



YOUR *INTEGRATED* WORKFLOW SYSTEM

All-in-one ticketing solution, workflow builder, central Catalog & service desk

Ticket Portal

Catalog

My Requests

Ticketing Center

Catalog Builder

Analytics

Related Tickets

Any ticket you are part of will appear here. Feel free to check-in on the status of ongoing tickets

Search

Organization

Filter by status

Available

Start date

→ End date

<input type="checkbox"/> 0 selected	Reporter	Assigned To	Date Submitted	Latest Activity
<div> <div>Customer Response Request</div> <div>Compliance and QA</div> <div> <div>Preview: Need help with responding to Joey Smith</div> <div> <div> <div></div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> <div>P1</div> </div> <div> <div>SLA</div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>2 days overdue</div> <div>Breached</div> </div> </div> </div>	<div>andrew@jetdocs.io</div>	<div>andrew@jetdocs.io</div>	<div>Aug 25 at 1:08 pm</div> <div>3 days ago</div>	<div>Aug 25 at 5:42 pm</div> <div>0 comments</div>
<div> <div>(Legal) Contract Review</div> <div>Jetdocs Onboarding</div> <div> <div>Preview: Vendor name: Huge Swimming Pools Plus. Leasing ne...</div> <div> <div> <div></div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> <div>P2</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> </div> </div>	<div>andrew@jetdocs.io</div>	<div>andrew@jetdocs.io</div>	<div>Aug 24 at 4:05 pm</div> <div>4 days ago</div>	<div>Aug 25 at 12:52 pm</div> <div>0 comments</div>
<div> <div>(IT & Support) Support Request</div> <div>Jetdocs Onboarding</div> <div> <div>Preview: Inventory Mgmt System / Mobile</div> <div> <div> <div></div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> <div>P2</div> </div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> </div> </div>	<div>andrew@jetdocs.io</div>	<div>andrew@jetdocs.io</div>	<div>Aug 24 at 2:14 pm</div> <div>4 days ago</div>	<div>Aug 25 at 12:53 pm</div> <div>0 comments</div>
<div> <div>Customer Response Request</div> <div>Compliance and QA</div> <div> <div>Preview: Customer withdrawal exceeds limit</div> <div> <div> <div></div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> <div>P3</div> </div> <div> <div>SLA</div> <div> <div></div> <div></div> <div></div> <div></div> <div></div> </div> <div>11 hours left (95% complete)</div> <div>Warning</div> </div> </div> </div>	<div>andrew@jetdocs.io</div>	<div>andrew@jetdocs.io</div>	<div>Aug 19 at 1:01 pm</div> <div>9 days ago</div>	<div>Aug 25 at 1:47 pm</div> <div>1 comments</div>

WORKFLOWING YOUR WAY TO HIGH PERFORMANCE

- › **Difficulty of internal requests**
- › **True costs of cross-functional teams**
- › **Platforms and hybrid workforces**
- › **The Jetdocs system**
- › **Benefits across SMB to large cap**
- › **Guaranteed success & Getting in touch**




The average employee is productive for 2 hours and 53 minutes per day.

- Multiple follow-ups to get needed info → Instead of getting 8 items you asked for, you get 6 and need to follow-up
- Group email inboxes → I thought 'so and so' was handling that. Triaging and accountability issues are too common
- 50+ chat notifications → Ping! Ping! Ping! Deep work is nearly impossible when you're trying to sort importance through the noise
- Channel 'fatigue' → Where was that info? Need to scour through multiple channels to find what you need and use elsewhere (meetings, reports etc.)
- CC'ing entire teams on threads → # of employees included * disruption time = expensive notification (7 employees * 6 minutes = 42 minute disruption)
- Tracking statuses of requests and approvals → Is that done yet? Who is responsible for that right now?

