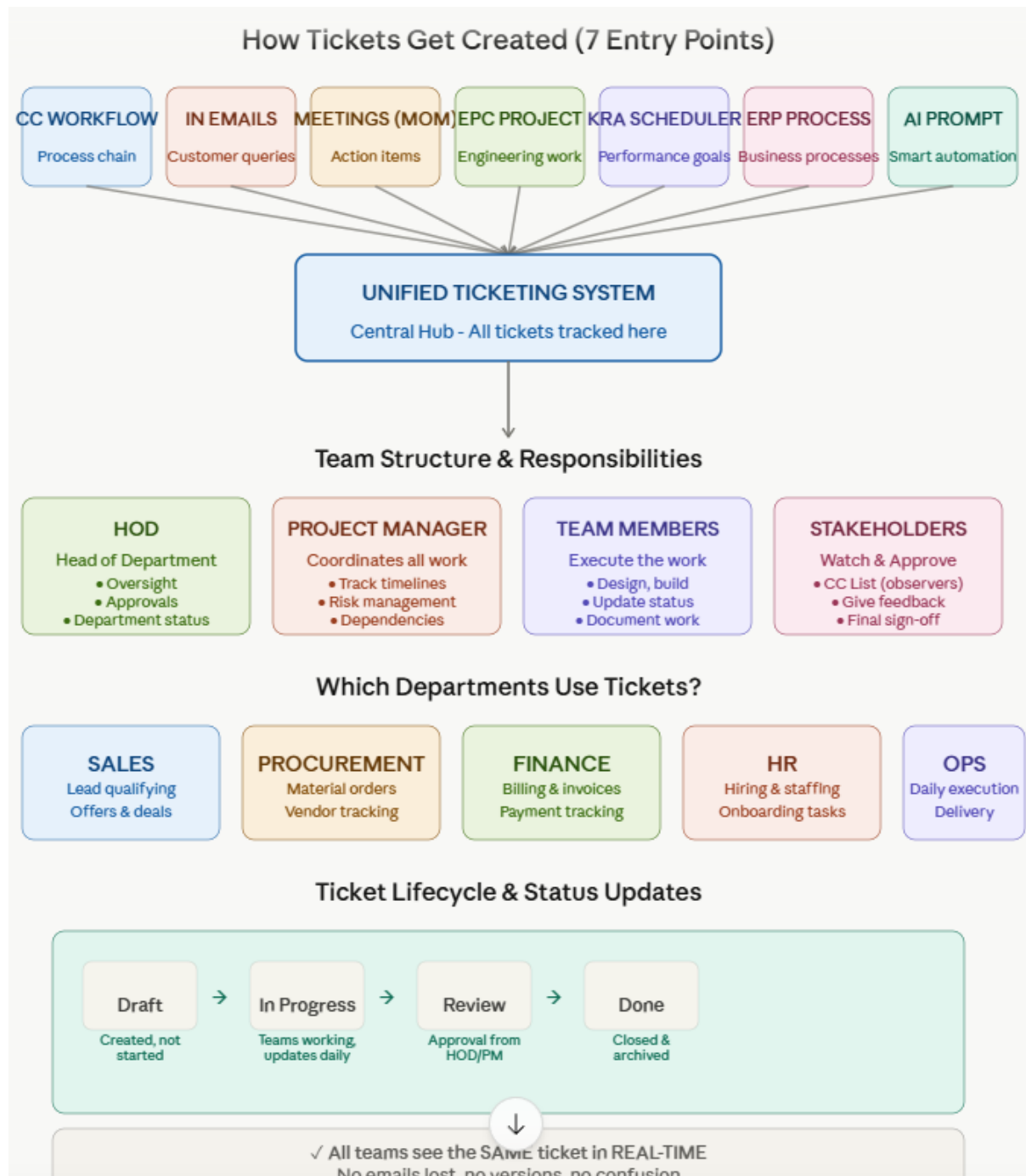


Ticket System: Manager's Quick Reference Guide



Ticket Generated From (9 Entry Points):

[Manual TO/CC Workflow](#) - [INCOMING Emails](#) - [MOM Meetings](#) - [EPC Project](#) - [KRA Scheduler](#) - [ERP Process](#) - [ERP Task](#) - [AI Prompt](#) - [API Apps](#)

What Should I Know About Ticketing System?

