**WORKFLOWS FOR SUPPORT MODULE**

1. ADMIN flow:

In the left pane of Admin dashboard, we will have a new module called Support in which we will have following options:

1. Send Support Invite
2. Manage Support Invite

**Flow Diagram for 1) Send Support Invite**

Admin is taken back to the dashboard after confirmation to leave the page.

Invite is sent to given email ID with login credentials for support Login and Role with link to access Support login page.

Invite or Cancel

Admin clicks on Invite or Cancel button

Admin enters details like Client name, Project ID/Name, Client Email, Company, Phone(optional),Role dropdown(Client/Resource),Package selection dropdown(16hrs/40hrs etc) , Message(optional)

Admin clicks on Send Support Invite option

Invite Cancel

Admin clicks on the link and logs into Support Module as Client/Resource.

**Flow Diagram for 2) Manage Support Invite**

This option gives Admin the facility to see how many invites were accepted/pending, when were they sent, role chosen for that invitation, package/SLA for the invite et by showing the list of invitations sent by him/her. It will also tell number of open/closed tickets.

1. **Clients tab:**

Details shown in the table are: Client name, Project ID/Name, Status (Accepted/Pending), SLA/Package, Open Tickets, Resolved Tickets, Payment Method, and Date of Invitation

Admin will be shown a graphical summary of invites based on status on top of the page.

Admin can click on filter section to filter table entries and see desired results.

He can click on a row and click on Action dropdown with options to View, Edit, Delete, View Invoices, Add Invoice, Export to excel.

Admin sees list of Client invitations sent by him with details in tabular format.

1. **Resources tab:**

Details shown in the table are: Resource Name, Client name, Project ID/Name, Status (Accepted/Pending), Time Entered (hours), In-Progress Tickets, Resolved Tickets, and Date of Invitation

Admin will be shown a graphical summary of invites based on status on top of the page.

Admin can click on filter section to filter table entries and see desired results.

He can click on a row and click on Action dropdown with options to View, Edit, Delete, Approve Time, Export to excel.

Admin sees list of Resource invitations sent by him with details in tabular format.

1. **Support Login Workflow:**
2. **Login for Clients**

Client clicks on login link sent in the invitation email and is redirected to support login page. He enters credentials sent in the mail and role as client and clicks on login button.

Client reaches dashboard where he gets 3 tabs: Support, Accounts and Settings

Accounts tab

Settings

Support tab

Client will get options: Payment Methods, Currency and Language, Billing Address, Contact details, Email Notification Preferences, and Event History

Client will get options to Purchase Support Package, Support Hours Purchased (SLA), and Support Hours Balance.

Client will get options to Create Ticket, Manage Tickets, and Knowledge Base

1. **A) Support tab**
2. **Create Ticket**

Client is taken back to the dashboard after confirmation to leave the page.

New ticket is created in the DB with status Open

Backend logic will check if client has purchased Support Package and is valid on current date, and then Client will be redirected to Create Ticket page. Else he will get message on screen that the account is exhausted and will be redirected to Purchase Support Package page on button click on the message box.

Client will enter issue details, additional notes (optional), upload screenshot/documents (optional), and select priority of issue (High/Medium/Low). He will then click on Create Ticket OR Cancel.

Create Ticket or Cancel

Create Ticket Cancel

Entry is made in Event History table of DB and email notification is sent to Client with ticket ID and details (unless email notification is turned off in Client settings)

1. **A) Support tab**
2. **Manage Tickets**

Client will be shown a graphical summary of ‘Open/ In-Progress/Completed/ Closed tickets based on status on top of the page.

Client sees a list of tickets opened by him in tabular format with details like Issue Title, Ticket Raised Date, Ticket Completion Date (optional), Ticket Owner (Resource’s name for In-Progress and Completed Tickets OR Client’s Name for Open and Closed tickets), Ticket Status, SLA (Hours), Time logged (Hours), and Priority of Ticket.

Client can click on a row and click on Action dropdown with options to View Ticket (he will see all the details entered while creating the ticket with documents, if attached), Update Ticket, and Mark Ticket as Closed, View Event History, and Export to excel.

Client can click on filter section to filter table entries and see desired results.

1. **A) Support tab**
2. **Knowledge Base**

Client can view list of PDF documents added by resources for Knowledge Base section in a tabular format with details like Name of Document, Size, Date of Creation, Created By (Resource Name).

He can click on a row and click on Action dropdown with options to View PDF, and Download PDF.

Client can click on filter section to filter table entries and see desired results.

1. **B) Accounts Tab**
2. **Purchase Support Package**

Client will get options to choose from various packages specifying their costs, hours and other details. Packages will be based on Support Hours purchased in multiple of 8.

Client will view the SLA document and sign/click on agreement for SLA to confirm the package purchase.