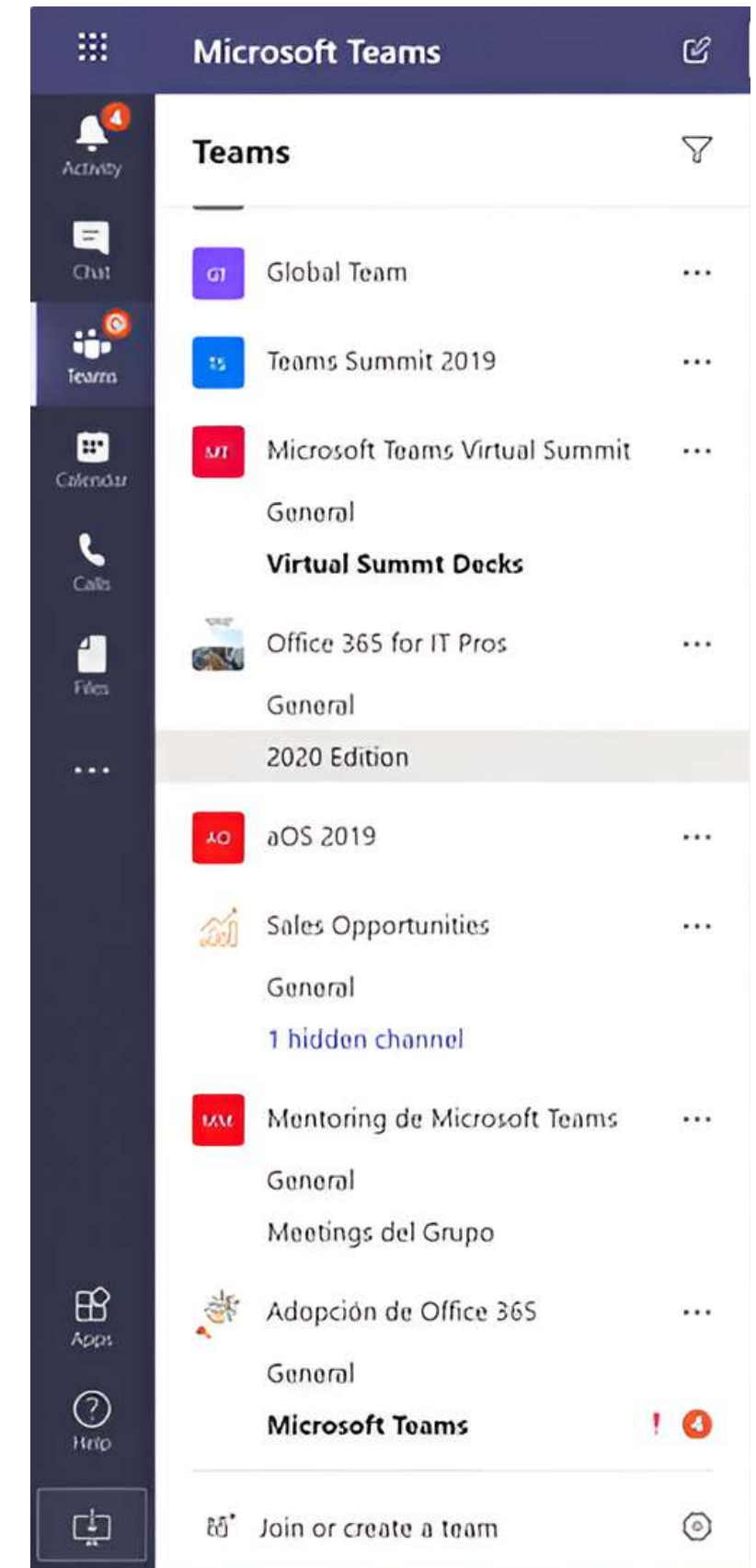
NOTIFICATION WARS

www.jetdocs.io



Hey Jordan, can you... 

- Approve this
- Ask engineering about this request
- Ask legal to approve this contract
- Ask facilities to order more of supply X
- Let me know how often this issue came up this month
- Loop in Stephan and track down their comments and files

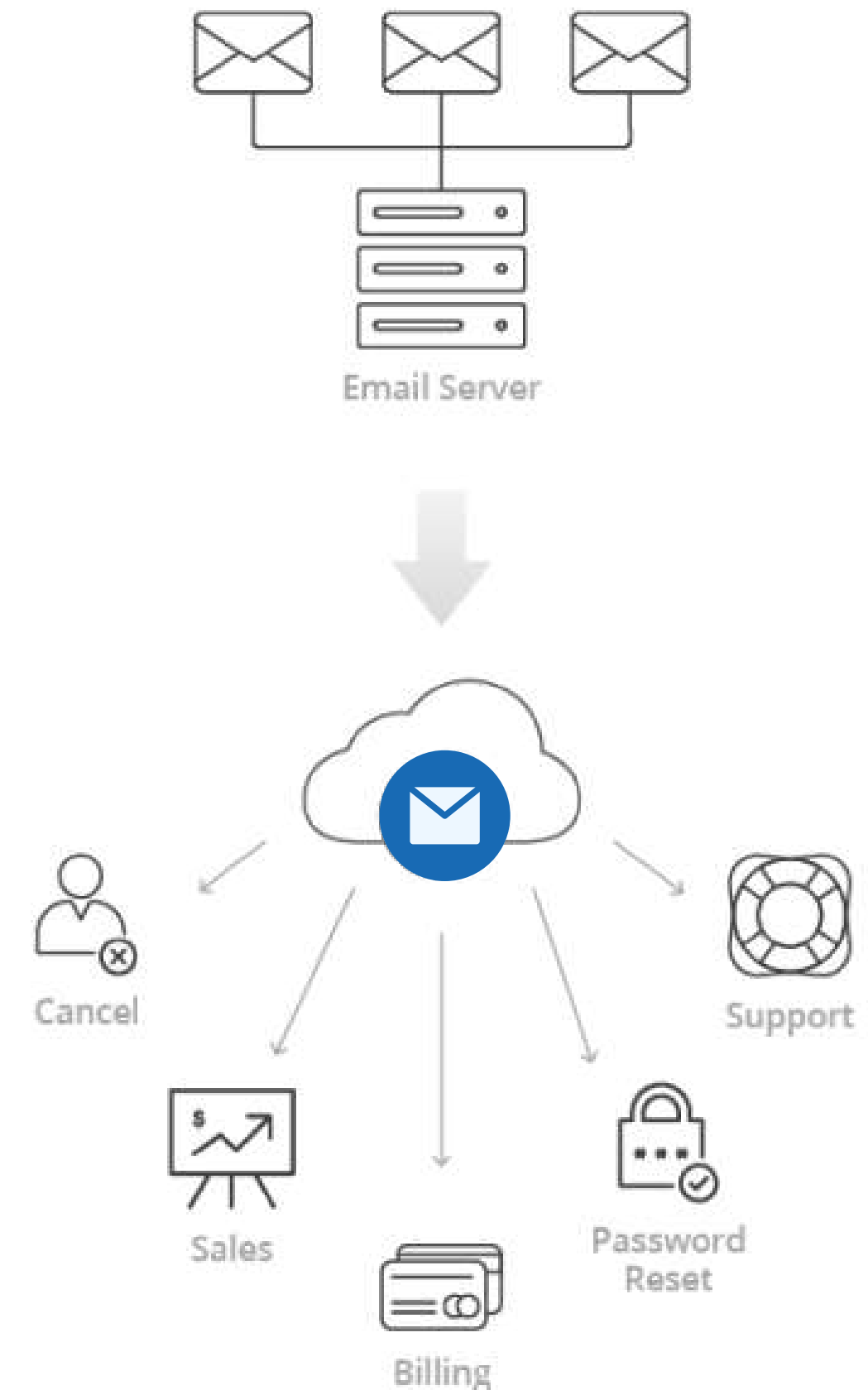


TRIAGING EMAILS TO EMPLOYEES

www.jetdocs.io



- Emails were designed to handle external communications
- Departments and teams set up group inboxes as a band aid solution to handle internal comms
- Employees have to guess when they send requests, issues and approvals to inboxes - hoping their request gets to the right person
- Tracking, statuses and accountability are nearly impossible

