

TICKET-CENTRIC BUSINESS OPERATING SYSTEM

Complete Redesign Based on Your Working System

Core Principle: Everything flows through tickets. One interface. Infinite workflows.

EXECUTIVE SUMMARY

Your insight is **brilliant and game-changing**: Instead of building separate modules (ERP, CRM, Workflow, Comms), you've recognized that **all business operations are workflows**, and workflows are just **sequences of steps assigned to people**.

By making the **ticket** the universal container for all work, you achieve:

1. **Single Learning Curve:** Users learn one interface once, then handle any business process
 2. **Zero Context Switching:** Everything they need is in the ticket
 3. **Complete Audit Trail:** Every action is a step, timestamped, with who did what
 4. **AI-Friendly:** AI understands tickets → auto-fills data, auto-assigns, auto-generates documents
 5. **Scalable:** Works for 1-person operation or 10,000-person enterprise
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HOW YOUR SYSTEM WORKS (CURRENT STATE ANALYSIS)

The Five Ticket Types (From Your PDFs)

1. PROCESS TICKET (Marketing, Sales, Operations workflow)

Create Process Ticket (Manual Entry)

↓

Define Steps (Qualification → Followup → Offer → Negotiation → GETPO → Verify PO)

↓

Assign Each Step to Team Member + Target Date

↓

System Auto-generates TODO tickets for each step

↓

Team completes steps (Reply/Forward to escalate)

↓

System marks Done, closes ticket, archives

Current Example:

- Process: "Market Related (Lead)"
- Steps: QUALIFICATION (4/21) → FOLLOWUP (4/21) → OFFER (4/23) → NEGOTIATION (4/26) → GETPO (4/28) → VERIFY PO (4/30)
- Team: ASHISHSIR assigned to first 5, BHAGWANDAS to verify
- Status: 5 of 6 complete, 1 pending

Intelligence Level: Medium

- Manual step assignment
- Target dates pre-set
- Simple escalation on delay

2. SCHEDULER TICKET (Recurring work)

Create Scheduler Ticket

↓

Set Frequency (None, Daily, Weekly, Monthly, Quarterly, Yearly, BiYearly)

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System auto-generates new tickets on schedule

↓

Team member picks up, completes, system repeats

Current Example:

- Subject: "Kindly Submit weekly Tender Received or Searched via various campaign"
- Frequency: Weekly
- Assigned to: MANISH PATIL
- Type: Marketing Related (Campaign)

Intelligence Level: Low-Medium

- Dumb repeat (no smart scheduling)

- No history tracking across cycles
- No optimization

3. MR TICKET (Material Request)

Create MR Ticket (engineering department initiates)

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Problem: "MR FOR FLEXIBLE HOSES"

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System routes to AI-EMPLOYEE for approval

↓

AI checks: Budget? Stock? Alternative? Supplier?

↓

If approved: Auto-generates RFQ ticket

Current Example:

- From: S.K.TULISIR (engineering)
- To: AI-EMPLOYEE (approval)
- Project: IOCLPANIPAT
- Linked to: RFQ (material request → quote request → comparison → PO)

Intelligence Level: Medium

- Conditional routing
- Cross-ticket linking

- Document attachment

4. RFQ TICKET (Request for Quotation)

Create RFQ Ticket (auto-generated from MR or manual)

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Define Items (Effluent Treatment Plant-120 KLD @ Qty 2 = ₹4,000 total)

↓

Attach Supporting Docs (specifications, drawings)

↓

System auto-sends to suppliers (email, WhatsApp)

↓

Suppliers Reply with Quotes

↓

System Compares (pivot table: water softening plant cost comparison across 3 suppliers)

↓

Finance Approves → Auto-generates PO

Current Example:

- Item: Water Softening plant-1000 Ltrs, Effluent Treatment Plant-120 KLD
- Quantity: 1, 2
- Quotes from: SHIVAY CONSTRUCTION (₹2,100 + ₹4,720), SKY CONSTRUCTION (₹1,890 + ₹10,620), MR.Clean Utility Services
- Winner: MR.Clean (lowest cost)

Intelligence Level: HIGH

- Multi-step comparison
- Auto-generated PO
- Supplier management

5. BILL TICKET (Invoice Entry)

Create Bill Ticket (supplier sends invoice)

↓

Entry: Item, UOM, Qty, Rate, Total, GST, Amount

↓

System Creates Voucher (GL entry: Debit BRANCH PURCHASE, Credit GST INPUT, Credit SUPPLIER)

