Trackpi Operations and Support Management System Documentation 29/11/2024

Trackpi Operations and Support Management System Documentation

Introduction

The Trackpi Operations and Support Management System consists of **4 main applications**:

1. **Super Admin App**
2. **Manager App**
3. **User or Employee App**
4. **Other Companies App**

These apps work collaboratively to manage team operations, track performance, oversee product details, handle support tickets, and much more.

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1. Super Admin App Documentation

The Super Admin App has full control over the operations of the platform, team management, revenue tracking, company and product management, and user administration.

1.1 Team Management

- **Add Team**: Super Admin can create new teams and assign roles (Manager, Sub Admin, Team Members).

- **Delete Team**: Teams can be deleted when no longer needed.

- **Activate/Deactivate Team**: Teams can be activated or deactivated based on requirements.

- **Team Insights**: View detailed performance metrics for each team, including revenue data.

- **Best Performing Team/Employee Sorting**: Sort teams and employees based on performance over various timeframes (Daily, Weekly, Monthly, Yearly).

1.2 Users Management

- **Add User**: The Super Admin can add users with details like name, email, role, and ID proof.

- **Promote/Demote User**: Change user roles as necessary (e.g., from Employee to Manager).

- **Edit User Details**: Modify user information.

- **Activate/Deactivate User**: Enable or disable user access to the platform.

- **User Resignation Page**: Allows employees to submit resignation, which requires multiple levels of approval.

- **Trash Option**: Removed users can be reviewed or permanently deleted.

1.3 Company and Product Management

- **Add Company Details**: Add new companies and assign products to them.

- **Edit Company/Product Details**: Modify details such as company name, description, and product media.

- **Delete Company/Product**: Remove company or product details from the system.

- **Revenue Management**: View and manage revenue data for teams, employees, and products.

1.4 Ticket Management

- **Track Pi Tickets**: Super Admin can manage and resolve tickets related to Track Pi issues.

- **Company Product Tickets**: Support tickets from companies are reviewed by the Super Admin.

- **Ticket Categories**: Sort and manage tickets based on category (company, product, etc.).

- **Ticket Status:** Tickets statues would be pending for uncompleted tickete , open for current solving ticket, closed for solved ticket

1.5 Form Management

- **Create and Manage Forms**: Super Admin can create forms like dispute registration, social media declarations, and admin punching forms.

- **Form Dashboard**: View total number of forms filled by users and filter them by type.

1.6 Revenue Management

- **Total Revenue**: View overall revenue data for all teams, employees, and products.

- **Add Revenue**: Track revenue based on teams, employees, and companies.

- **Revenue List**: View detailed revenue entries and sort them by team, employee, company, or product.

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2. Manager App Documentation

The Manager App allows managers to track the performance of their respective teams, manage tickets, handle company details, and oversee revenue data.

2.1 Team Management

- **Team Insights (Individual Team)**: View performance data for the manager's team, including revenue and performance trends.

- **Best Performing Employee Sorting**: Managers can sort best-performing employees based on different timeframes (Daily, Weekly, Monthly).

2.2 Company and Product Management

- **Add/Manage Company Products**: Managers can add and update products for their company.

- **Edit/Remove Product Details**: Managers can modify or remove outdated product details.

2.3 Revenue Management

- **Track Revenue**: Managers can track revenue generated by their team, employees, and products.

- **Add Revenue**: Add revenue data on a team, employee, or product basis.

- **Revenue List**: View revenue entries for the team and filter by employee, product, or company.

- **Sort Revenue**: Filter and sort revenue data by various criteria.

2.4 Ticket Management

- **Ticket Management**: Managers can manage tickets related to Track Pi and other products/services of their team.

- **Ticket Approval**: Review and approve or reject tickets submitted by users.

- **Ticket Categories**: Manage tickets categorized by company, product, or issue.