1. TICKET = PROJECT FILE or IWO (Internal Work Order)

- One ticket contains everything about a project
- From lead → delivery → completion
- All departments see the same ticket in real-time

2. WHO CREATES TICKETS?

Tickets are manually-created by your company employees/customers/suppliers:

- **Manual TO/CC Workflow Forms** → You can create any time
 - **To:** Direct User or Manager

Tickets are auto-created from 9 entry points via following systems:

1. **CC Workflow** – As per DCM: Dynamic Case Management process flow making
2. **INCOMING Emails** from customers → Sales team creates OFFER ticket
3. **MOM Meetings** action items → MOM Action Items ticket generated
4. **EPC Project** BBU items → Deliver Equipment List as per BBU: 3% CODE2
5. **KRA Scheduler** → Time based Event Tickets as per KRA. E.g. GST Return on 20th
6. **ERP Processes** → Procurement/Finance/HR tickets auto-created with flows
7. **ERP Task** → Invoice Document Generation as per Billing Scheduler Monthly
8. **AI Prompts** → Your team can ask AI to create tickets with text prompt
9. **API Prompts** → Your 3rd party Apps create tickets e.g. LinkedIn message

MAIN MASTERS ARE:

ACCOUNTS – PROJECTS – SCHEDULARS – PROCESS - TASK

LEFT SIDEBAR NAVIGATION (PERSISTENT)

The sidebar is your OS hub. It's always visible and contextually aware:

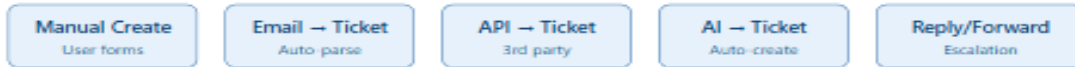
OPERATING SYSTEM

— 🏠 Dashboard	→ Real-time business overview
— ⚡ AI Engine	→ Document processing, Search, Automation
— 🏢 ERP Module	→ Financials, Inventory, Accounting
— 🗣️ Communications	→ Email, Chat, Calls, Docs
— ✓ Workflows	→ Tasks, Approvals, Custom processes
— 👥 People	→ Team, Roles, Skills, Payroll
— ⚙️ System	→ Settings, Integrations, Admin

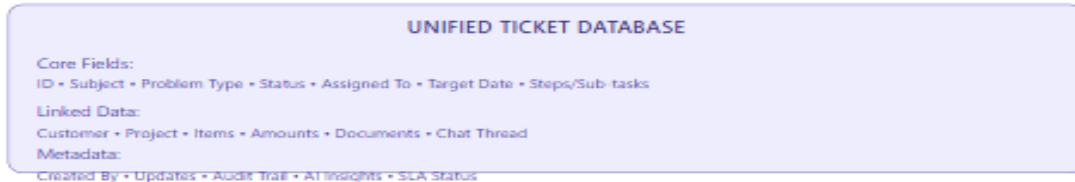
TICKET-CENTRIC OPERATING SYSTEM

Everything flows through tickets. One UI, infinite workflows.

Ticket Entry Points



Central Ticket Hub

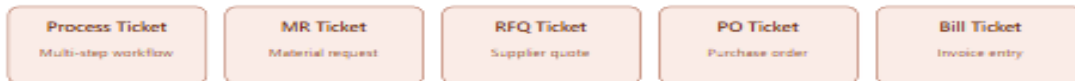


Universal Ticket Workflow



Every ticket follows same path. No exceptions. Simplicity = Power.

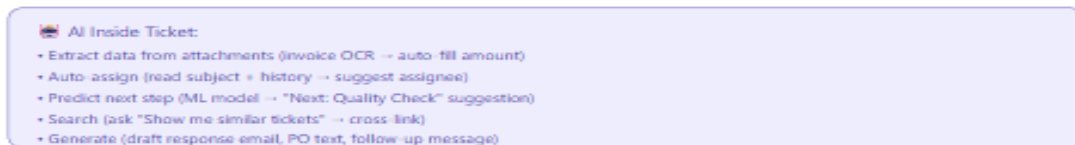
Ticket Problem Types (Auto-routed)



What You Do Inside Tickets



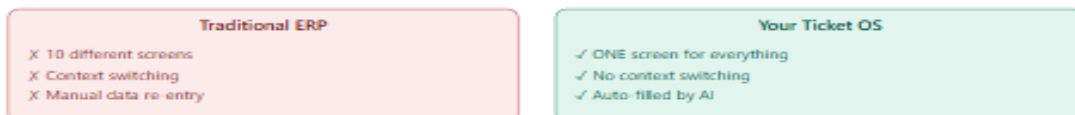
AI Co-pilot (Embedded in Every Ticket)



