

Auto Tags Workflow BRD

**V 3.0
22 OCT 2024**

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Revision history

Date	Version Number	Document Changes
03/09/2024	0.1	Initial Draft
18/09/2024	0.2	Updated with new services and Diagram
21/10/2024	1.0	Updated with some enhancement
21/10/2024	2.0	Updated with some enhancement
22/10/2024	3.0	Update Requirement #Tags_063 Adding User stories till requirement ID Tags_003

Introduction

This document illustrates the digital solution for Auto tags website in USA, the objective is to complete the process and accordingly giving the customer the service fees in a few minutes

Approvals

This section aims to collect the approval of the key project stakeholder's, by approving this document you adhere that you read this document and all attached documents and agree that it is complete, consistent and cover all business requirements and solution the business are agreed upon:

Position	Name	Date
Auto Tags CEO	Mina Soliman	
Project Consultant	Remon Magdy	
Developer		

[illegible]

Business Requirements

Below tabulated data contains the functional business traceability matrix including the business brief description of the business aspiration including the priority. This description can be enriched based on demand.

The requirements in this document are prioritized as follows:

Value	Rating	Description
1	Critical	This requirement is critical to the success of the project. The project will not be possible without this requirement.
2	High	This requirement is high priority, but the project can be implemented at a bare minimum without this requirement.
3	Medium	This requirement is somewhat important, as it provides some value but the project can proceed without it.
4	Low	This is a low priority requirement, or a "nice to have" feature, if time and cost allow it.
5	Future	This requirement is out of scope for this project and has been included here for a possible future release.

Req#	Priority	Description
Tags_001	1	<p>The website should contain:</p> <ul style="list-style-type: none">• Home Page with details and pictures, videos about the services and the company.• Admin Can change the pictures and the videos.• The service menu includes the services provided by the company.• Once the user clicks on service tab, dropdown with all services should be displayed• Fast Track workflow for vehicle selling.• Fast Track workflow “Buy Vehicle” page.• Website Should contains two Languages for the GUI support English and Spanish• The company menu contains a detailed company profile and services catalogue.• “Contact us” menu contains “Customer Support + Frequently Asked Questions + Request Status.• Home page footer “Services (Most frequently used) – Company – Support – Connect “Social media accounts” – Legal.
Tags_002	1	Fast track option _The Visitor can complete the journey and request the services “Tags or buy” without registration by adding hyperlink to start the service.
Tags_003	1	Visitor able to register by phone number, Email address or social media accounts
Tags_004	1	Segmentation methodology to be in place while building the client profile via the workflow system/tool – Customer ID/parameters configuration based on segment. Customer segmentation based on customer loyalty “Customer request the services more than 3 to 4 times”
Tags_005	1	If the customer performs the registration process, unique customer ID should be generated automatically. If the customer completes a service request, also unique Request “Case” ID should be generated automatically.

Commented [RM1]: Mina will share the data of the below points

Tags_006	1	User able to login and the details to be displayed after the login process.
Tags_007	1	Ability to expose this onboarding journey over internet (self service)
Tags_008	1	Integration with 3rd parties' systems to automate the journey as much as possible through APIs or batch-based technologies "Social media account, SIM provider
Tags_009	1	User able to change this password, in case forget the password.
Tags_010	1	Save and resume concept where the user can save data entry and resume later whenever needed
Tags_011	1	Support online validation per field
Tags_012	1	General field management concepts such as adding fields, mandatory fields, default value, field validation, parent child relationship and etc
Tags_013	1	<div>The dropdown list of services below must be implemented:</div> <div><div></div><div><div>1. Renewals</div><div>2. In-State Title Transfer</div><div>3. Out-of-State Title</div><div>4. Out-of-Country</div><div>5. Duplicate Title</div><div>6. Replacement Decal or Plate</div><div>7. Handicap Permits</div><div>8. Specialty Plates (Not Personalized)</div><div>9. Personalized Plates</div><div>10. HOV (High Occupancy Vehicle)</div><div>11. Lien Release</div></div></div>