Client will be redirected to Payment Gateway page. If user has already selected a payment method in Settings tab, he will be redirected to that particular payment type. Else he will be asked to enter details for payment.

Client makes the payment and purchases Support Hours. Entry is made in Event History table. Email notification is sent to Client (unless turned off in settings) and an email is sent to Admin so that he can go ahead with invoice generation for purchase.

1. **B) Accounts Tab**
2. **Support Hours Purchased**

Client will see details of purchased package like Date of Purchase, Support Hours Purchased (Total), Support Hours Balance, SLA details, Cost of Purchase, Mode of Payment.

Client can click on Action dropdown to Upgrade Support/ Renew Support.

Client will be redirected to 1) B) i) workflow to purchase support package page if he clicks on above option of Upgrade/Renew Support.

1. **B) Accounts Tab**
2. **Support Hours Balance**

Client will see details like Support Hours Purchased (Total), Support Hours Balance based on time entered by Resource.

Client can click on Action dropdown to Upgrade Support/ Renew Support.

Client will be redirected to 1) B) i) workflow to purchase support package page if he clicks on above option of Upgrade/Renew Support.

If Client has selected in settings to send alert notification when 80% of support time is over, then he will receive the email on 80% of total package been spent to renew package with the link to Support Login. If balance is zero, automatic email notification will be triggered to client email (unless turned off in settings) with the link to Support Login. Email will also be sent to the Admin for zero account balance for the client.

1. **C) Settings tab**

Client gets the options to set preferences for: Payment Methods (for future payments), currency and Language, Contact and billing address details, email notification preferences, Account Balance notification preferences.

Client can click on Action dropdown to Edit Settings, and View Event History where he can see list of activities and actions taken for his support account.

When Client clicks on save after adding/editing his account settings, entry will be made in Settings table for his account. Entry will be made in Event History table. Email notification will be sent to client that Account Settings were updated (unless turned off in settings preferences).

1. **Login for Resources:**

Resource clicks on login link sent in the invitation email and is redirected to support login page. He enters credentials sent in the mail and role as resource and clicks on login button.

Resource reaches dashboard where he gets 5 tabs: Support, Time Tracking, Expenses, Projects, and Settings

Profile Settings tab

Accounts tab

Projects tab

Expenses tab

Support tab

Resource will get options: General contractor Time Entry, Support Ticket time Entry

Resource will get options: Manage Tickets, and Knowledge Base

1. **A) Support tab**
2. **Manage Tickets**

Resource will be shown a graphical summary of ‘Open/ In-Progress/Completed/ Closed tickets based on status on top of the page.

Resource sees a list of tickets generated by client in tabular format with details like Issue Title, Ticket Raised Date, Ticket Completion Date (optional), Ticket Owner (Resource’s name for In-Progress and Completed Tickets OR Client’s Name for Open and Closed tickets), Ticket Status, SLA (Hours), Time logged (Hours), and Priority of Ticket.

He can click on a row and click on Action dropdown with options to View Ticket, Update Ticket (add notes or attachments or query), Assign Ticket (Changes ticket owner to himself for Open tickets, status would change to in-progress, time tracking starts) and Mark Ticket as Completed, Add or Update Time, View SLA, View Event History, and Export to excel.

When resource clicks on Assign Ticket, Update Ticket, Add or Update Time; then email notification is sent to client for that event (unless turned off in preferences) and entry is made in event history table for that particular ticket ID, event, and timestamp.

Resource can click on filter section to filter table entries and see desired results.

Once the issue is resolved, Resource will click on ‘Mark as Completed’, he will be redirected to Time tracking page where he can enter the time spent on the ticket. Email will be sent to Client (unless turned off in preferences) and Admin (for invoice purposes).

If the ticket is In-progress and SLA is about to complete, resource will be sent an email reminder to update the ticket and Add time for the same.

1. **A) Support tab**
2. **Knowledge Base**

Resource can view list of PDF documents added by resources for Knowledge Base section in a tabular format with details like Name of Document, Size, Date of Creation, Created By (Resource Name).

He can click on a row and click on Action dropdown with options to View PDF, Download PDF, Upload new PDF, and Edit PDF.

Resource can click on filter section to filter table entries and see desired results.

**2 B) Time Tracking**

1. **General Contractor time entry 🡪 workflow already made for this module.**
2. **Support Ticket Time Entry**

Resource can add time manually by click on Add or Update time option. Resource will automatically be redirected to this page when he assigns ticket to himself and when he marks the ticket as Completed.

Resource will add the time spent on ticket, his notes/ attachments and he will save the time entry.

Entry will be made in Time Tracking table and Event history table. Email notification will be sent to Client (unless turned off in preferences) and Admin

**2 C), D) and E) modules are already covered before with workflows.**