Analytics & Reports (From Tickets)



Why This Beats Fragmented Stack



Introducing World's First Ticketing AI ERP OS

THE UNIFIED TICKET-CENTRIC OS (REDESIGNED)

CORE DATA MODEL



**Everything flows through tickets.
One UI, infinite workflows**

3. TICKET TYPES BY DEPARTMENT

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
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
Marketing	Scheduler / Process	Marketing	Campaign planning → Execution → Report	Tender tracking, campaign scheduling, performance metrics

Department-Specific Ticket Workflows

SALES DEPARTMENT

Ticket Types:

- LEAD - New customer inquiry
- OFFER - Quotation sent
- NEGOTIATION - Discussions ongoing
- PO - Purchase Order received ✓ (Deal closed)
- FULFILLMENT - Order execution

AI Power: Auto-email followups, deal closure prediction

PROCUREMENT

Ticket Types:

- MR - Material Requisition
- RFQ - Request For Quote
- PO BILL - Purchase Order issued
- DELIVERY - Track received items
- INVOICE - Vendor billing

AI Power: OCR extraction, supplier comparison, payment planning

FINANCE

Ticket Types:

- BILL - Invoice entry & verification
- PAYMENT - Approve & release payment
- GL POSTING - Accounting entry
- RECONCILIATION - Bank match & audit
- BREAKUP - Itemized billing structure

AI Power: Duplicate detection, cash flow forecasting, duplicate invoice

HUMAN RESOURCES

Ticket Types:

- RECRUITMENT - Open position
- INTERVIEW - Schedule & conduct
- OFFER - Job offer extended
- ONBOARDING - New hire setup
- PAYROLL - Salary & benefits processing

AI Power: Resume screening, interview scheduling, document genera

OPERATIONS

Ticket Types:

- PROCESS - Daily/Weekly checklist
- SCHEDULE - Resource scheduling
- DELIVERY - Site work & installation
- QC - Quality checks
- SHIPMENT - Warehouse dispatch

AI Power: Auto-schedule, auto-assign, predictive alerts

ENGINEERING

Ticket Types:

- DESIGN - Technical drawings & specs
- APPROVAL - Drawing sign-offs
- BOM - Bill of Materials
- VENDOR DATA - Datasheets & catalogs
- TECHNICAL REQUEST - Spec clarification

AI Power: Document generation, design review automation

Real-World Example: MRPL Refinery VOC Project

ONE Ticket #3119 follows this path:



Timeline: Jan 15 → May 04, 2024 (142 days)

Inside ONE Ticket #3119:

- 📄 Documents: 54 design files, drawings, PDFs, BOMs, vendor datasheets
- 💰 Financial: 7 billing items, ₹7.31 Cr budget, payment milestones tracked
- 🔧 Work: 20+ sub-tasks (approval, purchase, delivery, QC, installation)
- 💬 Communication: All emails, meeting notes, approvals, status updates in one place

✓ Every team updates ONE ticket → Automatic visibility to CEO, Managers, and All Teams

3. TICKET TYPES BY DEPARTMENT

SALES

Ticket Type	What It Means	Who Creates	Status
LEAD	New customer inquiry	Sales team	Draft
OFFER	Quotation sent	Sales team	In Progress
NEGOTIATION	Discussing price/terms	Sales team	In Progress
PO	Purchase Order received ✓	Customer	Done (Deal closed)
FULFILLMENT	Order being executed	PM	In Progress

PROCUREMENT

Ticket Type	What It Means	Who Creates	Status
MR	Material request	Engineering	Draft
RFQ	Request for quote	Procurement	In Progress
PO_BILL	Purchase order issued	Procurement	In Progress
DELIVERY	Materials arrived	Warehouse	Review
INVOICE	Vendor bill received	Finance	Review

FINANCE

Ticket Type	What It Means	Who Creates	Status
BILL	Invoice to customer	Finance	Draft
PAYMENT	Pay to vendor	Finance	Review (needs approval)
GL_POSTING	Accounting entry	Finance	In Progress
BREAKUP	Itemized billing	Finance	Review
RECONCILIATION	Bank match	Auditor	Done

