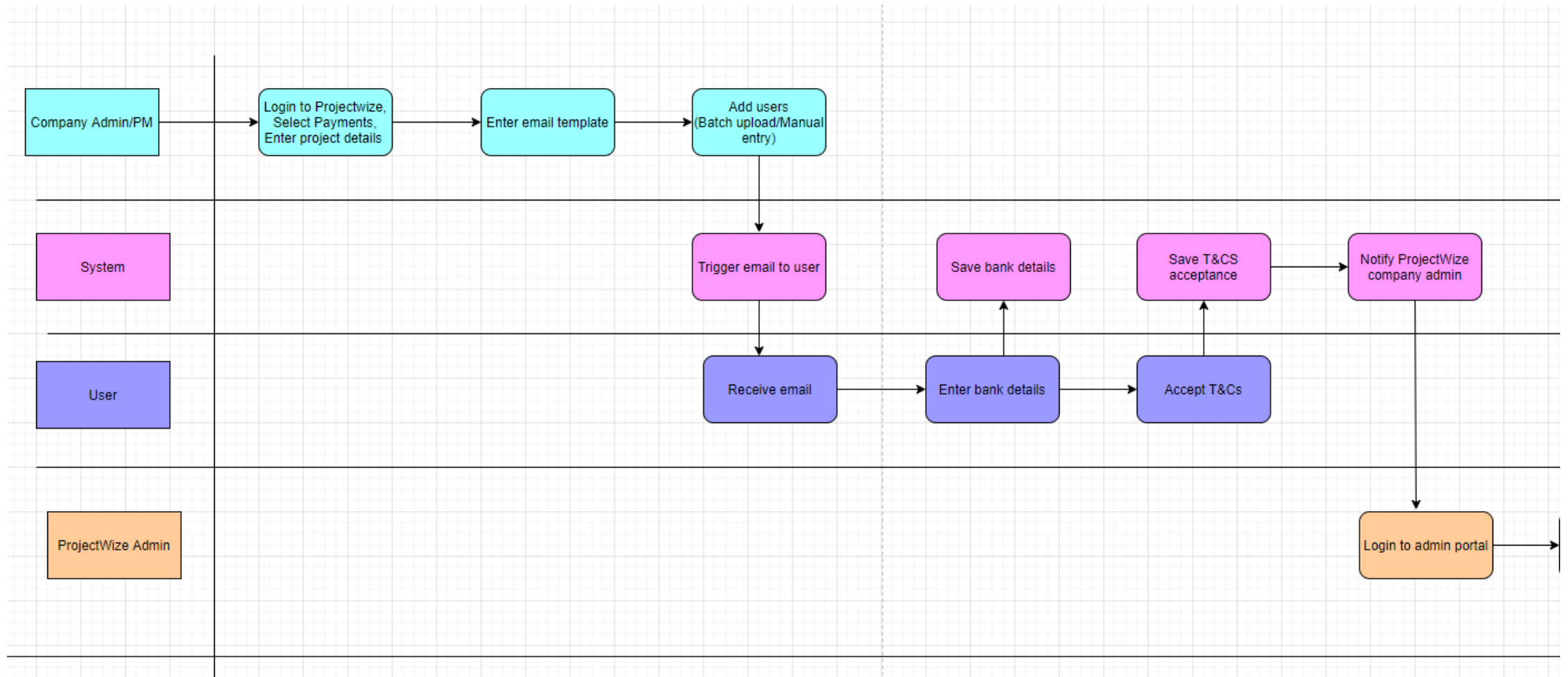
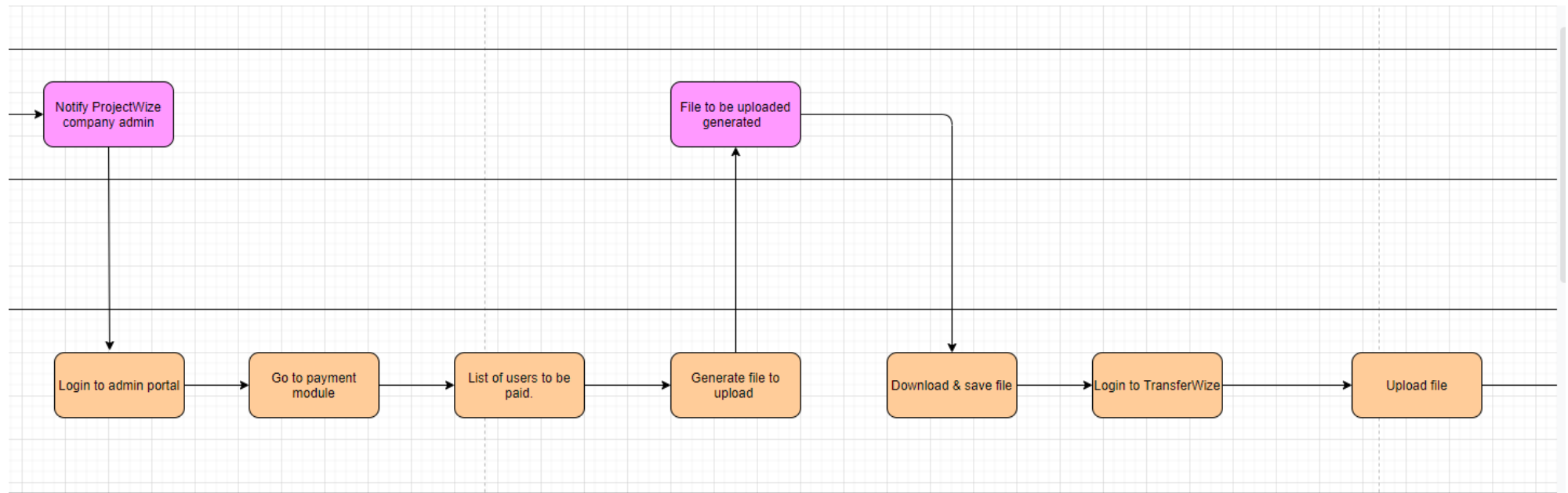
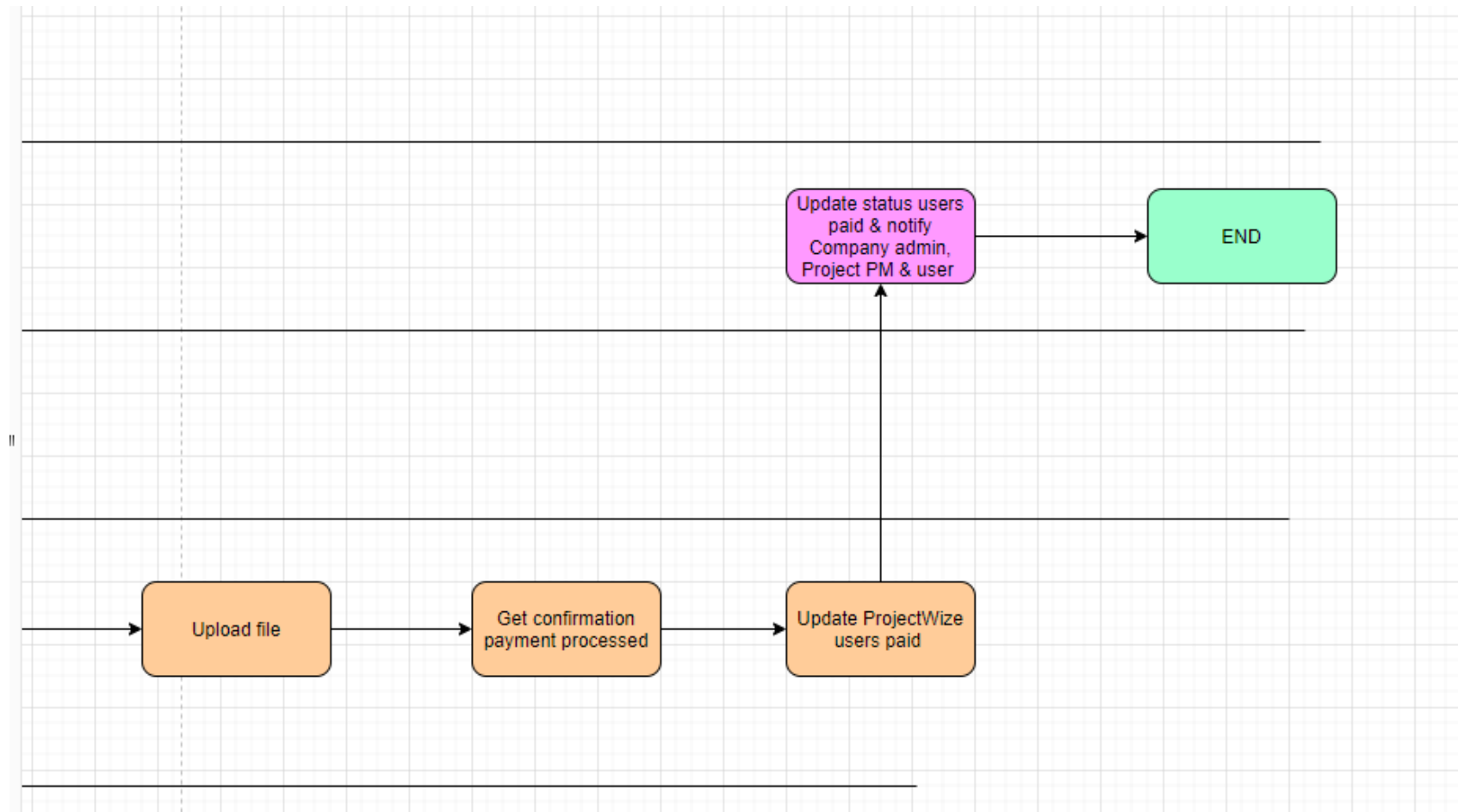


