

Support360 User Manual

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Support360

Getting Started

Introduction

Support360 is a comprehensive support management solution designed to integrate seamlessly with Salesforce Service Cloud. It aims to provide a centralized platform for managing projects, tickets, tasks, resources, and service requests. The application leverages Salesforce's robust features, such as reporting, dashboards, automation, and collaboration tools, to improve efficiency and streamline business processes.

Installation

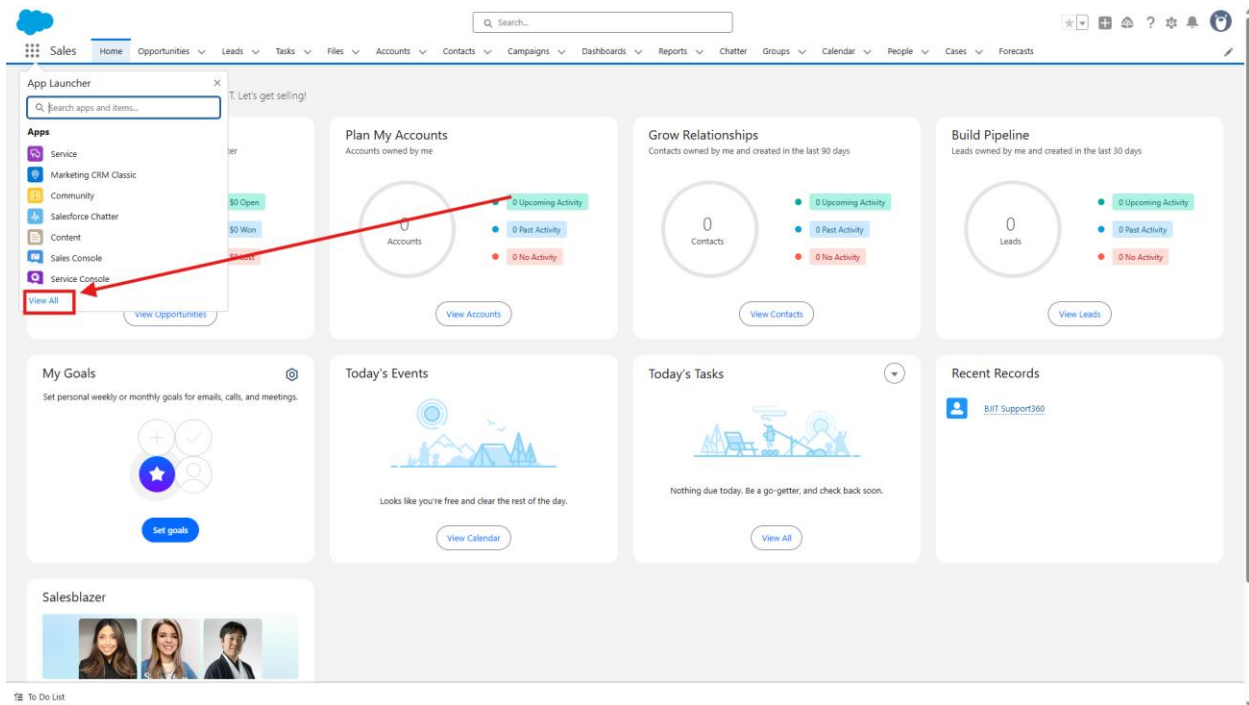
It's very easy to install. Just Install the AppExchange package and good to go.

Steps to follow:

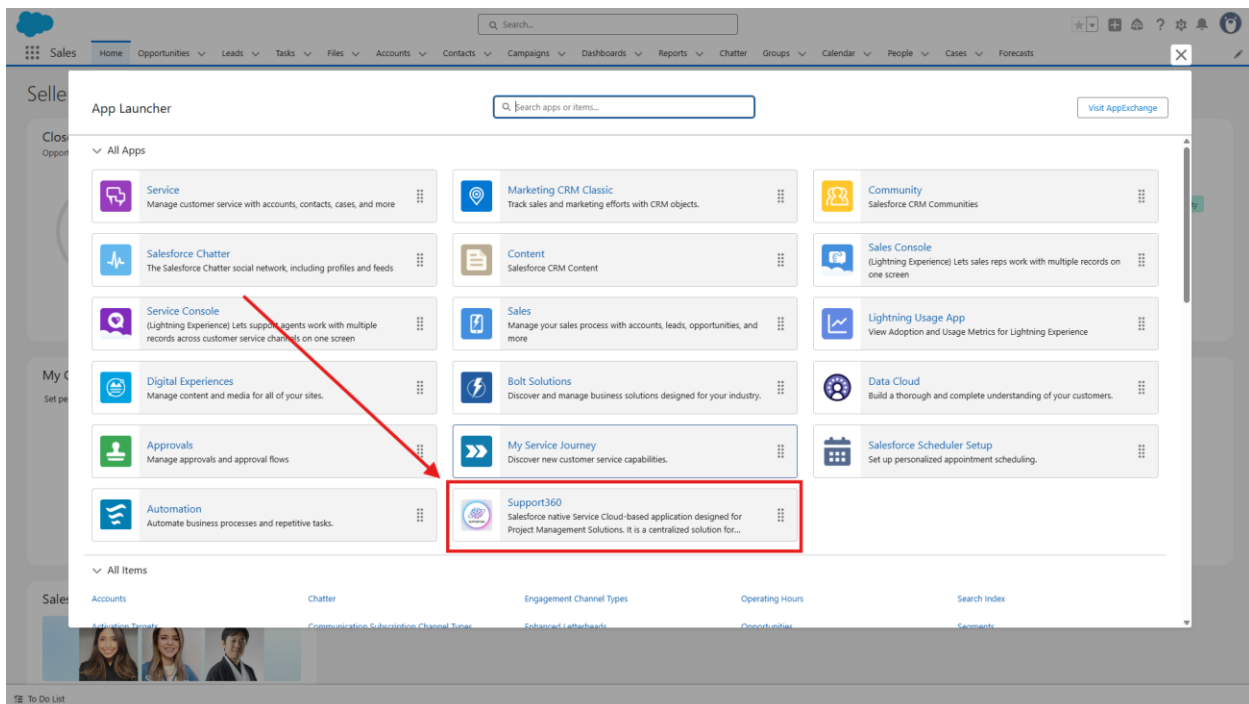
- Go to **AppExchange**
- Search '**Support360**' in the Search Box of AppExchange
- Click on '**Support360**' App Icon
- Click on '**Get It Now**' Button
- Check the '**I Acknowledge**' checkbox.
- Click '**Install**' Button
- After the installation the app will appear in the **App Launcher**

App Operating Guidelines

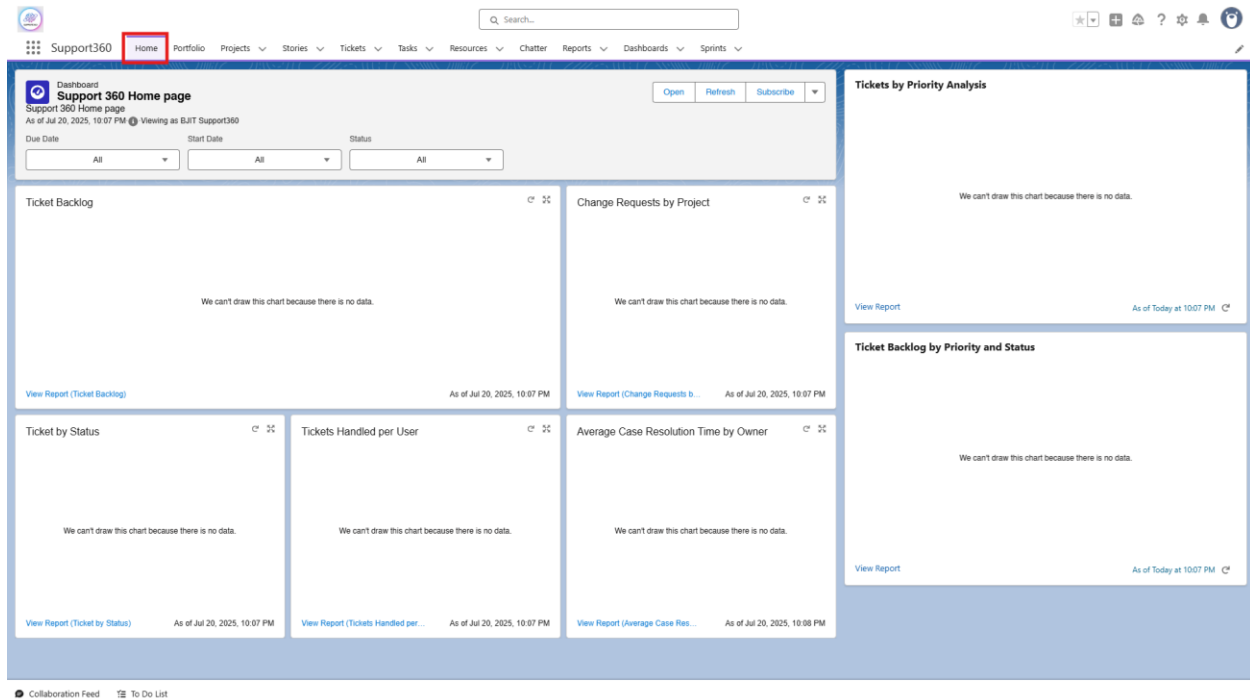
Step 1: Click on the View All button on the App Launcher.