Commented [RM2]: Mina will share the required data per each service

		12. Add Lien 13. Surrender Plate
Tags_014	1	A list of different products, sub products per service should be implemented.
Tags_015	1	Each service should have ID.
Tags_016	1	Each Service will have different required data.
Tags_017	1	Ability to upload\download scanned copy (client) documents, and availability to be viewed by defined stakeholders through access rights
Tags_018		At any request status the documents could be attached to the request.
Tags_019	1	The ability to print any uploaded documents
Tags_020	1	Document definition "Names of the documents should be displayed beside the upload filed.
Tags_021	1	Internal messages on website for the customer and the agent, SMS or Email notification "Notify the customer that is no replay Email" can be per stage if the customer needs to be notified for example once the document uploaded, the fees was calculated, and the contract is ready for signage and etc.
Tags_022	1	Instant confirmations Messages should be displayed if the customer completed any transaction
Tags_023	1	Customer able to perform payment through the website.
Tags_024	1	If the customer is completing the request, request ID should be generated by website automatically using the below format: State Letters _ service ID _ request ID "12 digits"

		<p>After the submission of the request and completing the payment process, a summary with all request details should be displayed to the customer</p> <ul style="list-style-type: none">- Confirmation text content will be shared
Tags_025	1	The customer can download or send the request to his mail address for archiving purpose
Tags_026	2	Also worth to mention that it is essential to allow the 'auto save' option for these templates, meaning that If I am processing an application now and preparing template 'customer profile for example
Tags_027	1	(for any reason such as requiring additional documents or waiting a clarification from client/stakeholders) so I can open it once again, I can recall what I did/find what I did before so I can add on to complete (this might happen more than one time) (save and continue \ concept should be available)
Tags_028	1	Define different workflows (routes) based on certain fields.
Tags_029	1	Admin & Back-office user should have ability to track the request starting from submission of request till final closure
Tags_030	1	Each request should have status: Request Status: <ul style="list-style-type: none">• New• In progress• Rejected• Completed• Cancelled

Commented [RM3]: Mena will share the confirmation text

		<ul style="list-style-type: none"> • Pending On customer
Tags_031	1	<p>Web sites should send notifications for customers via SMS or mail as reminders for renew his tag. Renewal date = Customer birth date Customer to select the reminder date “Dropdown” For corporate customers the renewal should be in Jun or Dec, also customer can select the remainder date.</p>
Tags_032	1	Each request should be assigned to the state and the office/branch will be selected by them while inserting the required data.
Tags_033	1	The user must select the office/branch while the data entering process
Tags_034	1	When customers submit the case for specific office/branch the case must be routed and displayed to the admin and office users “Back-end user” only.
Tags_035	1	The web site will serve multiple states with multiple offices/branches “dropdown list will be shared”
Tags_036	1	The super users will have the access to add/remove branches and states.
Tags_037	1	The Website should have ability for the sponsors to display their Images and those images could be changed VIA Super and Admin users.
		Selling Requirement
Tags_038	1	User can select “Sell your vehicle” hyper link
Tags_039	1	Registered users only allow to use the selling service

Tags_040	1	If the user not registered and click on "Sell your vehicle", the web site should navigate the user to sign-up/ login Page
Tags_041	1	User can insert all car details and pictures "All required data for Ads submission will be shared"
Tags_042	1	When the user completing the data insertion process, he should accept the terms and condition
Tags_043	1	The Ads is divided into 2 types Free or paid ADs
Tags_044	1	Message should be displayed to the user "Your Ad will be published after Admin review.
Tags_045	1	After the submission, The AD will freeze from user editing and waiting for the admin decision.
Tags_046	1	The admin users have the right to review the submitted ADs
Tags_047	1	The admin has the right to upload the car history report to the AD, and will be available for downloading by the byer
Tags_048	1	If the Admin accepted the AD, it should be displayed in "Buy Vehicle" page
Tags_049	1	The admin has the right to return the AD for the customer with return reason
Tags_050	1	The user receives an internal message with the return reason for update, and the AD status should be updated.
Tags_051	1	<ul style="list-style-type: none"> Each Ad should has status as below: <ol style="list-style-type: none"> Draft ----- AD submitted by customer Under review ----- AD under admin Review Pending On customer ---- Admin request update from customer side. Published ----- AD published on website Expired ---- AD exceeding the expiration days Renewed----- AD was renewed by Customer. Sold--- AD marked as sold by customer. Deleted—Customer delete the AD
Tags_052	1	The communication between the buyer and seller could be what's App or phone call

