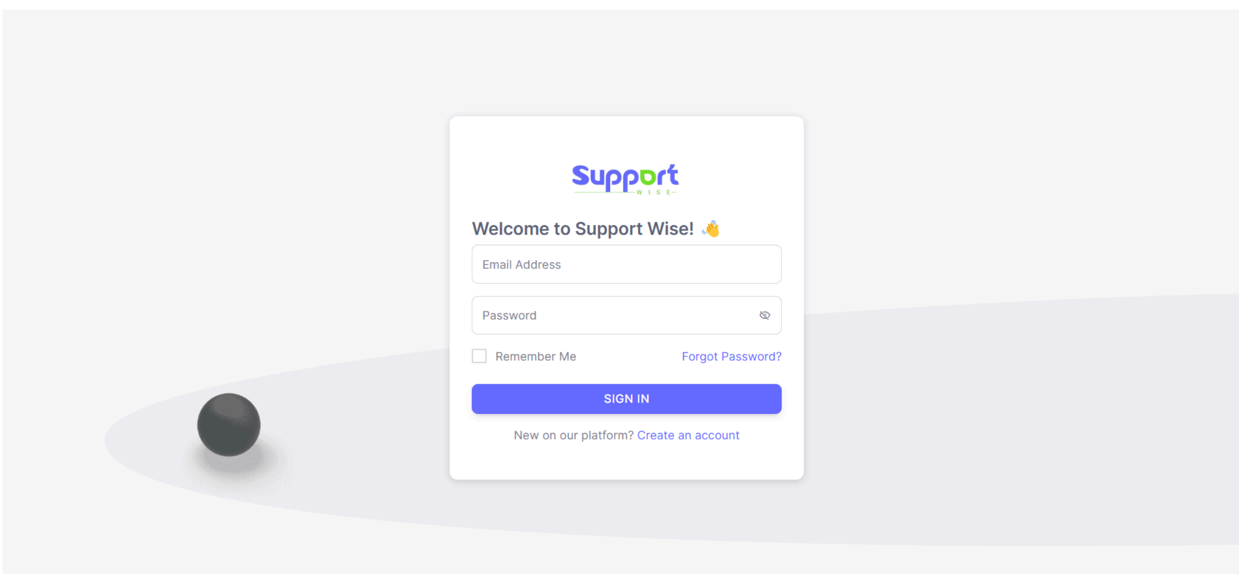
1. Introduction

Welcome to SupportWise, your comprehensive support ticket solution designed to facilitate seamless communication between companies and customers. With SupportWise, both parties can create and manage tickets effortlessly, engaging in real-time chat to resolve issues quickly and efficiently. Our platform ensures organized, transparent, and efficient support interactions, enhancing satisfaction for both customers and support teams. Experience the future of customer support with SupportWise.

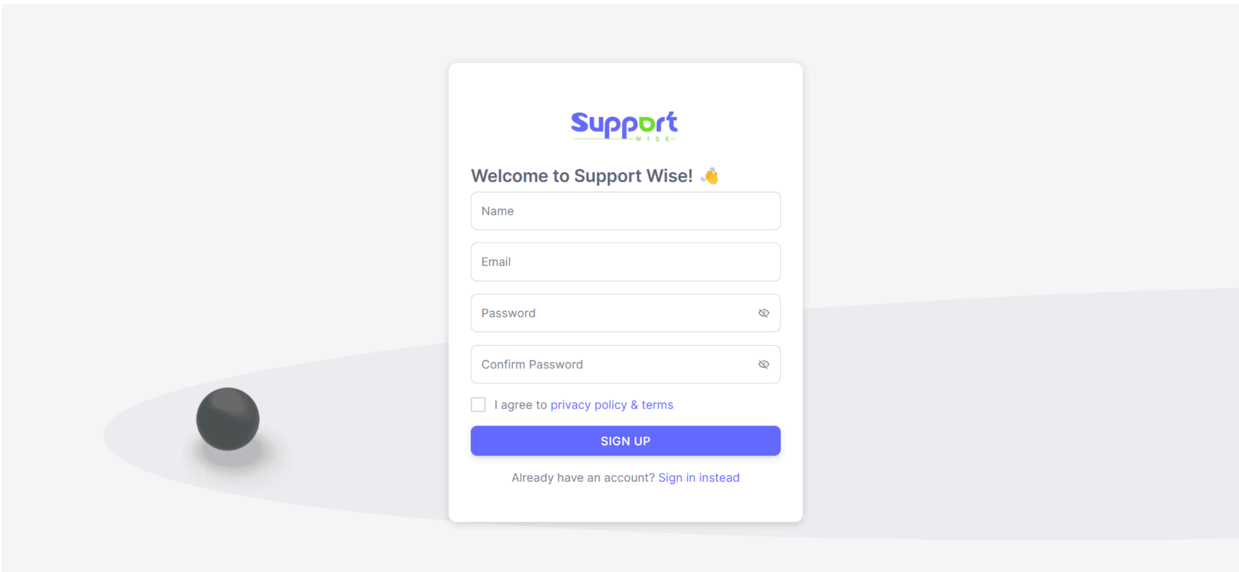
2. Login & Registration Process

- After successfully Installation of the product you can see this login screen. Here If you want to create a new company you must have to register the company from here.



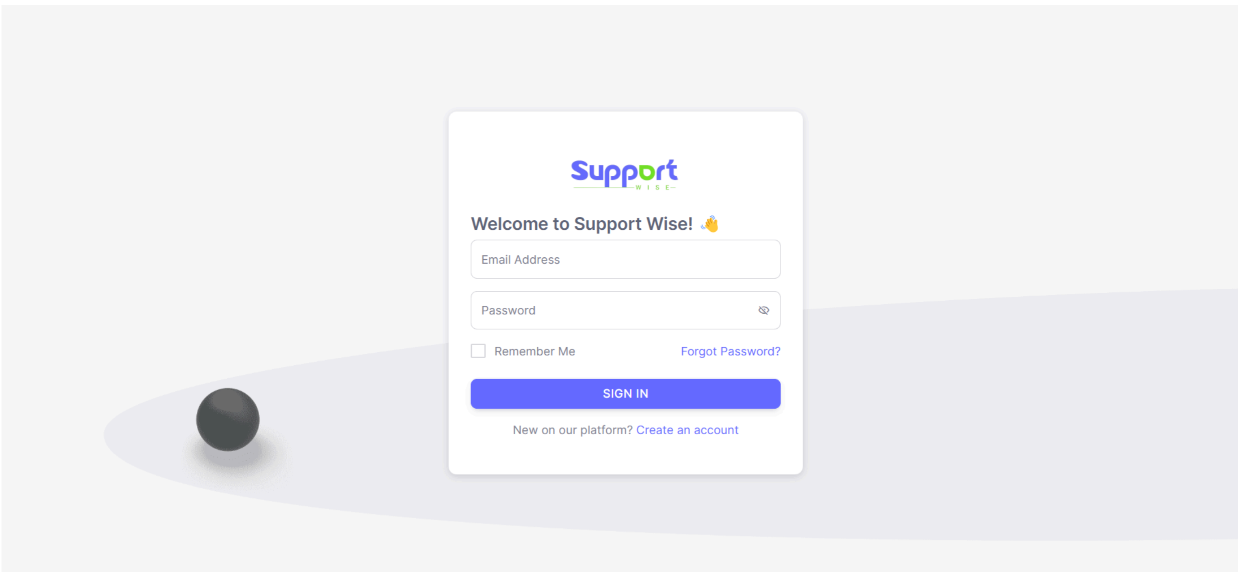
2.1 Registration Process

- Once you click on Create an account link the Registration page will be open like this.
- For creating the new company you must have to enter the company name , email address , password & confirm password.



2.2 Login Process

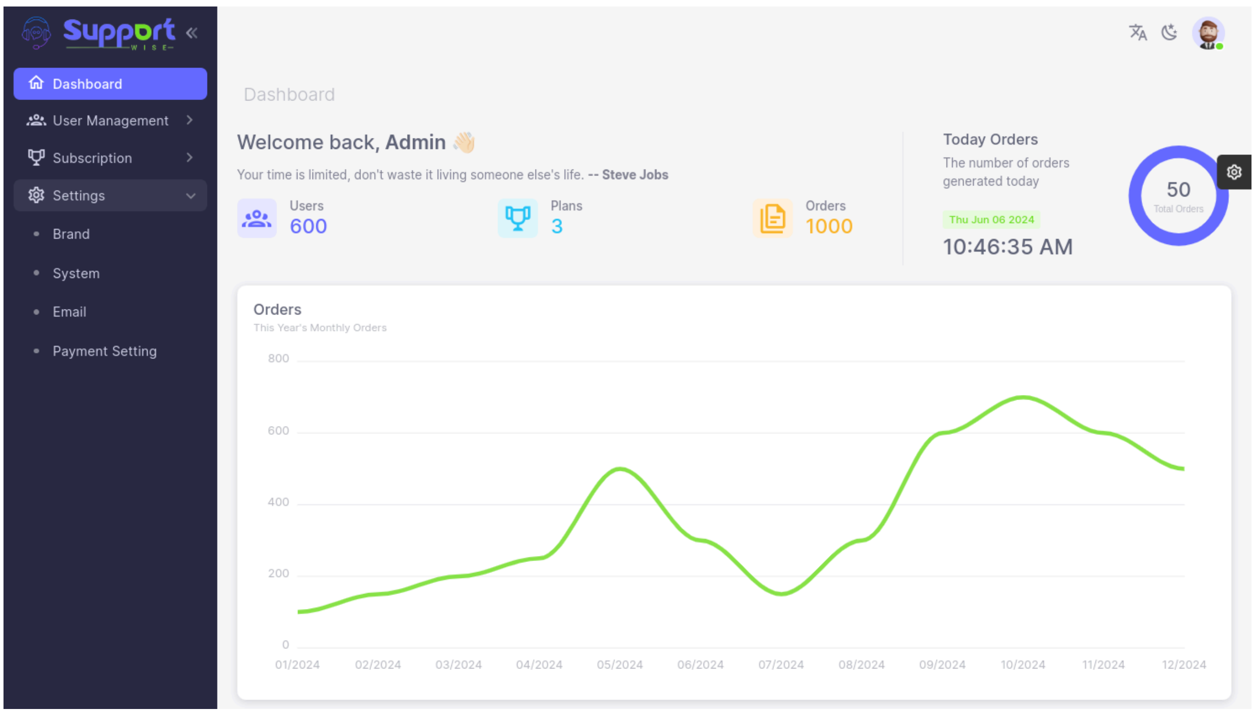
- After registration of the company using email address & password you can login into that company.
- you can also login the company via default login credentials which will shown at the time of completion of the product installation.



3. Admin Privileges and Functions

3.1 Dashboard insight

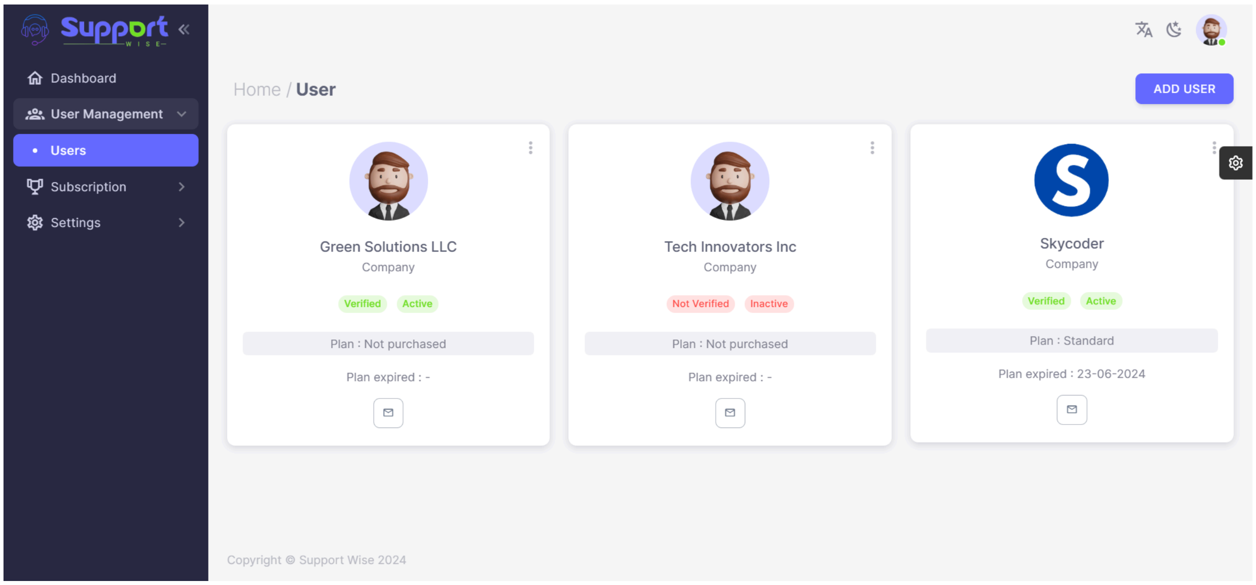
- Once you login as admin you can see the dashboard like in the image below.
- Here in the dashboard you can see the total number of companies that are registered in our system, after that you can see the total number of plans that have been created by the admin & at last you can see the total number of orders.



4. User Management

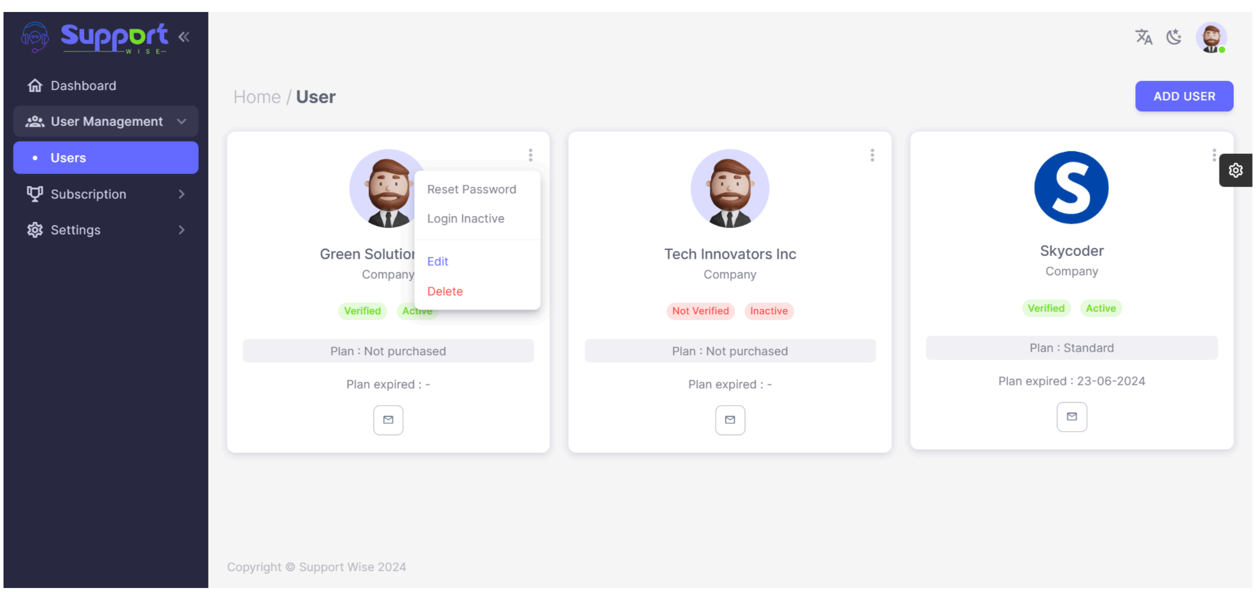
4.1 Users / Company Listing

- here you can see the total number of registered companies.



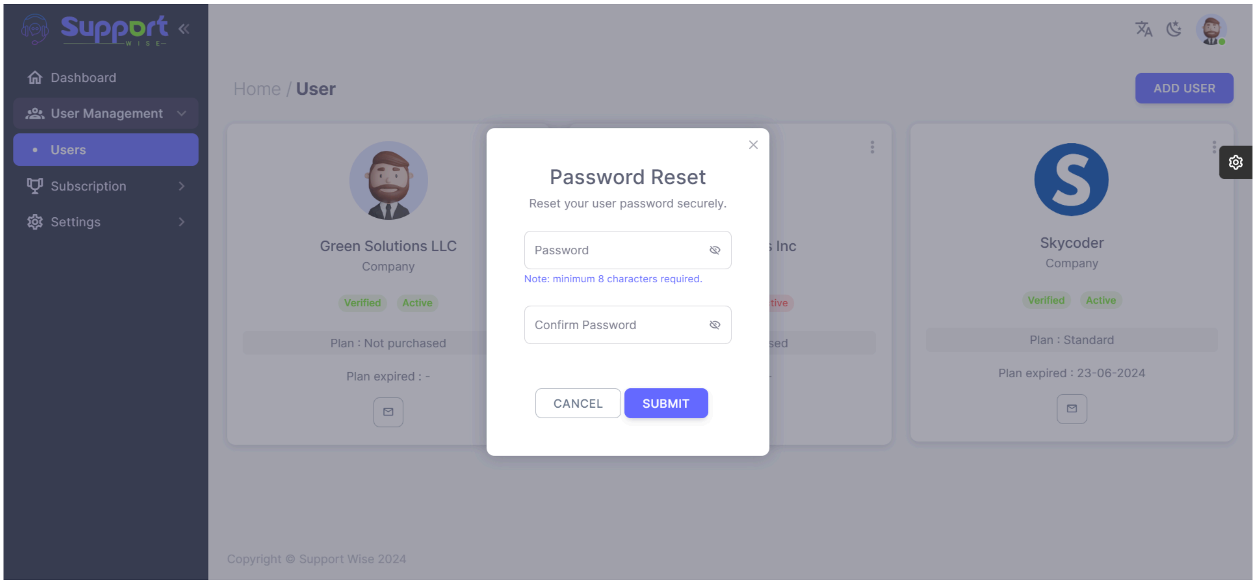
4.2 Users / Company Diiferent Functionality

- as you can see here we have provided different functionality such as reset password , login active / inactive , edit & delete.