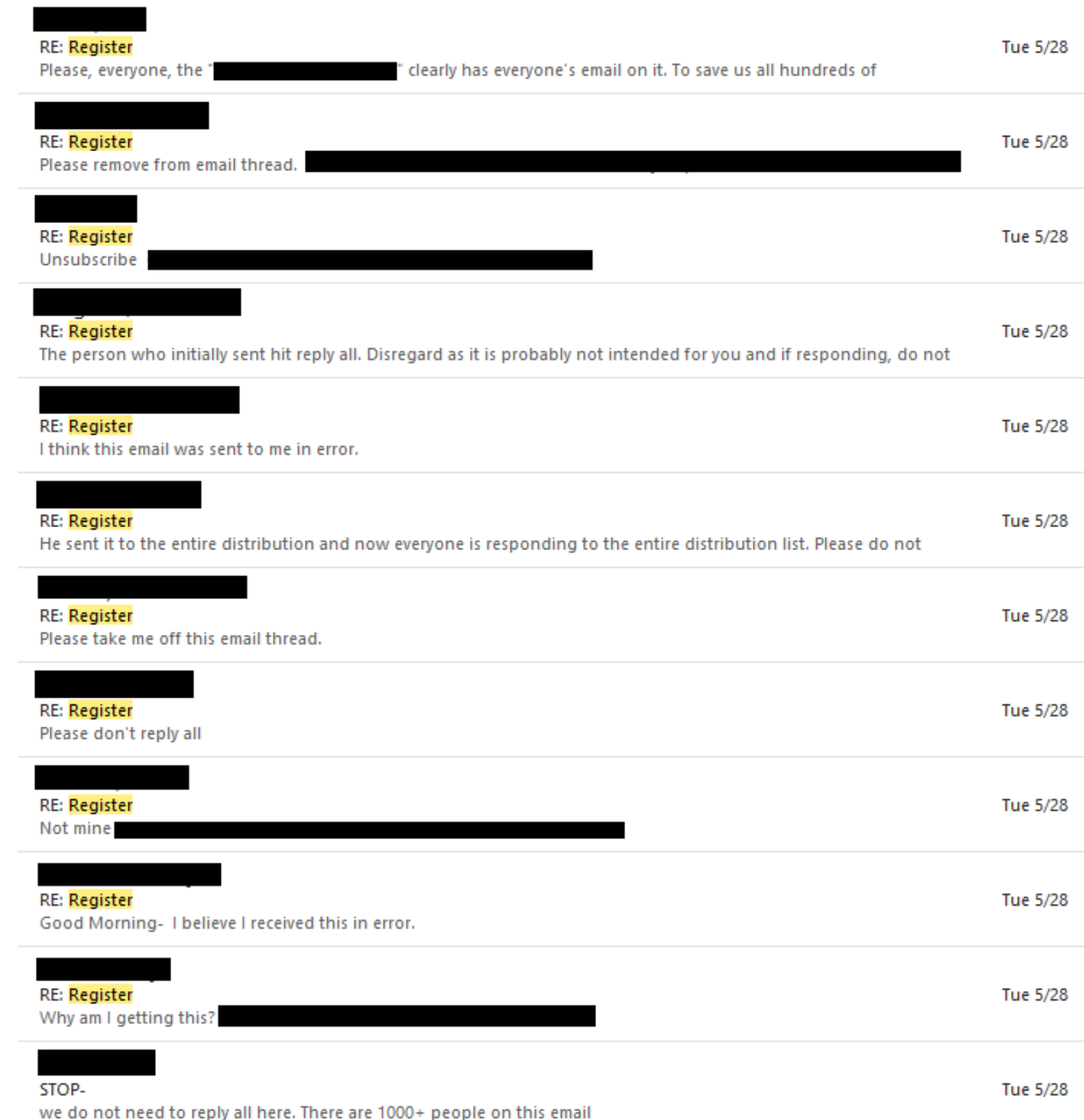
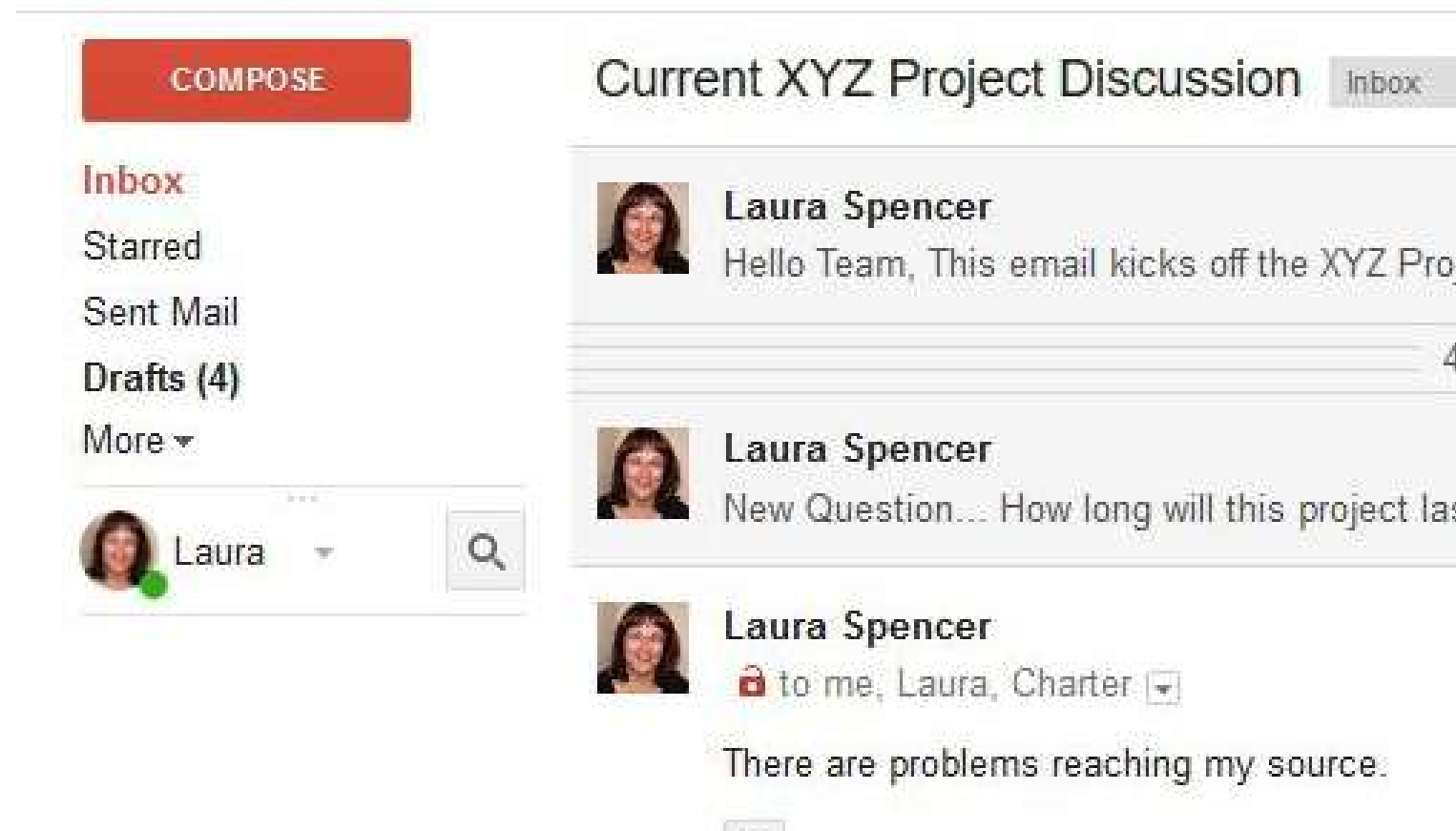


GROUPS, CHAINS AND FORWARDING

www.jetdocs.io



- Back and forth threads are difficult to track and messy
- Various email chains are often required to solve a problem. Finding historical information is both fragmented and poor compliance
- Adding one more piece of information or an additional file makes pulling together information very difficult
- Pulling company productivity metrics is impossible



FORMS AND SHEETS/EXCEL

www.jetdocs.io



- Relying on these to scale? This is one of the most obvious organizational fixes
- Where is that form? Who can edit this form I need a new field? I need to ask the submitter for another piece of information...how do I do that?
- Who is controlling this sheet?
- "I asked you to update this sheet after every approval"
- "I need to attach a file to this approval, how do I do that?"