## Payments Module

### Work flow







**Add New Project Manager**

Field Name	Field Type/Description	Validation	Comments
Add New Project Manager	Label	NA	NA
First Name*	Text Box	Mandatory Alphanumeric can include special characters Min 2 characters Max 50 characters	
Last Name*	Text Box	Mandatory Alphanumeric can include special characters Min 2 characters Max 50 characters	
Email id*	Text Box	Mandatory Alphanumeric, maximum of 64 characters in the "local part" (before the "@") and a maximum of 255 characters in the domain part (after the "@") for a total length of 320 characters Must have @ and .com	
Contact Number*	Text field	Mandatory Numeric only Default value 0 Must be 11 digits with the zero Must be 10 digits without zero	
Add	Button	Checks for all validation & Saves the details entered	
Close	Button	Closes the window and brings the	

		user back to previous screen that triggered the pop-window	
--	--	--	--

### **Add Project Details**

Field Name	Field Type/Description	Validation	Comments
Project Details	Label. Page Heading		
Project Title*	Text Box	Mandatory, Alpha Numeric , Min = 3 letters, Max = 50 characters	
Payment Reference*	Text Box	Mandatory, Alpha Numeric , Could be combination of letters and numbers, Min = 3 characters, Max = 18 characters No special characters allowed.	
Project Description	Text Box	Not - Mandatory, Alpha Numeric , Max = 500 characters	
Project Manager*	Drop down	Mandatory, List of all Project managers added to the company	If no Project Manager is available then display a link Add Project Manager. To be checked with Hemal what is less work.
Add Project Manager	Link	Opens a pop-up and takes user to Add project Manager screen	After the user has added a PM and closed the pop-window bring back the user to this screen
Project Manager Contact Number	Label	Displayed from PM screen	
Project Manager Email	Label	Displayed from PM screen	
Incentive	Text Box	Not - Mandatory, numeric, min = 3 Max 5	
Number of participants	Text Box	Not Mandatory, numeric, min = 2 Max 3-5	

Number of groups	Text Box	Not Mandatory, numeric, min = 1 Max 3	
Project Start Date	Calendar	Must have a date picker/calendar Should be	
Project Specific Terms & Conditions *	Radio button Options Yes & No	Mandatory	
This question is asked to check if the client wants the respondent to sign or accept any project specific terms and conditions. These will be sent to the respondent either as part of the welcome email or during taking payment details.	Label		
Does the user need to sign the terms and conditions Or Can only tick a Check Box	Radio button Options User should Sign T&Cs User can only tick a Check Box	Mandatory if Project Specific Terms & Conditions is YES	
Upload T&Cs	Button	Mandatory if Project Specific Terms & Conditions is YES User should be able to browse and upload a file If user need to sign the terms then Accepted format = .doc only If user can only tick a Check Box then Accepted format = .doc, pdf, textfile Max size 500 MB (to be checked with Hemal)	
Preview Email Template			
Standard	Link	Opens a pop-up window with standard email template	
Customise	Link	Opens a pop-up window with customise email template. The user	

		would be able to change the text of the template	
Add	Button	Checks for all validation & Saves the details entered	
Close	Button	Closes the window and brings the user back to previous screen that triggered the pop-window	

### **Standard Email Template**

#### **Enter User details**

Field Name	Field Type/Description	Validation	Comments
User Details	Label	NA	NA
Salutation*	Drop down Options: Select Mr, Mrs, Miss, Dr. Prefer not to say	Mandatory, Default value Select	
First Name*	Text Box	Mandatory Alphanumeric can include special characters Min 2 characters Max 50 characters	
Last name*	Text Box	Mandatory Alphanumeric can include special characters	