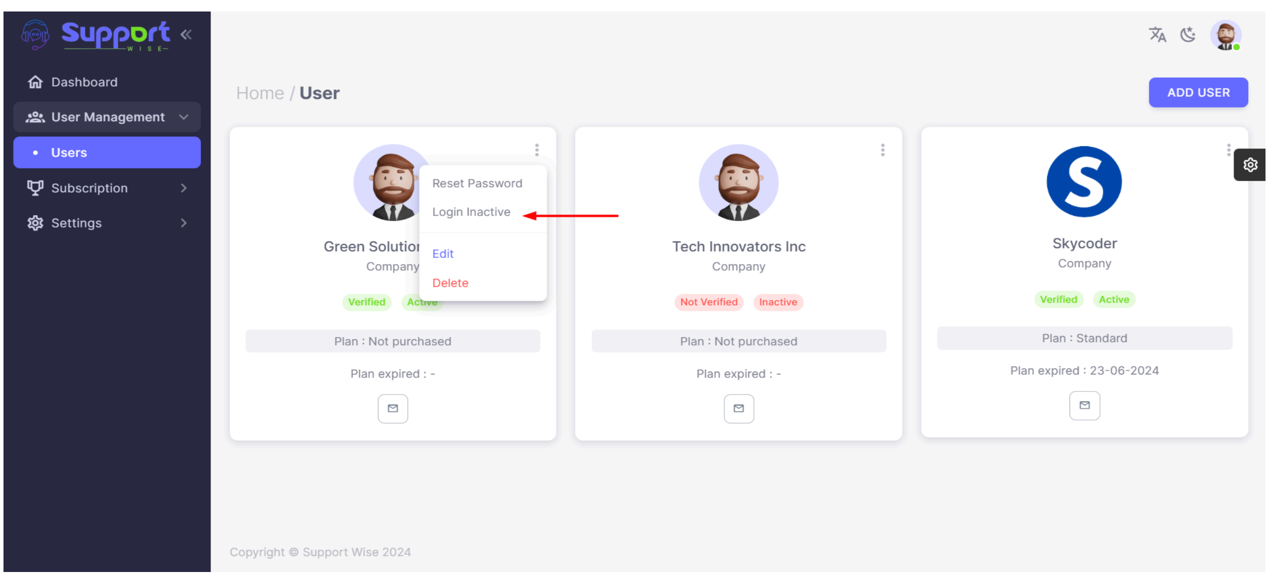
4.2.1 Reset Password

- if the admin wants to change the company current password then via this option admin can reset the password. You have to enter the new password & confirm the password



4.2.2 login Inactive / Active

- using this option admin can manage the company login. If the company will make the login inactive it means that company can not login once that company will try to login you will get this message login is disabled please contact your admin.



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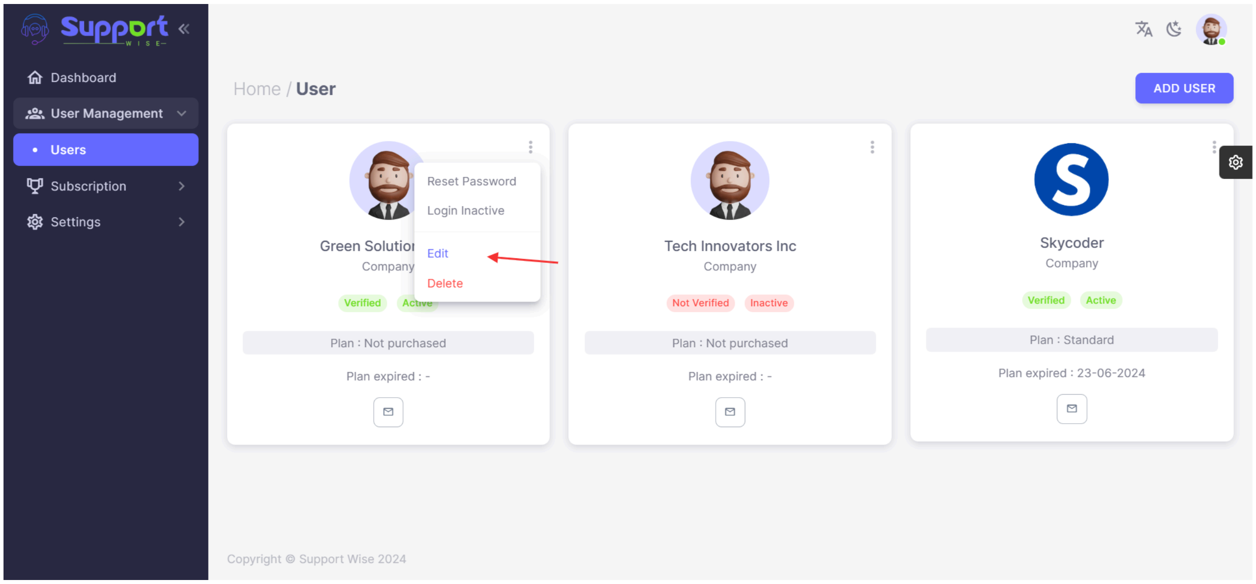
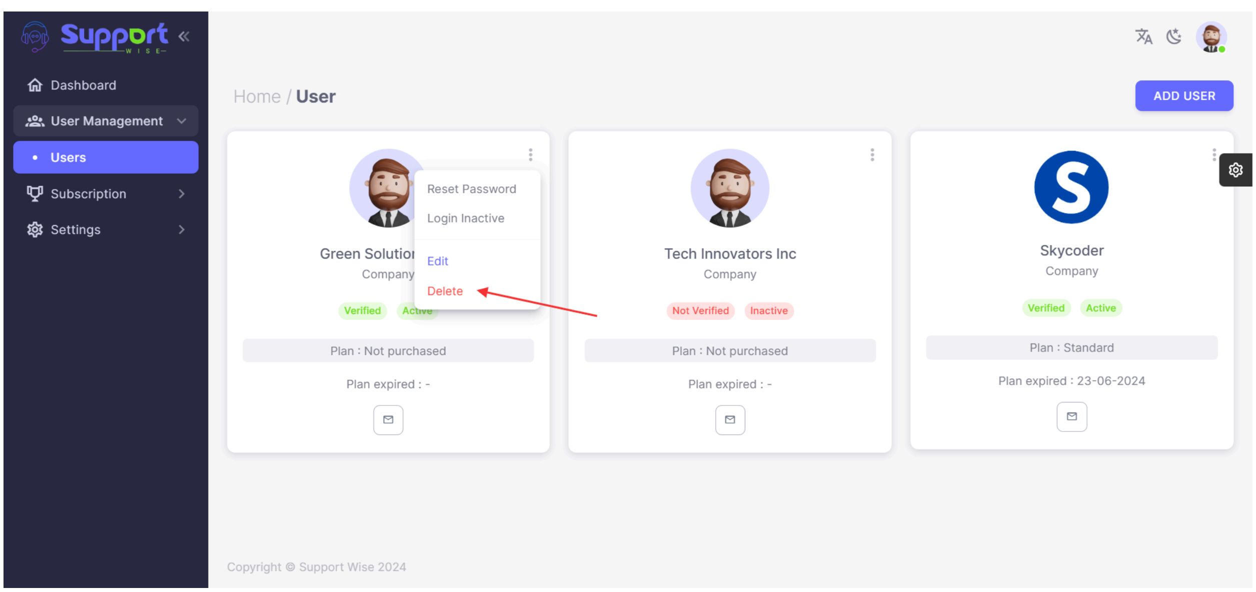
<u>4.2.3 Edit</u>

- using this edit options admin can update the company name & email.



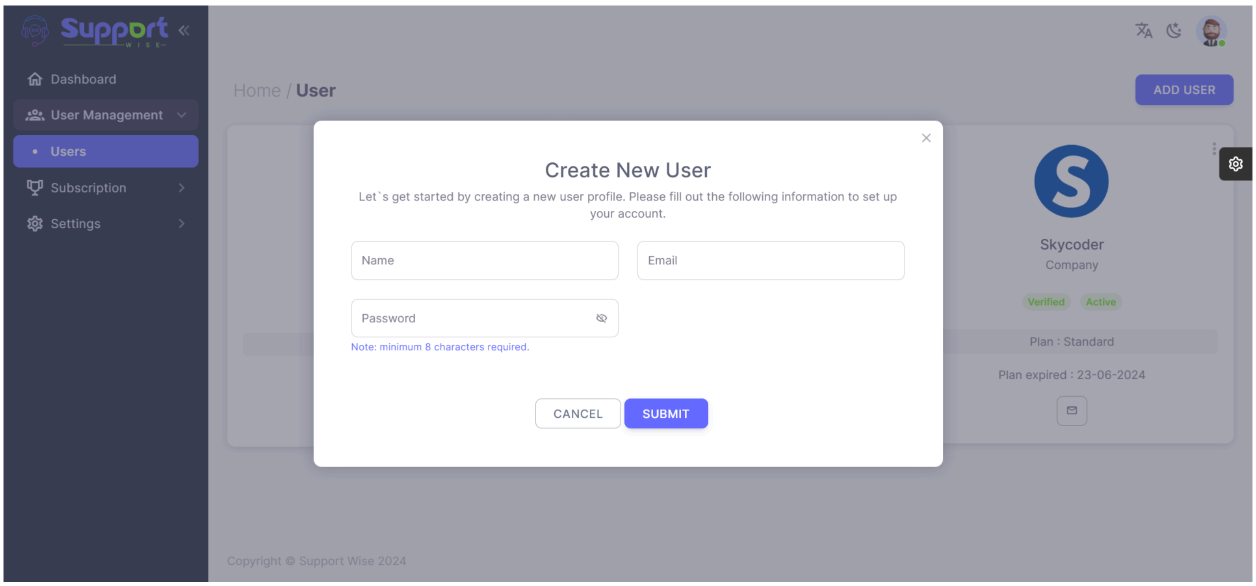
<u>4.2.4 Delete</u>

- using the delete button admin can delete the company.
- **<u>Note :-</u>** If the company will delete, keep in mind the company's all customers , agents , Blog , Knowledge base , tickets all the data will be deleted.



4.3 Creating A New Company / User

- Here in the screenshot below you can create the new company.
- using name , email & password you can create a new company. This email & password will be used for company login.
- one more thing, once the admin creates the company on company registered email company will get the it's login credentials.

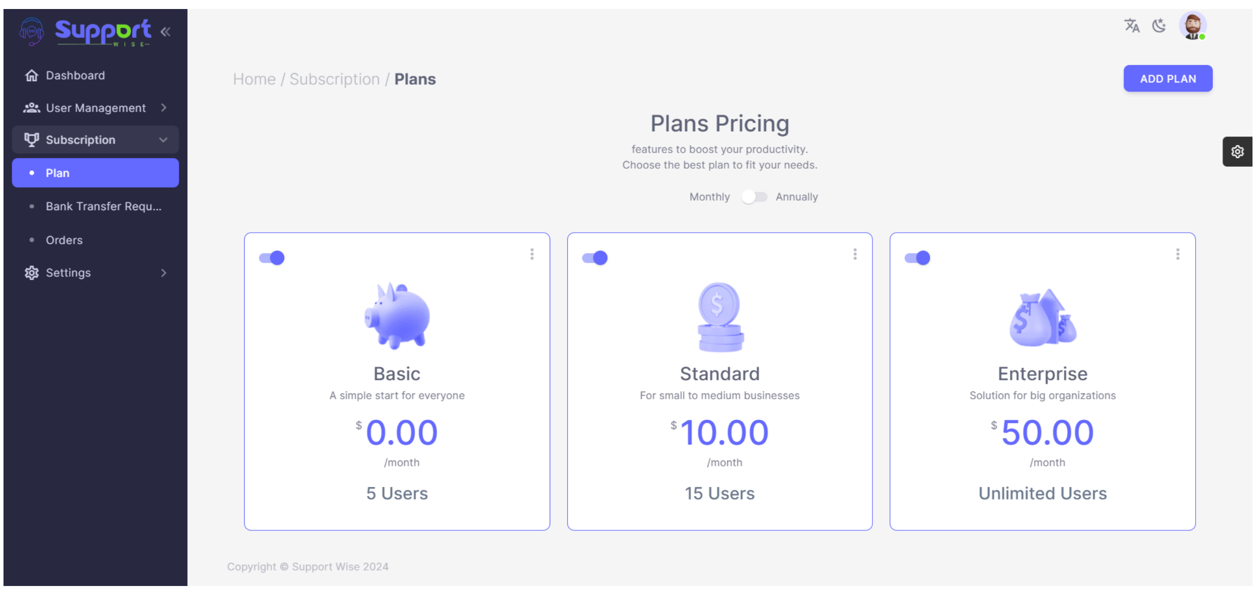


5. Subscription

- Here under the subscription menu we have 3 options: plans , Bank transfer request & orders. Let me give a little introduction about that.

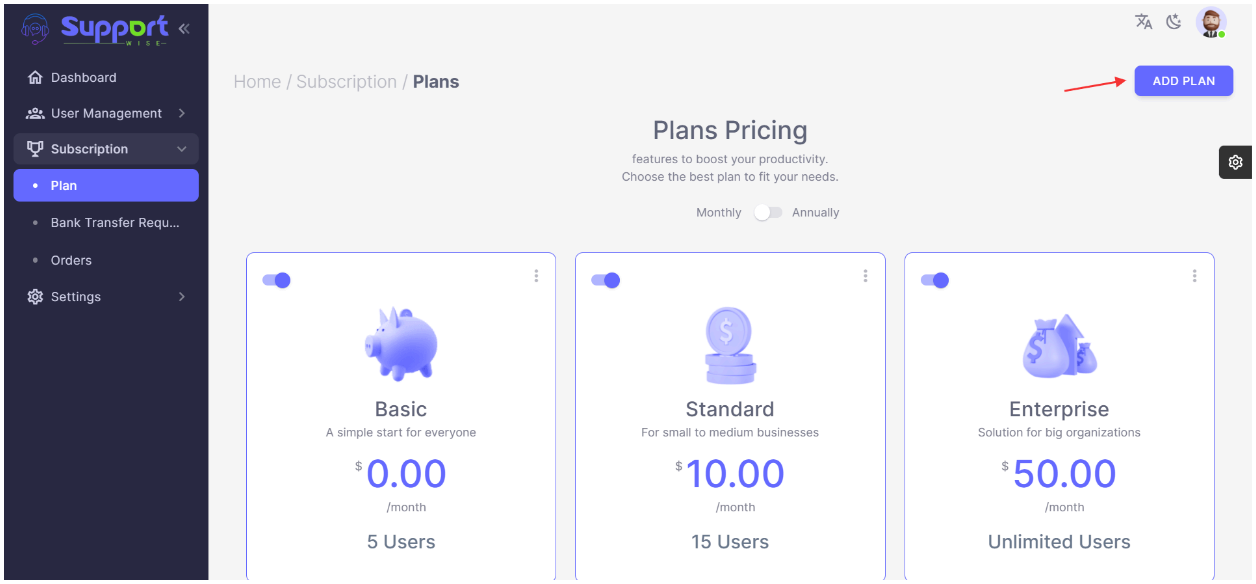
5.1 Plan Listing

- As you can see here in the plan page you can see all the plans that have been created by the admin.
- Admin can also perform different actions such as plan enable/disable , edit , delete etc..

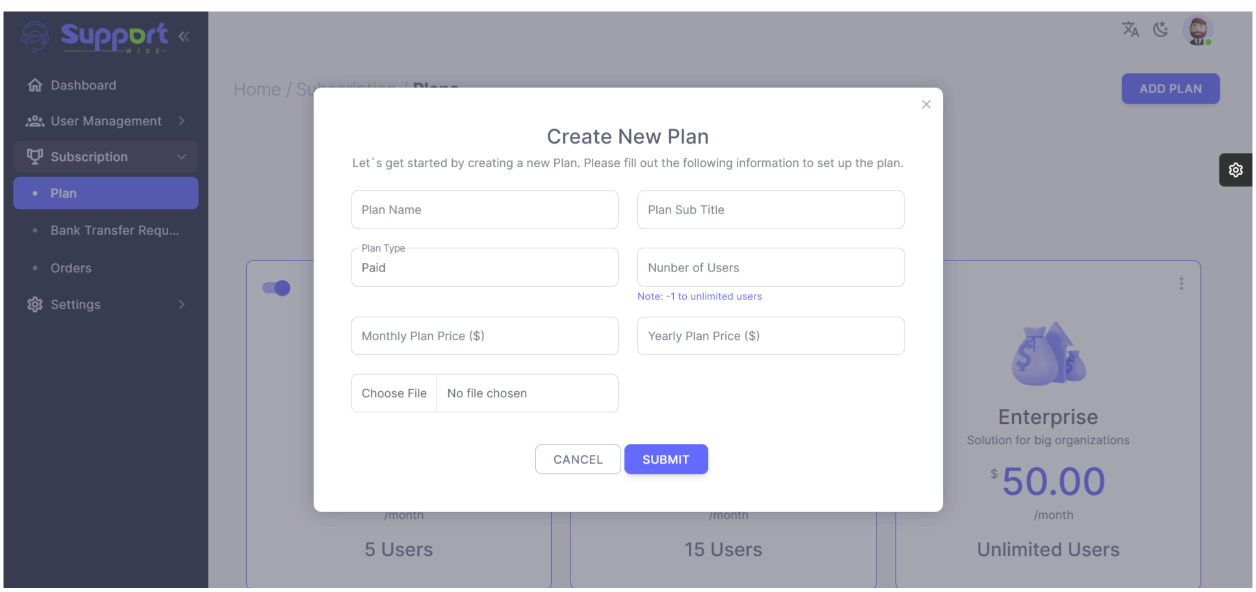


5.2 Create New Plan

- As you can see in the image below, from here you can create the new plan.