- **Ticket Status:** Tickets statues would be pending for uncompleted tickete , open for current solving ticket, closed for solved ticket

2.5 Form Management

- **Form Dashboard**: Managers can view the forms filled by users of their team and export form data in CSV or Excel formats.

3. User or Employee App Documentation

The User or Employee App provides a user-friendly interface for employees to manage their personal data, track performance, interact with products, and submit support tickets.

3.1 Home Page (FAQs)

- **Company List**: Displays all companies associated with the platform.

- **Product List**: Shows products offered by each company.

- **FAQ Section**: Displays frequently asked questions, and users can search for specific answers.

3.2 Documents Page

- **Documentation**: Users can view and share documentation in PDF format.

- **Testimonial Videos**: Shareable via a link.

- **Posters & Brochures**: Shareable as images or in PDF format.

3.3 Operation Page

- **Authentication**: First-time users set up a passkey and optional fingerprint authentication.

- **Operation Cards**: Users can manage tasks, view revenue, calculate payouts, and raise tickets for support.

- **Task Management**: Create and manage tasks with descriptions.

- **Payout Calculation**: Users can calculate commissions based on different payment criteria (EMI, Full, Partial).

3.4 Ticket Raising System

- **Track Pi Support Tickets**: Raise and track issues related to Track Pi.

- **Company Product Tickets**: Raise issues related to products, with approval workflows.

3.5 Profile Page

- **Personal Documentation**: Users can access documents such as offer letters, personal PDFs, and resignation forms.

- **Resignation Section**: Submit resignation with approval workflows.

- **Logout**: Option to log out of the app.

4. Other Companies App Documentation

The Other Companies App allows companies to manage their products, add details, and update promotional materials.

4.1 Company and Product Management

- **Add Company Details**: Other companies can add their company information and assign products.

- **Edit Company/Product Details**: Modify or update existing product details and media (brochures, posters).

- **Delete Company/Product**: Remove company or product details from the system.

4.2 FAQ Management

- **Answer Unknown Questions**: Companies can add answers to questions raised by employees or customers during product sales.

- **Add to FAQ**: If the question is new, it can be added to the FAQ section for future reference.

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5. Commission and Sales Management (All Apps)

5.1 Commission Structure for Employees

Each employee earns commission based on product sales, which can be calculated by:

- **Full Payment Commission**

- **EMI-wise Commission**

- **Partial Payment Commission**

5.2 Target Audience

- Each product has a specific **target audience**, which is categorized based on the product's industry and usage.

5.3 Product Details

- Each product in the system has detailed descriptions, pricing, and promotional media.

- **Which product has more profile while selling**: Products with better branding and detailed profiles are more likely to attract users.

- **Which product has more product**: Products with higher stock levels are more in demand.

5.4 Location-Based Product Scope

- The scope of product sales can vary by location, and each product's availability is mapped to specific regions.

6. Additional Features

6.1 FAQs and Tutorials (User App)

- **FAQ Display**: Users can view frequently asked questions by category.

- **Tutorial Button**: Access to app tutorials to help users understand how to use the app efficiently.

6.2 Product Scope by Location

- The system allows companies to track product demand and availability across different regions, ensuring better logistics and inventory management.

6.3 Company's Update Feature

- **Company App**: Companies can update their product details, upload new brochures, posters, and FAQs at any time.

7. Reporting and Statements

7.1 Employee and Revenue Statements

- Each app allows for the generation of detailed revenue and performance reports, with options to download these reports in PDF format.

7.2 Revenue Sorting and Graphical Data

- Statements can be sorted by company, product, or employee, and graphical data is available for easy analysis.

Conclusion

The **Trapi Operations and Support Management System** provides a robust set of tools for managing company operations, tracking employee performance, and overseeing product and support systems. Each of the 4 apps—Super Admin, Manager, User/Employee, and Other Company—offers a tailored experience, ensuring efficient workflow and operations across teams and companies.

[Employe App](#)

[Super Admin App](#)

[Manager App](#)

[Other Company App](#)