	Date raised	Agenda Item	Action no	Action	Due date	Owner	Status	Comments
10	01/03/2012	Webinar planning	123	Plan schedule of webinars	01/04/2012	Mike	Not Started	
11	01/03/2012	Website	124	Move website to new server	01/05/2012	Elaine	In Progress	
12	10/03/2012	Merchandise	125	Find new colours of thongs	15/03/2012	Mike	Completed	
13	14/03/2012	New iMac	126	Research purchase of new iMac	30/04/2012	Mike	Not Started	
14	14/03/2012	Show	127	Prep and record MacBites	14/03/2012	Both	Completed	
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								

QuestionsResponses 3

Contact information

Form description

Email Address *

Short answer text

Full Name *

Short answer text

Comments

Long answer text

Undo

Make a copy

Move to trash

Get pre-filled link

Print

Add collaborators

Script editor

Add-ons


Preferences

"I'LL JUST BUILD THIS OUT MYSELF"

www.jetdocs.io
















Slack



<  Copy review update Published 1 hour ago Publish ...


Workflow Activity Settings

Filter activity by

Any status  From  To  All people  Clear

Status	Last activity date 
 Complete	Today at 5:45 PM
 Workflow error	Today at 2:52 PM
 Workflow error	Today at 2:50 PM
 Complete	Today at 2:49 PM
 Workflow error	Today at 2:49 PM
 Complete	Today at 2:45 PM
 Workflow error	Today at 2:44 PM
 Complete	Today at 2:44 PM


 Workflow error 

- Started by Adam
Today at 2:52 PM
- Form completed by Adam
Today at 2:52 PM
- Request copy edit step started
Today at 2:52 PM
-  Error: Task not created! The task name 'test' is not allowed
Today at 2:52 PM

Microsoft Flow

Your flow needs attention

It started experiencing issues at 14:58 ,7/15/2020 UTC

 +7

Fix my flow

What happened?

- Looks like your flow's [ba@microsoft.com](#) connection needs to be signed-in again.
- The most common cause is a changed password or a policy set by your tenant administrator.
- Connections may also require reauthentication, if multi-factor authentication has been recently enabled for your account. [Learn more](#)

How do I fix it?

Select 'Fix my flow' to reauthenticate the connection. Remember to test your flow after updating your connection to make sure the problem is solved.

Troubleshooting Tips

- See how many times your flow has failed. [Run history](#)
- Resubmit failed runs using the exact same data. [Learn more](#)
- Customize what happens when your flow fails. [Learn more](#)

"I'LL JUST BUILD THIS OUT MYSELF"

www.jetdocs.io



- Silos of control are created as the builder takes full ownership and reduces transparency and feedback
- "This would work if they just had one more feature" - says Mike who spent 5 weeks building out one flow
- "I haven't had time to build that one out yet, just send them a message for now"
- This build vs. buy conversation is noble; however, slows down organizational progress to see if one employee can figure it out
- Not a realistic approach for cross-functional departments who have varying and demanding needs (integrated interface, comments, back-and-forth etc.)

Flow run failed.

Days to remind me in 0s

Get my profile (V2) 0s

Unauthorized.

INPUTS

[Click to download](#)

OUTPUTS

Status code

401

Headers

Key	Value
x-ms-failure-cause	apim-token-exchange
x-ms-apim-cached-response	true
Date	Wed, 15 Jul 2020 15:01:46 G...

Body

```
{
  "status": 401,
  "source": "https://firstrelease-001.token.azure-apim.net:443/tok...
  "message": "Error from token exchange: Runtime call was blocked..."
}
```

Details

Error Help

Start time
Jul 15, 05:01 PM (42 min ago)

Duration
00:00:00

Status
Failed

Error

Alert: Your @microsoft.com connection isn't working

Error Details

Looks like your flow's @microsoft.com connection needs to be signed-in again. The most common cause is a changed password or a policy set by your tenant administrator. Connections may also require reauthentication, if multi-factor authentication has been recently...

How to fix

Authenticate your connection to resolve this problem.

[View Connections](#)

NO WORKFLOW, NO PROCESS = NO HARMONY

Attempting to solve your company's most pressing issues with long messaging threads, unconnected teams and no repeatable processes is a guaranteed way to create friction and reduce your bottom line.



Both sides need to work in harmony towards an objective

Company & Mgmt focus

- Defined expectations and clear goals
- Access to platforms and software that allow for excellence
- *Important:* ability to modify software as company evolves
- Reward results
- Reduce barriers and increase cross-department comms







Employee focus

- Continuous improvement mindset - proper processes
- Accountability and self-starter (take action!)
- Bad news travels fast (so it can be fixed)
- Analytics focused - improve what you measure



“The average employee is productive for 2 hours and 53 minutes per day.

Employees are not efficient for 64% of their day

# of Employees		Average Wage		Headcount Expense		Non-efficiency %		Cost of INACTION
 15	×	\$50,000	=	\$750,000	×	64%	=	\$480,000
 75	×	\$50,000	=	\$3,750,000	×	64%	=	\$2,400,000
 150	×	\$50,000	=	\$7,500,000	×	64%	=	\$4,800,000
 350	×	\$50,000	=	\$17,500,000	×	64%	=	\$11,200,000



Without processes, workflows, metrics and tracking... **issues manifest in multiple ways:**

- **Customer sales and retention issues:**
 - Slow refund approval requests (support to general manager to finance)
 - Issues with goods and services (manufacturing, ecommerce etc.) - request fixes
 - Looping in sales, engineering, legal etc after customer inquiry
- **Slower cycles = large opportunity costs:**
 - Goods and services requests, orders, questions, changes
 - Contract approvals
 - Sales contracts and security questions
- **Productivity issues**
 - Employees question where to send requests
 - Requests go through wrong channels
 - Emails, random forms and excel sheets are not reliable for tracking and scaling
 - Missed deadlines, stressed team members, accountability blame game



FOOD FOR THOUGHT

The easiest way to increase your organisation's **TIME LEVERAGE** is to complete cycles quicker.