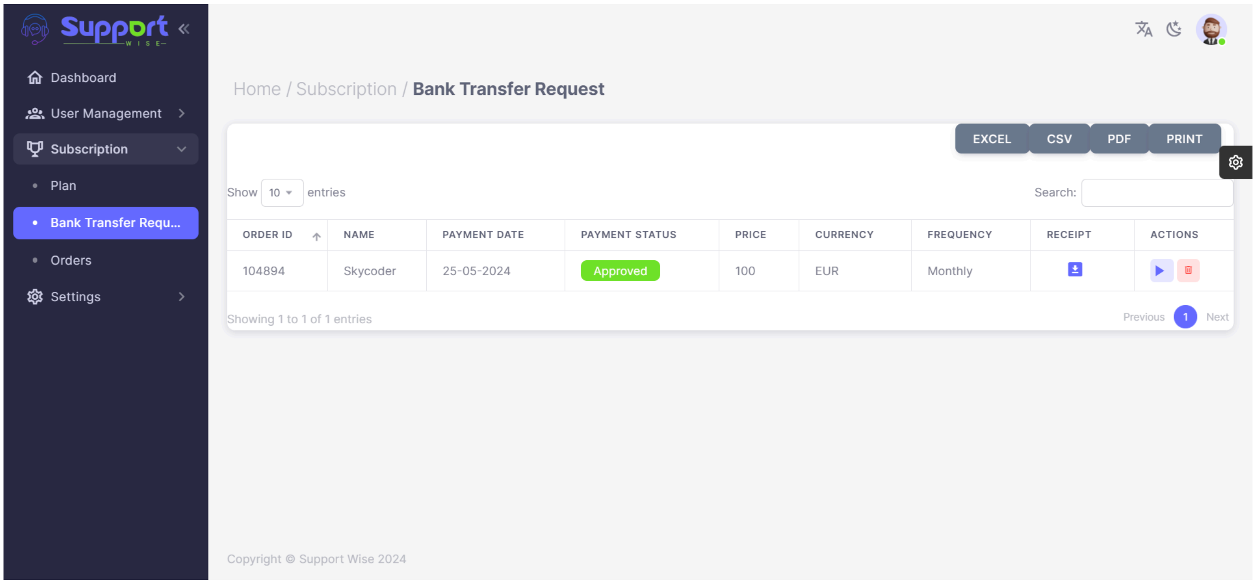


- Once you click on the Add Plan button below, a pop-up will be opened for creating the plan.
- For creating a new plan there are some input fields such as plan name , plan subtitle , plan type , number of users , plan monthly price , plan annual price & plan image.



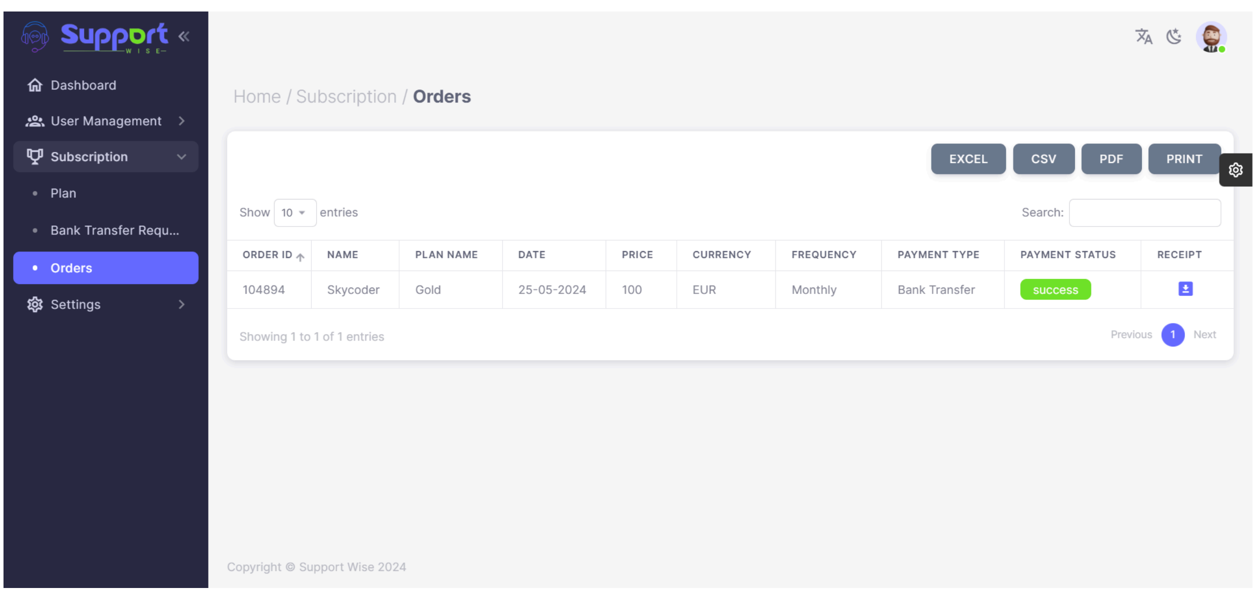
5.3 Bank Transfer Request

- Once a company will purchase any plan & make the payment via bank transfer then these payment requests will be shown here.
- From the action button admin can accept or reject that payment request.



5.4 Orders

- If a company purchases any plan then regarding its plan details , Order Id , Payment information all things will be shown in this order page.

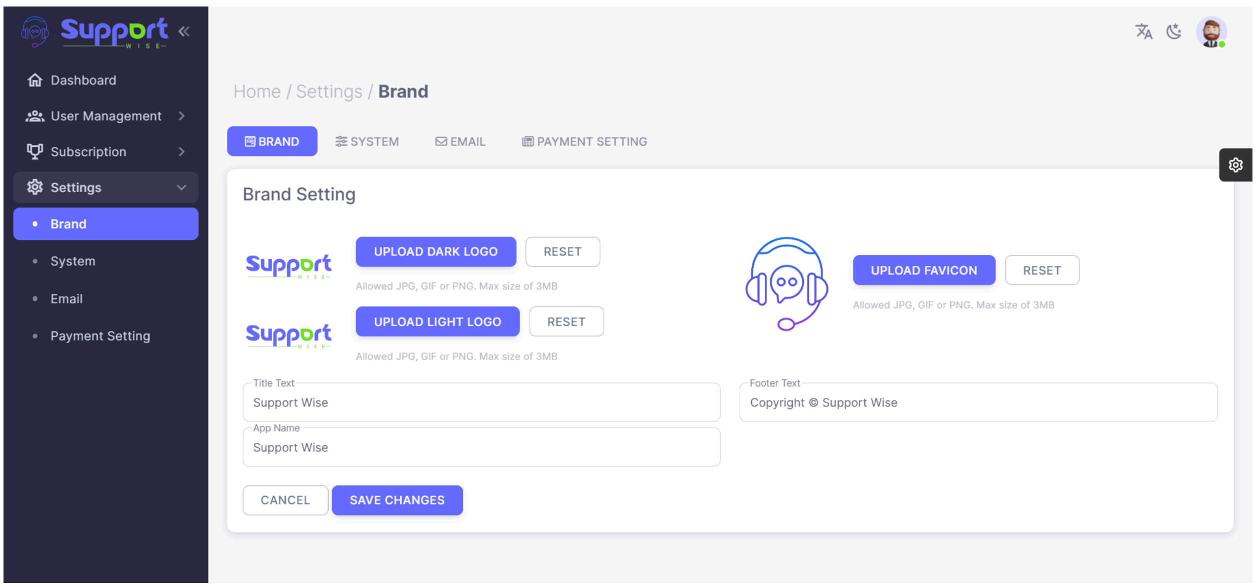


6. Settings

- Under the settings menu admin can manage the different settings such as Brand Setting , System Setting , Email Setting , Payment Setting.

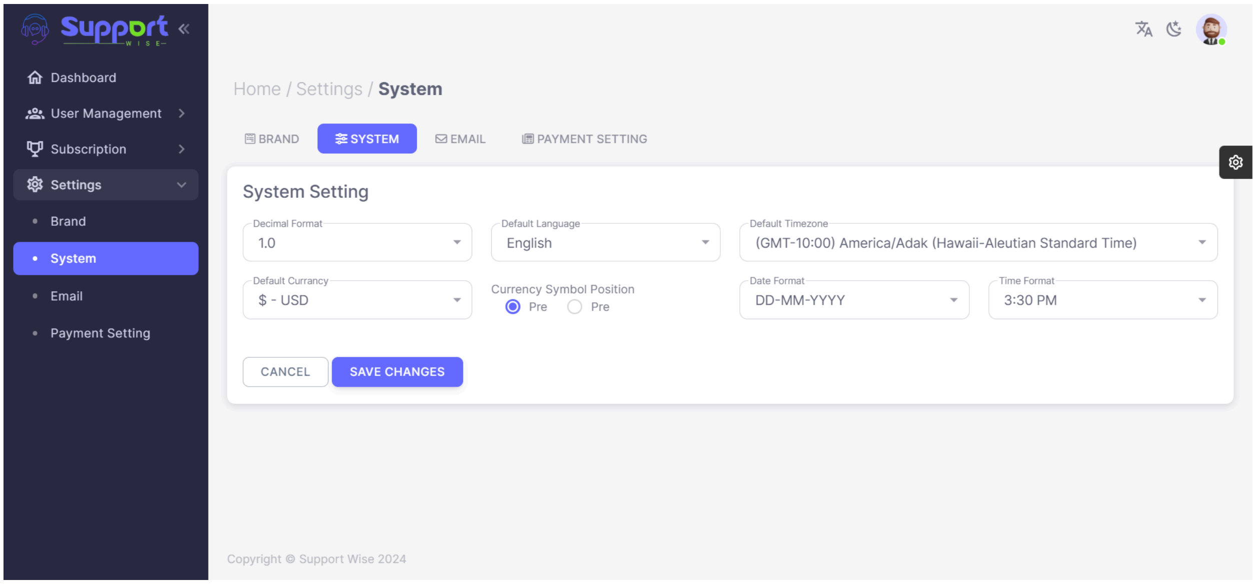
6.1 Brand Setting

- under the brand section admin can add the dark logo, light logo & favicon.
- admin can also add the footer text & app name.



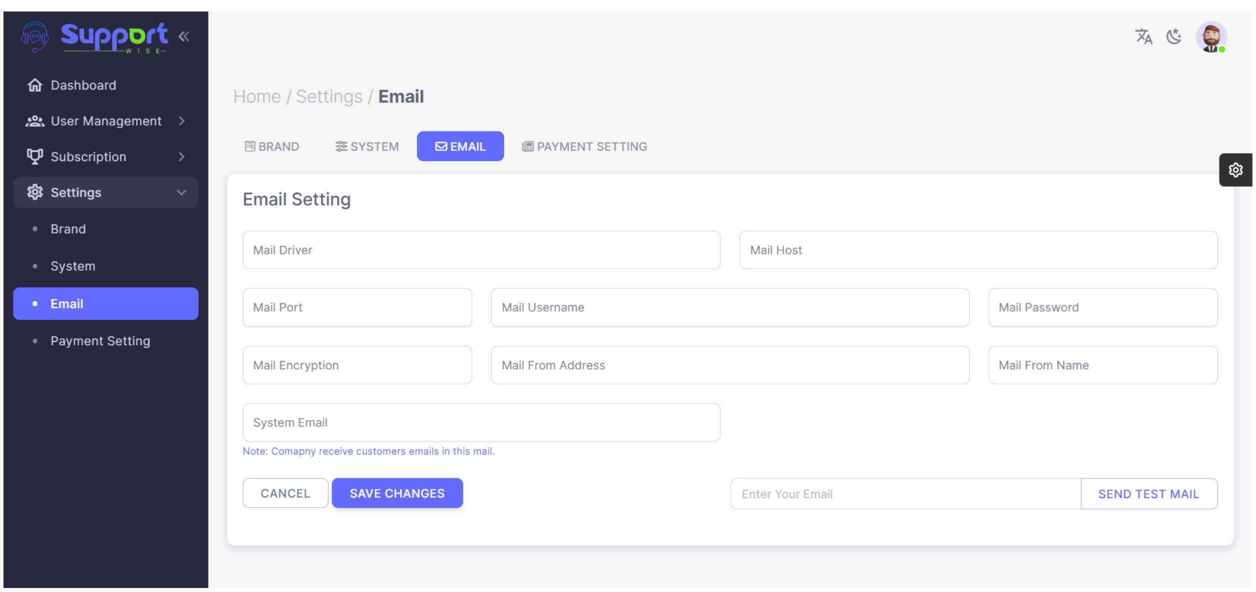
6.2 System Setting

- under the system setting there are lots of settings available such as default currency , timezone , language etc. you can manage it based on your requirements.



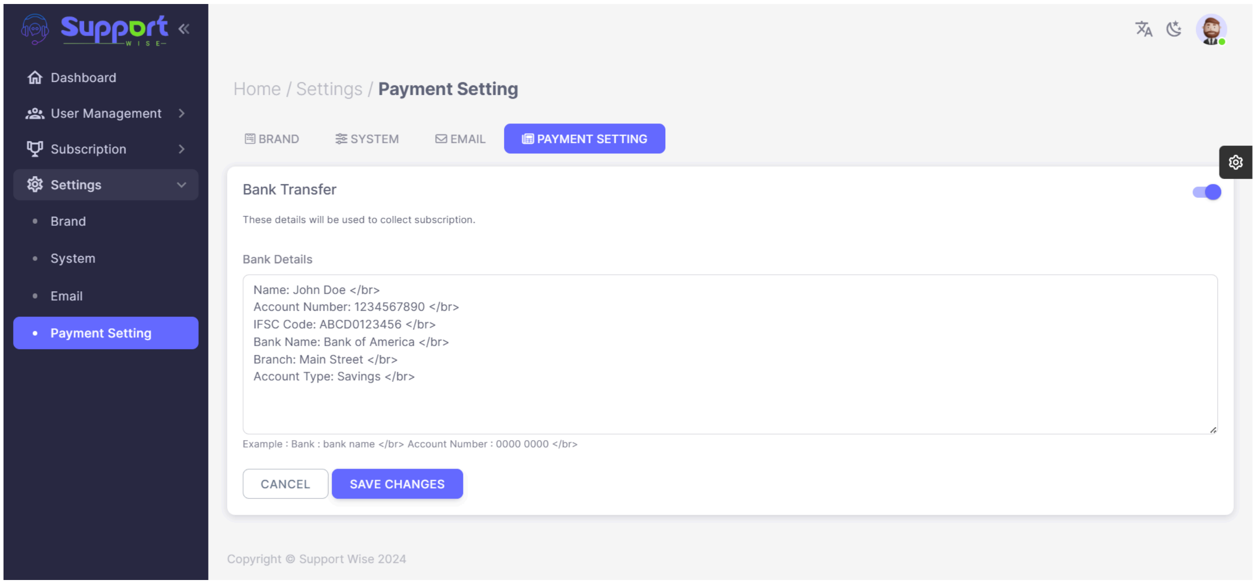
6.3 Email Setup

- Here using an email setting admin can set his SMTP/email credentials & based on this email setting mail will be sent once a new company will be registered.
- one more thing we will also provide the send test mail functionality. As you can see in the below screenshot.



6.4 Payment Setting

- from this menu admin can add the credentials for different payments for now we are providing only bank transfer functionality and in future will add the different payment such as stripe , paypal etc..

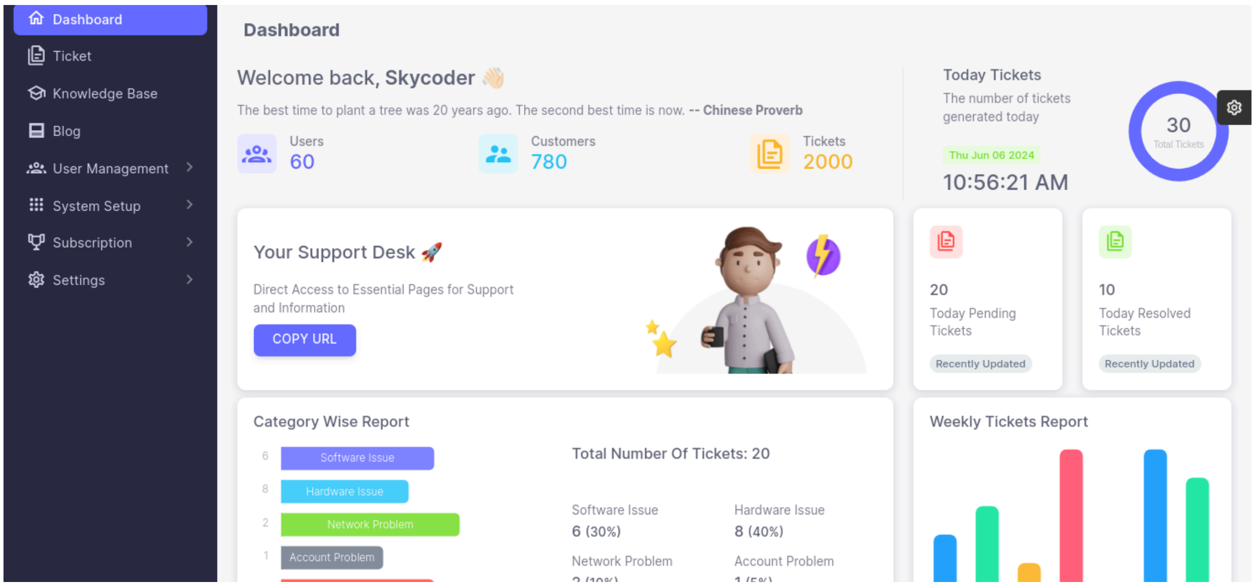


- Now here admin all details has been completed let's discuss about the company login & Company Functionality

7. Company Privileges and Functions

7.1 Company Dashboard insight

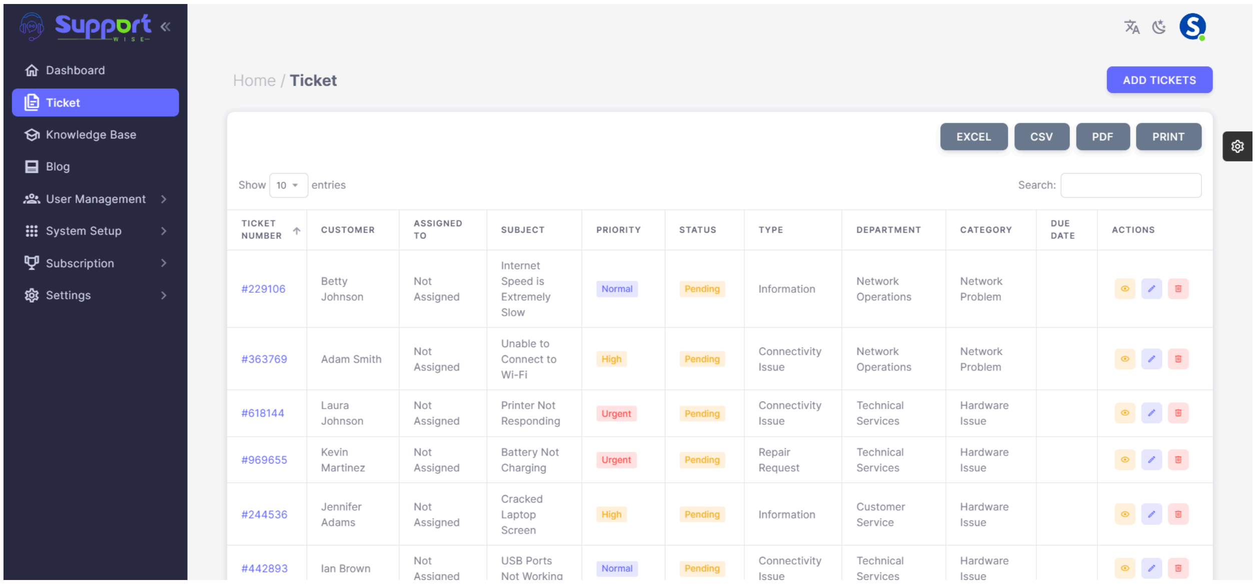
- Once you login the company as mentioned in the image below you can see the dashboard here you can see the many details regarding this login company.