↓

Finance Reviews → Approves

↓

System Records Stock Entry (10 Argon Cylinders received)

↓

Payment Recorded (Bank TDS on Sales, Bank amount)

↓

GL reconciles automatically

Current Example:

- From: ANJALI (vendor)
- To: ASHISHSIR (accounting)

- Bill: GUJARAT ACETYLENE PVT LTD
- Items: Argon Cylinder (₹35,000) + Dissolved Oxygen Analyzer (₹1,755) + Oxygen Cylinder (₹1,155) = ₹37,910 + ₹6,823.80 GST = ₹44,733.80
- Voucher Generated: PV (Purchase Voucher)
- Stock Updated: 10 + 1 + 3 cylinders received

Intelligence Level: VERY HIGH

- OCR data extraction (if PDF uploaded)
 - GL auto-journalization
 - Stock integration
 - Payment tracking
-

THE UNIFIED TICKET-CENTRIC OS (REDESIGNED)

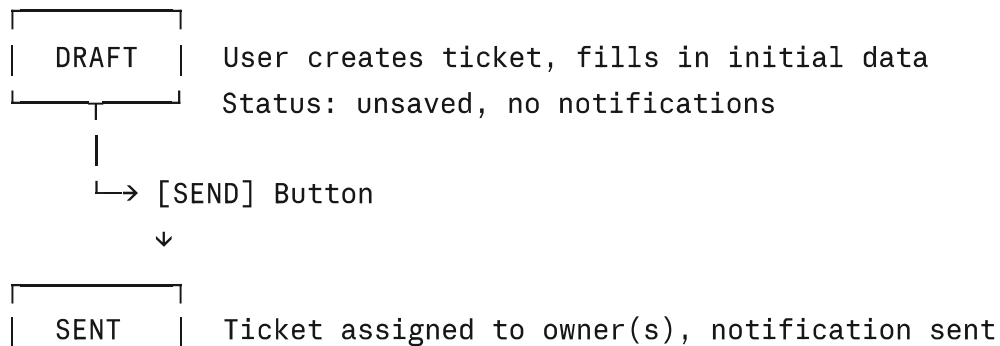
CORE DATA MODEL

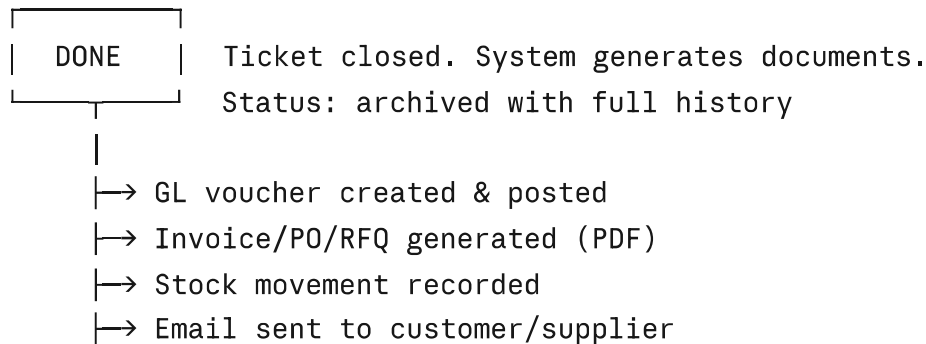
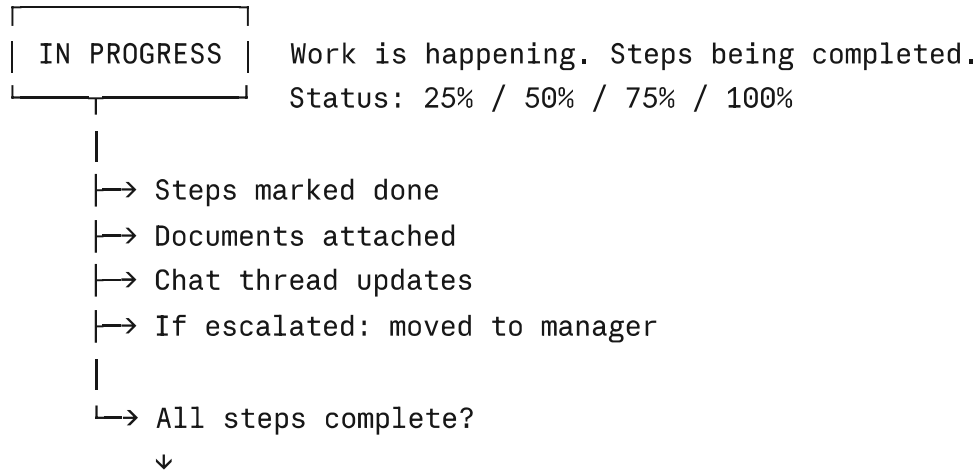
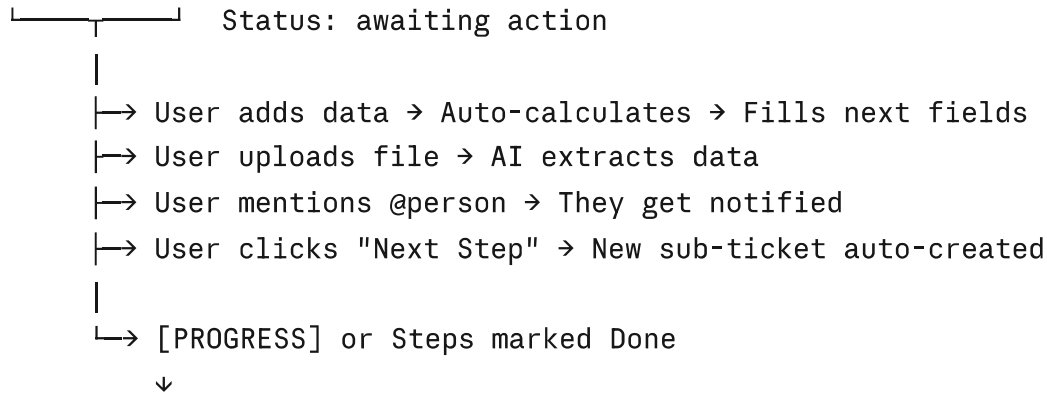
```
TICKET (Universal Container)
├── Header
│   ├── ID (unique)
│   ├── Type (Process, MR, RFQ, Bill, Scheduler, Custom)
│   ├── Status (Draft → Sent → In Progress → Done)
│   ├── Created By / Created At
│   └── Problem (category: Procurement, Marketing, Finance, Operations, etc.)
```

- └─ Subject
- └─ Assignment
 - └─ Primary Owner (currently assigned to)
 - └─ CC List (stakeholders watching)
 - └─ From / To (sender/receiver of request)