		Min 2 characters Max 50 characters	
Email id*	Text Box	Mandatory Alphanumeric, maximum of 64 characters in the "local part" (before the "@") and a maximum of 255 characters in the domain part (after the "@") for a total length of 320 characters Must have @ and .com	
Mobile number*	Text field	Mandatory Numeric only Default value 0 Must be 11 digits with the zero Must be 10 digits without zero	
Project Title*	Drop down All the active projects for the company	Mandatory If no value available in the project then display a link to Project Details	
Add Project	Link	Must open the Add Project Details screen in a pop-up window	
Project Reference	Label	Displayed based on the project selected	
Incentive*	Text Box	Mandatory, numeric, min = 3 Max 5 Default value – Incentive as entered for the project in the project details screen Blank if not entered in the project details screen	
Add	Button	Checks for all validation & Saves the details entered	
Close	Button	Closes the window and brings the	

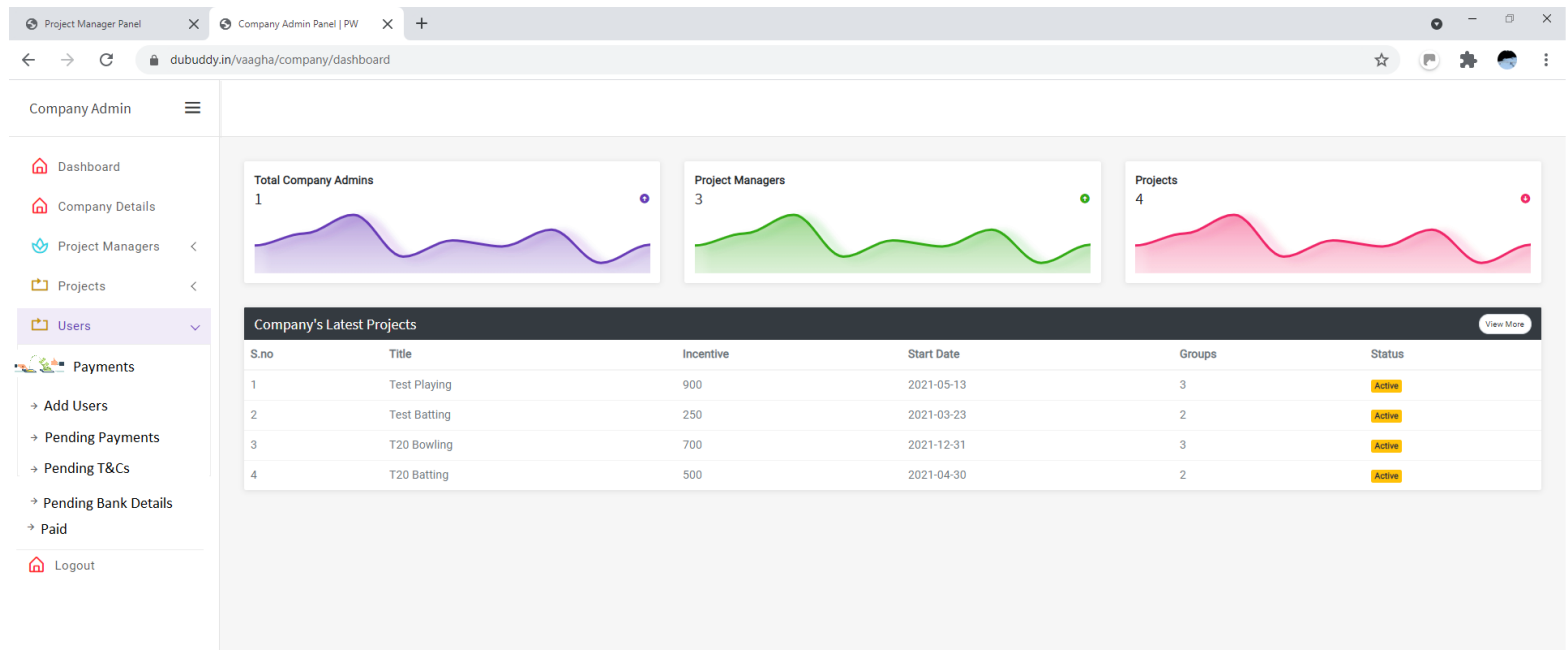


		user back to previous screen that triggered the pop-window	
--	--	--	--

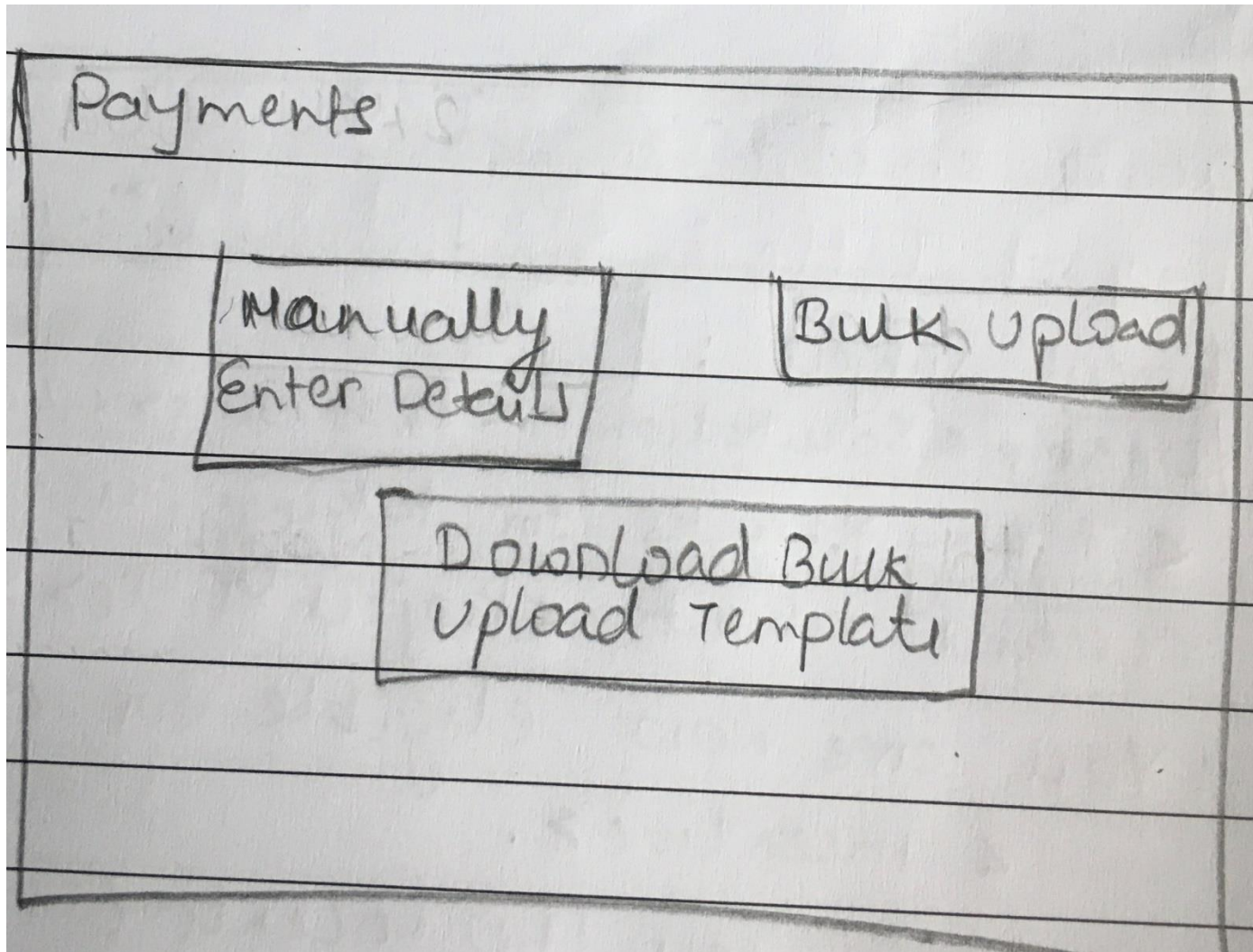
### **Payments Module**

Company admin will see the following options in Payment modules.