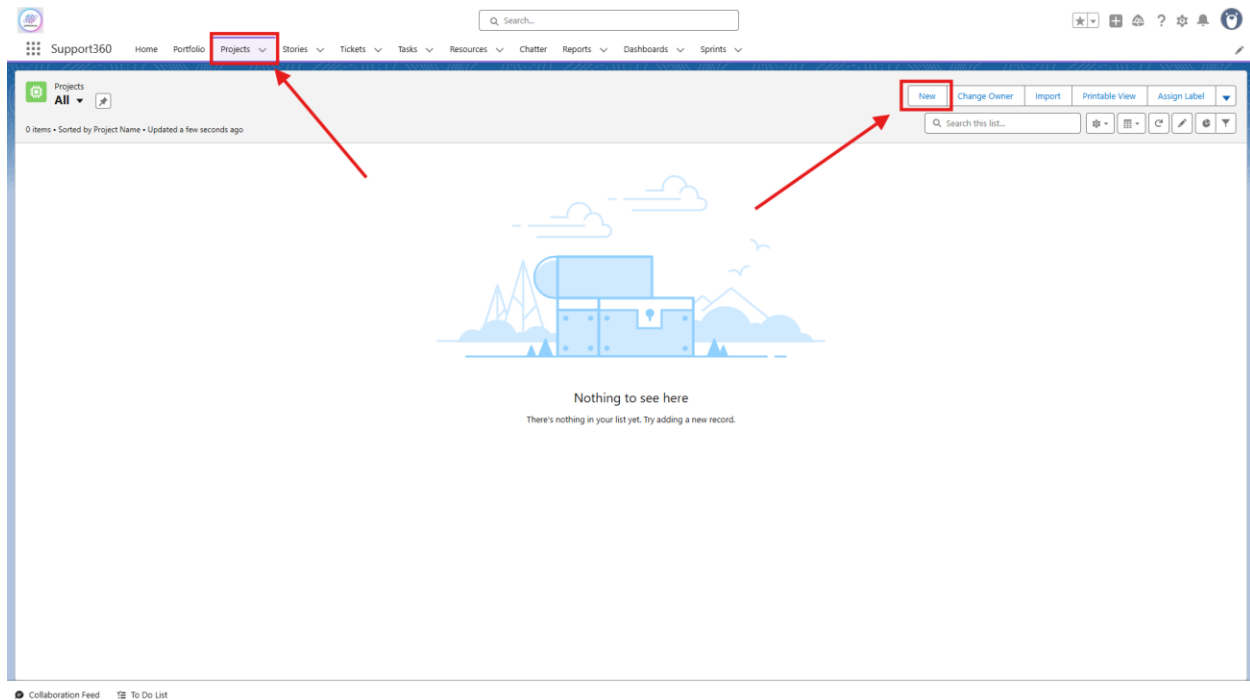
Step 2: Select Support360 App



Step 3: You will start with the Home Page, and you can navigate through the tabs by selecting individual tabs.



Step 4: Navigate to the Project Tab to Create a Project.



Step 5: Enter the information related to your Project and click Save.

New Project

* = Required Information

Information

*Project Name
Hospital Management System

Description
Salesforce Sans 12
The Hospital Management System project aims to develop a comprehensive solution that streamlines hospital operations, enhances patient care, and improves overall efficiency. By integrating various functions such as patient registration, appointment scheduling, billing, and medical records management, this system will facilitate better communication among healthcare providers and patients. The project is crucial for meeting the increasing demands of the healthcare sector and ensuring compliance with regulatory standards.

Project Overview
The Hospital Management System project aims to develop a comprehensive solution that streamlines hospital operations, enhances patient care, and improves overall efficiency. By integrating various functions such as patient registration, appointment scheduling, billing, and medical records management, this system will facilitate better communication among healthcare providers and patients. The project is crucial for meeting the increasing demands of the healthcare sector and ensuring compliance with regulatory standards.

This initiative is expected to reduce administrative burdens, minimize errors, and provide valuable data analytics for decision-making. Ultimately, the Hospital Management System will contribute to improved patient outcomes and operational excellence within the organization.

Owner
BJT Support360

Manager
BJT Support360

Project Details

Priority
High

Progress Percentage
0%

Status
Not Started

Cancel Save & New **Save**

Step 6: After the Project is successfully created, it'll redirect to the Sprint Section. You will find details section right next to it for further modification.

Support360 Home Portfolio Projects Stories Tickets Tasks Resources Chatter Reports Dashboards Sprints

Project **Hospital Management System**

Project "Hospital Management System" was created.

Not Started In Progress On Hold Completed

Related **Sprint** Board Details Timeline

Search backlog All Resources All Stories All Tickets All Priorities

Backlog (0 work items) Create Sprint

Step 7: Now let's add Resources to the Project. For the available user, go to the Portfolio Tab where you will find more details about the Users currently working in your Org.

Resource Portfolio

Search users, email, title and department...

Avatar	Name	Title	Department	Email	Allocation	Actions
	Dummy User One	Frontend Developer	WEB - 1	dummy1@user.com	0%	View Projects
	Dummy User Two	Backend Engineer	WEB - 1	dummy2@user.com	0%	View Projects

https://orgfam-8000ac31b-dev-ed.develop.lightning.force.com/lightning/n/bjrl_Support360_Portal

Step 8: You can also click on each Resource and get more details about them.

Dummy User One

Frontend Developer

Hi! I'm Dummy User One, a passionate Frontend Developer with a strong eye for design and a love for clean, responsive code. I specialize in building user-friendly web interfaces using modern technologies like HTML, CSS, JavaScript, and React. With a focus on performance and accessibility, I strive to create engaging digital experiences that work seamlessly across all devices and platforms. Always eager to learn and grow, I enjoy collaborating with teams to bring creative ideas to life.

[+ Follow](#) [Edit](#) [User Detail](#)

Details

Name	Dummy User One	Manager	
Title	Frontend Developer	Company Name	BJIT Ltd
Email	dummy1@user.com	Phone	50505050505
Address	221B, Baker Street London, NW1 6XE United Kingdom	Mobile	

About Me

Hi! I'm Dummy User One, a passionate Frontend Developer with a strong eye for design and a love for clean, responsive code. I specialize in building user-friendly web interfaces using modern technologies like HTML, CSS, JavaScript, and React. With a focus on performance and accessibility, I strive to create engaging digital experiences that work seamlessly across all devices and platforms. Always eager to learn and grow, I enjoy collaborating with teams to bring creative ideas to life.

Project Details

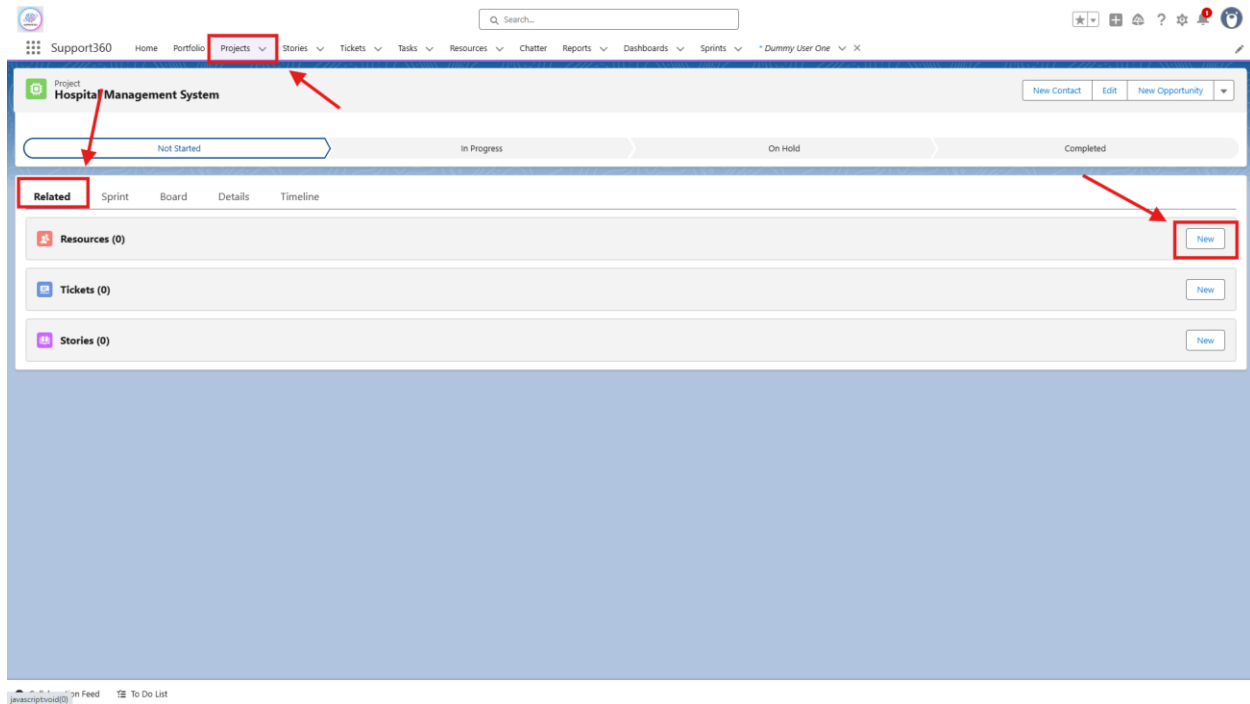
This user is not allocated to any projects yet.

Related

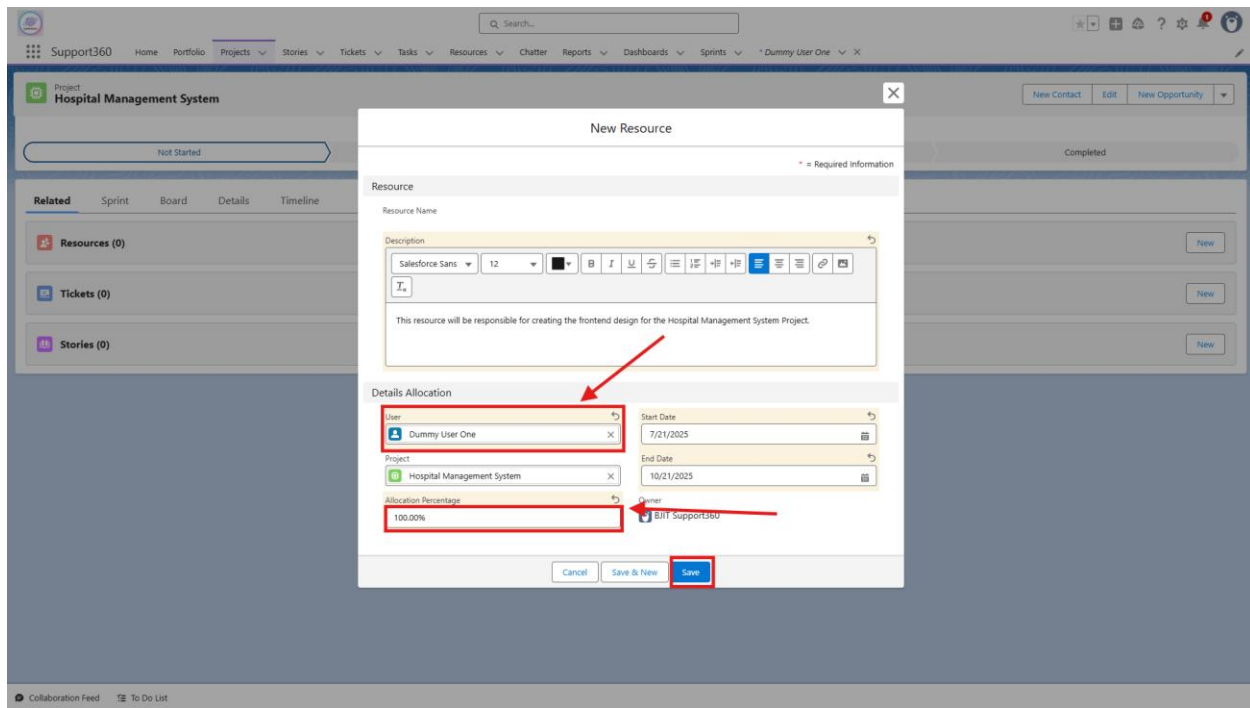
- [Groups \(0\)](#)
- [Files \(0\)](#)
- [Followers \(0\)](#)
- [Following \(0\)](#)