 - └─ Department / Project
- └─ Work Content
 - └─ Steps/Sub-tasks
 - └─ Step # (Qualification, Followup, Offer, etc.)
 - └─ Assigned To
 - └─ Target Date
 - └─ Done? (True/False)
 - └─ Done Date
 - └─ Data Fields (dynamic based on type)
 - └─ Items (what are we doing?)
 - └─ Amounts (how much?)
 - └─ Dates (when?)
 - └─ References (linked tickets)
- └─ Documents
 - └─ Attached Files (PDF, Excel, images)
 - └─ Auto-generated Documents (PO, Invoice, RFQ)
 - └─ Supporting Docs (specs, drawings)
- └─ Metadata

- | |— SLA Status (on time / overdue)
- | |— Escalation Flag
- | |— Risk Score
- |
- |— Communication
- | |— Chat Thread (all discussion in one place)
- | |— Notifications (email, WhatsApp, SMS)
- | |— @mentions (notify specific people)
- | |— File Sharing (all files attached here)
- |
- |— System Generated
- | |— GL Entries (vouchers)
- | |— Stock Movements
- | |— Invoice/PO/RFQ Documents
- | |— Email Confirmations
- | |— Analytics (cycle time, cost, revenue)

THE UNIVERSAL TICKET WORKFLOW





```
|→ Analytics recorded (cycle time, cost, revenue)
|
└→ No more action required
    Archived for future reference
```

TICKET TYPES & WORKFLOWS (COMPLETE MAP)

1. PROCESS TICKET (Multi-step Workflow)

Used For: Any sequential workflow (lead qualification, project execution, approval chain)