- As you can see in the above image there are lots of details shown on the dashboard such as total number of users, total number of customers , total number of created tickets , total number of resolved tickets , total number of pending tickets.
- Here we also have shown all this data in the form of a chart like you can check the weekly ticket report via chart.

7.2 Ticket Management

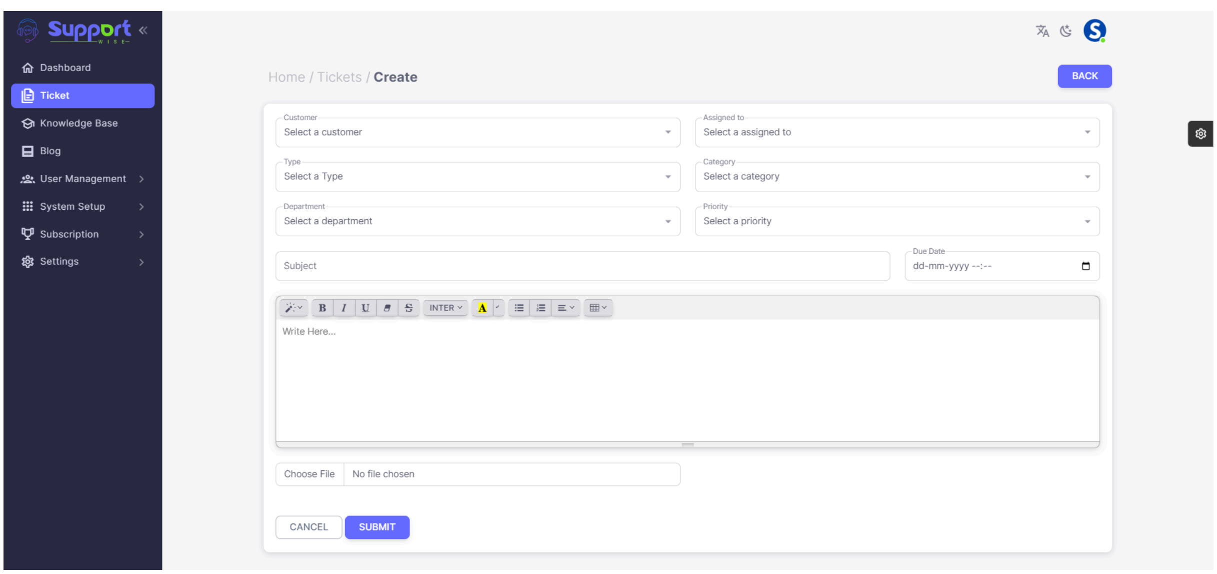
- here as you can see in the ticket page there is the listing of all the tickets. You can also edit & delete these tickets.



7.2.1 Create Ticket

- here we are providing this kind of functionality. If a company wants to create a ticket for they specific customers then the company can create the ticket for them as well as customer can also create the tickets from there side.

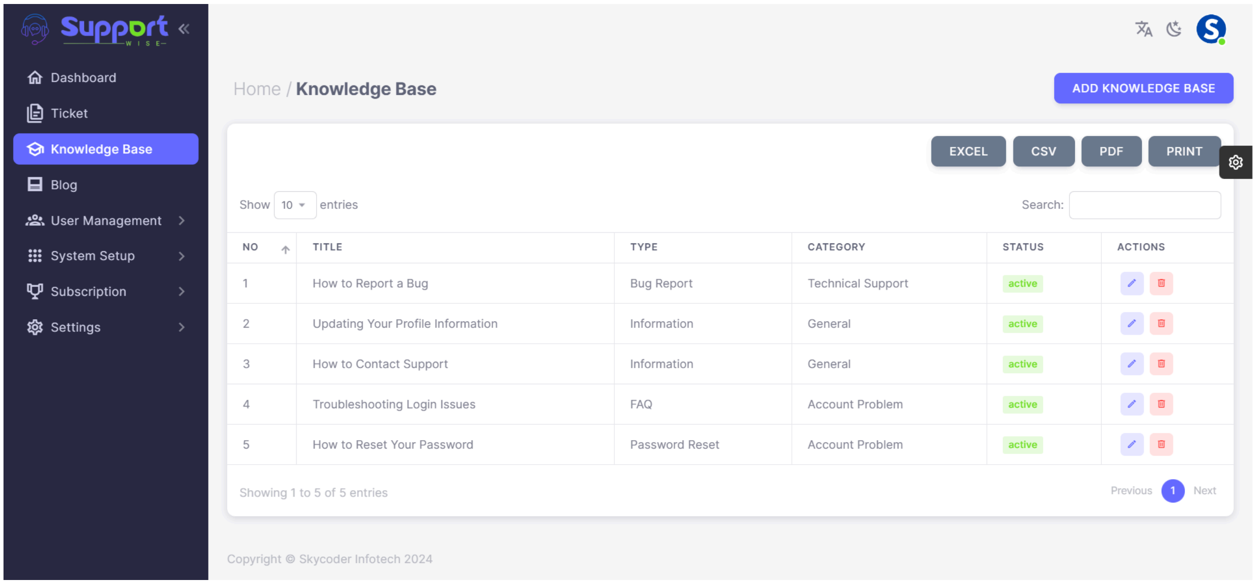
- Once you click on the add tickets button you can see this below page for creating the ticket.



- for creating the ticket there are required lot’s of data such as you can select the customer for which customer you want to create the ticket.
- After that you can select the agent which means which agent you want to assign this ticket to.
- After that you can select the ticket type , ticket category , department , ticket priority , ticket subject , ticket due date , ticket description & you can also add the attachment in the ticket.

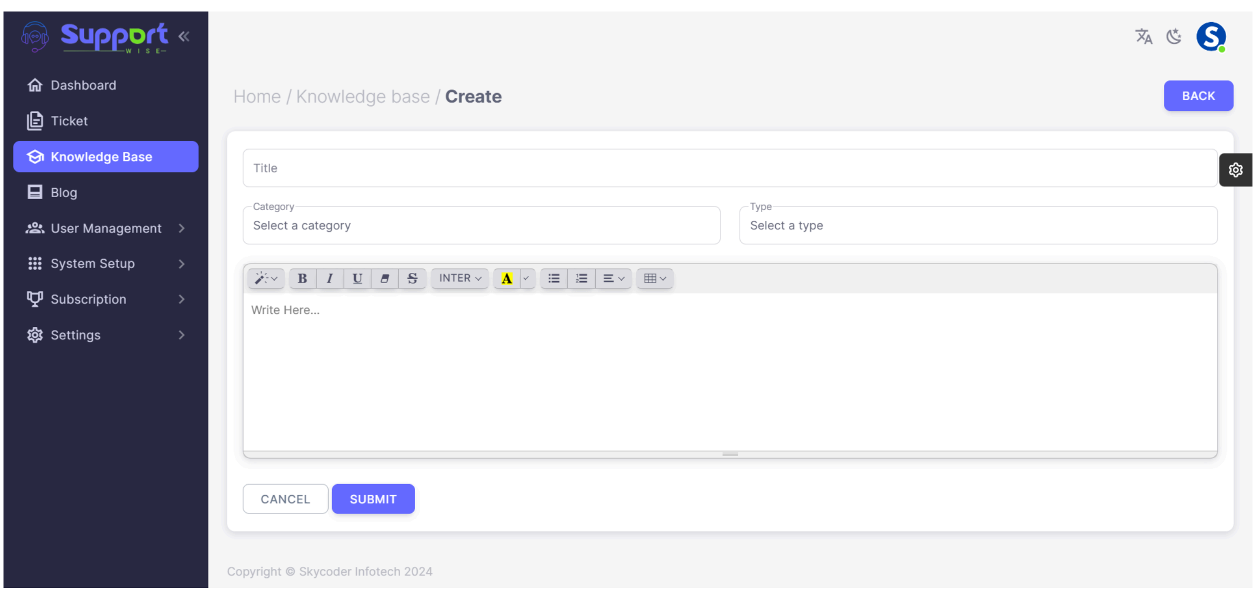
7.3 Knowledge Base

- here as below the image in the knowledge base page you can see the all created knowledge base by company. Companies can also edit & delete the specific knowledge base.



7.3.1 Create Knowledge Base

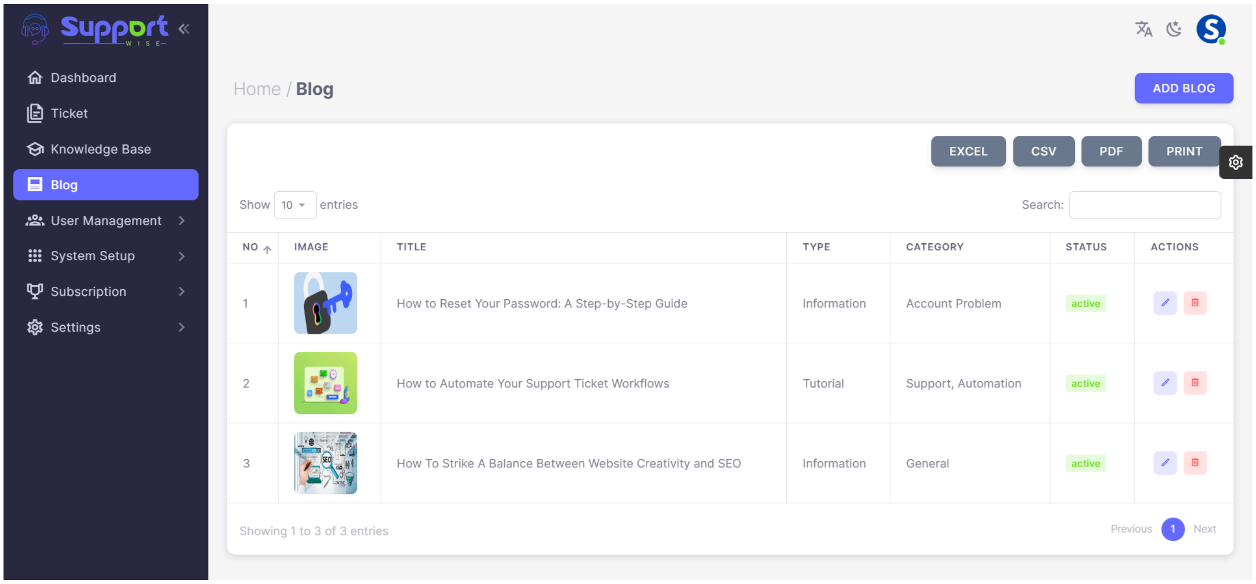
- once you click on the add knowledge base button the knowledge base create page will be open.



- For creating the knowledge base you have to enter the knowledge base title , type , category & its description.

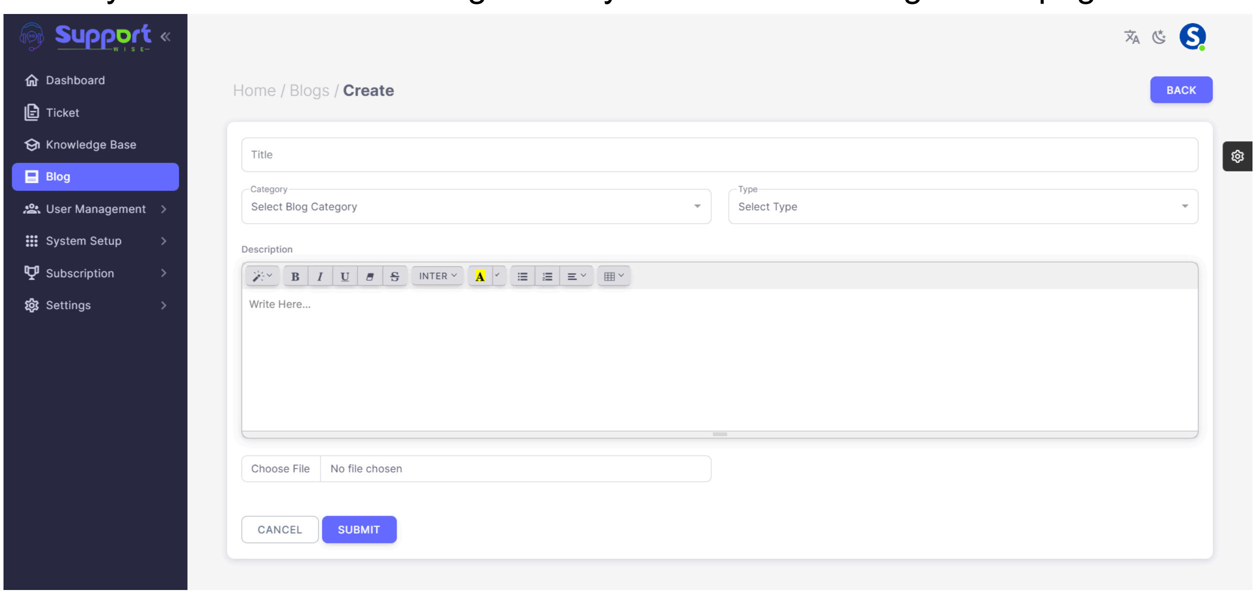
7.4 Blog

- in the image below you can see the list of all blogs that have been created by the company.



7.4.1 Create Blog

- once you click on the add blog button you can see the blog create page.



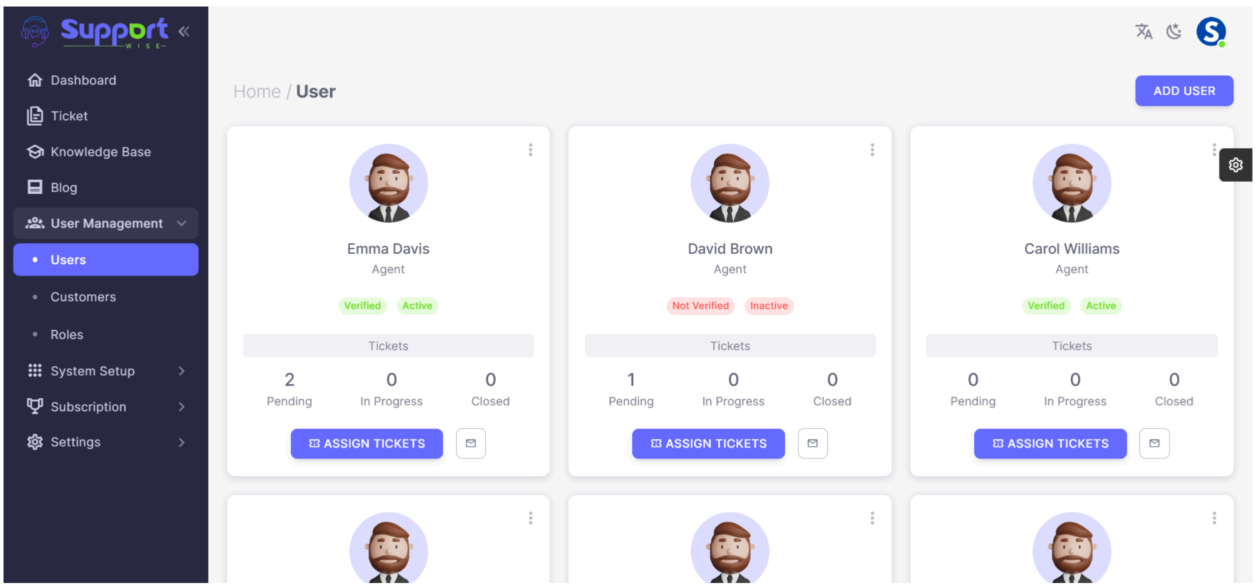
- For creating the blog you have to enter the blog title, blog category , blog type , blog description & blog image.

7.5 User Management

- there are various options available inside the user management section. Such as you can create users , customers & also create your custom roles. Let's understand all options step by step.

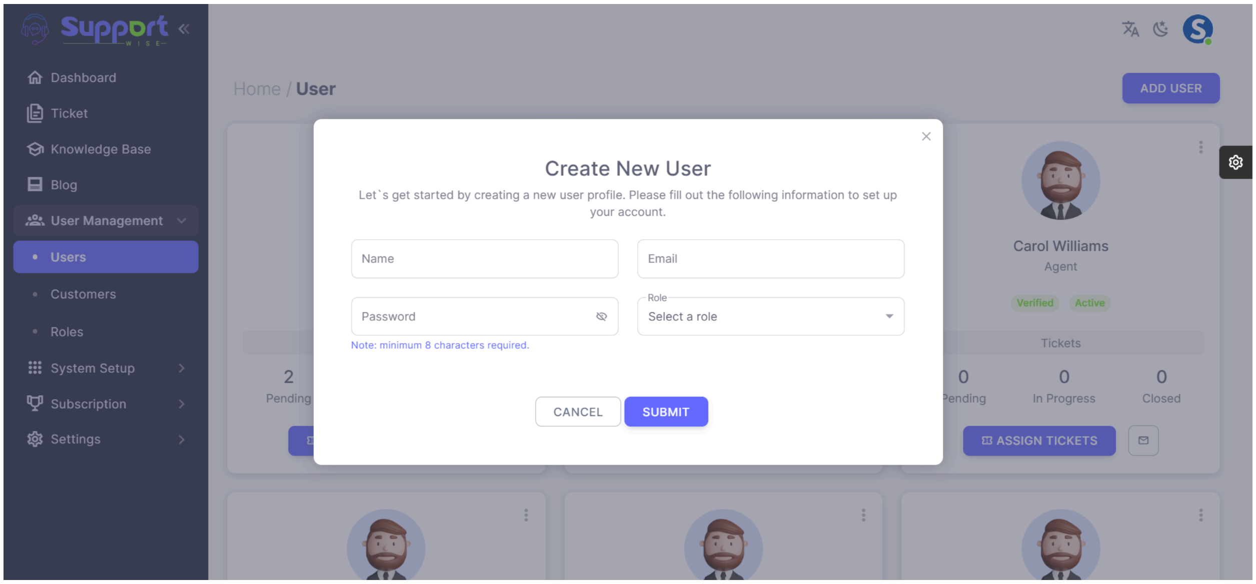
7.5.1 Users

- once you click on the users you can see all the users of your company.