- Add Users
- Pending Bank Details
- Pending T&Cs Signature
- Pending Payments
- Paid



## Add Users for Payments



User will have the option to enter details manually or bulk upload.

Field Name	Field Type/Description	Validation	Comments
Add Users for Payments	Label/Screen Title	NA	NA
Manually add users	Link	When user clicks on this the user will be displayed Project Details	
Bulk upload users	Link	When user clicks on this the user will be able to upload users Validate formats – CSV, excel	For Bulk upload, user will have to download the bulk upload template and fill it and upload via bulk upload functionality.
Download bulk upload template	Link	When user clicks on this the user will be able to download the file	 Payment_Upload_template_ProjectWise_'

**Select & send email to end user to provide bank details**

Once user uploads the user details via bulk upload functionality, the company admin will be displayed the following screen.

Select users to initiate bank details email

Project Manager

Ravi Shastri  
Sanjay B

Rahul Dravid

Projects

Under 19  
Under 15  
T20 U19  
T20 U15

TEST U19

User Details

select all

	First Name	Last Name	Email Id	Phone Number	Incentive (₹)	Project Title	Project Manager	Payment Reference	T&Cs	Email Template
<input type="checkbox"/>	Rohit	Sharma	Rohit@sharma.com	0712356789	1500	T20 Battering	Ravi Shastri	T20BAT	Yes	Link
<input type="checkbox"/>	Krunal	Pandya	Krunal@pandya.com	071456	700	T20 Bowling	Sanjay B	T20 BOWL	Add T&Cs (Link)	Link
<input type="checkbox"/>	Dhawan	Virat	Kohli.com	12345678900	800	T20 Battering	Ravi Shastri	T20BAT	Yes	Link

Initiate Email

Add User

In this screen the user will be able to

- Upload T&Cs
- Select individual users to send an email to enter bank details
- Select multiple users to send an email to enter bank details

- Select all users to send an email to enter bank details
- Add individual users manually.

The Initiate email button should not be clickable if there is no email template selected

The Initiate email button should not be clickable if T&Cs is Yes and no T&C is uploaded

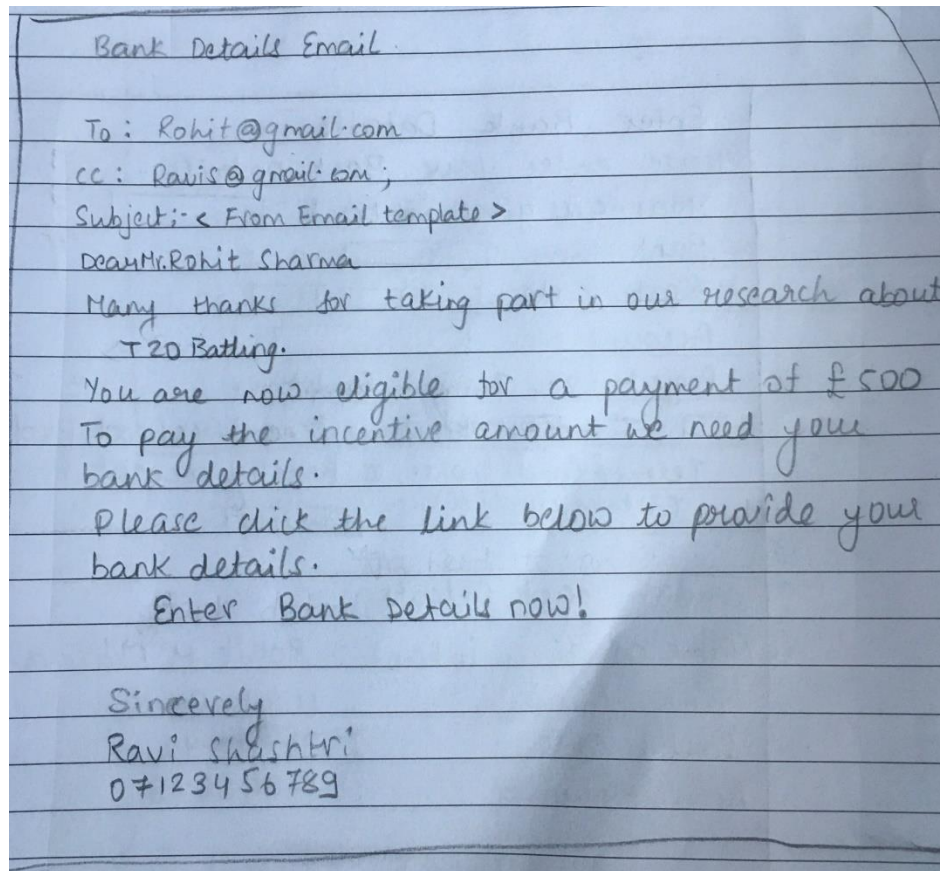
Field Name	Field Type/Description	Validation	Comments
Users to Capture Bank Details	Label	NA	NA
Project Manager	Multiple selectable field	Display all the project managers that are mapped to the company. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Project Title	Drop Down	Display all the projects that are mapped to the selected project managers. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Search	Button	Display users for the selected projects or selected project managers that are mapped to the company. By Default – All	
Clear	Button	Clears all selection. No project manager or project selected.	
Add Users	Button	Should open the Enter User details pop-up	
User Details	Title of the table		
Select All	Link	By default not selected. When clicked , all users/check boxes against all users must be selected	
	Check Box	By default not selected.	From here the details must be

		When selected and clicked on Initiate email button must send email to the selected user	repeated
First Name	Label	Display the First Name of the user from the uploaded file or manually added user	
Last Name	Label	Display the Last Name of the user from the uploaded file or manually added user	
Email Id	Label	Display the Email id of the user from the uploaded file or manually added user	
Phone Number	Label	Display the Phone number of the user from the uploaded file or manually added user	
Incentive	Label	Display the Incentive of the user from the uploaded file or manually added user	
Project Title	Label	Display the Project Title of the user from the uploaded file or manually added user	
Project Manager	Label	Display the Project Title of the user from the uploaded file or manually added user	
Payment Reference	Label	Display the Payment Reference of the user from the uploaded file or manually added user	
T&Cs	Label	Display the Option Yes/No from the uploaded file or manually added project details	
Email template	Link	Display the email in pop-up	
Initiate Email	Button	Will initiate email to the selected user/s and change the status of the	This will be only button common for all users

		user to Email sent	
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### Email to end user to provide bank details



The email will have a link to enter bank details. When end user clicks on the screen , the user will be taken to the Authentication Screen.