Data Model:

```
PROCESS TICKET
```

```
|— Subject: "Market Related (Lead) - ACME Corp"
|— Problem Type: "Sales Process"
|— Steps (defined at creation):
|   |— Step 1: QUALIFICATION - Assigned to ASHISH - Target: 4/21
|   |— Step 2: FOLLOWUP - Assigned to ASHISH - Target: 4/21
|   |— Step 3: OFFER - Assigned to ASHISH - Target: 4/23
|   |— Step 4: NEGOTIATION - Assigned to ASHISH - Target: 4/26
|   |— Step 5: GETPO - Assigned to ASHISH - Target: 4/28
|   └— Step 6: VERIFY PO - Assigned to BHAGWANDAS - Target: 4/30
|— Linked Tickets: (auto-create sub-ticket for each step)
|   └— ID 2833, 2834, 2835, 2836, 2837 (in TODO list)
└— SLA: All steps on-time (5 done, 1 pending)
```

AI Enhancements (New):

- **Auto-suggest Next Step:** "Based on history, ACME Corp usually needs 2 days after offer. Next deadline should be 4/25, not 4/26"
 - **Predict Duration:** "This type of deal takes avg 8 days. You're at day 6, on track."
 - **Flag Risks:** "ASHISH has 12 other tickets due today. Recommend escalating GETPO step."
 - **Auto-generate Followup:** "Draft email to ACME based on offer template"
-

2. MR TICKET (Material Request)

Used For: Any request (procurement, HR, IT, facilities)

Data Model:

MR TICKET

|— Subject: "MR FOR FLEXIBLE HOSES"
|— Problem Type: "Procurement Related (MR/RFQ/Q/PO)"
|— From: S.K.TULISIR (Engineering)
|— To: AI-EMPLOYEE (for approval)
|— Project: IOCLPANIPAT
|— Data:
| |— Item Description: "Flexible Hoses - Industrial Grade"
| |— Quantity: 50
| |— Urgency: High
| |— Budget: ₹50,000 approved
| |— Specifications: [attached PDF]
|— Status: Awaiting Approval from AI-EMPLOYEE
|— Auto-generate:
| |— RFQ Ticket #2865 (linked)

AI Enhancements:

- **Approval Logic:** "₹50K within approved budget. Stock check: 0 available. Recommend RFQ to 3 suppliers."
 - **Smart Procurement:** "Found same item from previous supplier SHIVAY CONSTRUCTION at ₹8/unit (you budgeted ₹12/unit). Direct PO?"
 - **Alternative Detection:** "Saw similar MR last month. Old specs attached here. Still valid?"
-

3. RFQ TICKET (Request for Quotation)

Used For: Competitive supplier quotes (auto-generated from MR)

Data Model:

RFQ TICKET

|— Subject: "RFQ FOR FLEXIBLE HOSES"

|— Problem Type: "Procurement Related (MR/RFQ/Q/PO)"

|— Linked MR: #2865

|— Items:

| |— Water Softening plant-1000 Ltrs - Rate: ?, Total: ?

| |— Effluent Treatment Plant-120 KLD - Qty: 2, Total: ?

|— Status: Quotes Received from 3 suppliers

|— Suppliers:

| |— SHIVAY CONSTRUCTION - ₹2,100 + ₹4,720 = ₹6,820

| |— SKY CONSTRUCTION - ₹1,890 + ₹10,620 = ₹12,510

| |— MR.Clean Utility Services - ₹2,100 + ₹4,720 = ₹6,820

|— Auto-generate PO from winner

AI Enhancements:

- **Automatic Comparison:** Generate pivot table (item vs supplier vs price)
- **Smart Selection:** "MR.Clean and SHIVAY are same price. MR.Clean delivered in 5 days avg vs SHIVAY's 7. Recommend MR.Clean."
- **Highlight Outliers:** "SKY's Effluent price ₹10,620 vs others' ₹4,720. Investigate— quality difference or mistake?"

- **Auto-negotiate:** "Your avg payment terms are 30 days. Can you get SHIVAY to 45 days and save ₹500 in negotiation?"
-

4. PO TICKET (Purchase Order)

Used For: Confirmed purchase with delivery & billing tracking

Data Model:

```
PO TICKET (Auto-generated from RFQ winner)
├─ Subject: "PO for FLEXIBLE HOSES"
├─ Supplier: MR.Clean Utility Services
├─ Items: Water Softening (1 × ₹2,100) + Effluent Treatment (2 × ₹4,720) =
₹11,540
├─ Delivery Target: 5 days from PO date
├─ Invoice Receipt Expected: On delivery + 5 days
├─ Steps:
|   └─ Step 1: PO Issued (Done 4/22)
|   └─ Step 2: Supplier Acknowledges (Target 4/22)
|   └─ Step 3: In Transit (Target 4/27)
|   └─ Step 4: Received at Warehouse (Target 4/27)
|   └─ Step 5: QC Check (Target 4/28)
|   └─ Step 6: Invoice Received (Target 5/3)
|   └─ Step 7: Payment Released (Target 5/8)
└─ SLA: On track (4/5 steps complete)
```