7.5.2 Create Users

- Once you click on the add user button one popup will be open as below image for creating the user in your company.



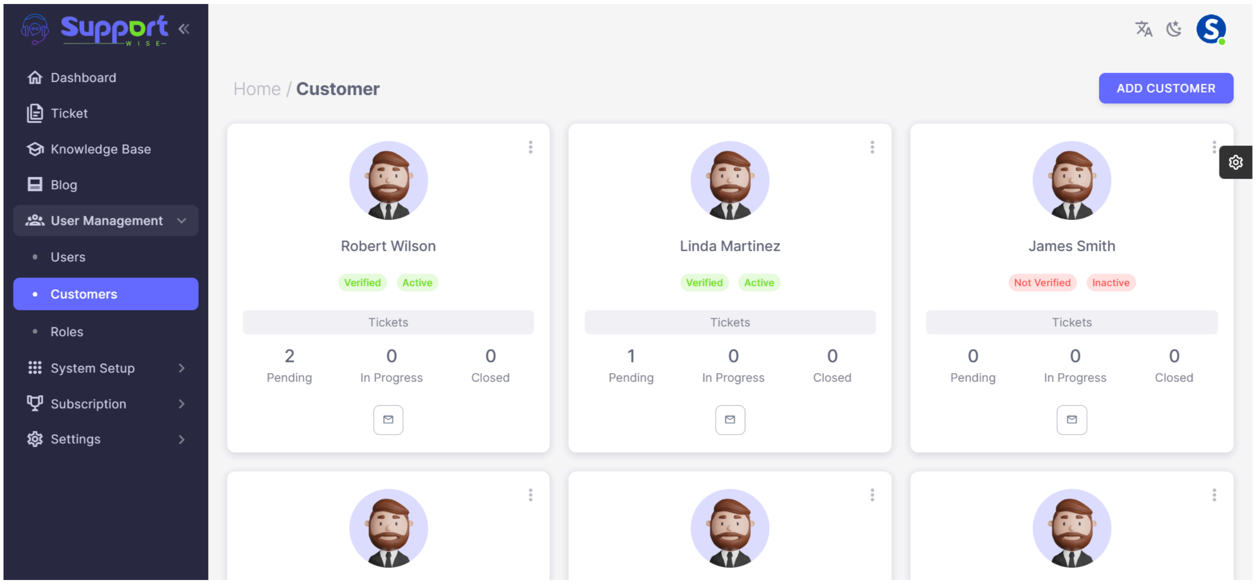
- as you can see in the above image there are 4 input fields for creating the user like name , email , password & role.

- whatever email & password you are entering make sure that email & password will help you the user for their login. One more thing if a company has added their email credentials then when the company creates the user at a time whatever email they enter on that email user will get the login credentails on that registered email.

- whatever role you will select for the user, respecting that role all the permission will be assigned to the user.

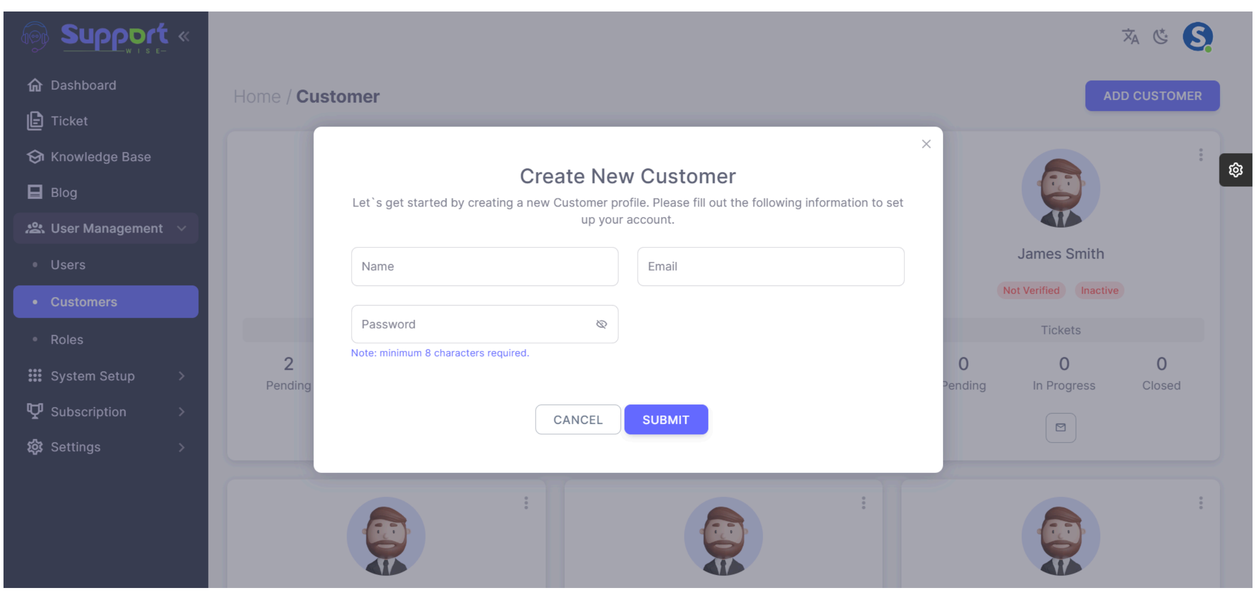
7.5.3 Customer

- once you click on the customer you can see all the customers that have been created by the company.
- company can edit & delete the customer.



7.5.4 Create Customer

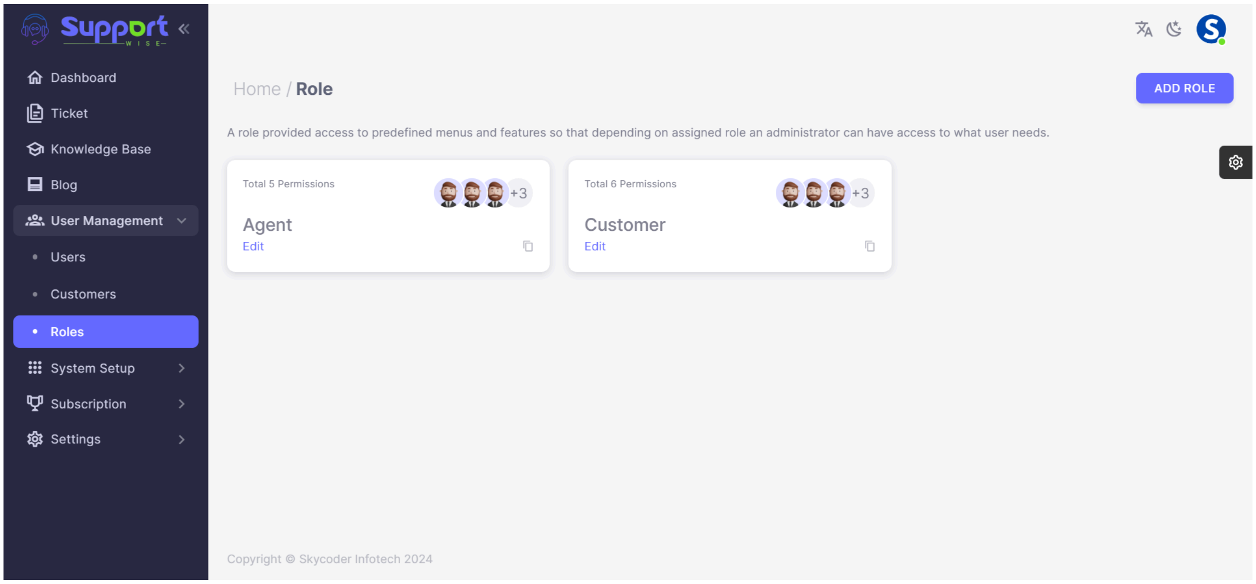
- once you click on the add customer button one popup will be open like this for creating the customer.



- for creating the customer you need to enter the customer name , email & password.
- keep in mind whatever email & password you are using for creating the customer that email & password will be used for login to the customer.

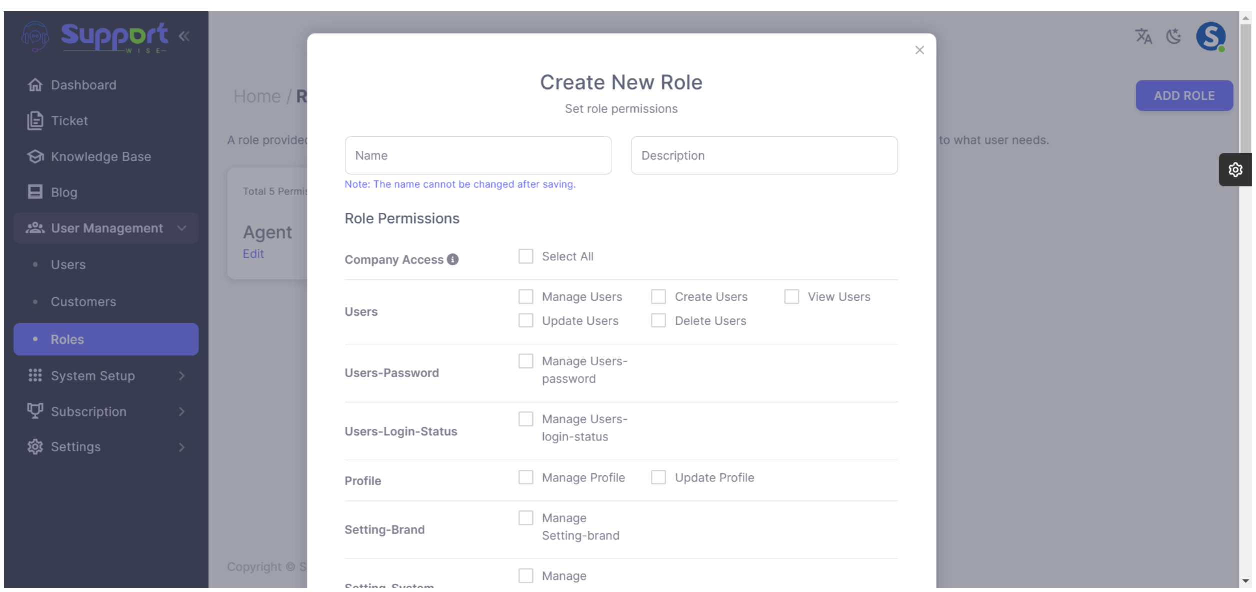
7.5.5 Roles

- Once you click on the roles you can see all the roles that will be created by the company.
- you can see the all roles list like this.



7.5.6 Create Roles

- once you click on the add role you can see one popup for creating the role like this.



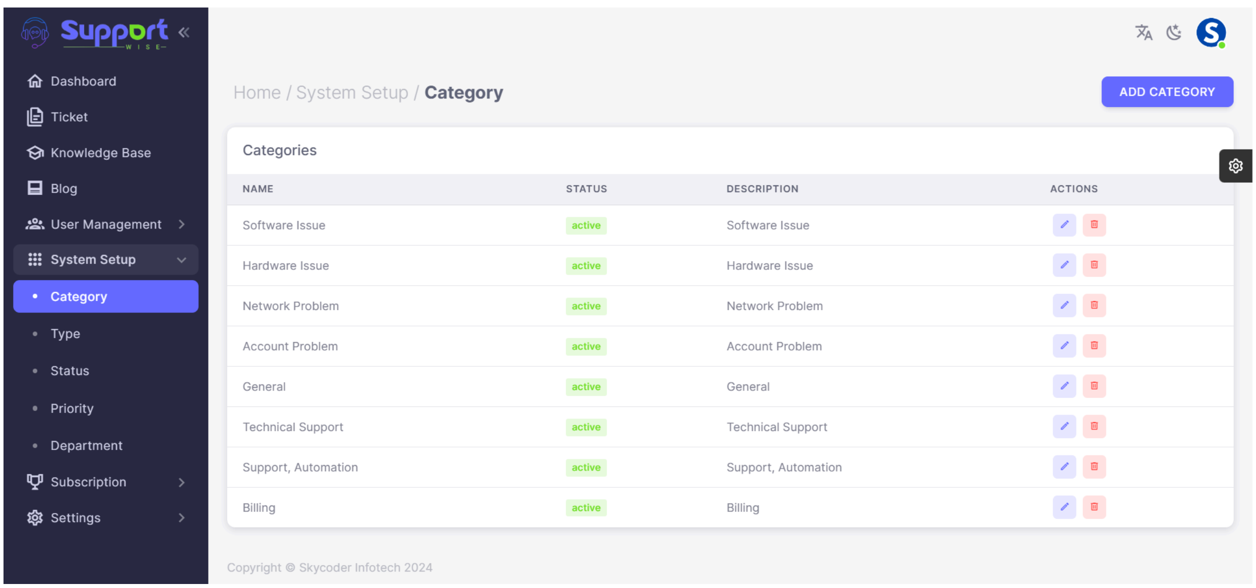
- for creating the role you have to enter the role name, role description & you have to select those permissions which you wanna to assign that role.

7.6 System Setup

- There are various system settings available in our system such as category , type , status , priority , department. These settings will be used in many places. Let's understand each and every setting one by one.

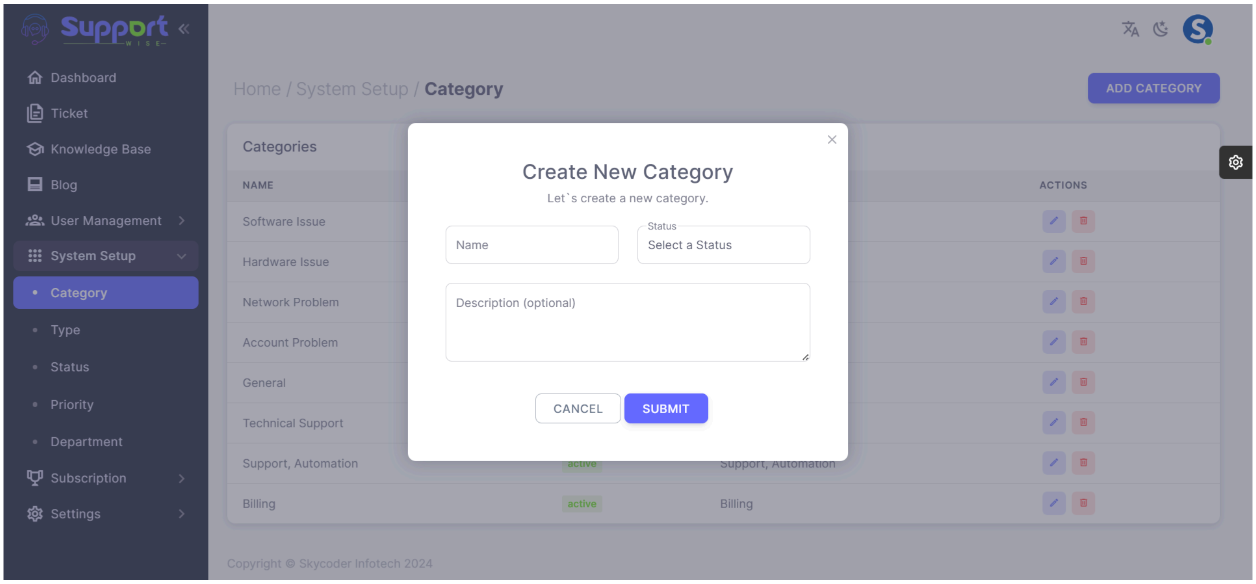
7.6.1 Category

- Once you click on the category menu it will show all the categories which have been created by the company. Companies can also perform actions on that.



7.6.2 Create Category

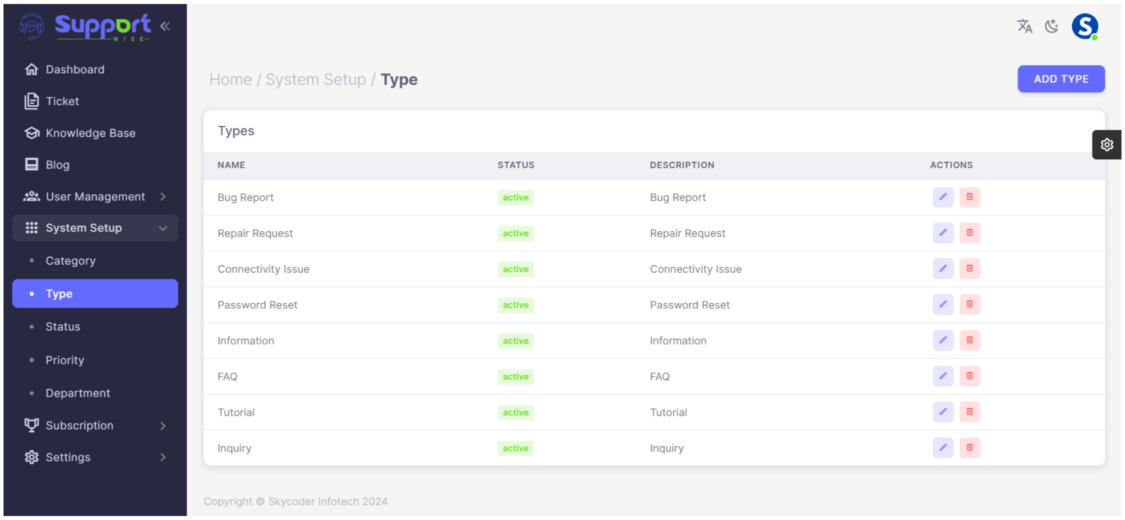
- Once you click on the add category button one popup will be open as shown in the below screenshot.