Field Name	Field Type/Description	Validation	Comments
Email text	Label	Text must be as per the email template	
Enter Bank Details Now	Link	Should take the user to	This link should be unique to the

		Authentication screen	user
--	--	-----------------------	------

### Authentication Screen

Authentication Screen

You are now eligible for a payment of  
£500. For security purpose we will  
now send you an One Time Password (OTP)  
to the mobile number you registered. Please  
make sure you have your mobile at hand.

Enter OTP  (Timer)

On this screen the user will be able to request OTP. When the user clicks on Send OTP now button, an 4-digit unique OTP should be generated & sent to the user's registered mobile number.

The user should be prompted to enter the OTP . The user should also have the option to Resend OTP. When the user enters the correct OTP and clicks on Submit, the OTP must be validated and if correct, user must be displayed the bank details capture screen.

Field Name	Field Type/Description	Validation	Comments
Authentication	Label	NA	
Text You are now eligible for a payment of £<incentive of the user>. For security purpose we will now send you an One-time-password (OTP) to the mobile number <078xxxxxx12> you have registered. Please make sure you have the mobile at hand.	Label	Display first 2 digits and last two digits of the mobile number. All other digits must be masked with * Mobile number is the users mobile number	
Send OTP now	Button	When clicked generates a 6-digit OTP and sends it as an SMS to the users mobile number	The OTP must be valid for 5 minutes. This time must be configurable.
Enter OTP	Text Field	Mandatory Numeric only	
Resend OTP	Button	When clicked generates a 6-digit OTP and sends it as an SMS to the users mobile number	
Submit	Button	On click checks if the OTP entered is correct. If correct then display the Enter Bank details screen. If incorrect, display a pop-up message, OTP incorrect please try again.	The user should be able to try / enter incorrect OTP for 5 times. After the 5 <sup>th</sup> incorrect attempt, block the user account.

### Enter Bank Details

Enter Bank Details

Please enter your Bank details

Name as given in bank

Bank Name

Sort Code

Account No.

Projectwise Terms & Conditions

☐ I have read and understood Projectwise Terms & Conditions. I hereby accept Projectwise terms & conditions. Continue

On this screen, the user should have the ability to enter bank details. The continue button must be disabled until the user ticks the check box and accepts Projectwise T&Cs.

Field Name	Field Type/Description	Validation	Comments
Full Name as given in bank	Text field	Mandatory, Alphanumeric, Min 3	

		characters maximum 225 characters	
Bank Name	Text field	Mandatory, Alphanumeric, Min 3 characters maximum 225 characters	
Sort Code	Text field	Mandatory Numeric Must be 6-digits	
Account	Text field	Mandatory Numeric Must be 8-digits	
ProjectWize T&C	Check Box	Mandatory	
ProjectWize T&C	Label		This is the Text as given in the screen shot
Client T&C	Check Box	This field is displayed only when admin / project manager has selected "User can only tick a Check Box" in the field Does the user need to sign the terms and conditions Or Can only tick a Check Box	
Client T&C	Label		This is the Text as given in the screen shot
Continue	Button	By default disabled. The Continue button is only enabled when the user selects both the check boxes	

### **Confirm Bank Details**



Confirm Bank Details

Name as given in bank: Rohit M Sharma

Bank Name : Lloyds Bank

Sort Code : 30-93-92

Account Number : 12345678

On this screen, the user should be able to check the bank details provided and either edit (in which case user is taken back to the Enter Bank details screen) or Confirms the details. If the user confirms the bank details, then user is shown the success screen.

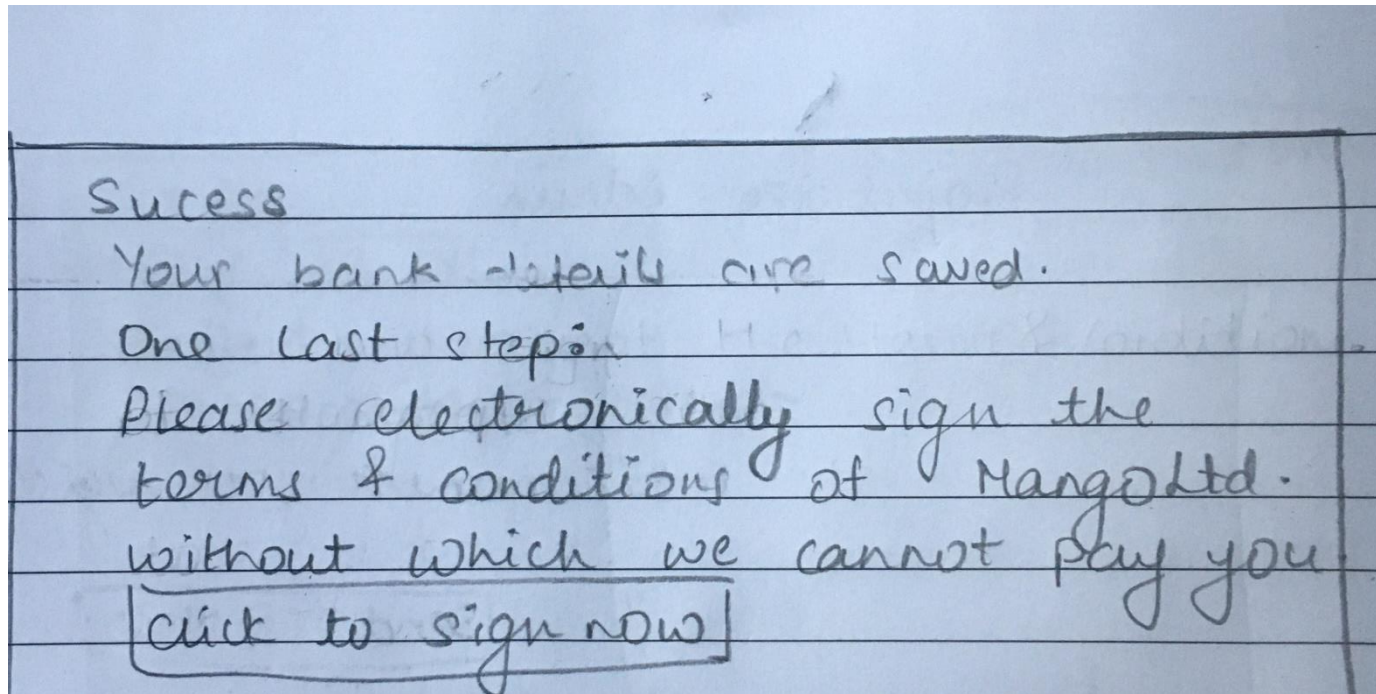
Field Name	Field Type/Description	Validation	Comments
Confirm bank details	Screen title		
Full Name as given in bank	Label	As given by the user in the previous	

		screen	
Bank Name	Label	As given by the user in the previous screen	
Sort Code	Label	As given by the user in the previous screen	
Account	Label	As given by the user in the previous screen	
Edit	Button	Takes the user back to the enter bank details screen	
Confirm	Button	<p>Will save the details against the user. and change the status of the user to Bank Details provided</p> <p>If the user has accepted the client T&amp;Cs, then change status to Accepted T&amp;Cs change the status of the user to T&amp;Cs accepted</p> <p>Once the user bank details are saved, then the Link in the email must expire. The user should not be able to enter bank details again.</p>	If the user clicks on the link again, then check the user should be taken to the appropriate screen depending on the status