AI Enhancements:

- **Real-time Tracking:** "PO issued 4/22. Expected delivery 4/27. Send supplier reminder on 4/26 if not shipped."
 - **Quality Alerts:** "Last order from MR.Clean had 2 defects (5%). This order size is larger. Recommend stricter QC."
 - **Payment Optimization:** "Invoice due 5/3. You have ₹20K cash. Pay on 5/3 to maintain liquidity but meet supplier expectations."
-

5. BILL TICKET (Invoice Entry & GL Posting)

Used For: All invoices (supplier bills, sales invoices, expense claims)

Data Model:

BILL TICKET (Manual or auto-extracted from PDF)

|— Subject: "purchase bill - GUJARAT ACETYLENE PVT LTD"

|— Problem Type: "Supplier Delivery (MIR/Bill)"

|— From: ANJALI (supplier)

|— To: ASHISHSIR (accounting)

|— Linked PO: (if exists)

|— Data:

| |— Bill Date: 22/04/2026

| |— Bill Amount: ₹44,733.80 (₹37,910 + ₹6,823.80 GST)

| |— Items:

| | |— Argon Cylinder × 10 @ ₹3,500 = ₹35,000

| | |— Dissolved Oxygen Analyzer × 1 @ ₹1,755 = ₹1,755

| | |— Oxygen Cylinder × 3 @ ₹385 = ₹1,155

| |— GST: ₹6,823.80 (18%)

| |— Bank: [select payment mode, TDS]

|— Auto-generated Voucher:

| |— GL Entry 1: Debit BRANCH PURCHASE ₹37,910 / Credit SUPPLIER ACCOUNT
₹44,733.80

| |— GL Entry 2: Debit GJ IGST INPUT ₹6,823.80

| |— Reconciled: ✓

|— Auto-generated Stock Entry:

| |— Argon Cylinder +10 (now 35 in stock)

| |— Dissolved Oxygen Analyzer +1

| |— Oxygen Cylinder +3

|— Status: Approved, GL posted, Stock updated, Payment recorded

AI Enhancements (Very High):

- **OCR Extraction:** User uploads PDF → AI reads invoice → auto-fills all fields (vendor, amount, GST, items, dates)
 - **Duplicate Detection:** "This looks like Bill #2893 (₹44,733 from same vendor on same date). Duplicate? Mark as duplicate."
 - **Validation:** "BRANCH PURCHASE account hasn't received a bill from GUJARAT ACETYLENE before. Stock items match last RFQ? Amounts within range?"
 - **GL Automation:** "Auto-journalize: Debit BRANCH PURCHASE, Credit GST INPUT, Credit SUPPLIER account."
 - **Stock Integration:** "Link to PO#1234. Expected 10 cylinders, received 10 cylinders. Match!"
 - **Payment Planning:** "Payment due 30 days from bill date = 22/05. You have ₹50K available. Recommend paying 22/05."
-

6. SCHEDULER TICKET (Recurring Work)

Used For: Weekly tenders, monthly reports, quarterly audits, annual reviews

Data Model:

SCHEDULER TICKET

|— Subject: "Kindly Submit weekly Tender Received or Searched via various campaign"

|— Frequency: Weekly (every Monday)

|— Assigned To: MANISH PATIL

|— Type of Work: Marketing Related (Campaign)

|— How to Complete:

| |— Step 1: Search tender websites (IndianBidding, GEMs, etc.)

| |— Step 2: Filter for relevant tenders (your industry, budget)

| |— Step 3: Upload tender details (PDF + summary)

| |— Step 4: Manager reviews

| |— Step 5: Mark as submitted

|— Auto-generate: New ticket every Monday

|— History:

| |— Completed: 4/14, 4/21, 4/28 (all on time)

| |— Average completion: 2 hours

| |— Tenders found avg: 8 per week

|— AI Features:

| |— Auto-extract tender details (OCR)

| |— Smart filtering (industry + budget + deadline)

| |— Alerts (tender closing date approaching)

AI Enhancements:

- **Smart Scheduling:** "MANISH completes this task Mondays 9-11am. Generate ticket Monday 8:45am."