Collaboration Feed To Do List

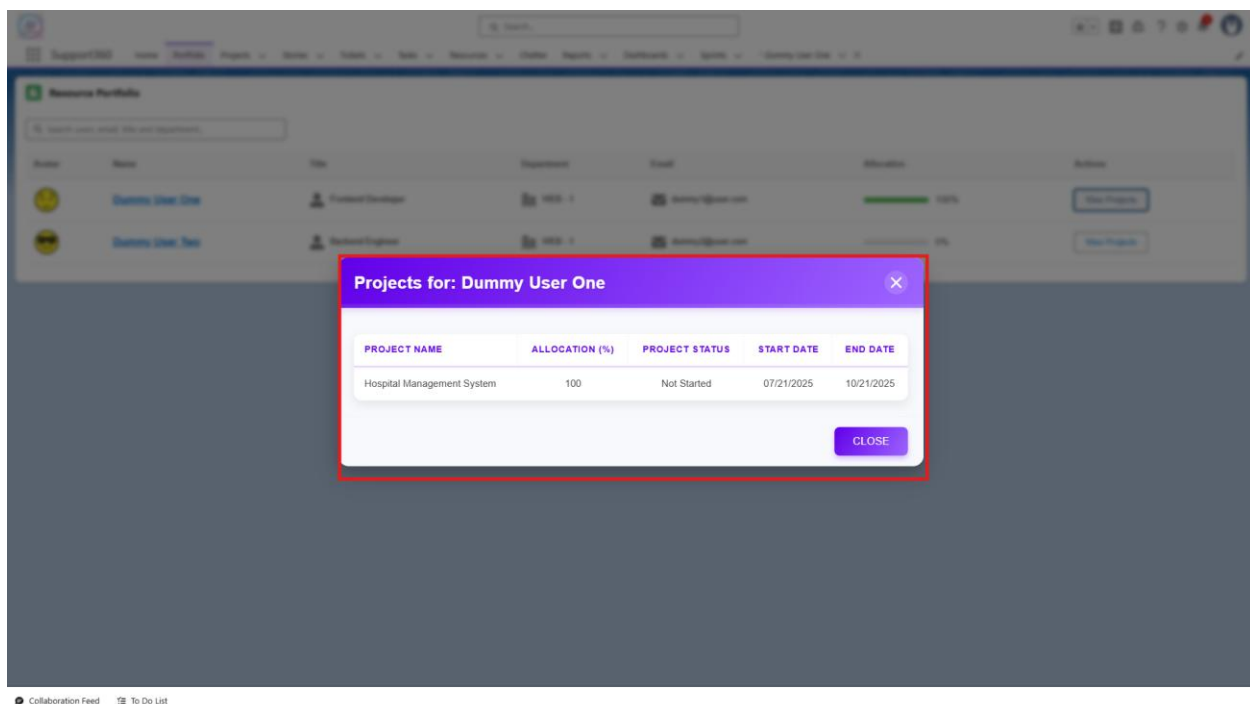
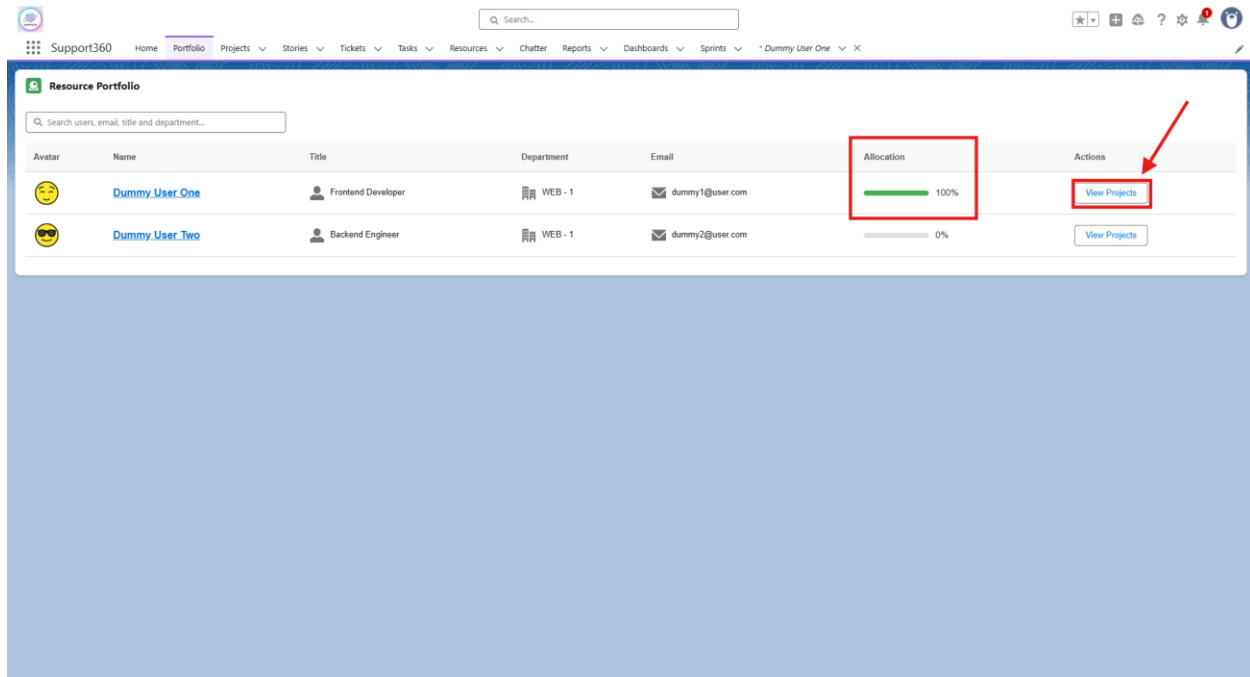
Step 9: Now let's use these resources in the Projects. Navigate to the Project Tab and Select the Project, then go to the Related Tab. There, under Resources, click New.



Step 10: Fill up the details and click Save. One thing to remember, you **cannot** add **System Admin** as a Resource.

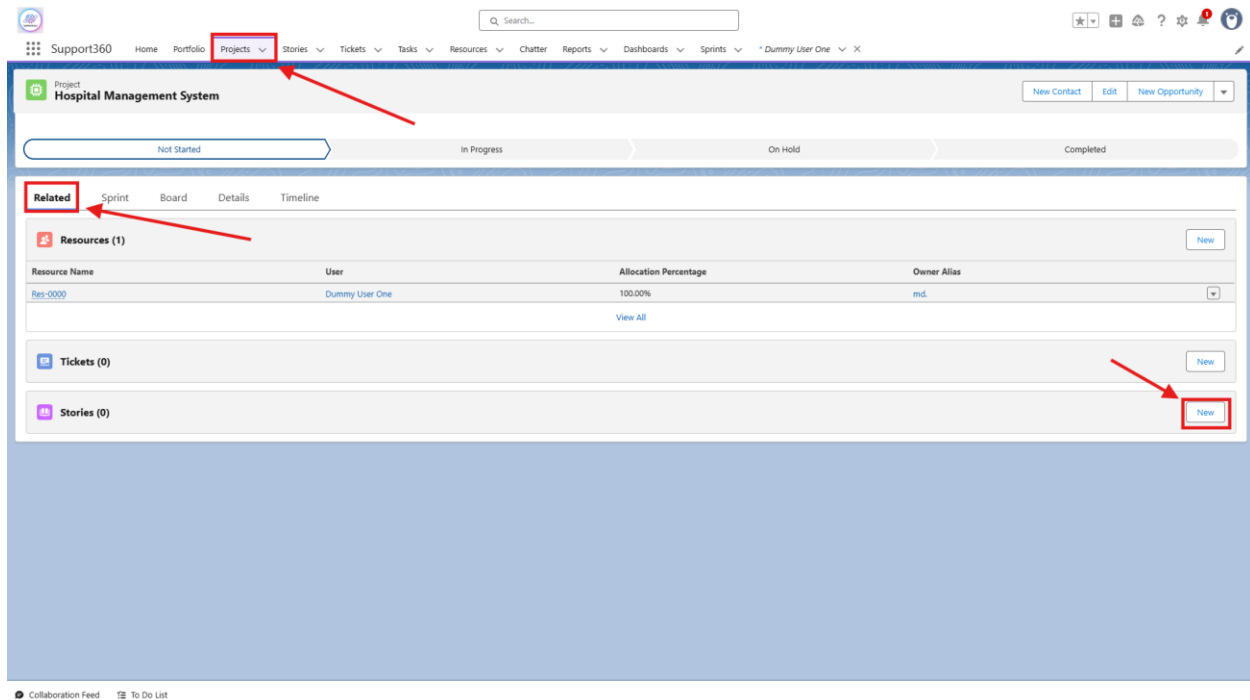


Step 11: Now if you go back to the Portfolio Tab and you can see that the information has already been updated. Now you can also click on the View Projects to see more details.