Commented [RM4]: The details will be shared with user stories

		When the byer click on what's App Icon, the Post will be sent to the seller as start message of conversation.
Tags_053	1	The customer has the right to update the AD, and resubmit for Admin review
Tags_054	1	AD validity should be configured by Admin users
Tags_055	1	Expiration Notification: Reminder: 5 days before the free period expires, the website should generate an automated notification Via Email to inform the customer about the expiration.
Tags_056	1	Expired add should be removed from Database after 15 days of expiration.
Tags_057	1	If the AD marked as sold by customer, it should be removed from Database after 5 days
Tags_058	1	The customer has the ability to delete the AD at any stages, it should be removed from Database after 5 days
Tags_059	1	If the customer wants to renew the AD, fees should be applied.
Tags_060	1	AD validity should be configured by Admin users
Tags_061	1	The fees of AD renewal will be configurable and controlled by Admin users
Buying Requirements		
Tags_062	1	<p>The "Buy Vehicle" page should have The Ads sored by the below the Title" Clean Title, Rebuilt, Salvage and Sale Type: Dealer or Private Sale</p> <ol style="list-style-type: none"> 1. Clean Title: Vehicles with a clean, accident-free history. 2. Rebuilt: Vehicles that were previously damaged but have been restored. 3. Salvage: Vehicles with a salvage title, typically sold for parts or repair. 4. Private Sale: Vehicles listed directly by owners without a dealer.

5. **Dealer:** Listings from verified dealerships.

The above data will be inserted by the seller, while inserting process.

Screenshot mentioned below as a sample:



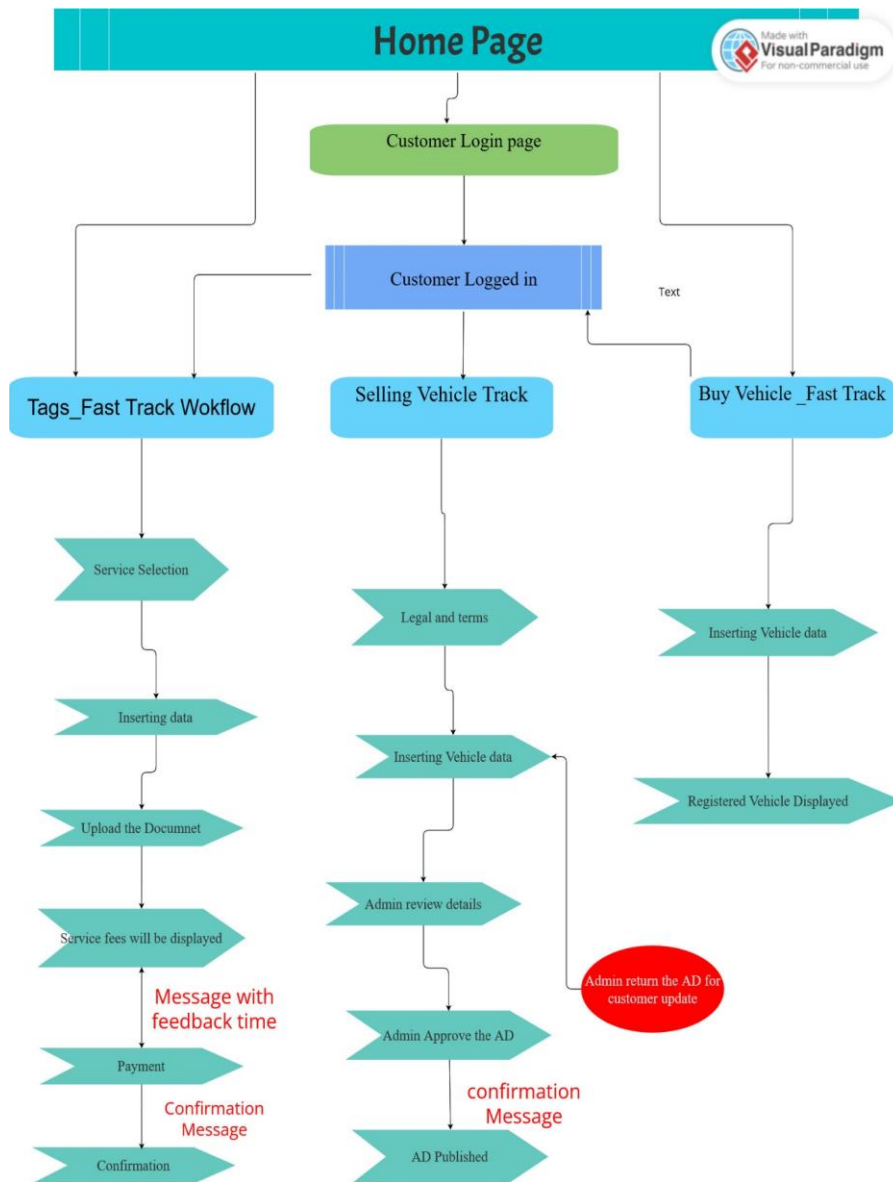
Tags_063	1	<p>The “Buy Vehicle” page should have the below filters, which should be inserted during the adding Ad process</p> <ol style="list-style-type: none"> 1. Vehicle Type “Categories” 2. Used/New 3. Location 4. Zip code “Search Bar” 5. Body Style:” Dropdown menu” 6. Years: MIN – MAX “” Dropdown menus” 7. Price “Cash or Finance – From -To filter 8. Make “Dropdown List” 9. Fuel Type “Dropdown List” 10. Popular Feature “Dropdown” for example “Sunroof” 11. Reported Accidents “Dropdown” 12. Transmission type “Dropdown” 13. Drive Type “Dropdown”
Tags_064	1	The user can Save his search to favorites
Tags_065	1	The user able to display his saved search only if he registered user
Tags_066	1	If the user click on save for selected search parameters “and error message will be displayed “please login first Etc .
Tags_067	1	<p>The page should have sorting filter “Dropdown”</p> <ul style="list-style-type: none"> • Title Status • Newly listed • Price low to High