### **Success screen**

On this screen, the end user is told that the bank details were captured successfully.

If the company needs the user to Sign their T&Cs, then the user is prompted to sign the T&Cs by clicking the button/link Sign Now



When user clicks on the Sign Now button/link, the user is taken to the DocuSign page to sign the documents.

Field Name	Field Type/Description	Validation	Comments
Success	Screen Title		
<Your bank details are saved>	Label		
<Please digitally sign the terms and conditions of <project title> without which we cannot pay you.	Label	This text is displayed only if the answer to the question "Does the user need to sign the terms and conditions " in Project Details is "User should Sign T&Cs"	Project Title from Project details.
Click to sign now	Link	Displayed only if the answer to the question "Does the user need to sign	



		the terms and conditions “ in Project Details is “User should Sign T&Cs”. Takes the user to the docuSign page to sign the T&Cs	
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## DocuSign Screen

A hand-drawn sketch of a DocuSign screen on lined paper. The sketch is enclosed in a rectangular border. At the top left, the word "DocuSign" is written in a cursive-like font. Below it, the word "Text" is written. In the middle section, there is a checkbox followed by the text "I accept the terms & Conditions". Below this, the word "Signature" is written, followed by a rectangular box containing the text "Write your Full Name". At the bottom center, there is a rectangular button labeled "Submit".

On this screen the user signs the document electronically. This is noted by changing the user's payment status.

Field Name	Field Type/Description	Validation	Comments
Submit	Button	Enabled only when user has signed the T&Cs When user clicks on the button then save the T&Cs and change the payment status of the user to "T&Cs signed, pending payment".	

### User's payment statuses

Status	Description	If user clicks on the link
Research completed, pending email	This is the first payment status when the user is created in payments module or bulk uploaded.	NA
Email failed	When the email has not reached the user	NA
Email sent, Pending Bank details	User has received email but not yet completed bank details	Display Authentication Screen
Bank details received, NO T&Cs required, pending payment	User has entered bank details and does not has not accept the T&Cs, pending payment	Display message "You have provided the bank details. If there is a problem contact your project manager".
Bank details received, pending T&Cs signature	User has entered bank details but has not accepted the T&Cs	Display the Success screen
T&Cs signed, pending payment	User has accepted T&Cs , pending payment	Display message "You have provided the bank details. If there is a problem, contact your project manager".
Payment initiated	Projectwize admin has downloaded the user details to be uploaded to Transferwize	Display message "You have provided the bank details. If there is a problem, contact your project manager".
Paid, status updated in Projectwize & email sent to PM, company admin and user	Confirmation has received that the user has been paid and the Projectwize admin has updated the status in Projectwize	Display message "You have been paid. If there is a problem, contact your project manager".

**Automatic reminder email**

Status	Reminder email	Email Template
Research completed, pending email	NA	NA
Email failed	NA	NA
Email sent, Pending Bank details	Send a 1 <sup>st</sup> reminder email after 7 days if user has not provided bank details. 7 must be a configurable number	1 <sup>st</sup> email reminder template – Bank details not provided
1 <sup>st</sup> reminder email sent, Pending Bank details	Send 2 <sup>nd</sup> reminder email after 3 days if user has not provided bank details. A copy must be sent to the PM. 3 must be a configurable number	2 <sup>nd</sup> email reminder template – Bank details not provided
Bank details received, NO T&Cs required, pending payment	NA	NA
Bank details received, pending T&Cs signature	Send a 1 <sup>st</sup> reminder email after 7 days if user has not provided bank details. 7 must be a configurable number	1 <sup>st</sup> email reminder template – T&Cs pending
Bank details received, pending T&Cs signature	Send 2 <sup>nd</sup> reminder email after 3 days if user has not provided bank details. A copy must be sent to the PM. 3 must be a configurable number	2 <sup>nd</sup> email reminder template – T&Cs pending

### Pending Bank Details

Pending Bank Details

Select Project Manager

Select Project

Ravi S	>		TEOBAT	>	
Sanjay B	>>		TEOBanjy	>>	
Rahul D	<<		Test Batching	<<	
	<			<	

Search

Clear

User Details (Sorted on Last email Sent date, most old date on the top)

Select All

First Name

Last Name

Email Id

Phone Number

Incentive

Project Title

PM

Email Sent date

PM Sent date

Send Reminder Email

Field Name	Field Type/Description	Validation	Comments
Users Pending Bank Details	Screen Title	NA	NA
Company	Multiple selectable field	Display all the companies By Default – All It should be possible to select one project manager or all and deselect one project manager or all	This field is displayed only to the ProejctWize admin
Project Manager	Multiple selectable field	Display all the project managers that are mapped to the company. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Project Title	Multiple selectable field	Display all the projects that are mapped to the selected project managers. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Search	Button	Display users for the selected projects or selected project managers that are mapped to the company. By Default – All	
Clear	Button	Clears all selection. No project manager or project selected.	
User Details	Title of the table		The users must be sorted on the last email sent date with the oldest record (date) first/top of the list
Select All	Link	By default not selected. When clicked , all users/check boxes against all users must be selected	
	Check Box	By default not selected. When selected and clicked on Initiate email button must send email to the selected user	From here the details must be repeated
First Name	Label	Display the First Name of the user from the uploaded file or manually	

		added user	
Last Name	Label	Display the Last Name of the user from the uploaded file or manually added user	
Email Id	Label	Display the Email id of the user from the uploaded file or manually added user	
Phone Number	Label	Display the Phone number of the user from the uploaded file or manually added user	
Incentive	Label	Display the Incentive of the user from the uploaded file or manually added user	
Project Title	Label	Display the Project Title of the user from the uploaded file or manually added user	
Project Manager	Label	Display the Project Title of the user from the uploaded file or manually added user	
Last email sent date	Label	The date on which the last email was sent	
Days lapsed since last email	Label	Days passed since the last email was sent (Last email sent date – Today's date)	
Send Reminder Email	Button	Will initiate email to the selected user/s	This will be a common button for all users