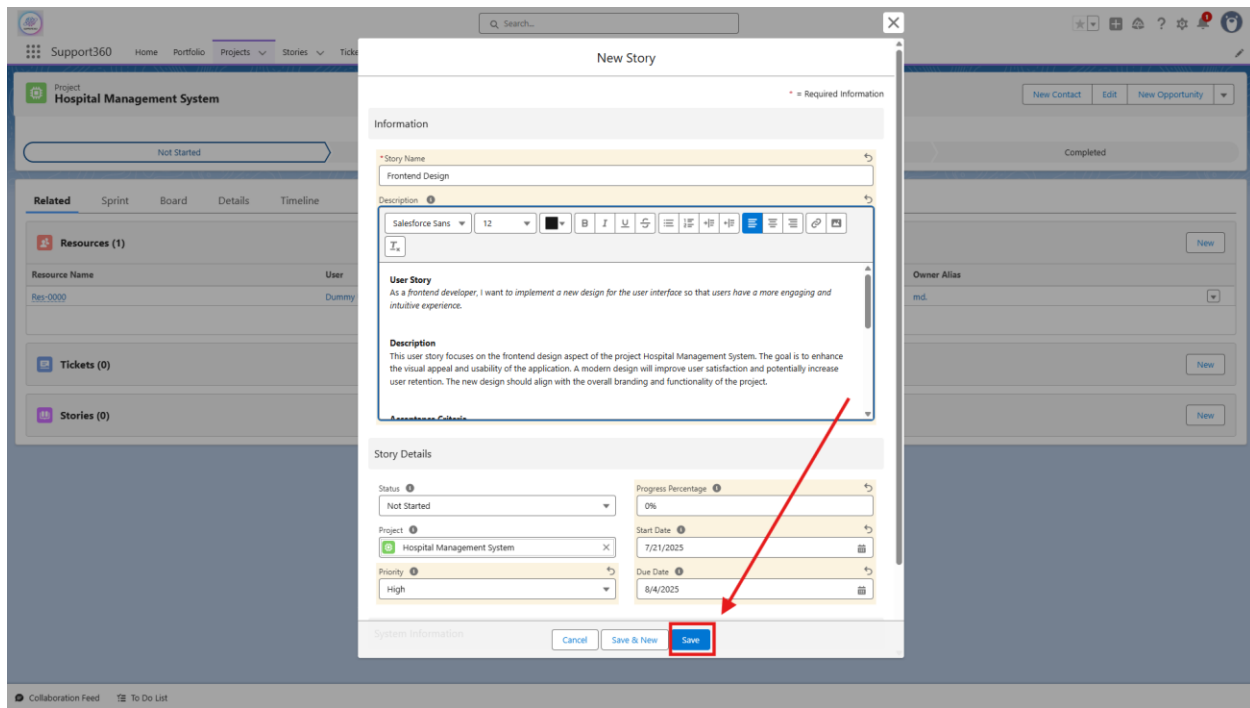


Step 12: Now, let's break the Project into more manageable chunks and then from those chunks into smaller piece and from those pieces to much more manageable tasks. That's

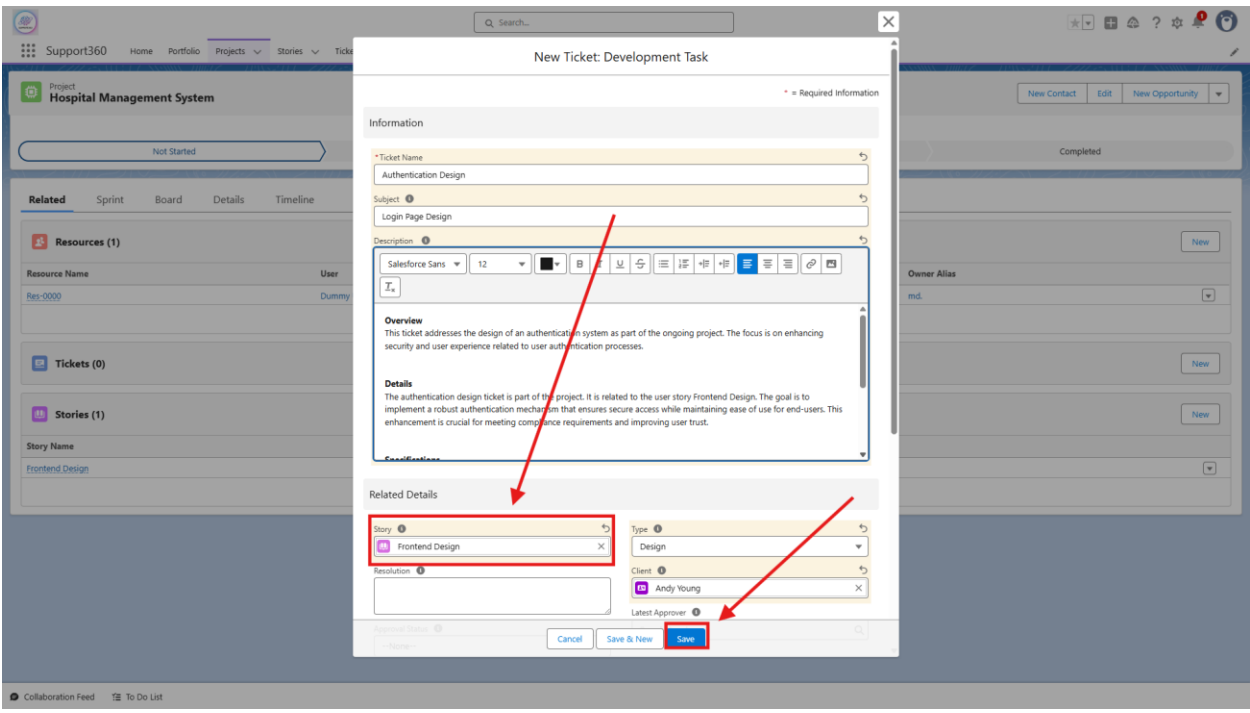
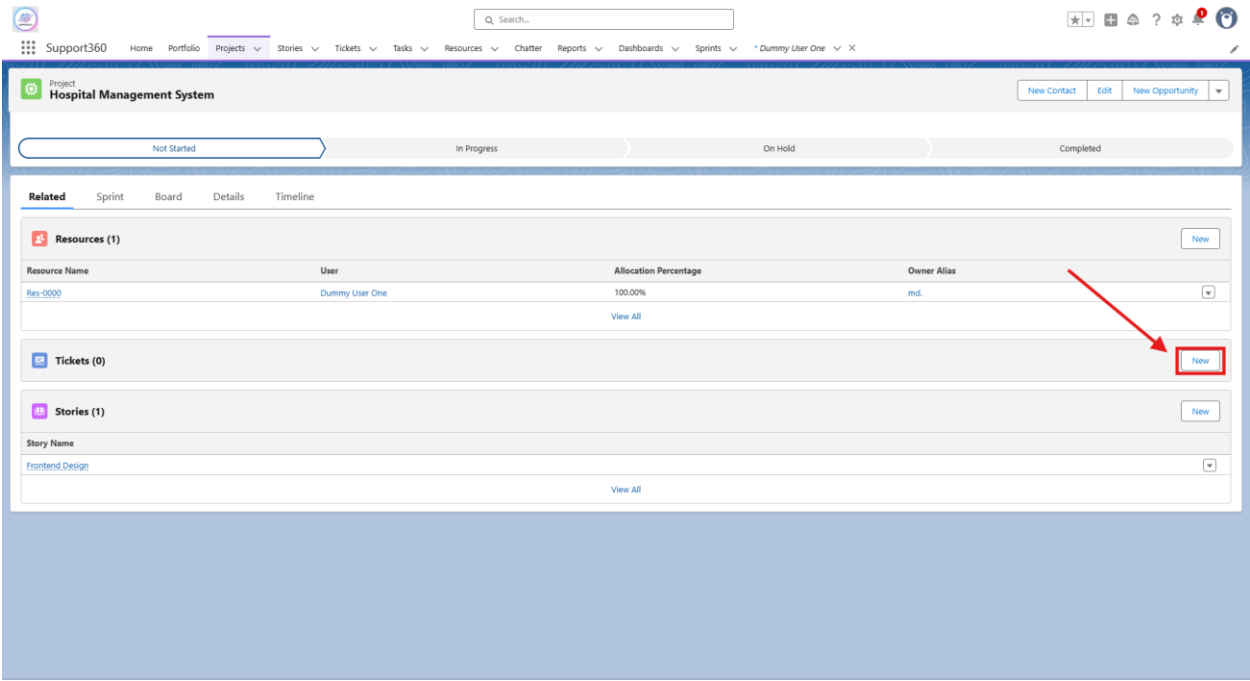
right, Chuks can be treated as Stories, Pieces can be Tickets. So, we can create Story or Ticket under the project and Taks under Tickets. Based on your project requirement you can do as you please. Click on the Story under Project Tab's Related Tab. And click new.