Contracts, approvals, requests, incidents.

If these normally take 5 days across multiple employees and now only take one, that's an 80% increase in productive capital.





Major shifts require technological adoption to increase productivity, retain talent and be competitive

- **The rise of platforms:**

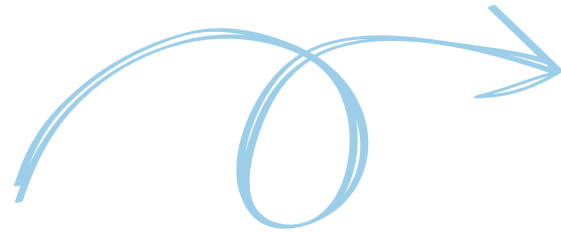
- Your employees and teams are now in the same virtual location with Microsoft Teams or Slack. This presents a unique opportunity to build processes that were unattainable in the past (where do I go? which login do I need? who is responsible for that?)

- **Technology is the answer to competition and margin pressures:**

- Organization's who supercharge their headcount via technology are able to attract better talent, deliver better returns on every dollar and create better environments that allow employees to focus on what matters
- E.g. for every 6 employees we receive an extra employee of productivity gains. This goes straight to the bottom line

- **Remote/hybrid work and the importance of cross-functional teams**

- Employees are no longer in the same room, which requires connectedness through technology
- Employees are demanding flexible work environments and many companies are being forced to compete here. It is up to the organization to make sure the appropriate infrastructure is set up



THE JETDOCS SYSTEM

YOUR WORKFLOW SYSTEM

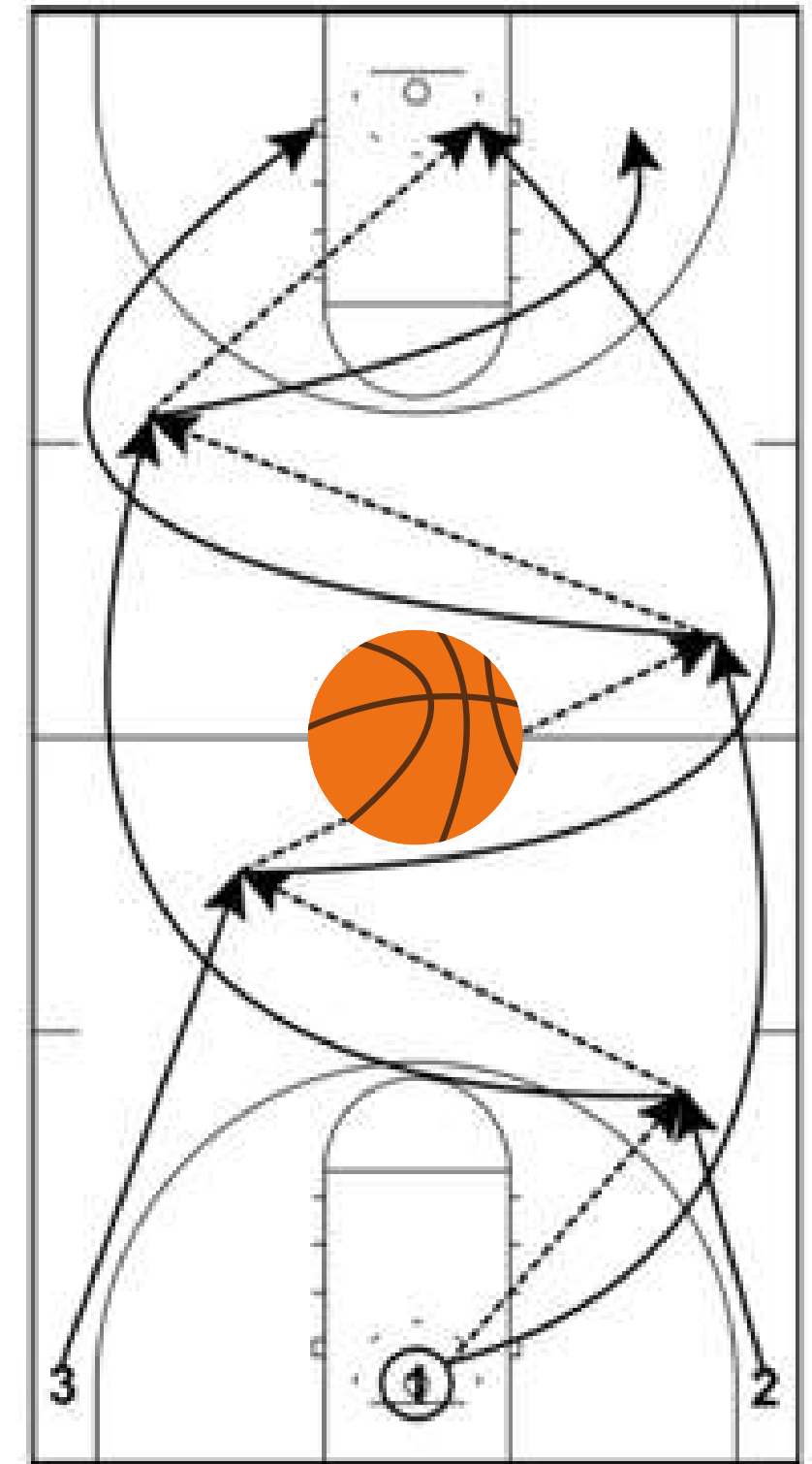
Jetdocs is your **integrated** workflow system that connects your teams, creates processes and empowers your organization towards a common goal.