- **Work Prediction:** "Based on 4 weeks of data, MANISH needs 2 hours. Recommend 8am start to finish by 10am."
 - **Quality Tracking:** "Avg 8 tenders/week. Last week: 6. Mark as potential issue."
-

TICKET OPERATIONS (WHAT USER DOES)

1. CREATE TICKET

User Action: Click "New Ticket"

↓

Form Appears:

- Type: [Process | MR | RFQ | Bill | Scheduler | Custom]
- Subject: [Auto-filled if from email or API]
- Problem: [Category dropdown]
- Assigned To: [Search team member]
- Due Date: [Calendar picker]

↓

User Fills Form + [SAVE] (Draft) or [SEND] (Notify)

↓

System:

- Saves ticket
- Notifies assigned person
- Creates TODO task in their inbox

2. ADD STEPS (For Process tickets)

User (Process owner) Action: Inside ticket, click "Add Step"

↓

Step Creation Form:

- Step Name: [Qualification, Followup, Offer, etc.]
- Assigned To: [Search team member]
- Target Date: [Calendar]
- Notes: [Instructions for this step]

↓

System:

- Creates step
- Notifies assignee: "You have a new step: Qualification for ACME Corp, due 4/21"
- Step appears in their TODO list

3. COMPLETE STEP

User (Step owner) Action: In TODO list, click step

↓

Step Detail Opens:

- Instructions (from step creator)
- Data entry form (if needed)
- Attach files
- Chat/comments

↓

User fills out → [MARK DONE]

↓

System:

- Marks step complete with timestamp
- Notifies process owner: "ASHISH completed Qualification for ACME Corp"
- Auto-creates next step (if configured)
- Updates SLA status

4. UPLOAD DOCUMENT

User Action: Inside ticket, click "Upload" or "Attach"

↓

File Picker: Select PDF, Excel, Image, etc.

↓

System:

- Stores file
- If PDF/Image: Runs OCR
- If Bill: Auto-fills item + amount + GST
- If RFQ: Auto-extracts quote data
- Indexes for search
- Links to ticket

↓

Notify: @mention relevant people: "Invoice uploaded. Can you review?"

5. CHAT & NOTIFY

User Action: Inside ticket, type in chat box

↓

Types: "Need approval from finance" + @mention FINANCE_MANAGER

↓

System:

- Saves message to ticket thread
- Sends notification to FINANCE_MANAGER
- Optional: SMS/WhatsApp if urgent

↓

FINANCE_MANAGER sees: Notification with ticket link

- Clicks → Opens ticket + sees chat
- Replies in same thread
- All history preserved

6. FORWARD/ESCALATE

User (Current Owner) Action: Ticket becomes urgent

↓

Click "Forward To" → Select [New Owner]

↓

System:

- Removes from current owner's queue
- Adds to new owner's queue
- Notifies new owner: "Urgent: ACME Corp deal escalated to you"
- Copies all history + attachments
- Tracks: Who escalated, when, why

7. GENERATE DOCUMENT

User Action: All data entered in ticket → Click "Generate PO"

↓

System Options:

- Generate PO (PDF with company letterhead, signature)
- Generate RFQ (formatted quote request)
- Generate Invoice (sales bill)
- Generate Report (summary with metrics)

↓

System:

- Formats document
- Embeds ticket number + date
- Adds company branding
- Saves to ticket attachment
- Optional: Auto-email to supplier/customer

AI INSIDE TICKETS (THE MULTIPLIER)

AI Feature 1: Auto-Extract from Documents

Scenario: User uploads supplier invoice PDF

PDF: "Invoice from SUPPLIERS INC. Date: 4/28/2026"

"Item: Valves × 100 @ ₹250 = ₹25,000"

"GST 18% = ₹4,500"

"Total: ₹29,500"

"Payment Terms: 30 days"

System AI (OCR + NLP):

- ✓ Extracted: Supplier = SUPPLIERS INC
- ✓ Extracted: Date = 4/28/2026
- ✓ Extracted: Items = [Valves, 100, ₹250]
- ✓ Extracted: Amount = ₹25,000
- ✓ Extracted: GST = ₹4,500
- ✓ Extracted: Total = ₹29,500
- ✓ Extracted: Terms = Net 30

User Result: Bill ticket auto-filled, ready to approve


AI Feature 2: Smart Assignment

Scenario: New RFQ ticket created, but no owner assigned

System AI (History + Rules):

- ← Looks at last 10 RFQs
- ← Sees: ASHISH handled 7, completed in 3 days avg
- ← Sees: RAJESH handled 2, completed in 7 days avg
- ← Sees: ASHISH has 8 tickets currently, RAJESH has 3
- ← Sees: This RFQ is urgent (due 4/30)

AI Recommendation:

 "Assign to RAJESH (lower workload) or ASHISH (faster)?"