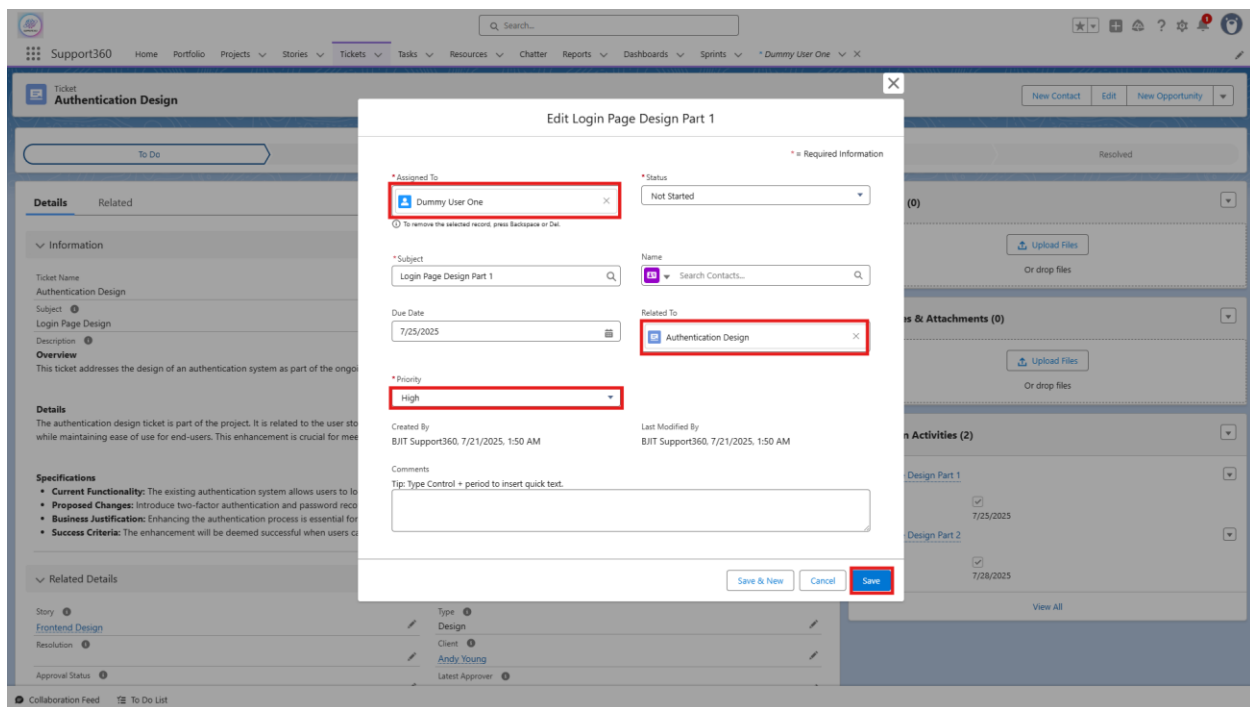
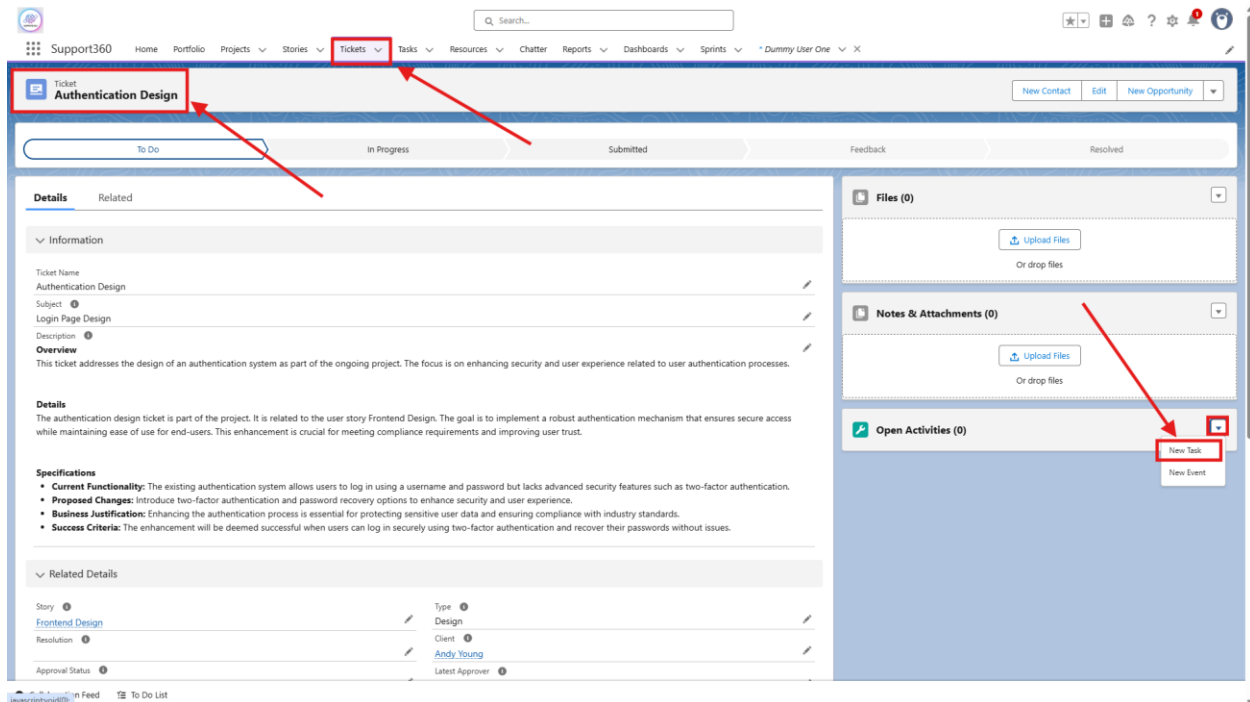
Step 13: Create the User Story for your project by filling the information.



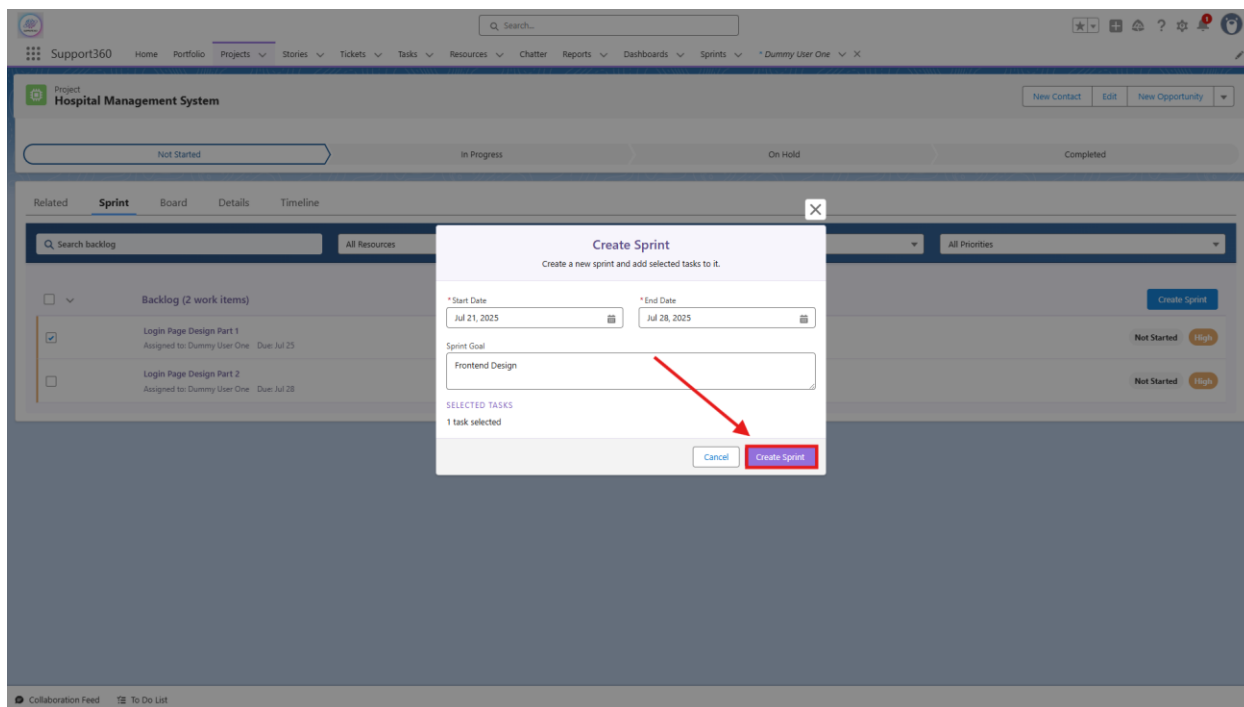
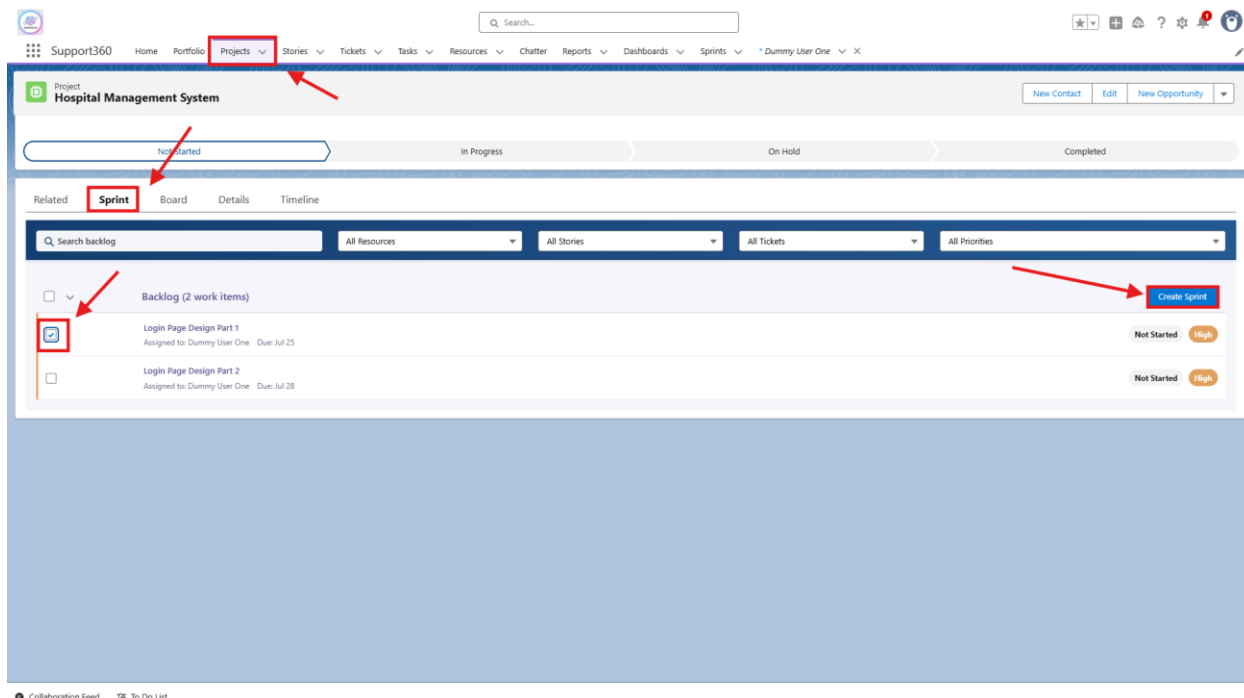
Step 14: Then Create a Ticket Under that Story. Click New and fill up the details information and click save.