**Pending T&Cs signature**

Pending T&Cs

Select Project Manager

Ravi S	>	
Sanjay B	>>	
Rohit D	<<	
	<	

Select Project

Teo B A	>	
Teo B A	>>	
Teo B A	<<	
Teo B A	<	

Search

Clear

User Details (Sorted on Last email sent date, most old date on the top)

Select All	First Name	Last Name	Email Id	Phone Number	Incentive	Project Title	PM	Last Email sent date
------------	------------	-----------	----------	--------------	-----------	---------------	----	----------------------

Send Reminder Email



Field Name	Field Type/Description	Validation	Comments
Users Pending Bank Details	Screen Title	NA	NA
Company	Multiple selectable field	Display all the companies By Default – All It should be possible to select one project manager or all and deselect one project manager or all	This field is displayed only to the ProejctWize admin
Project Manager	Multiple selectable field	Display all the project managers that are mapped to the company. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Project Title	Multiple selectable field	Display all the projects that are mapped to the selected project managers. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Search	Button	Display users for the selected projects or selected project managers that are mapped to the company. By Default – All	
Clear	Button	Clears all selection. No project manager or project selected.	
User Details	Title of the table		The users must be sorted on the last email sent date with the oldest record (date) first/top of the list
Select All	Link	By default not selected. When clicked , all users/check boxes against all users must be selected	
	Check Box	By default not selected. When selected and clicked on Initiate email button must send email to the selected user	From here the details must be repeated
First Name	Label	Display the First Name of the user from the uploaded file or manually	

		added user	
Last Name	Label	Display the Last Name of the user from the uploaded file or manually added user	
Email Id	Label	Display the Email id of the user from the uploaded file or manually added user	
Phone Number	Label	Display the Phone number of the user from the uploaded file or manually added user	
Incentive	Label	Display the Incentive of the user from the uploaded file or manually added user	
Project Title	Label	Display the Project Title of the user from the uploaded file or manually added user	
Project Manager	Label	Display the Project Title of the user from the uploaded file or manually added user	
Last email sent date	Label	The date on which the last email was sent	
Days lapsed since last email	Label	Days passed since the last email was sent (Last email sent date – Today's date)	
Send Reminder Email	Button	Will initiate email to the selected user/s	This will be a common button for all users

## Pending Payments

**Pending Payment**

Project Manager: Ravi Shastri Sanjay B Rahul Dravid Projects TEST U19

User Details: Search Clear

Select All	First Name	Last Name	Email Id	Phone Number	Incentive (₹)	Project Title	Project Manager	Payment Reference	T & C Signed Date	Days Lapsed Signed T & C
<input type="checkbox"/>	Rohit	Sharma	Rohit@sharma.com	0712356789	1500	T20 Batting	Ravi Shastri	T20BAT	28 Feb 2021	30
<input type="checkbox"/>	Krunal	Pandya	Krunal@pandya.com	071456	700	T20 Bowling	Sanjay B	T20 BOWL	3 Mar 2021	27
<input type="checkbox"/>	Dhruwan	Virat	Kohli.com	12345678900	800	T20 Batting	Ravi Shastri	T20BAT	15 Mar 2021	15

[Download User Payment file](#)

Field Name	Field Type/Description	Validation	Comments
Users Pending Bank Details	Screen Title	NA	NA
Company	Multiple selectable field	Display all the companies By Default – All It should be possible to select one project manager or all and deselect one project manager or all	This field is displayed only to the ProejctWize admin
Project Manager	Multiple selectable field	Display all the project managers that are mapped to the company. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Project Title	Multiple selectable field	Display all the projects that are mapped to the selected project managers. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Search	Button	Display users for the selected projects or selected project managers that are mapped to the company. By Default – All	
Clear	Button	Clears all selection. No project manager or project selected.	
User Details	Title of the table		The users must be sorted on the last email sent date with the oldest record (date) first/top of the list
First Name	Label	Display the First Name of the user from the uploaded file or manually added user	
Last Name	Label	Display the Last Name of the user from the uploaded file or manually added user	
Email Id	Label	Display the Email id of the user from the uploaded file or manually added	

		user	
Phone Number	Label	Display the Phone number of the user from the uploaded file or manually added user	
Incentive	Label	Display the Incentive of the user from the uploaded file or manually added user	
Project Title	Label	Display the Project Title of the user from the uploaded file or manually added user	
Project Manager	Label	Display the Project Title of the user from the uploaded file or manually added user	
Payment Reference	Label	Display the Payment Reference of the user from the project details	
T&Cs signed date	Label	The date on which the T&CS were signed	This field is displayed only to the ProjectWize admin
Days lapsed since T&Cs signed	Label	Days passed since the T&CS were signed (T&CS signed date– Today's date)	This field is displayed only to the ProjectWize admin
Download users	Button	Downloads the displayed user	

PAID

**PAID**

Project Manager

Ravishashtri  
Sanjay B

>><<<

Rahul Dandia

Projects

Under 19  
Under 15  
T20 U19  
T20 U15

>><<<

TEST U19

User Details

Select All

	First Name	Last Name	Email Id	Phone Number	Incentive (₹)	Project Title	Project Manager	Payment Reference	Paid Date
<input type="checkbox"/>	Rohit	Sharma	Rohit@sharma.com	0712356789	1500	T20 Batting	Ravishashtri	T20BAT	03 Mar 2021
<input type="checkbox"/>	Krunal	Pandya	Krunal@pandya.com	071456	700	T20 Bowling	Sanjay B	T20 BOWL	15 Mar 2021
<input type="checkbox"/>	Dhawan	Virat	Virat@kohli.com	12345678900	800	T20 Batting	Ravishashtri	T20BAT	30 Mar 2021

Field Name	Field Type/Description	Validation	Comments
Users Pending Bank Details	Screen Title	NA	NA
Company	Multiple selectable field	Display all the companies By Default – All It should be possible to select one project manager or all and deselect one project manager or all	This field is displayed only to the ProejctWize admin
Project Manager	Multiple selectable field	Display all the project managers that are mapped to the company. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Project Title	Multiple selectable field	Display all the projects that are mapped to the selected project managers. By Default – All	It should be possible to select one project manager or all and deselect one project manager or all
Search	Button	Display users for the selected projects or selected project managers that are mapped to the company. By Default – All	
Clear	Button	Clears all selection. No project manager or project selected.	
User Details	Title of the table		The users must be sorted on the last email sent date with the oldest record (date) first/top of the list
Download users	Button	Downloads the displayed user	
First Name	Label	Display the First Name of the user from the uploaded file or manually added user	
Last Name	Label	Display the Last Name of the user from the uploaded file or manually added user	
Email Id	Label	Display the Email id of the user from the uploaded file or manually added	

		user	
Phone Number	Label	Display the Phone number of the user from the uploaded file or manually added user	
Incentive	Label	Display the Incentive of the user from the uploaded file or manually added user	
Project Title	Label	Display the Project Title of the user from the uploaded file or manually added user	
Project Manager	Label	Display the Project Title of the user from the uploaded file or manually added user	
Payment Reference	Link	Display the Payment Reference of the user from the project details When clicked on the link displays the payment/transaction details	
Paid date	Label	The date on which the user was paid	
Download users	Button	Downloads the displayed user	