NO SYSTEM

- Why don't basketball players take a half-court shot every time?
- Because there is a 1/100 or 1% chance of going in
- Bad planning = bad results

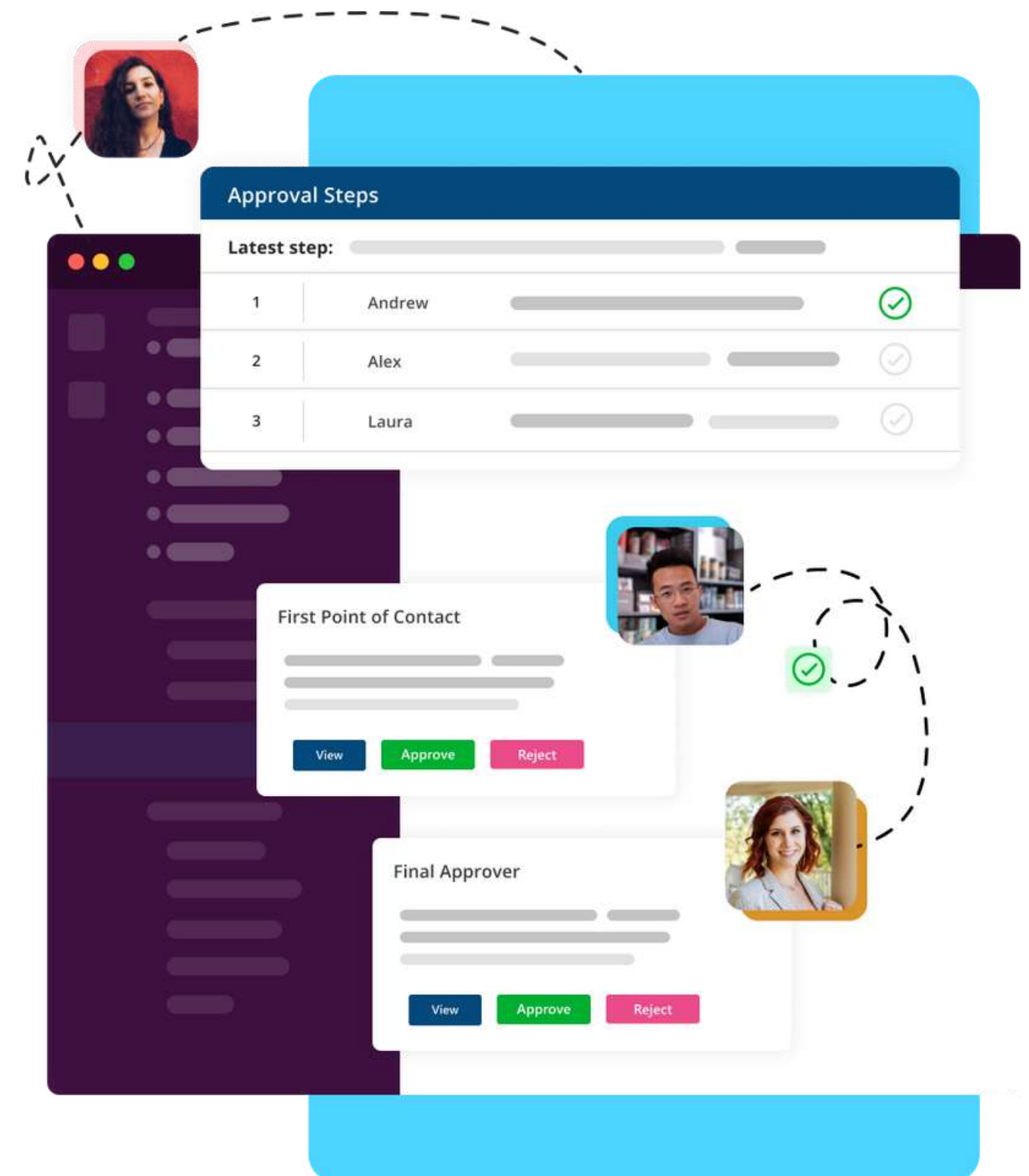
JETDOCS SYSTEM

- Defining key players and creating systems dramatically increases the probability of success
- In the basketball context, your odds increase 20x by moving-up court, passing between your key players and finally achieving your goal
- Let's create passing plays for your organization and stop relying on half-court shots (and then ask why things are going as planned)

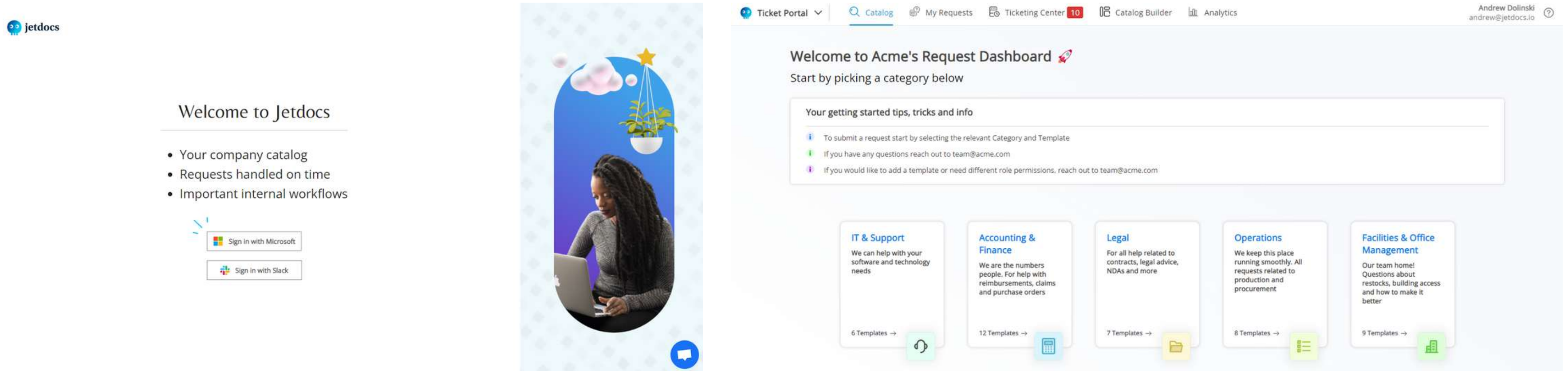




- Teams, Slack and Zapier Integrations
- Self-Serve and customizable central catalog
- Requests get routed to the right person or team with all required information
- Direct notifications (Teams & Slack) for relevant stakeholders
- Approvals, uploads, comments are chronological and easy to access
- Approvals, uploads, comments are chronological and easy to access
- Dashboards, tracking and analytics come out of the box







One Click Sign-In and Your Custom Catalog



Jetdocs catalogs are designed to be self-serve, fully-integrated and very intuitive. Users leverage Jetdocs as their starting point when they submit a request (mobile or desktop).

Keep your teams operating efficiently and on the highest priority items. Loop in multiple members from different departments and locations easily

-  **Status**
Outstanding
-  **Request Title**
Customer withdrawal exceeds limit
-  **Ticket Template**
Customer Response Request
-  **Category**
Compliance and QA

No-code builder for dynamic templates and conditional routing

In the Catalog Builder, Editors and Admins can quickly create powerful no-code workflows that get routed to the right person or team every time.