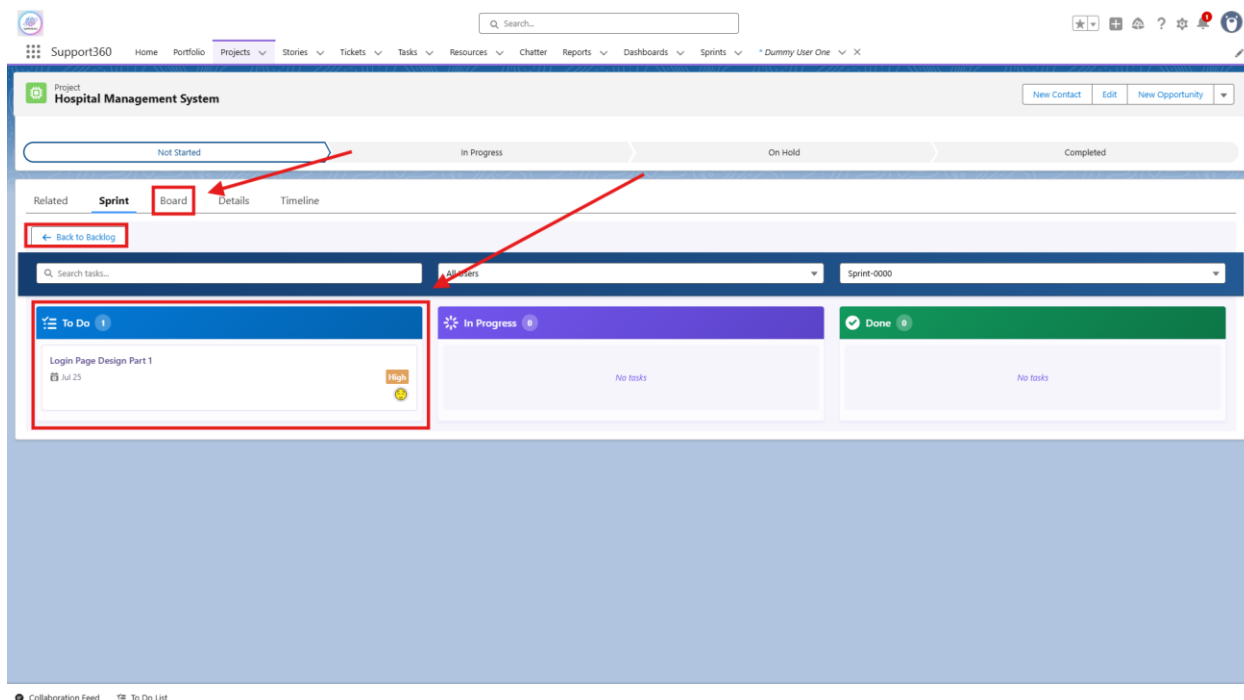
Step 15: Now navigate to the Ticket Tab and find the ticket you want to break down And then go to Details tab and Click on the dropdown arrow in Open Activities and click New Task. Fill in the information and create a Task.



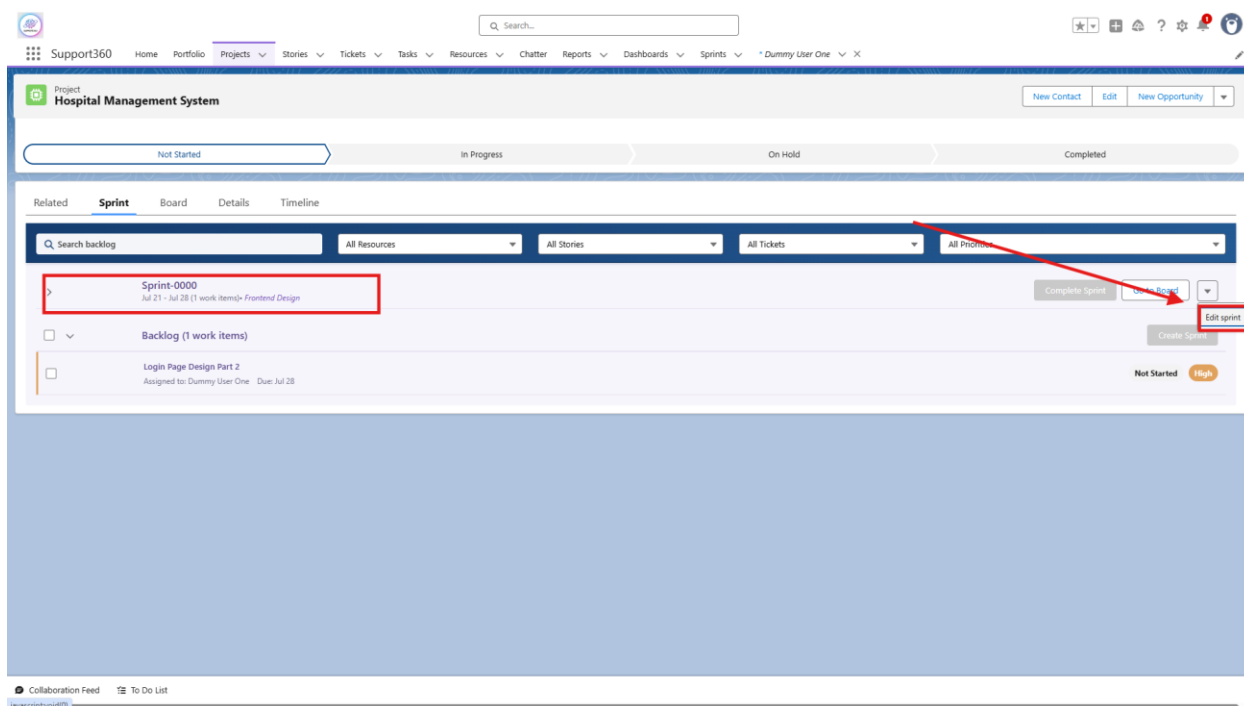
Step 16: Now with the tasks we can create Sprint for the Project. Navigate to the Project Tab and Find Sprint Tab. Then select the Tasks you want to include and click the Create Sprint Button.

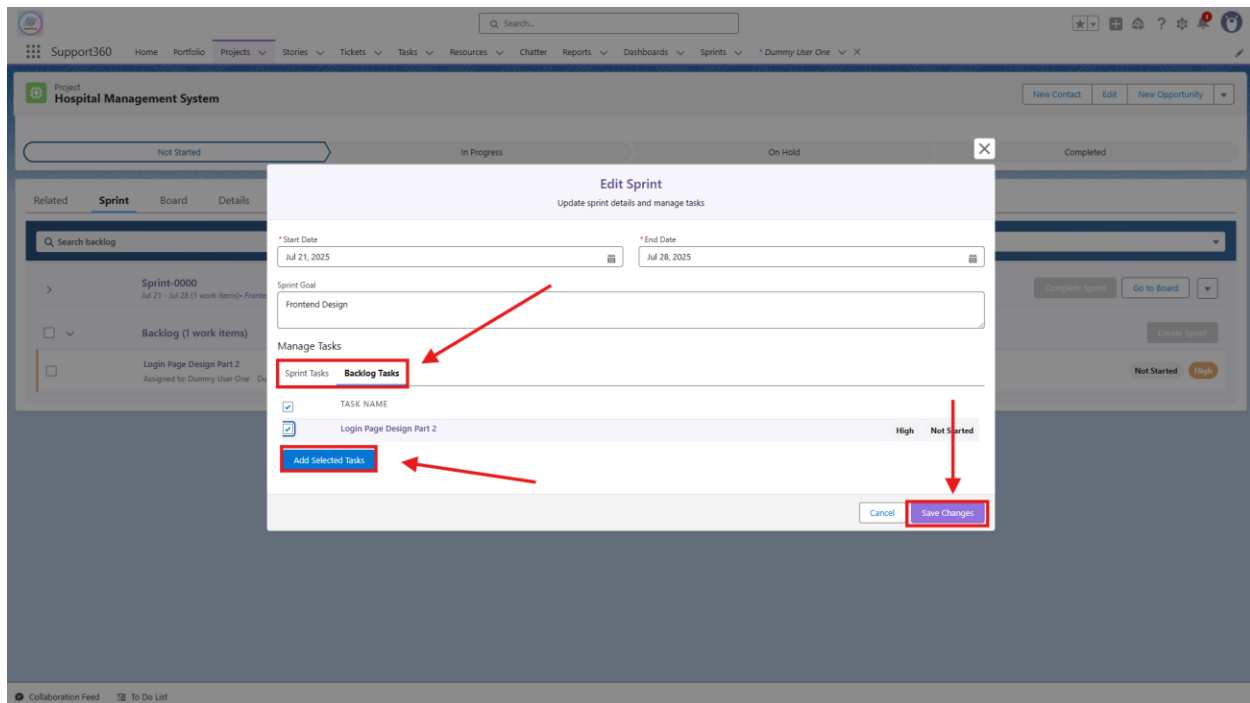


Step 17: Now click the Start Sprint button which will redirect you to the Board Tab where you can Drag and Drop the Tasks after working on them and navigate around.

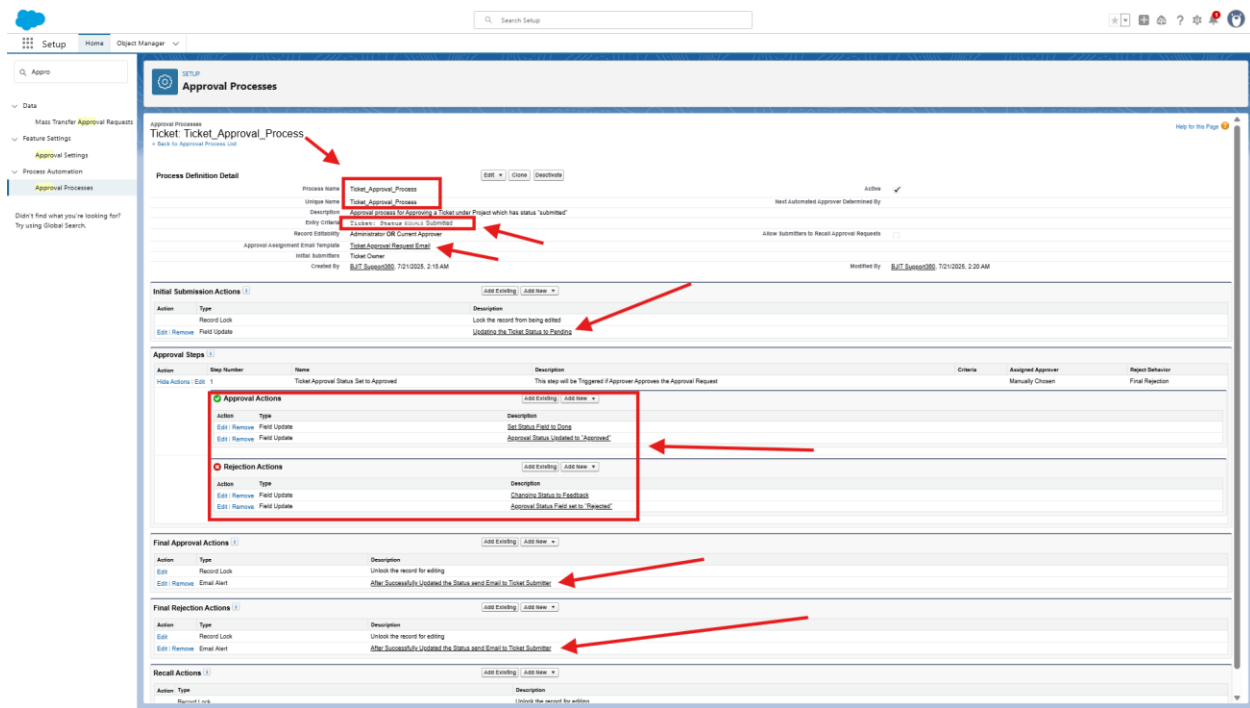


Step 18: If you want, you can add more tasks to the current Sprint by clicking on the Drop-down arrow and click Edit Sprint. You can click on the Sprint Tasks and Backlog Tasks to add or remove tasks from the Sprint and click Save.