- For creating the category you have to enter the category name , category description & also have to select the category status such as active or inactive.
- based on category status it will be shown.

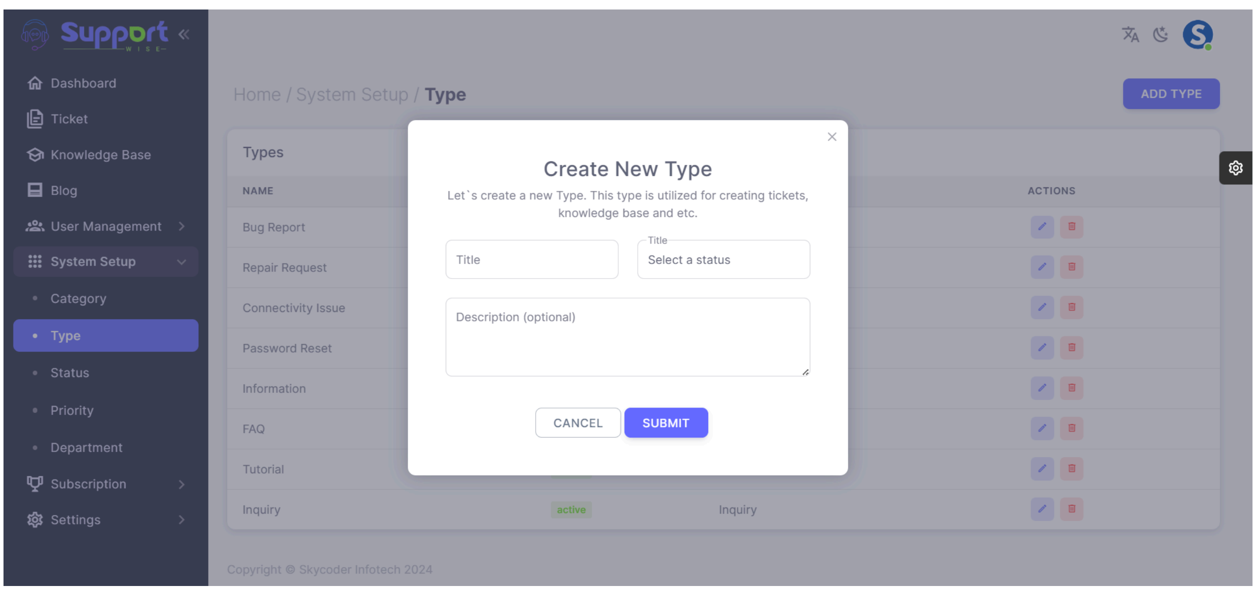
7.6.3 Types

- Let me clear it in advance. These types will be used when you create the ticket. So you can also call it ticket types.
- Once you click on the type it will show all the ticket types that has been created by the company.



7.6.4 Create Types

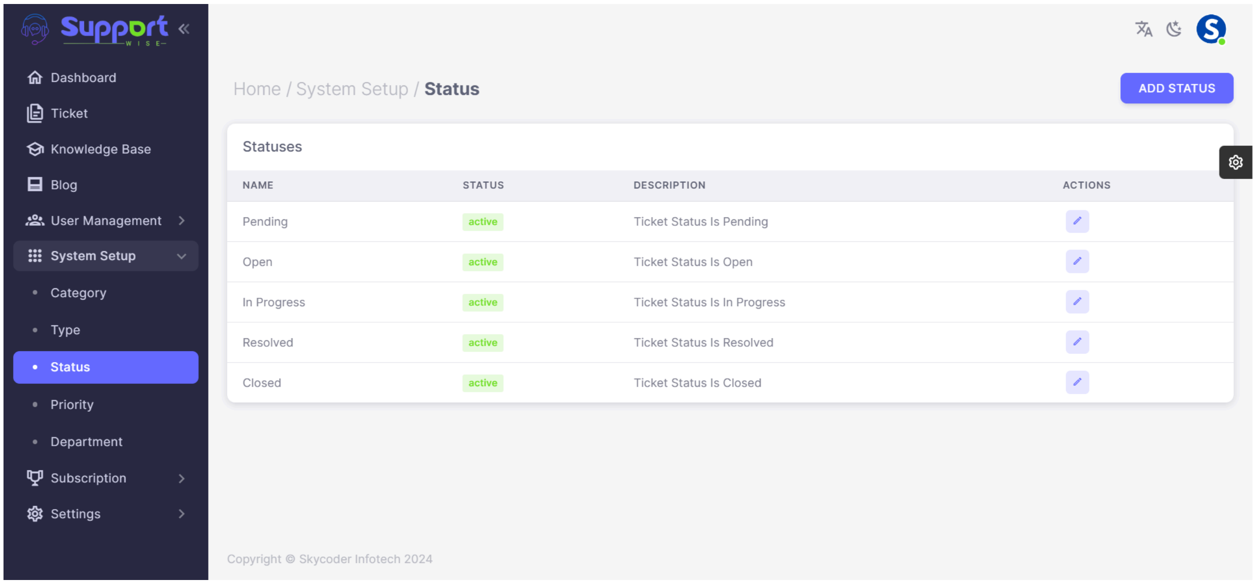
- once you click on the add type button one popup will be open like this.



- if you want to create a type you must have to enter that type title , type description & also have to select the type status such as active & inactive.
- based on the type status it will be shown.

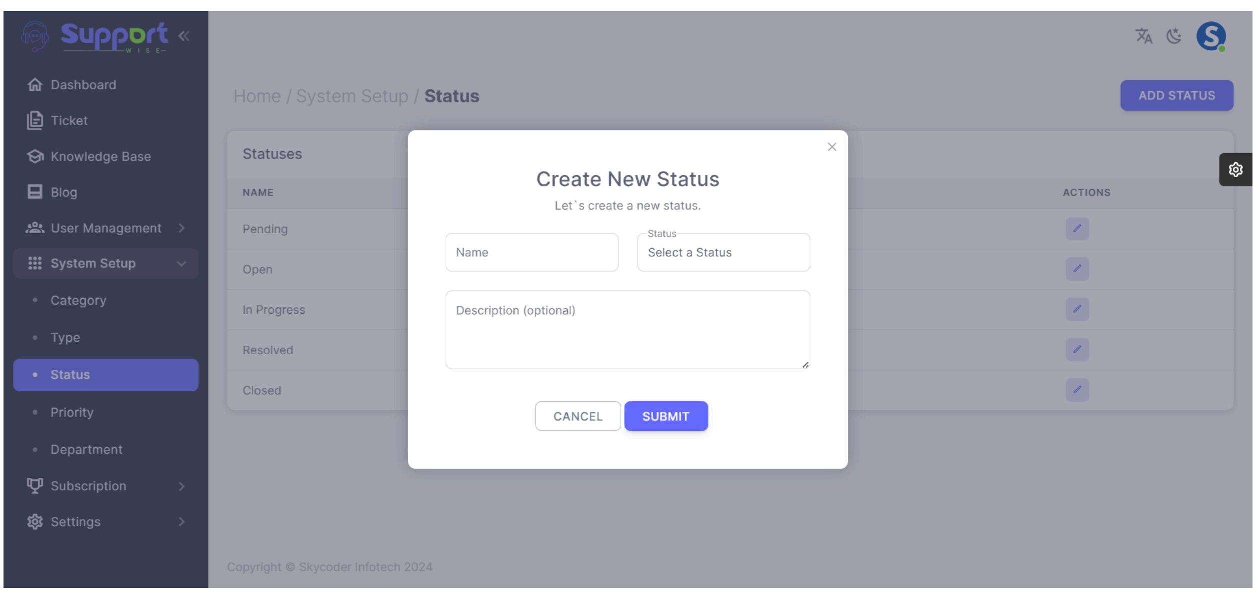
7.6.5 Status

- once you click on the status you can see the list of all the status which has been created by my company.



7.6.6 Create Status

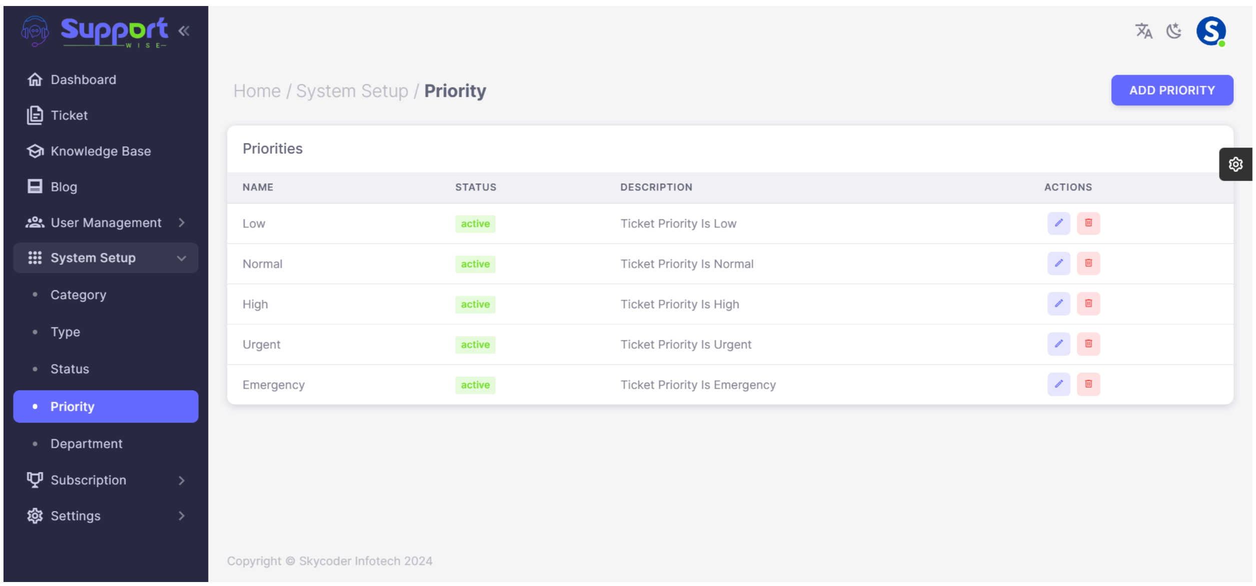
- once you click on the add status button one popup will be open to create a status.



- For creating the status you must have to enter the status name , status description & you have to select it' status active or inactive.
- based on the status it will be shown when you create a ticket.

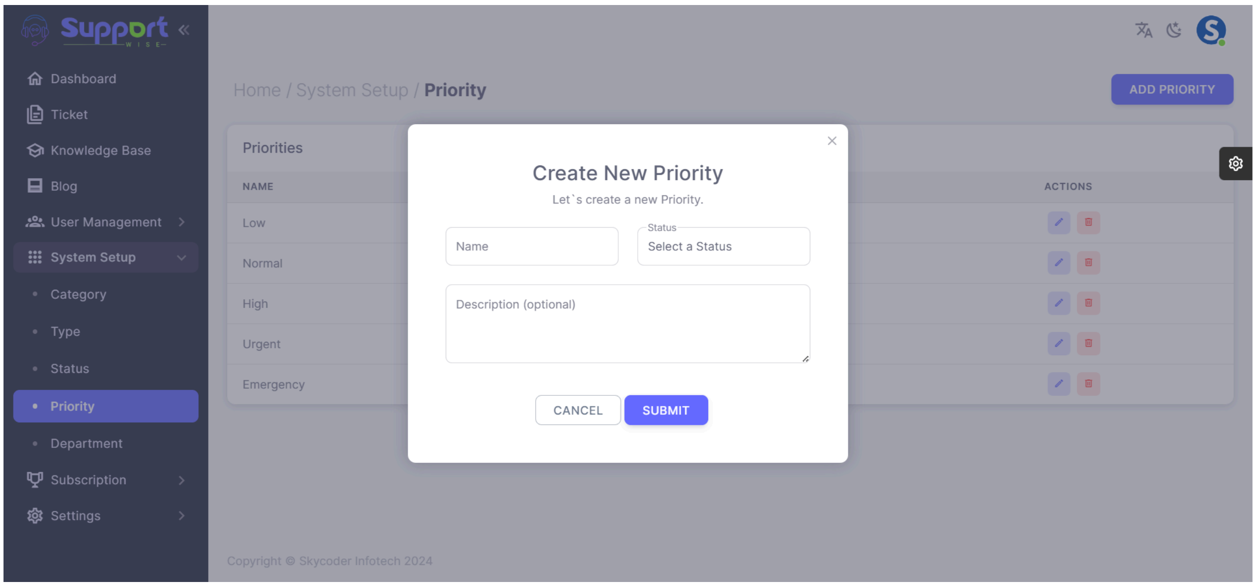
7.6.5 Priority

- once you click on the priority it will show the list of all priority which has been created by the company. company can perform different actions on it such as edit & delete.
- priority will show when you are creating the ticket. It will decide the present ticket priority.



7.6.5 Create Priority

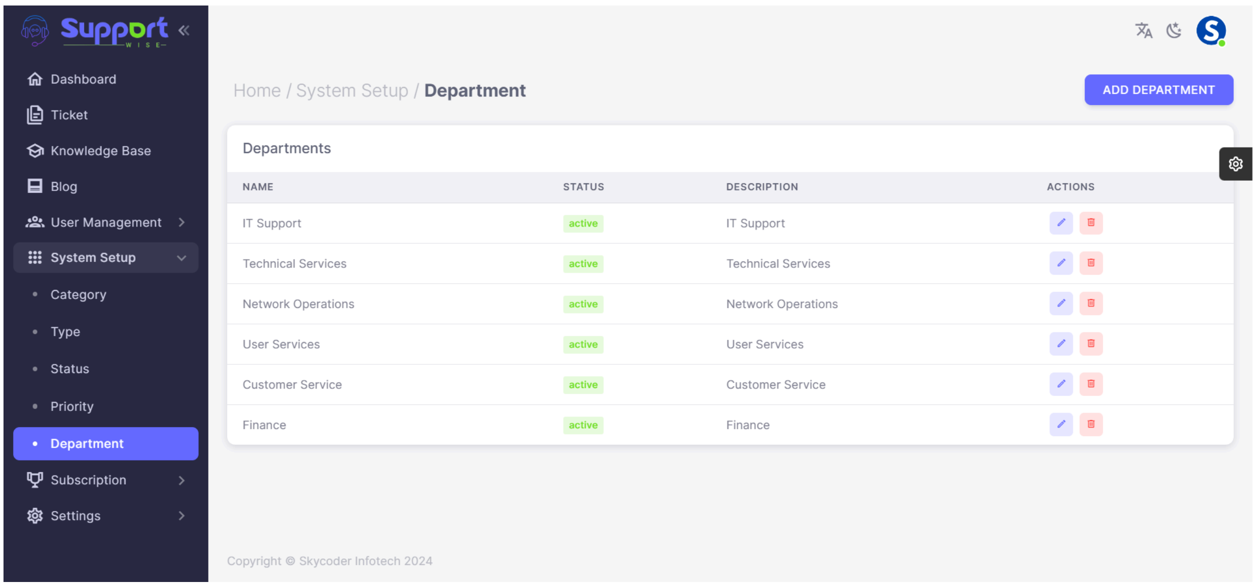
- once you click on the add priority button one popup will be open for creating the priority.
- this priority you can consider as a ticket priority when you create a ticket at that time you can select the priority of that ticket.



- for creating the popup you have to enter the title , description & you have to select the status of that priority.
- keep in mind based on priority status it will show once you will create the ticket.

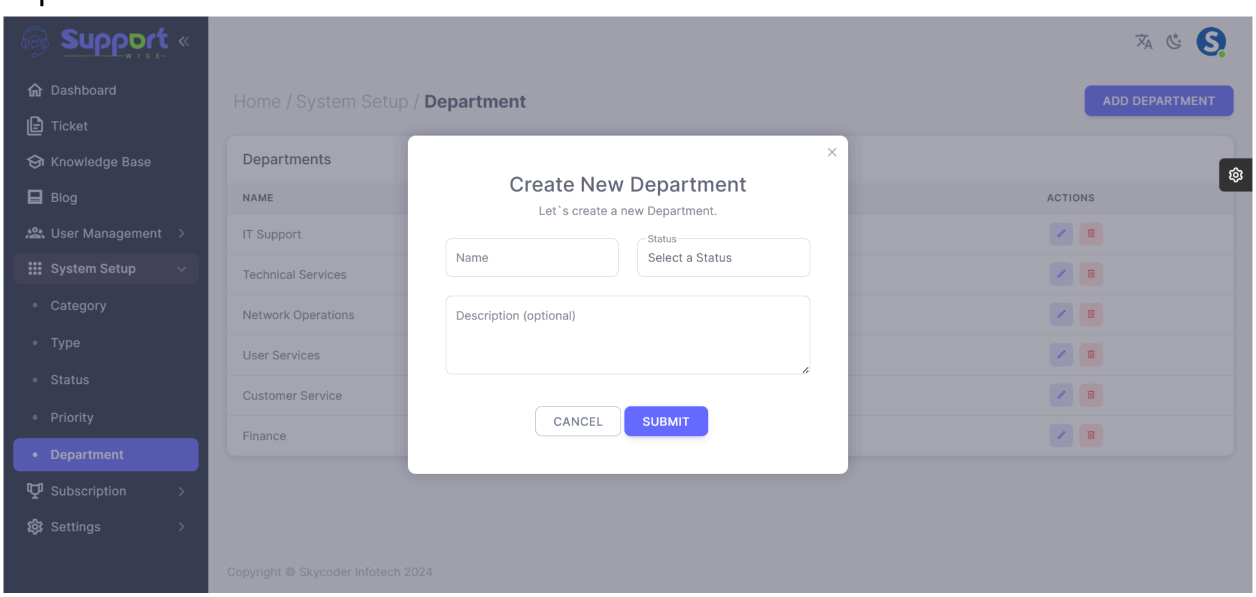
7.6.5 Department

- Once you click on the department you can see the list of all departments which have been created by the company.
- companies can perform different actions on that.
- whatever department you are adding these will show when you create the ticket.