### **Payment/Transaction details**



### Payment Details

Name : Virat Kohli

Company : Mango Project: T20 Batting

Bank : Lloyds Bank

Sort code : 53 52 90 A/c Number : 12345678

Email : Virat@gmail.com

Phone No. 07777777777

Payment Ref : - T20BAT

Date of Payment :- 14 Feb 2021

Close

Field Name	Field Type/Description	Validation	Comments
Payment Details	Title of the table		
Name	Label	Display the First Name & Last name of the user from the uploaded file or manually added user	
Company	Label	Display the name of the company	
Project Title	Label	Display the Project Title of the user from the uploaded file or manually added user	
Bank name	Label	Name of the bank to which payment was made	
Sort code	Label	Sort code to which payment was made	
Account number	Label	Account no. to which payment was made	
Email Id	Label	Display the Email id of the user from the uploaded file or manually added user	
Phone Number	Label	Display the Phone number of the user from the uploaded file or manually added user	
Incentive amount	Label	Display the Incentive of the user from the uploaded file or manually added user	
Payment Reference	Label	Display the Payment Reference of the user from the project details When clicked on the link displays the payment/transaction details	
Paid date	Label	The date on which the user was paid	
Close	Button	Closes the pop-window	

**Manually add user**

The company admin first need to add

- Project manager & Project details
- Add user details manually

The project manager will also have the capability to add

- Project details
- Add user details manually

### **Email Templates**

#### **Standard Templates:**

These will be different types of standard email templates

1. Provide Bank Details
2. 1<sup>st</sup> reminder – Pending bank details
3. 2<sup>nd</sup> reminder – Pending bank details
4. 1<sup>st</sup> reminder – Pending T&Cs
5. 2<sup>nd</sup> reminder – Pending T&Cs

#### **1. Provide Bank Details**

Subject: Bank details for payment of research project <Project Title>

Dear <Salutation><First name><Last name>

Many thanks for taking part in our research about <Project Title>.

You are now eligible for a payment of £<incentive>. To pay you the incentive amount we need your bank details. Kindly click on the link below to provide your bank details.

Enter bank details (link)

Sincerely,

<Project Manager of the project>

<Project Manager Contact no.>

2. 1<sup>st</sup> reminder – Pending bank details

Subject: Gentle Reminder – Pending bank details for research project <Project Title>

Dear <Salutation><First name><Last name>

Many thanks for taking part in our research about <Project Title>.

You are now eligible for a payment of £<incentive>. To pay you the incentive amount we need your bank details. Kindly click on the link below to provide your bank details.

This is a gentle reminder to provide your bank details.

Enter bank details (link)

Sincerely,

<Project Manager of the project>

<Project Manager Contact no.>

3. 2<sup>nd</sup> reminder – Pending bank details

Subject: 2<sup>nd</sup> Reminder – Pending bank details for research project <Project Title>

Dear <Salutation><First name><Last name>

Many thanks for taking part in our research about <Project Title>.

You are now eligible for a payment of £<incentive>. To pay you the incentive amount we need your bank details. Kindly click on the link below to provide your bank details.

This is a gentle reminder to provide your bank details, without which we are unable to process your payment.

[Enter bank details \(link\)](#)

Sincerely,

<Project Manager of the project>

<Project Manager Contact no.>

4. 1<sup>st</sup> reminder – Pending T&Cs

Subject: Pending T&Cs signature for research project <Project Title>

Dear <Salutation><First name><Last name>

Many thanks for taking part in our research about <Project Title> and providing your bank details.

To enable us to pay you the incentive amount we need you need to digitally sign the project terms & conditions.

Kindly click on the link below to digitally sign the project terms & conditions.

[Sign T&Cs now \(link\)](#)

Sincerely,  
<Project Manager of the project>  
<Project Manager Contact no.>

5. 2<sup>nd</sup> reminder – Pending T&Cs

Subject: Reminder Pending T&Cs signature for research project <Project Title>  
Dear <Salutation><First name><Last name>

Many thanks for taking part in our research about <Project Title> and providing your bank details.

To enable us to pay you the incentive amount we need you need to digitally sign the project terms & conditions.

This is a gentle reminder to digitally sign the terms & conditions.

Kindly click on the link below to digitally sign the project terms & conditions.

Sign T&Cs now (link)

Sincerely,  
<Project Manager of the project>  
<Project Manager Contact no.>

**Customise Email Templates:**

These will be different types of standard email templates

1. Provide Bank Details

Provide Bank Details template

Customize Email Template

Email template Name:

Project Title:

Email Subject:

Greeting:

Main Email body Content

Field Name	Field Type/Description	Validation	Comments
Email Template Name	Text Box	Mandatory, Alphanumeric Minimum 5 characters Max 50	
Subject:	Text Box	Mandatory, Alphanumeric Minimum 20 characters Max 250	
Greetings	Text Box	Optional Cannot be 1 character, Minimum 2 characters Max 20	e.g. Dear, Hello, Greetings from Cricket Ltd
<Salutation><First name><Last name>	Label	User's Salutation, first name, last name	
<Main email body content>	Text Field	Mandatory Mandatory, Alphanumeric Minimum 100 characters Max 500	
Ending greetings	Text Box	Optional Cannot be 1 character, Minimum 2 characters Max 20	
<Project Manager of the project>	Label	Name of the project manager	
<Project Manager Contact no.>	Label	Contact number of the project manager	
Next	Button	Displays the entered details in an email format in the next screen/window	



### Confirm Email template

Customize Email Template

To: enduser@gmail.com  
cc: projectmanager@abc.com  
Subject: < As entered in template >

< Greetings as entered > Mr. End user,

< Main body as entered in the template >

< End greetings as entered in the template >  
Project Manager  
PM Contact NO.

Field Name	Field Type/Description	Validation	Comments
Email Template Name	Label	As entered by user in the email	

		template	
To	Label	<a href="mailto:enduser@gmail.com">enduser@gmail.com</a>	
Cc	Label	Project <a href="mailto:manager@abc.com">manager@abc.com</a>	
Subject:	Label	As entered by user in the email template	
Greetings	Text Box	As entered by user in the email template	
<Salutation><First name><Last name>	Label	Mr. End User	
<Main email body content>	Label	As entered by user in the email template	
Ending greetings	Label	As entered by user in the email template	
<Project Manager of the project>	Label	Project Manager	
<Project Manager Contact no.>	Label	Project Manager Contact number	
Edit	Button	Takes user back to the customise email template screen	
Confirm	Button	Saves the email template and displays the success screen	

## Email template saved success screen