		<ul style="list-style-type: none"> • Price low to High • Year low to High • Year High to low • Mileage low to High • Mileage High to low
Tags_068	1	If the user selects an AD the details with PICs should be displayed.
Tags_069	1	Recommended ADs should be displayed automatically according to customer selection
Tags_070	1	Time out for the pages to be discussed during the implementation
Tags_071		Website should differentiate between Ads to avoid AD duplication for the same customer, for example the customer can't submit the ADD more than one time for the same vehicle , but he can add another vehicle
Tags_072	1	Audit Trail "Request and Ads History" report or inquiry to be available for admin users, with defined search parameter.
Tags_073	1	Ability to extract reports or inquiries and avail it automatically on shared folder to be accessed for defined stakeholders
Tags_074	1	Field validation and child \ parent relationship between fields to change the fields population accordingly and change the mandatory and non-mandatory fields
Tags_075	1	Calendar and holiday management
Tags_076	1	Dashboards and reports
Tags_077	1	Document management (validity, versioning etc)
Tags_078	1	Save all customer history
Tags_079	1	Basic incentive calculation mechanism through reporting
Tags_080	1	Flexible workflow definition

Tags_081	1	Flexible User Matrix module to manage the user access “CRUD Operations” Rights and actions															
Tags_082	1	Websites should allow creation of Super User has the full access to configuration screen and users creation															
Tags_083	1	Websites should allow the creation of multiple admin users for controlling.															
Tags_084	1	Website should allow to create of Back-end user per state and branch , to communicate with the customer or review the case.															
Tags_085	1	<p>The ability to extract the below reports:</p> <table> <tr> <th>Report Name</th><th>Description</th><th>Data</th></tr> <tr> <td>Audit Trail report Request history report</td><td>Audit trail activities on the system in a given date range for specific request.</td><td>User, Role, Action, Timestamp,</td></tr> <tr> <td>Request status report</td><td>Request status report shows to the viewing user how many Sell/buy/TAGs Requests with status</td><td>From date, To date, Requests count Total amount, Status, Inputter User,</td></tr> <tr> <td>Customer information List</td><td>Customer information list in each date Range and statue(s)</td><td></td></tr> <tr> <td>ADS consolidate report</td><td>Total Nr of ADs with status</td><td></td></tr> </table>	Report Name	Description	Data	Audit Trail report Request history report	Audit trail activities on the system in a given date range for specific request.	User, Role, Action, Timestamp,	Request status report	Request status report shows to the viewing user how many Sell/buy/TAGs Requests with status	From date, To date, Requests count Total amount, Status, Inputter User,	Customer information List	Customer information list in each date Range and statue(s)		ADS consolidate report	Total Nr of ADs with status	
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		Report with all customer payments amounts in certain period	Report should display the total payments amounts given date range for specific service "Tags, Buy, Sell" in certain period		
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User Case Diagram