7.6.6 Create Department

- once you click on the add department button popup will be open for creating the department.



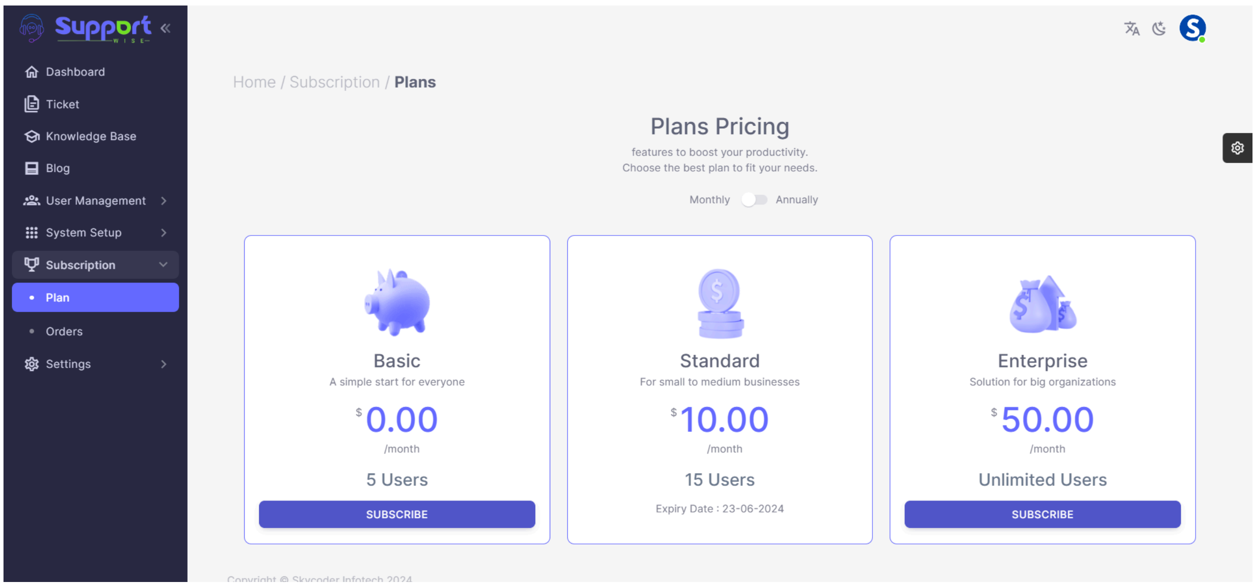
- for creating the department you have to enter the department name , description & you have to select the department status such as active or inactive.
- based on the status it will show when you will create the ticket.

7.6 Subscription

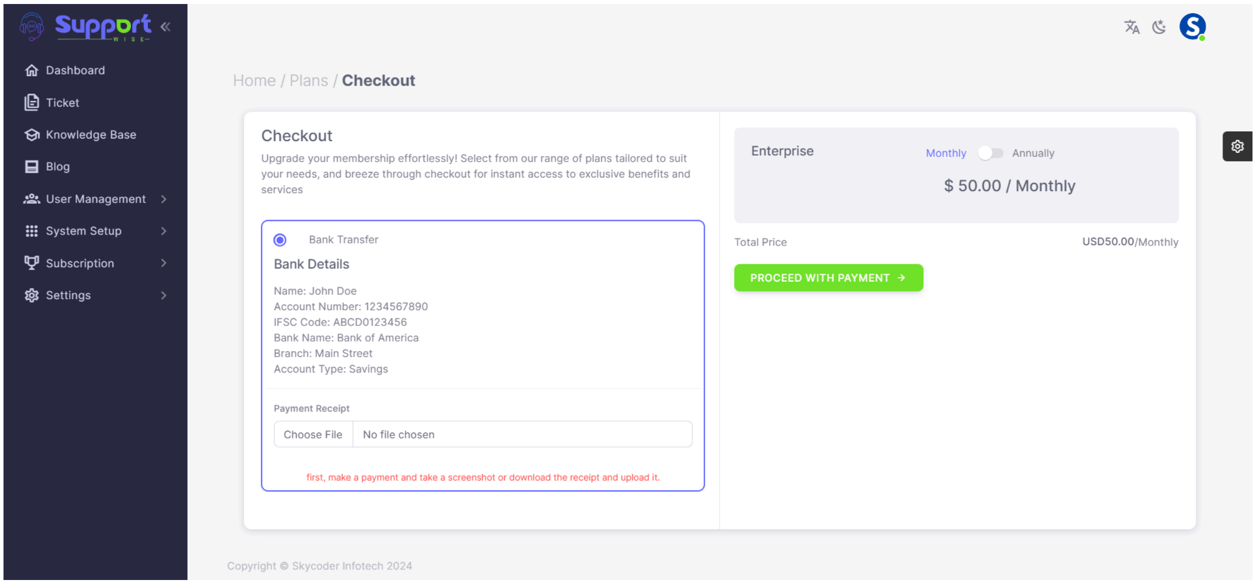
- As you can see here we are providing different options under the subscription. Let's understand each & every option step by step.

7.6.1 Plan

- Once you click on the plan under the subscription menu you can see all the plans that have been created by the admin.
- Here we have set one functionality when a new company created by default free plan will be assigned to the newly created company.



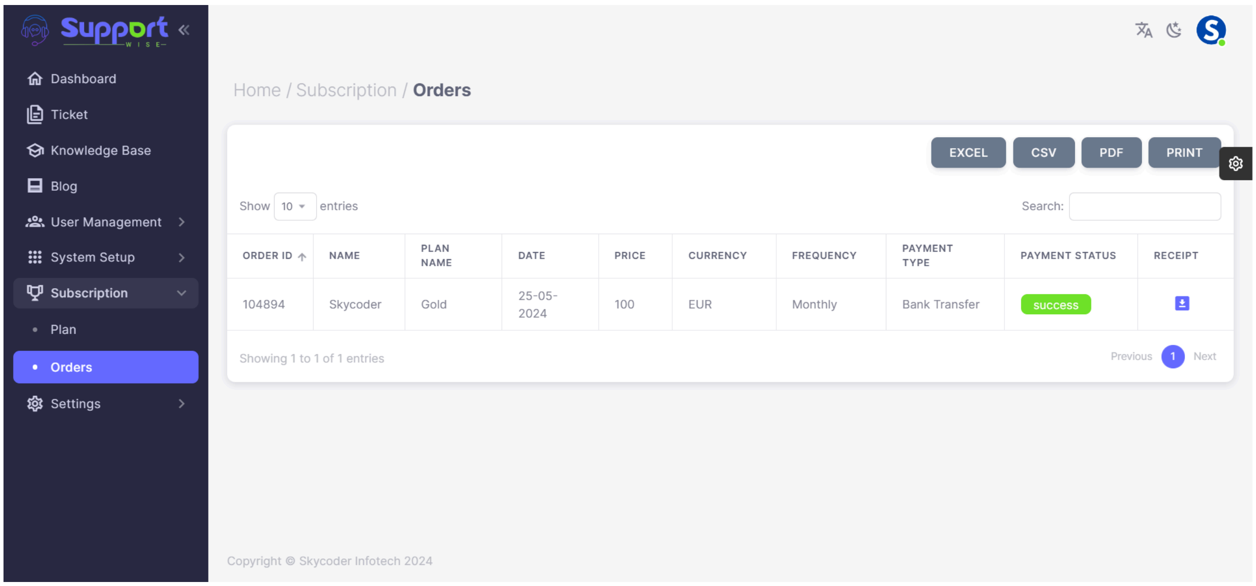
- As you can see the subscribe button on the above image. Once you click on that button it will be redirecting to you on the checkout page you can see the below image.



- Once you redirect on the checkout page there you can see the bank transfer option for making the payment. In the Future will add the different payment options such as Stripe , Paypal.
- here make sure one thing if the admin has enable the bank transfer payment from admin side then only you can see here the bank transfer option.
- Select the bank transfer option & click on the proceed with payment button.
- Once you click on the proceed with payment button your plan request will be sent to the admin. Admin can approve or reject the plan request from the admin side.
- Once the admin approves the plan request from the admin side that plan will be assigned to the company.

7.6.2 Orders

- when a company purchases any plan & makes the payment successfully then these transaction entries will be shown in the order page.
- here you can see the transaction id & all your plans details will be shown in the order page.

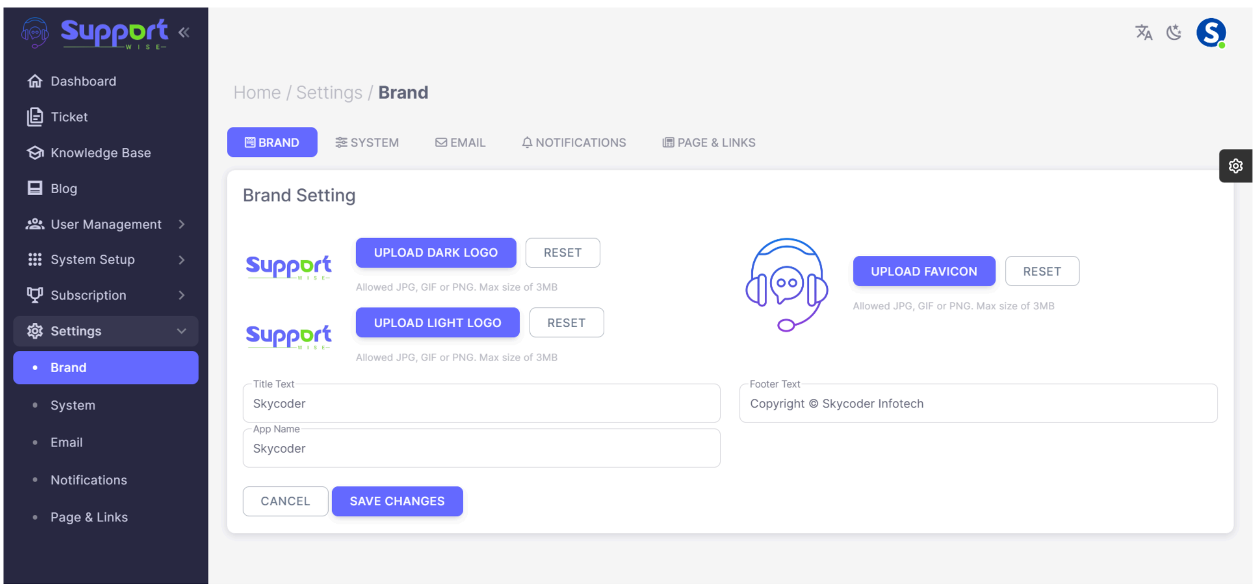


7.7 Settings

- as you can see there are various settings available for the company. Let's discuss each & every setting step by step.

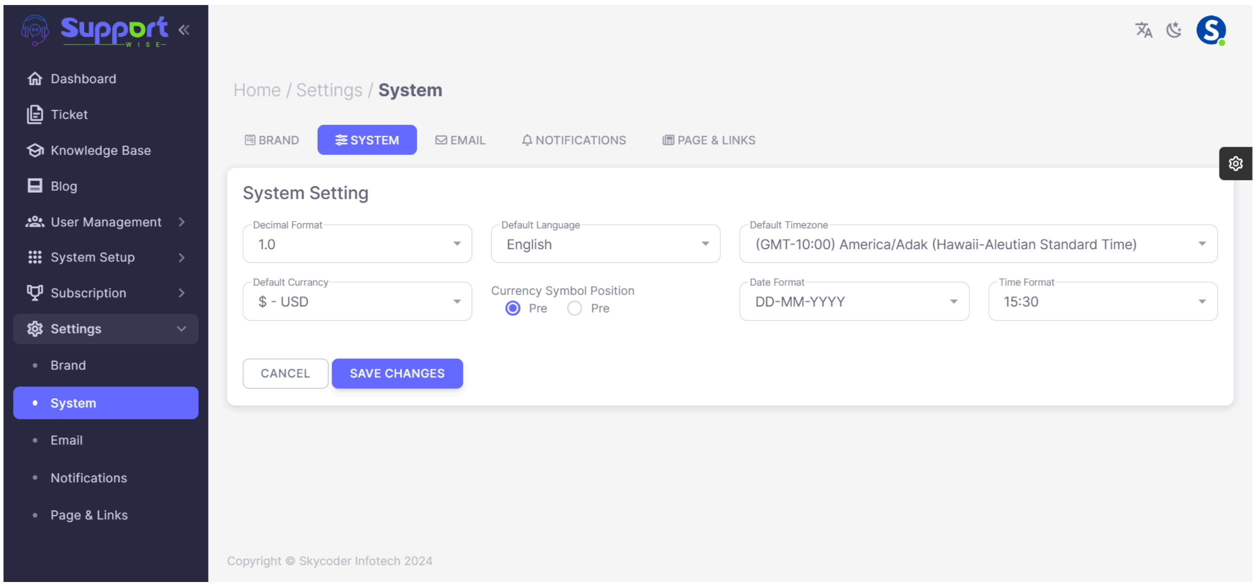
7.7.1 Brand Setting

- as I have mentioned above, brand setting for the admin. This brand setting is the same as it.
- Whatever logo , app name will be saved and it will be applicable for the company.



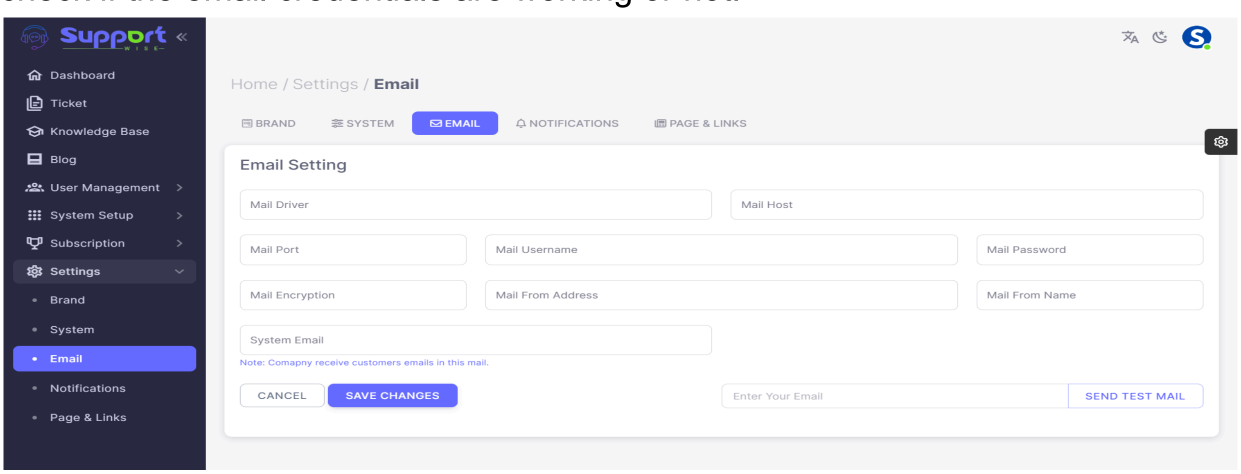
7.7.2 System

- under the system menu there are lots of settings available such as a company can set its default currency , default language , default timezone , date time format.
- based on the company requirement, the company can set everything.



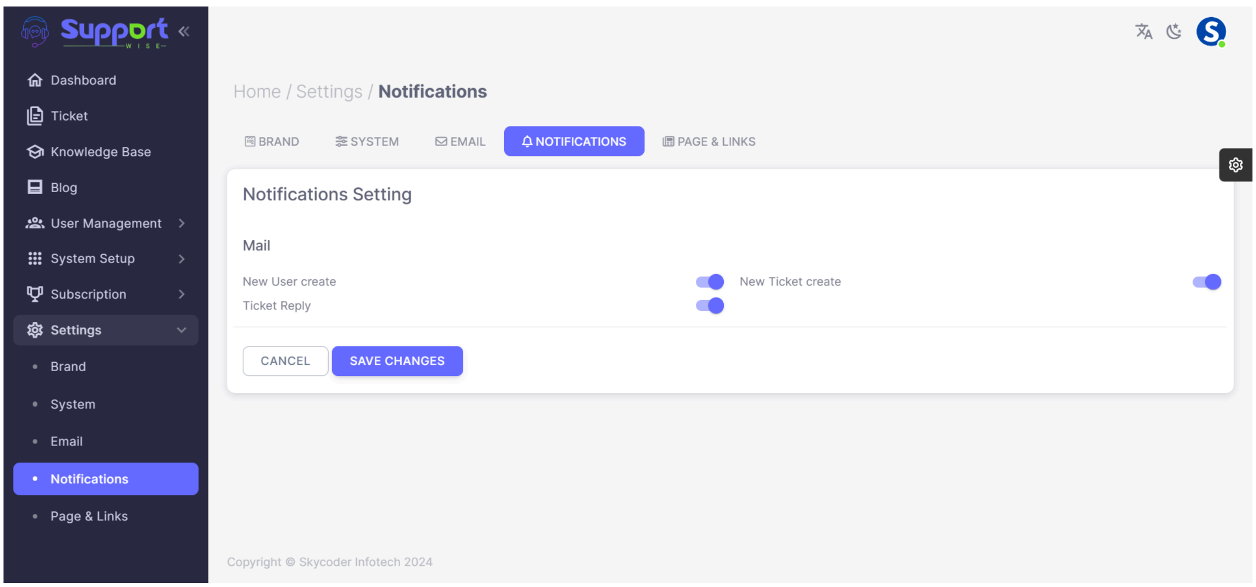
7.7.3 Email

- we have add functionality of email when the company will set the email credentials that will be helpful to sending the email.
- like when a new user will be created , a new ticket will be created, email goes to the user at time this credential will be used.
- We have also added one functionality to send test mail. Using that you can check if the email credentials are working or not.



