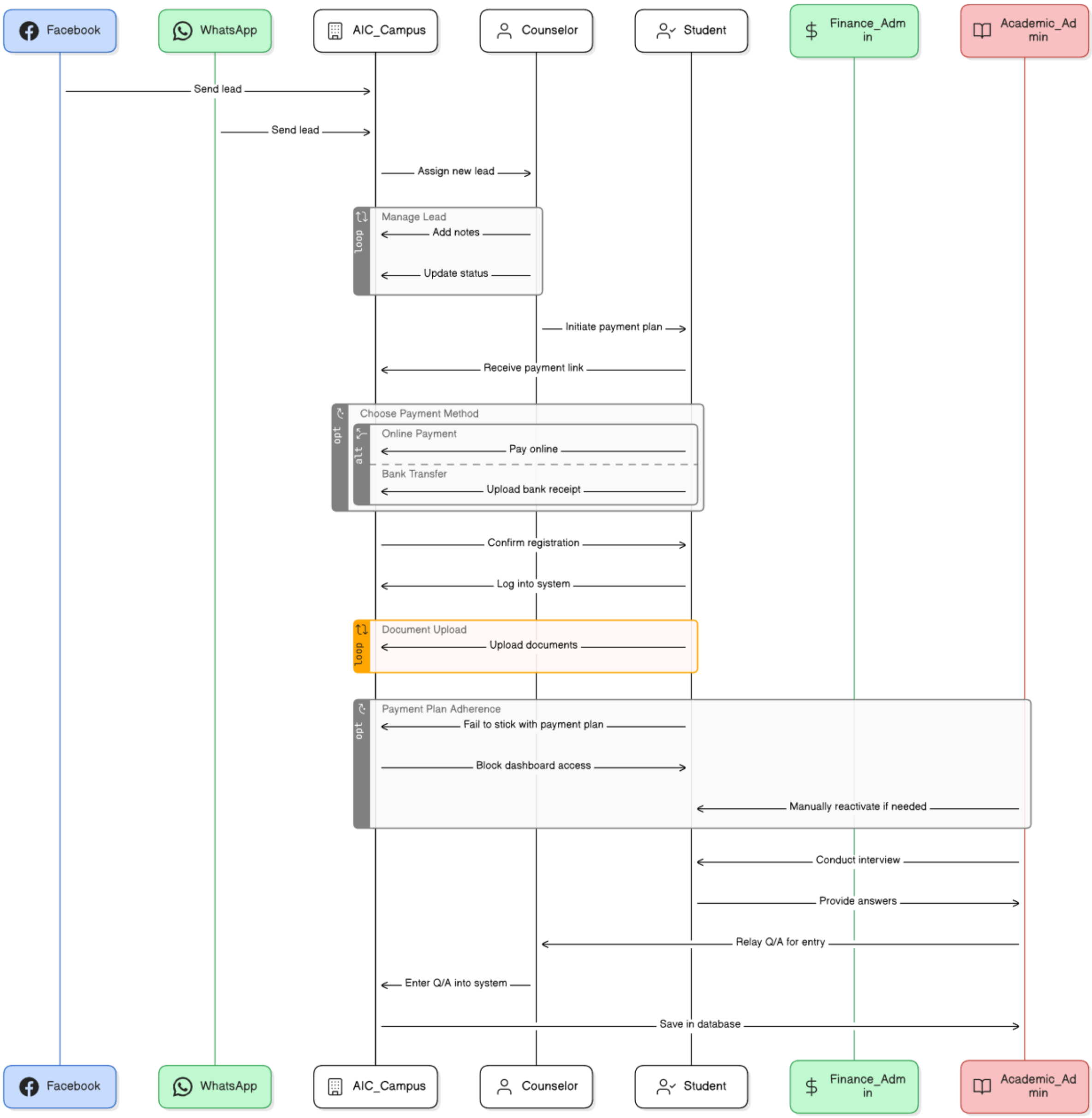
System Interaction for AIC Campus



Action : Finalizing Login UI and Main Inner Pages of Dashboard

Description :

The login user interface and dashboard inner pages, designed with creativity and a user-friendly layout, are currently in the finalization stage. Initially, the UI will showcase demo listings for demonstration purposes. Furthermore, the design of the primary inner pages has also been completed, ensuring a cohesive and visually appealing user experience.

Action : Login and Registration Functions

Description:

All user roles can log into the system by login interface and redirected to relevent dashboards by user role. user login designing for Center Function, Counselor, Student, Finance Admin, Academic Admin.

Action : Adding a New Lead

Description:

Users with the "Center Function" role can add a new lead to the system and assign it to a counselor. Additionally, they have the ability to search for existing leads by mobile number to avoid duplicate entries and ensure efficient lead management.

Action : Notifications

Description :

- Students will receive an email notification once a payment link is initiated by their counselor.
- Students will receive email notifications regarding upcoming payments seven days in advance.
- Students will be notified about the deactivation of their membership.
- Counselors will receive notifications of new assigned leads twice daily via email and SMS.

Required Resources:
Email contents for the above-mentioned email scenarios.

Action : Managing Lead Assignments for Counselors

Description :

Counselors have the ability to update the status of leads assigned to them, adding additional information such as notes. Upon completion of a lead status, counselors can generate a payment link for the relevant student., ensuring a cohesive and visually appealing user experience.

Required Resources: Payment Gateway

Action : Pending Document Update

Description :

Students have the ability to update their pending documents through their profile. Academic admins can then review and either approve or reject the documents via the Academic Admin Dashboard.

Required Resources: Documents required to be collected from students.

Action : Monitoring Payment Logs

Description :

The Finance Admin role is responsible for monitoring all payment logs processed via the system. They have the authority to accept or reject payments made via bank transfers through the system's interface.

Developer Note

Entities:

- Lead: (LeadID, Name, ContactInfo, Source (e.g., Facebook, WhatsApp), Status, CreatedDate, AssignedCounselorID (FK))
- Counselor: (CounselorID, Name, Username, Password)
- Student: (StudentID, Name, Username, Password, RegistrationStatus (e.g., Completed, Pending Documents, Blocked))
- PaymentPlan: (PaymentPlanID, StudentID (FK), Amount, DueDate)
- Document: (DocumentID, StudentID (FK), DocumentType, UploadDate)
- Portfolio: (PortfolioID, StudentID (FK), QnA (text))
- User: (UserID, UserRole (e.g., Counselor, Student, Finance Admin, Academic Admin), Username, Password) Note: This is a generic User entity

Relationships:

- Lead has a Many-to-One relationship with Counselor (one counselor can be assigned to many leads).
- Student has a One-to-One relationship with User (one user account per student).
- Student has a One-to-Many relationship with PaymentPlan (one student can have multiple payment plans).
- Student has a One-to-Many relationship with Document (one student can upload multiple documents).
- Student has a One-to-Many relationship with Portfolio (one student can have multiple QnA entries in their portfolio).
- User has a One-to-One relationship with a specific user role (Counselor, Student, Finance Admin, Academic Admin).

Additional Attributes:

- Lead: Add additional attributes like "Notes" for counselor updates.
- PaymentPlan: Include attributes like "PaymentStatus" (Paid, Unpaid), "PaymentLink".
- Document: Consider adding "DocumentStatus" (Pending, Approved, Rejected).
- Portfolio: You can extend "QnA" to be a structured format with separate fields for question and answer.

Notes:

- The "User" entity is a generic representation for user authentication. You can break it down into separate entities for each user role (Counselor, Student, etc.) if needed for specific functionalities.
- This is a basic ER diagram and can be further customized based on specific requirements.