User Stories:

Requirement ID	User Story ID	Actor	Details
Tags_001	Tags_001-1	Visitor	Home Page As a visitor, I want to see details, pictures, and videos about the services and the company on the home page, so that I can understand what the company offers.
	Tags_001-2	Visitor	Service Menu As a visitor, I want to see a service menu that includes all the services provided by the company, so that I can easily find the service I need.
	Tags_001-3	Visitor	Service Menu As a visitor, I want to see a dropdown with all services when I click on the service tab, so that I can quickly navigate to the specific service I am interested in
	Tags_001-4	Visitor	Fast Track Workflows As a visitor, I want a fast-track workflow for selling a vehicle, As a visitor, I want a fast-track “Hyper Link” workflow for buying a vehicle As a visitor, I want a fast-track “Hyper Link” workflow for Tags
	Tags_001-5	Visitor	Language Support As a visitor, I want the website to support both English and Spanish, so that I can use the website in my preferred language

	Tags_001-6	Visitor	Company Menu As a visitor, I want to see a detailed company profile and services catalogue in the company menu, so that I can learn more about the company and its offerings.
	Tags_001-7	Visitor	Contact Us Menu As a visitor, I want to access customer support, frequently asked questions, and request status in the contact us menu, so that I can get help and information easily.
	Tags_001-8	Admin	Home Page As an admin, I want to change the pictures and videos on the home page, so that I can keep the content up-to-date.
Tags_002	Tags_002-1	Visitor	Fast Track Option for “Tags or Buy” Services 1. As a visitor, I want to complete the journey and request the “Tags” service without needing to register, so that I can quickly access the service. 2. As a visitor, I want to complete the journey and request the “Buy” service without needing to register, so that I can quickly access the service. 3. As a visitor, I want a hyperlink to start the “Tags” service directly, so that I can begin the process immediately without additional steps. 4. As a visitor, I want a hyperlink to start the “Buy” service directly, so that I can begin the process immediately without additional steps.
Tags_003	Tags_003-1	Visitor	Register by Phone Number 1. As a visitor, I want to register using my phone number, so that I can quickly create an account without needing an email or social media account.

			<p>3. As a visitor, I want to receive a verification code on my phone number, so that I can verify my identity and complete the registration process.</p> <p>Register by Email Address</p> <p>4. As a visitor, I want to register using my email address, so that I can create an account with a secure and familiar method.</p> <p>5. As a visitor, I want to receive a verification email, so that I can verify my email address and complete the registration process.</p> <p>Register by Social Media Accounts</p> <p>5. As a visitor, I want to register using my social media account (e.g., Facebook, X, Instagram Google, and apple ID), so that I can quickly create an account without entering additional information.</p> <p>6. As a visitor, I want to grant permission for the website to access my social media account information, so that the registration process can be completed automatically.</p>
	Tags_003-2	Registered Customer	<p>Password Recovery:</p> <p>Password Recovery via Email</p> <p>1. As a Customer, I want to recover my password using my email address, so that I can regain access to my account if I forget my password.</p>

			<p>2. As a Customer, I want to receive a password reset link via email, so that I can securely reset my password.</p> <p>Password Recovery via Phone Number</p> <p>3. As a Customer, I want to recover my password using my phone number, so that I have an alternative method to regain access to my account.</p> <p>4. As a Customer, I want to receive a password reset code via SMS, so that I can securely reset my password.</p>
	Tags_003-3	Registered Customer	<p>Changing registration data:</p> <p>As a Customer, I can change the below registration data</p> <ul style="list-style-type: none"> • Updating Name • Updating Address • Changing Registered Phone Number • Changing Registered Email Address • Verification of New Phone Number • Verification of New Email Address
	Tags_003-4	Registered Customer	<p>Confirmation of Profile Updates</p> <p>As a registered customer, I want to receive confirmation notification after updating my profile information</p>