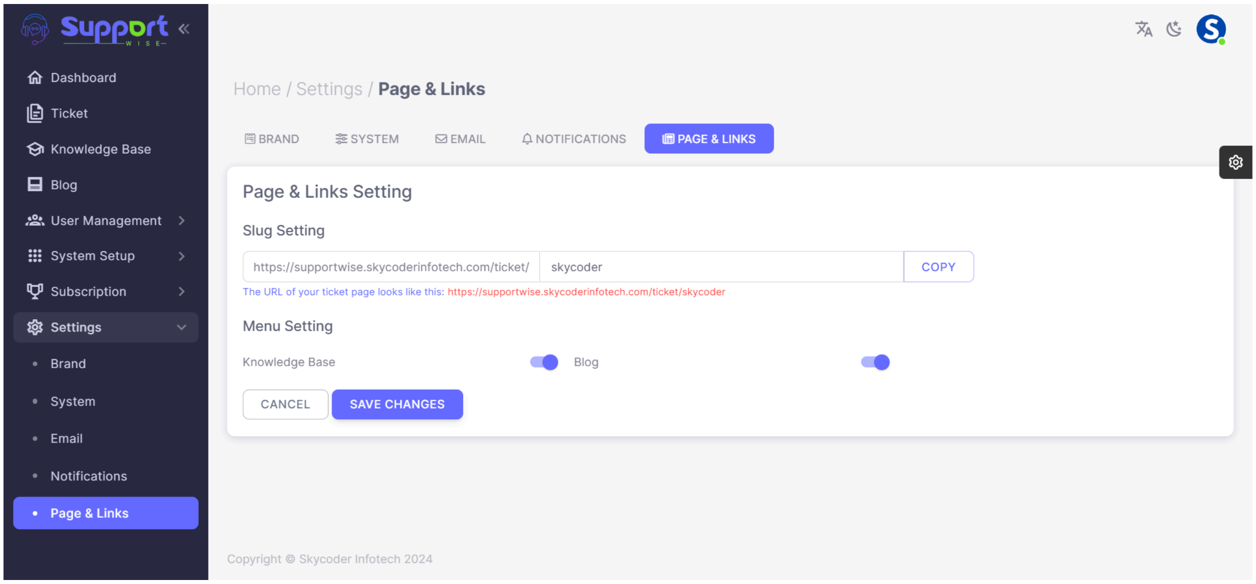
7.7.4 Notifications

- as you can see in the below screenshot the company can manage the notification setting as per it’s requirement.
- Let's take an example: if a company enables the new user create notification it means when the company will create the new user each and every time a newly created user email & password will be sent to the new user via email in the form of Notification.

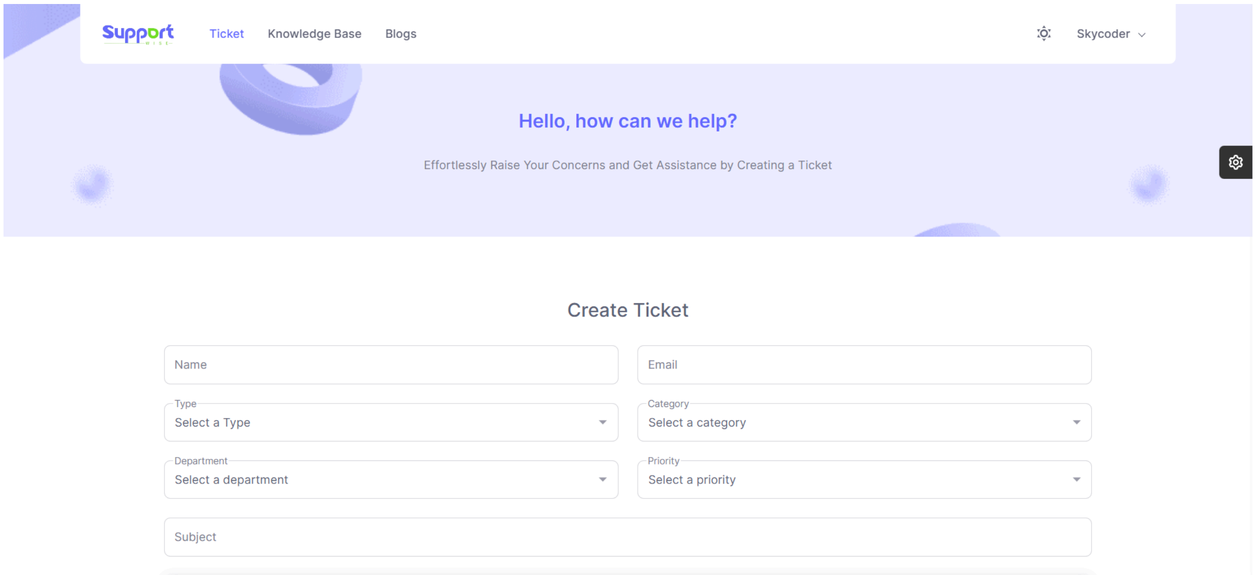


7.7.5 Page & Links

- here when you click on the page & link setting you can see the slug setting & manu setting.



- If you want to modify the slug of your company you can modify it.
- you can also see the menu setting there are 2 options blog & knowledge base when you enable this option it means your company blog & knowledge base will be shown on the copy link page.
- sometimes without a customer or user account they want to create the ticket. At that time you can copy the link of your system and send them. Once a user will open that link it will look like this.



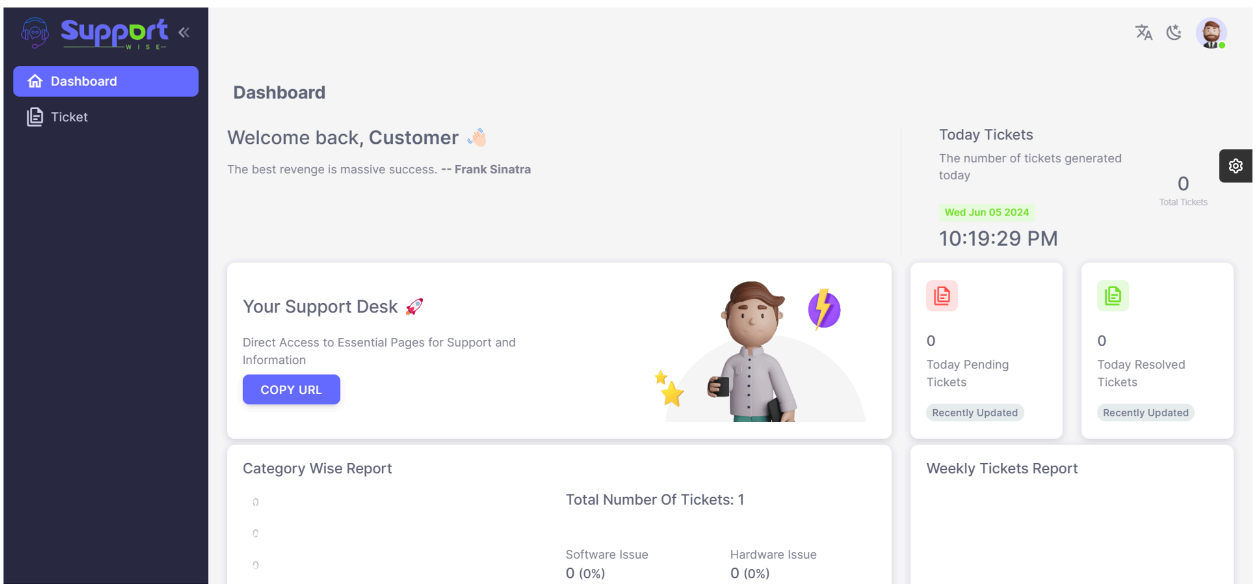
- as you can see in the above screenshot users can directly create the ticket without any login & register.

8. Customer Privileges and Functions

- now when a customer is logged in we will provide a different functionality to them. Let's understand all the functionality step by step.

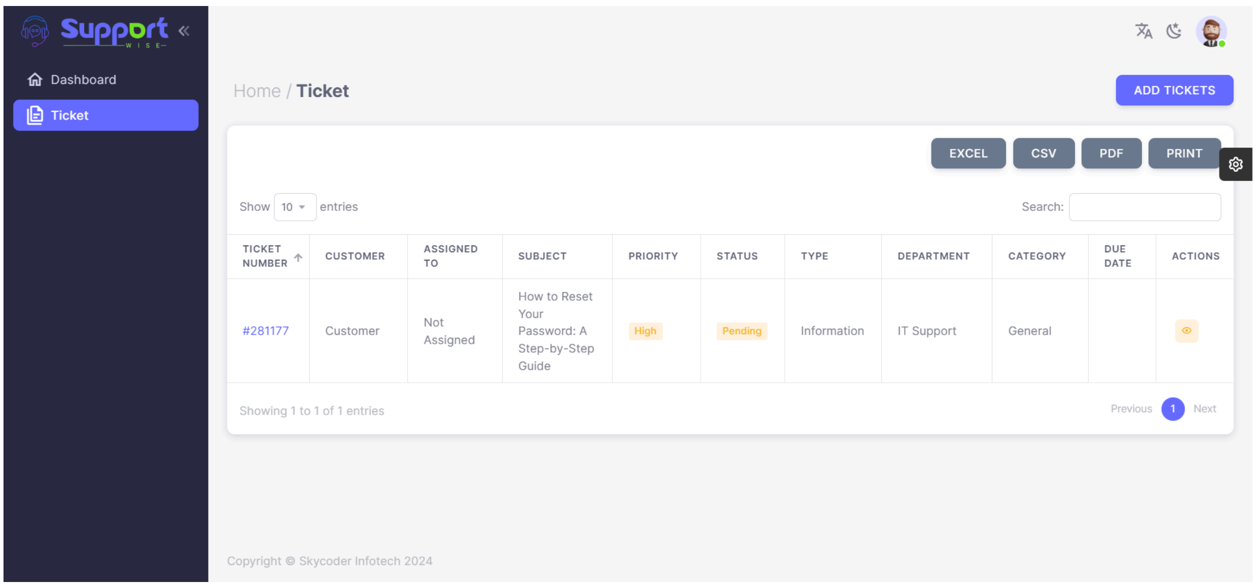
8.1 Dashboard insight

- once any customer is logged in into our system it will redirect to the customer dashboard.
- on the dashboard customer can see total number of tickets , total number pending tickets , total number of resolved tickets etc..
- for more understanding we also have put the chart like category wise all total number of tickets will be shown in chart & weekly ticket report can be shown in chart.



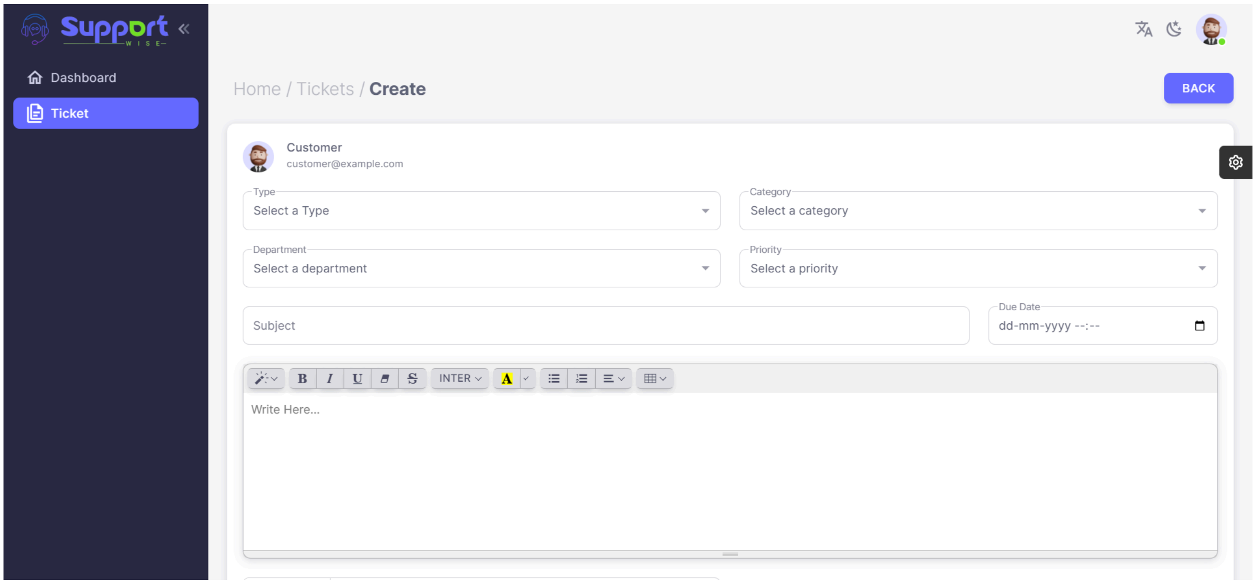
8.2 Ticket Management

- Once a customer clicks on the ticket menu, the customer can see all the tickets which have been created by the customer.
- also can see those tickets which the company has directly created from the company side for this customer.
- based on the permission of the customer role customer can perform the different actions on that such view ticket & reply on that ticket.



8.2.1 Ticket Management

- For creating the ticket when a customer clicks on the add ticket button a new page will be opened for creating the ticket.



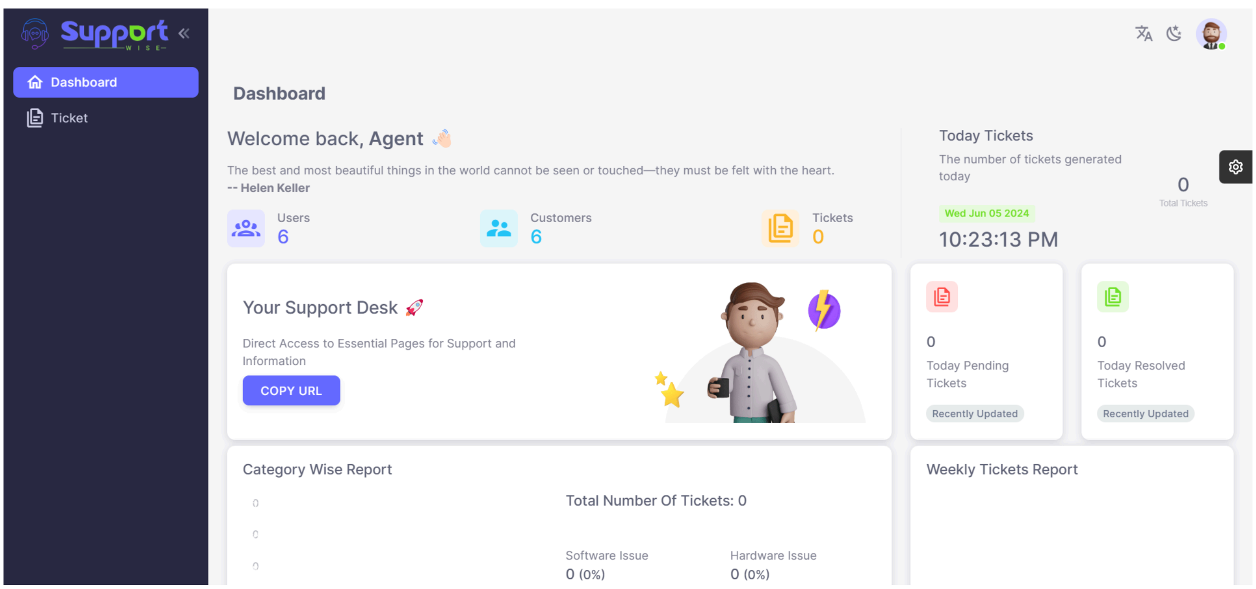
- For creating the ticket, customers have to select the ticket type , ticket category , ticket department , ticket priority , subject , due date , description & also can add the attachment on the ticket.
- Once a customer creates the ticket these tickets will be shown to the company and the company will assign that ticket to a specific agent.
- Once a ticket is assigned to the agent, that agent & customer can chat and the agent will help the customer resolve this ticket.

9. Agent Privileges and Functions

- now when an agent is logged in we will provide a different functionality to them. Let's understand all the functionality step by step.

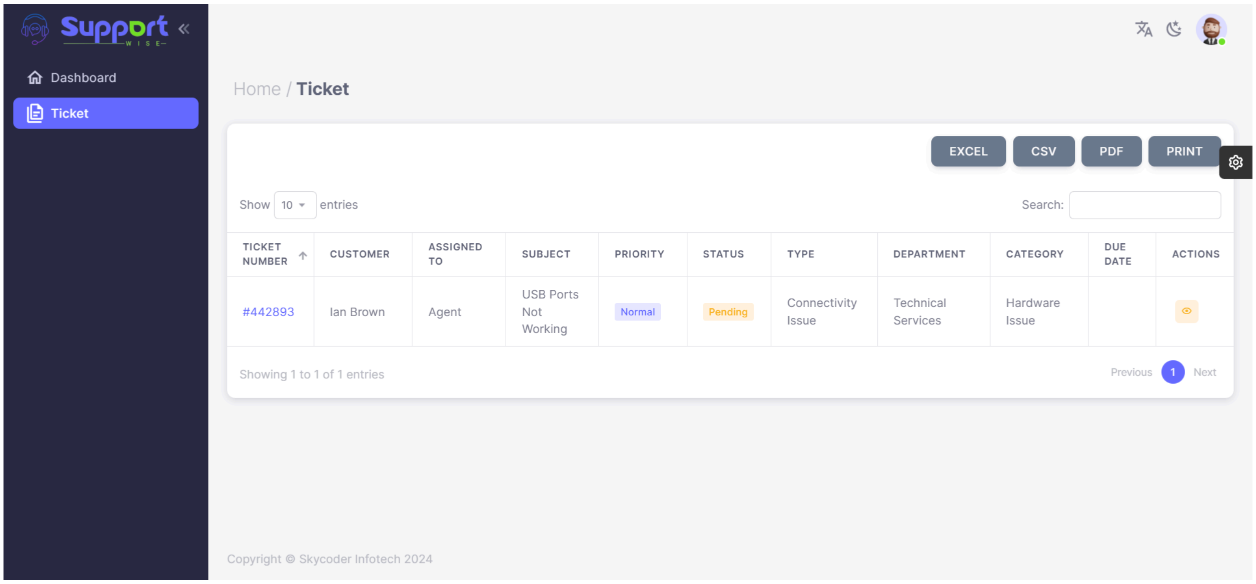
9.1 Dashboard insight

- on the dashboard agent can see total number of assign tickets , total number pending tickets , total number of resolved tickets etc..
- for more understanding we also have put the chart like category wise all total number of tickets will be shown in chart & weekly ticket report can be shown in chart.



9.2 Ticket Management

- once the agent clicks on the ticket agent can see the all assigned ticket to him.



- after that as permission assigned to the agent role based on that permission agent can also perform the different actions on that such show ticket & reply that ticket.
- as an assigned ticket to the agent agent will communicate with customers via chat and try to help customer issues.