Template Settings
Choose what will happen when a user submits a request or ticket through the portal

First point of contact

The user chosen will be the first person notified and assigned to when a ticket is submitted.
Your admin can configure notification settings. If Create in General Queue is selected, the ticket will enter a General Queue, which is made of users listed in 'Who else is involved?'

User response to 3

☐ Create General Queue
Members listed below will be

Who else is involved: queue & reassign

Users listed here will be able to (1) be part of a Queue (2) be manually added and perform actions to tickets in the Ticketing Center. First point of contact included.

andrew.d@jetdocs.io x admin@jetdocs.io x andrew@jetdocs.io

BizOps Team x bizops@teams.jetdocs.io x Finance and Accounting

First point of contact

Review request and documents

andrew@jetdocs.io

Acknowledge and send correspondence to vendor

Finance and Accounting

Provide to finance and accounting

User response to 3

only show if user response to 3 is facilities

Conditionally Shown

andrew@jetdocs.io

Based on select

Conditionally Shown

+ Add workflow step

Ticket Portal
Catalog
My Requests
Ticketing Center 10
Catalog Builder

+ Add request field

Input 1

Which vendor and country is this request for?

Select multiple
Required

Options: Canada, United States, United Kingdom, Germany, Italy, AGV Enterprise, Intercello Corp, C...

Input 2

Enter in the partner's account number (USA or UK only)

Text
Required
Conditionally Shown

Input 3

Who is the Sales lead tied to this Vendor or Channel Partner?

Company user
Required

Input 4

If there are any refunds list them here

Table
Required
Conditionally Shown

Input 5

Add in additional details about this vendors software stack

Text
Required
Conditionally Shown

Input 6

I have uploaded relevant docs or contracts for review

Checkbox
Optional
Responder Only

Input 7

how much?

Currency
Required
Conditionally Shown

Response Type

Text

Checkbox

Select

Date

Company User

Currency

Table

Quick requests with effortless next steps and audit logs

Title or short summary

New Vendor

Which vendor and country is this request for? (required)

United Kingdom x United States x

☒ ITA Management >
 ☐ Canada

☐ AGV Enterprise
 ☒ United States

☐ Intercello Corp
 ☒ United Kingdom

☐ Coast Ventures
 ☐ Germany

☐ Italy

Who is the Sales lead tied to this Vendor or Channel Partner? (required)

andrew@jetdocs.io

If there are any refunds list them here (required)

Item Name	Item Number	Refund Amount
Acme Item 2	123ABC	50,000

Re-open Export Archive

Approval Steps

Latest step: andrew@jetdocs.io marked this ticket as completed

Step	Assigned To	Description	Status
1	andrew@jetdocs.io	Confirms this request is needed for their department	Completed
2	admin@jetdocs.io	Finance lead approves this request	Completed
3	operations@teams.jetdocs.io	Ops orders equipment to designated address	Pending