Step 19: Now once all the Tasks for a Ticket is completed, an Approval Process will automatically occur. But for that you **MUST create an approval process** on Ticket using this API name **Ticket_Approval_Process**



Step 20: Now again, once all the tasks under a Ticket is completed, the approval process will start automatically, here are the preview.

The first screenshot shows the 'Hospital Management System' project dashboard. It features a Kanban board with columns for 'To Do', 'In Progress', and 'Done'. The 'Done' column contains two tasks: 'Login Page Design Part 1' and 'Login Page Design Part 2', both marked as completed. A red arrow points from the 'In Progress' column towards the 'Done' column.

The second screenshot shows the 'Authentication Design' ticket details. The ticket status is 'Submitted', highlighted by a red box. Below the status bar, the 'Approval History' table is visible, showing two steps: 'Ticket Approval Status Set to Approved' and 'Approval Request Submitted'. The 'Submitted' status is also highlighted by a red box. The 'Approval History' table has columns for Step Name, Date, Status, Assigned To, Actual Approver, and Comments.

Step Name	Date	Status	Assigned To	Actual Approver	Comments
Ticket Approval Status Set to Approved	7/21/2025, 2:22 AM	Pending	Support360	Support360	
Approval Request Submitted	7/21/2025, 2:22 AM	Submitted	Support360	Support360	

Step 21: The manager then can Approve or Reject based on the supervision of the works for the Ticket.

Authentication Design Ticket was approved.

Details **Related**

Approval History (2)
2 items • Sorted by: In Pending • Updated a few seconds ago

Step Name	Date	Status	Assigned To	Actual Approver	Comments
Ticket Approval Status Set to Approved	7/21/2025, 2:25 AM	Approved	8/17 Support360	8/17 Support360	Looks good!
Approval Request Submitted	7/21/2025, 2:22 AM	Submitted	8/17 Support360	8/17 Support360	

View All

Files (0) Add Files

Upload Files
Or drag files

Notes & Attachments (0) Upload Files

Upload Files
Or drag files

Files (0) Upload Files
Or drag files

Notes & Attachments (0) Upload Files
Or drag files

Open Activities (0)

Collaboration Feed To Do List

Step 22: You can also keep track of the project timeline in the Timeline tab.

Project Management System New Contact Edit New Opportunity

Related Sprint Board Details **Timeline**

Project Timeline

- develop theme
- Real-Time Monitoring Dashboard
- Ticket 6
- Hello
- Specialized AI Feature
- NextGen Story
- NextGen Story Ticket
- Created by Bot
- Created by Bot 2
- Hi
- Ticket 3
- New Test - 1
- New Test 2
- Test Present 2
- test present 1
- test ticket 2
- Test Present - 4
- test Present - 3

Timeline

Mar 1 Mar 31 Apr 20 May 10 May 30 Jun 19 Jul 9 Jul 29 Aug 18 Sep 11

Collaboration Feed To Do List

Some additional Guide for Approval Process:

The screenshot shows the 'Ticket' page in Support360. The ticket title is 'UI Enhancement for Real Estate Management System'. The status is 'To Do'. The ticket details include:

- Information:**
 - Ticket Name: UI Enhancement for Real Estate Management System
 - Subject: UI Enhancement
 - Description: Overview
- Overview:** This ticket addresses a UI enhancement for the Real Estate Management System, aimed at improving user experience and interface functionality.
- Details:** The enhancement is part of the ongoing project to develop the Real Estate Management System. It is related to the story focused on UI Development, which seeks to create a more intuitive and user-friendly interface for users. The enhancement is crucial for maintaining competitiveness in the market and ensuring user satisfaction.
- Specifications:**
 - Current Functionality:** The existing UI presents a basic layout that lacks modern design elements, which may hinder user engagement.
 - Proposed Change:** Implement a more visually appealing design that incorporates contemporary UI practices, including better navigation, updated color schemes, and responsive elements.
 - Business Justification:** Enhancing the UI will improve user interaction, potentially leading to increased user retention and satisfaction, which are vital for the success of the Real Estate Management System.
 - Success Criteria:** The enhancement will be considered successful if user feedback reflects improved satisfaction and if there is an observable increase in user engagement metrics post-implementation.
- Related Details:**
 - Story: UI Development for Real Estate Management System
 - Type: Client

On the right side, there are sections for 'Files (0)', 'Notes & Attachments (0)', and 'Open Activities (2)'. The 'Open Activities' section shows two activities: 'Signup Page UI' and 'Login Page UI', both with a due date of 5/8/2025.

The screenshot shows the 'Projects' page in Support360. The page displays a list of 15 projects, with the first project, 'Real Estate Management System', highlighted in red. The list includes the following projects:

- Real Estate Management System
- Etteplan Project
- RRR
- Live Football Streaming App
- Support360
- Albeam
- Foodie
- NextGen Engine
- p1
- Vendor App
- IRCheck
- Stress Test project 2
- Advanced AI
- Stress Test Project
- Triclingo

The page also includes a search bar and a 'Recently Viewed' section.

<https://orgfarm-6c36a8b30-dev-ed.lightning.force.com/lightning/r/a00yg000004vp18YQ01/view>



Support360

HomePortfolioProjectsSprintsStoriesTicketsTasksResourcesChatterReportsDashboards



Task

Login Page UI

Mark Complete

Edit Comments

Change Date

Create Follow-Up Task

Name

Related To

UI Enhancement for Real Estate Management System

Details

Related

Assigned To

Support 360

Status

Not Started

Subject

Login Page UI

Name

Due Date

5/8/2025

Related To

UI Enhancement for Real Estate Management System

Priority

High

Sprint

Sprint-0086

Created By

Support 360, 5/8/2025, 1:55 PM

Last Modified By

Support 360, 5/8/2025, 1:58 PM

Comments

Develop the user interface for the login page of the Real Estate Management System. Ensure it is responsive, user-friendly, and visually appealing.

Collaboration Feed

To Do List



Support360

HomePortfolioProjectsSprintsStoriesTicketsTasksResourcesChatterReportsDashboards



Task

Signup Page UI

Mark Complete

Edit Comments

Change Date

Create Follow-Up Task

Name

Related To

UI Enhancement for Real Estate Management System

Details

Related

Assigned To

Support 360

Status

Not Started

Subject

Signup Page UI

Name

Due Date

5/8/2025

Related To

UI Enhancement for Real Estate Management System

Priority

High

Sprint

Sprint-0086

Created By

Support 360, 5/8/2025, 1:55 PM

Last Modified By

Support 360, 5/8/2025, 1:58 PM

Comments

Develop the user interface for the signup page of the Real Estate Management System. Ensure it is responsive, user-friendly, and visually appealing.

Collaboration Feed

To Do List



Support360

HomePortfolioProjectsSprintsStoriesTicketsTasksResourcesChatterReportsDashboards

Q Search...



