

CLARIFICATION ON CUSTOMIZATION ASPECT OF SCOPE OF SERVICES

Critical Functional Specification required on base product on Day 0

(Over and above the existing functionalities/capabilities)

Customization Requirement

Collection being critical process for the organization and must adhere to change request from parent organization and regulator, the Dialer+CRM Solution should be capable to plug-in all the requirement which is required for Tele-Collection process from Day 0. Service Provider to provision for accommodating such adhoc requirement (approx. 30 such change request in a year) to get it amended within the Dialer & CRM solution as per requirement.

<i>S.No.</i>	<i>Required Functionalities/ Features/Specification/Requirement</i>
	Uploading of Data in Dialer / CRM
1.	Transaction / Paid file upload & visibility require - This file getting differently from client site through SFTP & file size >10lakh which cannot open & upload, need direct upload in server which will link to agent's CRM. Unique code will be Loan account number.
2.	Data Uploading- Data need to upload without any latency - Time frame 10 Min max upto 4lakh accounts
	Data Scrubbing
1.	DNC data should be scrub automatically once the allocation file is uploaded to Dialer
2.	BAD Number [Contact number / Wrong number] should scrub & summary should be visible & exclude from dialer when as required.
3.	Bucket wise bifurcation as per the delinquency of account
4.	Last disposition & best disposition wise status post scrubbing account
	Dialer Functionalities
1.	Re-churning of account - as per the disposition tagging on a timeline basis e.g. Ringing account churning after every 15 Minutes automatically
2.	ALTERNATE NUMBER - Uploading or updating alternate number for permanently, i.e once the alternate number is updated in the dialer/CRM it should be display for newly created list also
3.	Disposition & Status [Dialer / Preview / Manual Disposition] - New disposition creation / deletion facility requires as per the BAU
4.	AUX Code Creation / Deletion - Facility require for creation or deletion of aux code as per the requirement.
5.	Real time agent / campaign monitoring facility require - Status wise i.e. Wrap / Idle / Active / Preview dialing / Manual dialing / Total dialed - Connected / Connected % , etc.
6.	Unlimited creation of remote agents - Ongoing same facility should be made available
7.	Multiple DID number change facility required
8.	Data locking - Account as when not required to outcall should get lock in shift hours & admin can manage to unlock as when require.
9.	DNC Activation & deletion facility require - this will be required in IVR / Auto mode & Manual calling.
10.	User group movement facility available where in entire productive agents can be merged in a particular campaign

11.	Disposition wise calling facility without rechurning the list
12.	IVR Broadcast in Multiple language - Hindi , English , Gujrati , Tamil , Telugu , etc.
13.	Unlimited creation/ deletion of campaigns
CRM Specifications (Mandatory apart from other standard capabilities)	
1.	Account level Call History - should be displayed in agent's screen after uploading the data in the new list
2.	In manual Dialing mode agent should preview leads before dialing
3.	CRM fields can be created as per allocation headers – Min of 46 fields to be populated basis the allocation file, need to provision another 15 fields for future requirement
4.	In preview dialing mode data should be dialed out automatically without manual intervention
5.	Display a calling script for the agent to read with fields filled-in on connection of a call
Reports	
1.	Reports - Reports need to be customized as per the operations requirements – few of them are as below. Need provision to add 10 custom reports for future requirement, with user defined custom filter reports.
2.	Login / Log out report - Agent login & log out report of each time during availability.
3.	Agent Productivity - Agent productivity including login hours / Aux / Calls / etc.
4.	Call dump - Entire day's recent time calling dump require on an immediate basis.
5.	Agent performance report - All call dump summary report in real time
6.	Team performance report
7.	Real time calling summary report - Summary of entire out called data in real time basis
8.	Portfolio resolution report - Should available in report basis of allocation file which received from client site through SFTP
9.	Field resolution report - Should available in report basis of allocation file which received from client site through SFTP
10.	Allocation report - This require along with Portfolio resolution against Intensity, connect intensity, Right party contact intensity, Promise to Pay, etc.
11.	Aux changes report - requires in real time basis
12.	Customization of existing report or creating of new report as BAU
13.	Disposition category in export call report
14.	Bucket wise campaign and user group report