ENGINEERING

Ticket Type	What It Means	Who Creates	Status
DESIGN	Technical drawings needed	PM	Draft
APPROVAL	Design review & sign-off	Engineering	Review
BOM	Bill of Materials	Engineering	In Progress
VENDOR_DATA	Datasheets & catalogs	Procurement	In Progress
TECHNICAL_REQUEST	Spec clarification	Sales	In Progress

HR

Ticket Type	What It Means	Who Creates	Status
RECRUITMENT	Job opening	HR	Draft
INTERVIEW	Interview scheduled	HR	In Progress
OFFER	Job offer extended	HR	Review
ONBOARDING	New hire setup	HR	In Progress
PAYROLL	Salary processing	Finance	In Progress

OPERATIONS

Ticket Type	What It Means	Who Creates	Status
PROCESS	Daily/weekly checklist	Operations	In Progress
SCHEDULE	Assign resources & time	Operations	Draft
DELIVERY	Site work & installation	Operations	In Progress
QC	Quality check	Operations	Review
SHIPMENT	Warehouse dispatch	Logistics	In Progress

4. TICKET STATUS: What Each Means

1. CREATE > DRAFT → Not started, just created
2. SEND > REVIEW → Waiting for approval (HOD/PM)
3. SENT > IN PROGRESS → Teams actively working
4. DONE > COMPLETED → Completed & closed

Your role as manager:

- CREATE Draft tickets → Get them started
- Check REVIEW status tickets daily and SEND → They need your approval
- Check DELAYED overdue tickets → Send alerts or CC/Forward to teams

5. DAILY MANAGER CHECKLIST

Morning (5 minutes)

Check dashboard → Any tickets overdue? Check REVIEW queue → Any awaiting my approval? Check team's IN PROGRESS → Any blockers?

Before Meetings

Open the ticket → All meeting notes auto-add Attach any documents → Drawings, emails, approvals Update status → No need for separate email

End of Day

Mark completed tasks as DONE Flag any risks → Escalate to PM Check tomorrow's schedule in ticket

6. HOW TO FIND A TICKET

By Customer Name: "MRPL Refinery" → Search → Shows all their tickets

By Project: "VOC Collection" → Search → All related tickets

By Status: "All overdue" → Dashboard filter → Shows problems

By Team: "My team's work" → Filter by assigned person → Shows what they own

By Date: "Due this week" → Calendar view → What's coming

7. WHAT TO DO WITH A TICKET

If It's **CREATED / DRAFT (Not Started)**:

1. Review requirements
2. Assign to team member
3. Set due date
4. Change status to IN_PROGRESS
5. Notify team: "Your ticket is ready"

If It's **IN_PROGRESS (Team Working)**:

1. Check update frequency (should be daily)
2. If no update in 2+ days → Alert team
3. If blocked → Escalate
4. If on track → Leave alone
5. Communicate with other departments in the ticket

If It's **REVIEW (Waiting Approval)**:

1. Read the work summary
2. Check attached documents
3. Approve or send back for changes
4. Change status to DONE when approved
5. Notify team: "Approved ✓"

If It's **DONE (Completed)**:

1. Verify all work complete
2. Check customer satisfied
3. Archive the ticket
4. Use as reference for future similar work

8. COMMON PROBLEMS & SOLUTIONS

Problem	Cause	Solution
Team can't find a file	Not attached to ticket	Attach it to the ticket; send link
Customer doesn't know status	Ticket not shared	Add customer to CC list
Finance can't bill	No breakdown in ticket	Add BREAKUP item with costs
Other dept doesn't know	Status not updated	Add comment visible to all
Email got lost	Not added to ticket	Forward email to ticket → auto-attaches
Meeting decision forgotten	No MOM ticket created	Create MOM ticket with action items
Work is delayed	No milestone tracking	Set sub-task due dates in ticket

9. QUICK COMMANDS (If AI Integrated)

"Create a ticket for MRPL project"
 "What's the status of PO #3119?"
 "Show me all overdue tickets"
 "Assign this to Rajesh with 5-day deadline"
 "Generate billing breakup for this ticket"
 "Send status email to customer (auto from ticket)"

10. REAL EXAMPLE: How One Ticket Moves

Ticket #3119: MRPL Refinery VOC Project

DAY 1 (Jan 15)
 Status: DRAFT
 Sales creates ticket from PO

DAY 2 (Jan 16)
 Status: IN_PROGRESS
 PM assigns to Engineering

DAY 5 (Jan 19)
 Status: IN_PROGRESS → REVIEW
 Engineering uploads design docs
 Engineering manager reviews → Approves