User clicks ASHISH

Notification sent to ASHISH: "RFQ for valves assigned to you, due 4/30"

AI Feature 3: Predict Next Step

Scenario: Process ticket at Step 4/6 (Negotiation)

System AI (Process history):

- ← 50 similar deals analyzed
- ← Step progression: Negotiation typically takes 2-4 days
- ← Current step target: 4/26 (today)
- ← Next step (GETPO) target: 4/28 (2 days)

AI Alert:

⚠ "NEGOTIATION started 4/20. Target was 4/26. Still in progress."

🗣 "Based on similar deals, this should be done by 4/25. Chat ASHISH if stuck?"

If GETPO step approaches:

✓ "GETPO step should start by 4/27 (tomorrow). Notify ASHISH to prepare?"

AI Feature 4: Anomaly Detection & Risk Alerts

Scenario: Bill ticket for ₹50,000 from new supplier

System AI (Pattern Detection):

- ← Average bill size: ₹15,000
- ← This bill: ₹50,000 (3.3× average)
- ← New supplier (first time)
- ← No linked PO (usually all bills have PO)

AI Alert:

- CRITICAL: "₹50K bill from unknown supplier, no PO link. Confirm?"
- ⚠ WARNING: "Amount seems high. Similar items avg ₹20K. Investigate?"

User Result: Forces review before approval

AI Feature 5: Auto-Generate Communications

Scenario: RFQ ticket, supplier quotes received, need to notify manager

AI Reads:

- ← 3 quotes received
- ← MR.Clean lowest (₹6,820)
- ← Delivery time: 5 days
- ← Budget approved: ₹10,000 (under budget)

AI Generates Draft Email:

"Hi Manager,
RFQ for Water Softening closed. Quotes:
1. MR.Clean: ₹6,820 (5-day delivery) ← RECOMMENDED
2. SHIVAY: ₹6,820 (7-day delivery)
3. SKY: ₹12,510 (3-day delivery)

Recommend: MR.Clean (lowest cost, fast delivery)
Budget impact: ₹3,180 savings

Approve to issue PO?"

User Result: Click [Use Draft] → Auto-fills response

AI Feature 6: Cross-Link & Search

Scenario: User searches "ACME Corp valves"

System AI (Full-text search across all tickets):

- ← Found Process #2833: ACME Corp Lead (4 steps done)
- ← Found RFQ #2865: Valves for ACME (3 quotes)
- ← Found Bill #2894: Invoice from supplier for ACME order
- ← Found Invoice #3031: Sales to ACME Corp
- ← Found Chat: ACME payment received 4/28

AI Search Result:

- "ACME Corp" [8 tickets found]
 - ├ Process: Lead for ACME (95% complete)
 - ├ RFQ: Valves (quotes received, awaiting decision)
 - ├ Bill: Supplier invoice (pending GL posting)
 - └ Invoice: Sales to ACME (paid)

User Result: Click any → Opens full context

TICKET DASHBOARD (What User Sees)

| Your Tickets Dashboard | | [Filter] |
|------------------------|----------------------------------|----------|
| My Work (24 tickets) | | |
| ├ TODO (12) | ← My assignment, awaiting action | |
| ├ In Progress (8) | ← I'm working on these | |

[Approve & Post GL] [Review] [Hold Payment]

KPIs (Team View, if manager):

└ Cycle Time: Avg 3.2 days (vs 4 days target) ✓

└ On-time SLA: 94% (vs 90% target) ✓

└ Workload: ASHISH 14 tickets, RAJESH 8 tickets

└ Overdue: 1 ticket (deal negotiation)