 Approval Request

Ticket Approval

Pending

ApproveRejectReassign

Submitter
Support 360

Date Submitted
May 8, 2025

Actual Approver
Support 360

Assigned To
Support 360

Details

Approval Details

Ticket Name
UI Enhancement for Real Estate Management System

Type
Submitted

Status
Submitted

Owner
Support 360

Subject
UI Enhancement

Priority
High

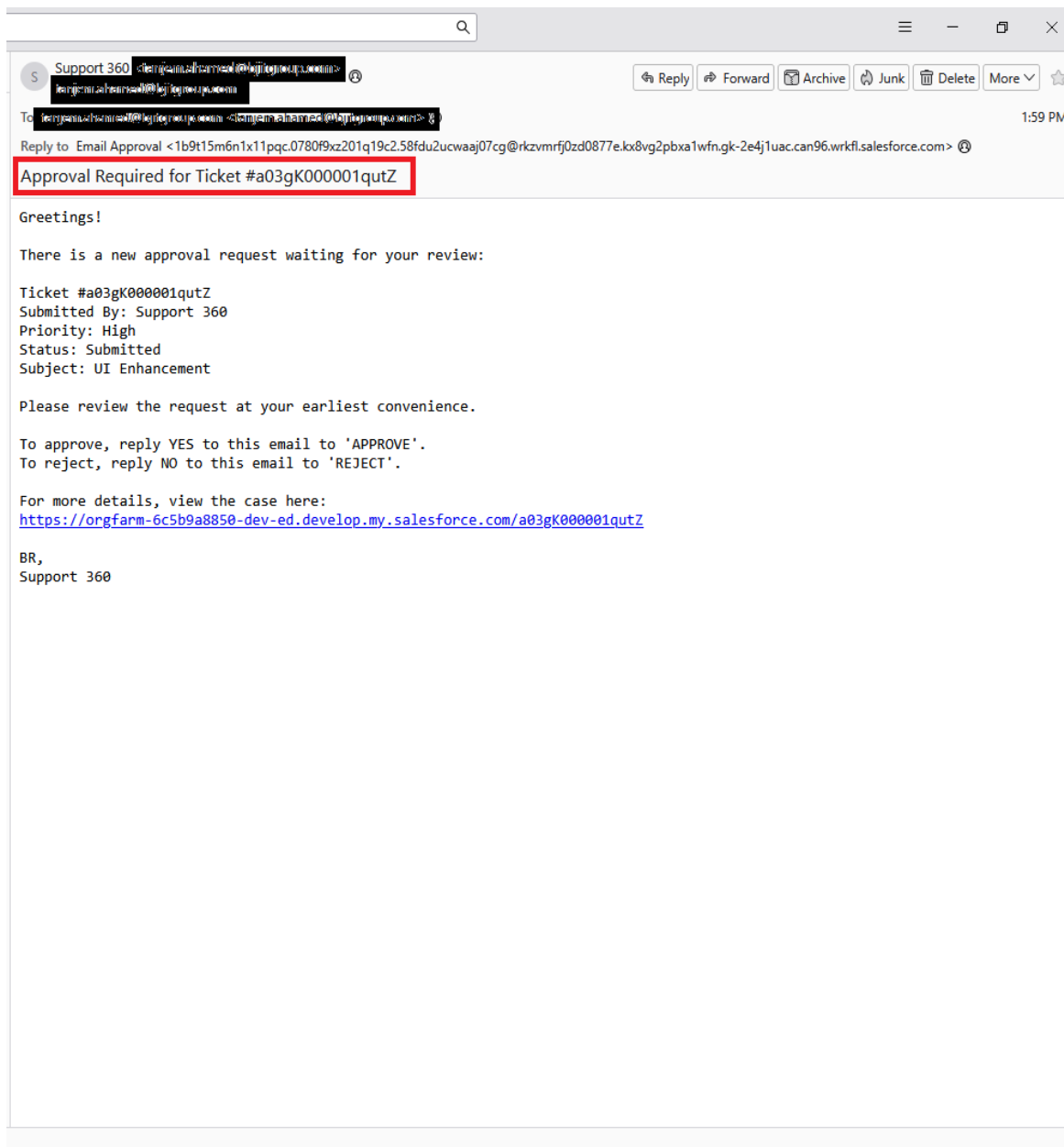
Due Date
5/9/2025

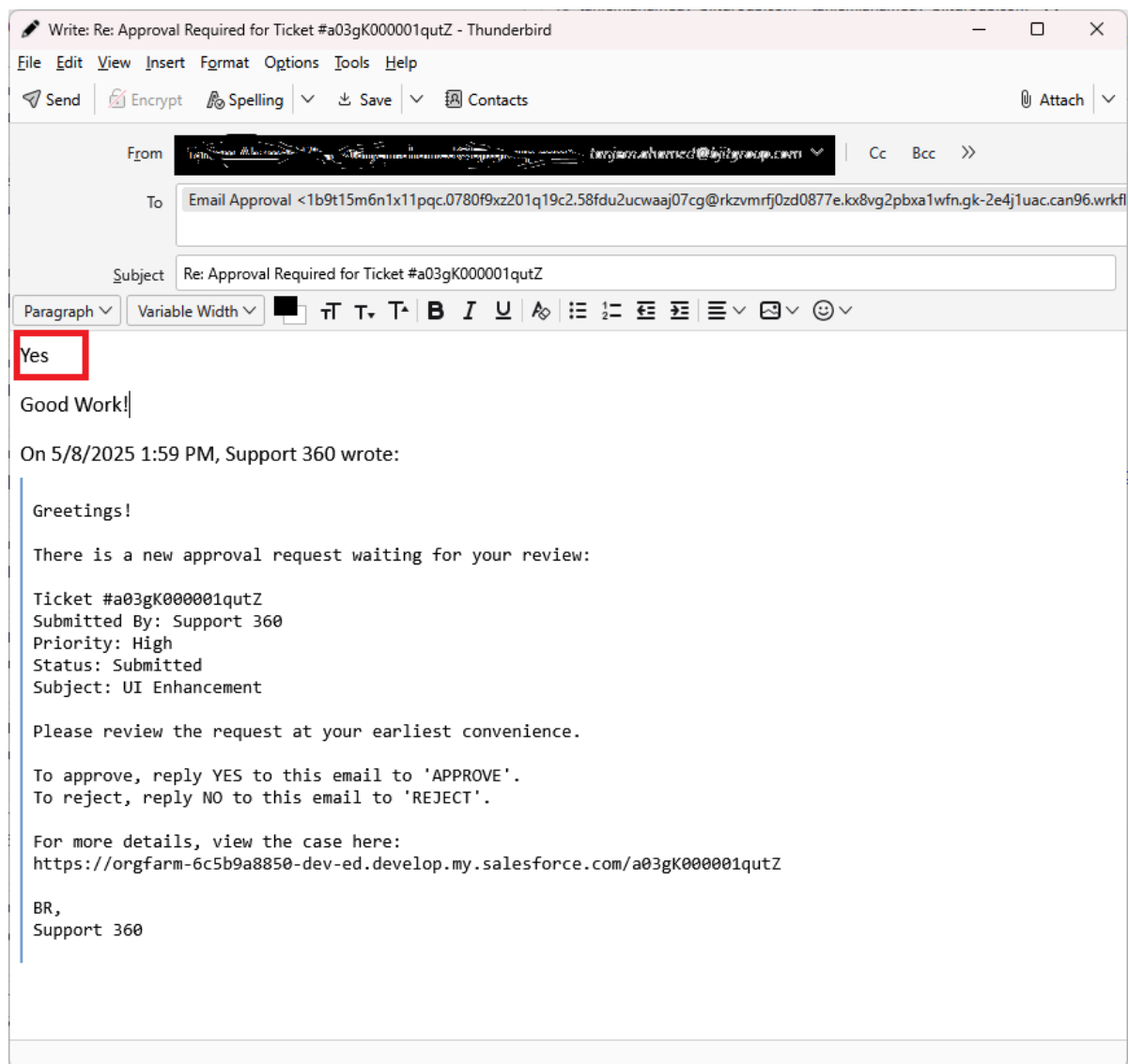
No Comments

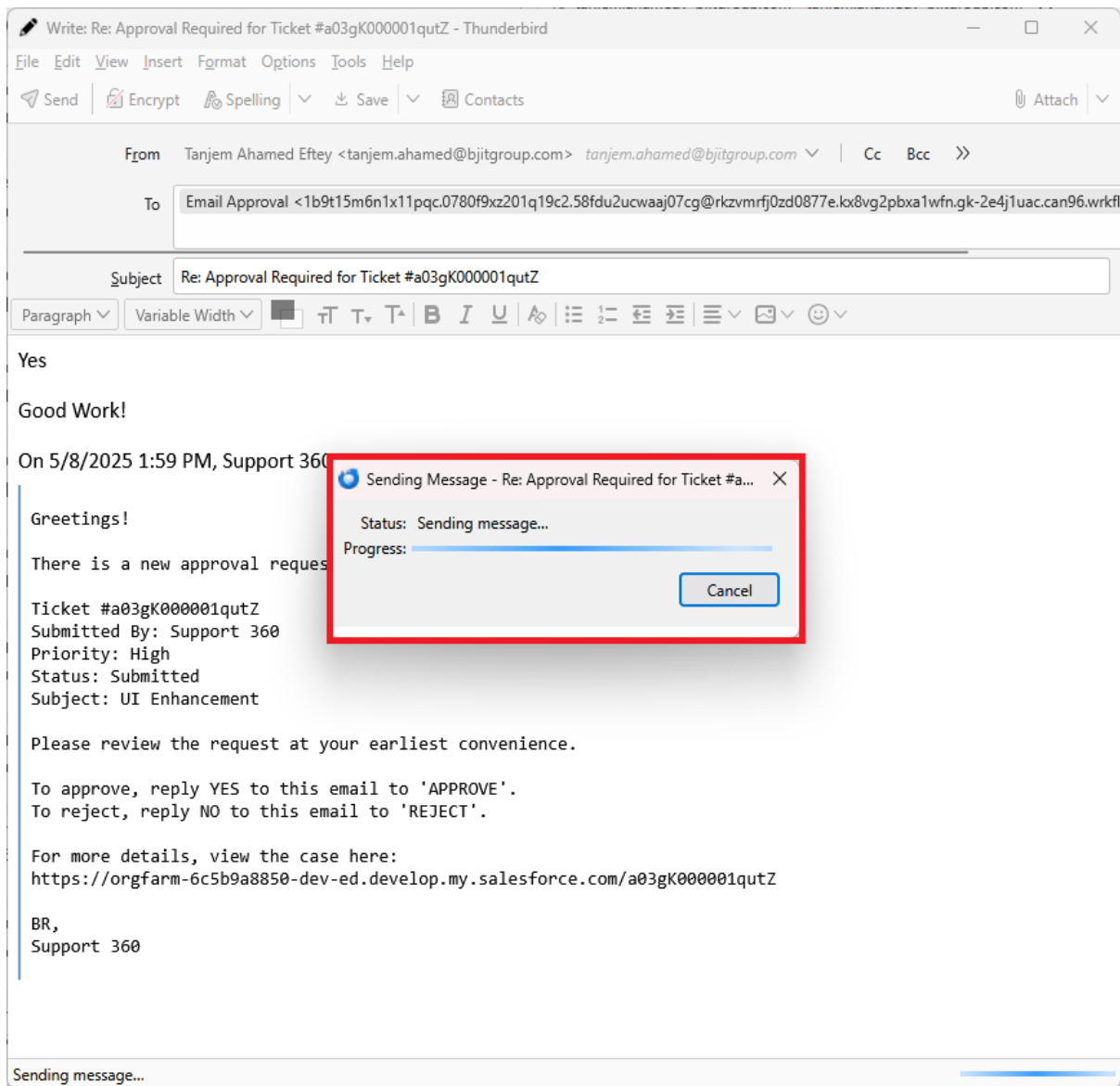
Collaboration Feed

To Do List

After starting approval process It will automatically send an Email to the project manager For Approval, He/She can Approve or Reject using Email Reply.







The screenshot displays the Support360 application interface. At the top, there is a navigation bar with the Support360 logo and a search bar. Below the navigation bar, the main content area shows a project dashboard for 'Real Estate Management System'. The dashboard includes a progress bar with four stages, each marked with a checkmark. Below the progress bar, there are tabs for 'Related', 'Sprint', 'Board', 'Details', and 'Timeline'. The 'Sprint' tab is active, showing a search bar for 'Search backlog' and a list of items. The first item is 'Sprint-0086' with a date range of 'May 1 - May 8 (2 work items)' and a sub-item 'Auth Design'. Below this, there is a section for 'Backlog (0 work items)'. On the right side, a 'Notifications' sidebar is open, displaying several alerts: 'Approval request for the ticket is approved', 'Story Status Changed!!!', 'Ticket Status Changed!!!', 'Due Date', and 'Project Status Changed!!!'. The bottom of the interface shows a 'Collaboration Feed' and a 'To Do List'.

This screenshot shows the same Support360 interface as the previous one, but with a green success message overlay. The message reads 'Success: Sprint marked as completed' and has a close button (X). The 'Sprint' tab is still active, and the 'Backlog (0 work items)' section is visible. The 'Collaboration Feed' and 'To Do List' are also present at the bottom.