DAY 10 (Jan 24)
Status: IN_PROGRESS
Procurement creates RFQ ticket (linked to #3119)

DAY 20 (Feb 03)
Status: IN_PROGRESS
Finance adds billing breakup (7 items, ₹7.31 Cr)

DAY 50 (Mar 05)
Status: IN_PROGRESS
Operations starts site work
Daily updates in ticket

DAY 142 (May 04)
Status: DONE
Delivery complete
Customer satisfied
Ticket archived

ARCHIVE VALUE:
Same template used for next refinery project
All docs, approvals, costs available as reference

11. MANAGER RESPONSIBILITIES

Create Tickets For:

- New projects from sales
- Team goals/KRAs
- Process improvements
- Budget allocations

Update Tickets For:

- Status changes
- Milestone completions
- Risks/blockers
- Approval decisions

Share Tickets With:

- Your team (direct access)
- Other departments (CC list)
- Customer (if external project)
- CEO (for reporting)

Close Tickets:

- Only when 100% complete
- All approvals done
- Customer satisfied
- Documentation complete

12. PERMISSIONS: WHO SEES WHAT?

Your Team: See all tickets they're assigned to + all tickets you're assigned to

Other Departments: See only if CC'd or assigned

Customers: See only external-facing tickets (if enabled)

Finance/Audit: See billing & payment tickets (restricted access)

CEO/CFO: See all tickets (read-only dashboard)

13. TIPS FOR SUCCESS

- ✓ **Update daily** — Ticket is useless if stale
 - ✓ **Attach documents** — Don't send via email, attach to ticket
 - ✓ **Use comments** — Public discussion within ticket (not email chains)
 - ✓ **Set realistic dates** — Overdue tickets show red
 - ✓ **Link related tickets** — "This invoice is for that PO"
 - ✓ **Escalate early** — Don't wait until deadline to flag delays
 - ✓ **Use templates** — Repeat tickets standardize process
 - ✓ **Review retrospective** — "What went well? What next time?"
-

14. RED FLAGS (When to Alert PM/CEO)

- 🚩 **Ticket overdue 3+ days**
- 🚩 **No update in 5+ days**
- 🚩 **Approval stuck > 2 days**
- 🚩 **Missing documents**
- 🚩 **Cost overrun flagged**
- 🚩 **Customer not satisfied**
- 🚩 **Team member overwhelmed** (too many tickets)

Why ticket-centric beats email & traditional ERP

Feature	Email-centric	Menu-based ERP (SAP/Oracle)	Ticket-centric OS
Accountability guarantee	✗ work gets lost	⚠ logs but no ownership	✓ assigned, tracked, must close
Escalation on delay	✗ manual resend	⚠ complex workflows	✓ auto by SLA, priority, aging
Audit trail	✗ emails can be deleted	✓ strong but siloed	✓ immutable ticket history
Learning curve	Low but no process	Very steep (months)	✓ simplest: create & execute ticket
Cross-dept collaboration	CC/BCC chaos	⚠ modules siloed	✓ tickets move seamlessly across coworkers
AI & automation	✗ none	⚠ heavy IT projects	✓ native AI agents auto-route, auto-resolve
Real-time metrics	✗ manual reports	✓ built-in but rigid	✓ dashboards: cycle time, SLA, team load, revenue/ticket

"One software to learn — creation & execution of tickets. Results guaranteed because work cannot disappear." — SoftRobot model

Unified inbox: email + chat + calls

Native communications replace Slack, Teams, Zoom — all linked to tickets and customer records.

✉ Email → ticket

Auto-parse attachments, route to correct department. AI summarizes long threads.

💬 Team chat & notifications

Contextual chat inside tickets + task mentions. No app switching.

🎥 Video call intelligence

Record → transcribe → action items auto-logged to relevant tickets.

📱 SMS / WhatsApp

Send SLA alerts, reminders, delivery updates (Twilio integration).

Analytics from every ticket

🕒 Cycle time

Draft → Done (hours/days). Identify process bottlenecks.

📄 Throughput

Tickets/day per user, department, region.

🎯 SLA tracking

On-time %, breach prediction with AI.

💰 Revenue per ticket

Track deal value, invoice amounts aggregated.

👤 Team load

Workload distribution, rebalancing suggestions.

📊 Custom dashboards

Role-based insights (CEO sees P&L; warehouse sees inventory).