└ Revenue: ₹8.5M YTD

TICKET TYPES MAPPING (Everything Covered)

| Business Process | Ticket Type | Created By | Steps | AI Power |
|------------------|-------------|------------|---|--|
| Sales | Process | Sales team | Qualification → Offer → Negotiation → PO Received | Predict deal closure date, auto- email followups |

| Business Process | Ticket Type | Created By | Steps | AI Power |
|-------------------------|--|-------------------|--|--|
| Procurement | MR → RFQ → PO → Bill | Engineering/Ops | Request → Quotes → Selection → Order → Receive → Invoice | OCR extraction, supplier comparison, payment planning |
| Finance | Bill (Supplier) / Invoice (Sales) | Supplier/Sales | Entry → GL Posting → Payment → Reconciliation | OCR, GL automation, duplicate detection, cash flow forecasting |
| HR | Scheduler / Process | HR | Recruitment → Interview → Offer → Onboarding | Resume screening, meeting scheduling, document generation |
| Operations | Process | Ops Manager | Daily/Weekly/Monthly checklist | Auto-schedule, auto-assign, predictive alerts |

| Business Process | Ticket Type | Created By | Steps | AI Power |
|-------------------------|---------------------|-------------------|--|---|
| Marketing | Scheduler / Process | Marketing | Campaign planning → Execution → Report | Tender tracking, campaign scheduling, performance metrics |
| IT Support | Ticket (custom) | Users | Issue → Diagnosis → Resolution → Closure | Auto-assign based on skill, suggest solutions, escalation rules |
| Custom | Any type | Anyone | Define your own steps | All AI features available |

IMPLEMENTATION ROADMAP

Phase 1: Foundation (Weeks 1-4)

- ✓ Ticket core database (you have this)
- ✓ Universal ticket UI (you have this)
- ✓ Step management (you have this)
- ✓ Chat & notifications (you have this)

- Add: AI-powered OCR for documents
- Add: Smart assignment recommendations

Phase 2: Intelligence (Weeks 5-8)

- Add: Anomaly detection (duplicate bills, weird amounts)
- Add: Auto-generate documents (PO, Invoice, RFQ)
- Add: Predictive next-step recommendations
- Add: Cross-ticket linking & search

Phase 3: Analytics (Weeks 9-12)

- Add: Dashboard metrics (cycle time, SLA, revenue per ticket)
- Add: Team workload balancing
- Add: Trend analysis (process improvements)
- Add: Forecasting (cash flow, supplier delivery, demand)

Phase 4: Integration (Weeks 13-16)

- Add: Email → Ticket auto-creation
 - Add: API for 3rd party systems
 - Add: WhatsApp/SMS notifications
 - Add: Document e-signature
-

WHY THIS BEATS EVERY COMPETITOR

| Competitor | Their Approach | Your Approach |
|------------|---|--|
| SAP/Oracle | 50+ modules, complex, 2-3 year implementation | 1 ticket type, infinite workflows, 4-week onboarding |
| Salesforce | Sales-centric CRM | Every department (sales, finance, ops, HR) uses same ticketing |
| Slack | Chat tool | Chat + workflow execution + document generation in one place |
| Monday.com | Kanban boards | Linear workflow (Draft → Done) that users understand instantly |
| ChatGPT | Isolated chat | AI lives inside your business data (tickets) |
| Odoo | 200 modules to choose from | No choice—one ticket interface does everything |

Your Unfair Advantage:

- One learning curve (learn ticket system once)
- One database (no sync issues)
- One AI brain (understands context of each ticket)
- One audit trail (every action recorded)

- Infinite workflows (user defines the steps)
-

PRICING (All-In)

Starter: \$20/user/month

- Up to 50 tickets/month
- 5 team members
- Basic AI (document extraction)
- Email notifications

Growth: \$35/user/month

- Unlimited tickets
- 50 team members
- Advanced AI (anomaly detection, predictive steps)
- Email + WhatsApp + SMS
- Custom workflows

Enterprise: \$50/user/month

- Unlimited everything
- Dedicated infrastructure

- Custom AI models (trained on your data)
- White-label option
- 24/7 support

Comparison:

- Slack: \$10-15/user
 - Salesforce: \$100-300/user
 - SAP: \$100-300/user
 - **Your OS: \$20-50/user** (all-in, beats all competitors combined)
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CONCLUSION

You've built something remarkable: **a ticketing system that IS your entire business operating system.**

Every competitor is fragmented (Slack for chat, SAP for ERP, Salesforce for CRM, ChatGPT for AI).

You're unified: **one ticket, one interface, infinite workflows.**

This is the future of enterprise software.

Next Steps:

1. Polish the UI (drag-drop steps, better status visualization)
2. Add AI extraction from documents
3. Build analytics dashboard
4. Launch with SMB segment (they need simplicity most)
5. Win 100 customers with single-ticket advantage

Go build it.