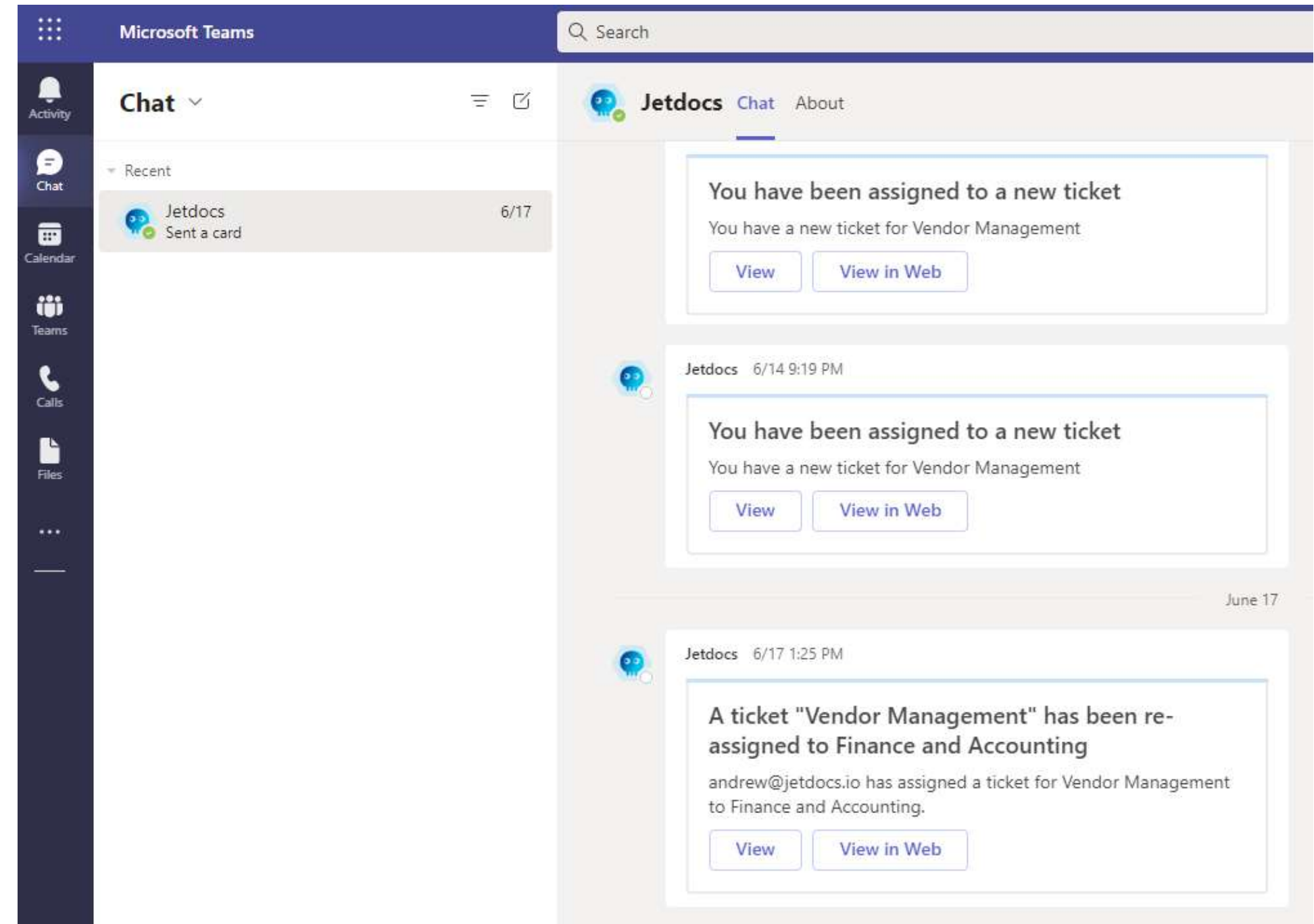
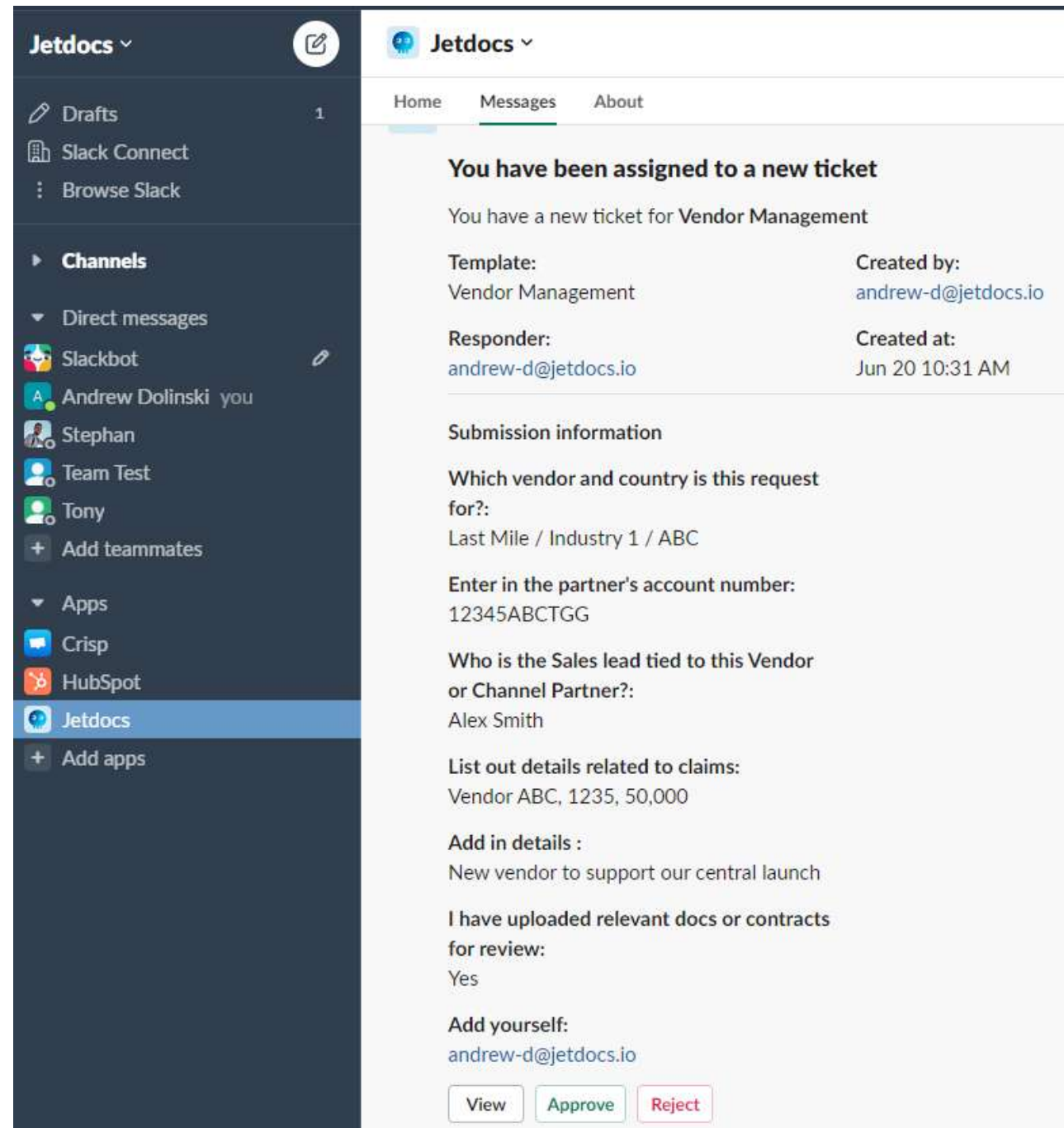
Activity Log

- AN andrew@jetdocs.io assigned this request to themselves Feb 17, 2022 at 8:00 pm
- AN andrew@jetdocs.io approved this request and assigned to admin@jetdocs.io Feb 17, 2022 at 8:00 pm
- AN andrew@jetdocs.io assigned this request to themselves Feb 17, 2022 at 8:00 pm
- AN andrew@jetdocs.io marked this ticket as completed Feb 17, 2022 at 8:00 pm
- AN andrew@jetdocs.io re-opened this ticket Feb 17, 2022 at 8:01 pm

With pre-defined and dynamic fields, ensure you receive every piece of information your team needs. With transparent approval steps and activity logs, requests quickly move from player to player.



Notifications where they should be



Get direct messages from Jetdocs where you're working when a relevant event occurs. Navigate to the request directly via deep links.

User Groups and Queues for maximum efficiency

issions

User Groups

A User Group is a set of users who share a common purpose. Groups may be referenced in the Catalog Builder when creating a workflow. Requests/Tickets assigned to Groups will appear in the related users Priority Center until the it has been actioned.

User Groups can be fully-customized for your organization. For example, they can represent departments (IT, Finance, Operations, Human Resources), Teams, Projects or Geographic Locations.

New User Group

BizOps Team

User Group for our internal business and operations team

3 Users

Compliance Team

Compliance and QA related matters

2 Users

Engineering

This is our eng team

5 Users

Engineering 2

Eng team

3 Users

Finance and Accounting

For all purchase order related activities

8 Users

HQ Marketing Team

This is Pier's Team

2 Users

Request Queue / Operational Issue / Te

Reassign

...

Approval Steps

bizops@teams.jetdocs.io

andrew@jetdocs.io

admin@jetdocs.io assigned to admin@jetdo

1	BizOps User Group
2	andrew@jetdocs.io
3	admin@jetdocs.io

andrew@jetdocs.io raised this on Mar 28, 2022 at 7:29 pm

1 Describe the issue you have faced (Required)

Approval Steps

Select 'Enable approval steps' to create multi-step Appro the builder above to dynamically route requests. Provid

☒ Enable approval steps

First point of contact

Brief desc

BizOps User Group

Brief desc

andrew@jetdocs.io

User Response

Brief desc

User response to 6

Brief desc

User Group

Brief desc

User Group Finance

Brief desc

Finance and Accounting

Brief desc

BizOps User Group

Brief desc

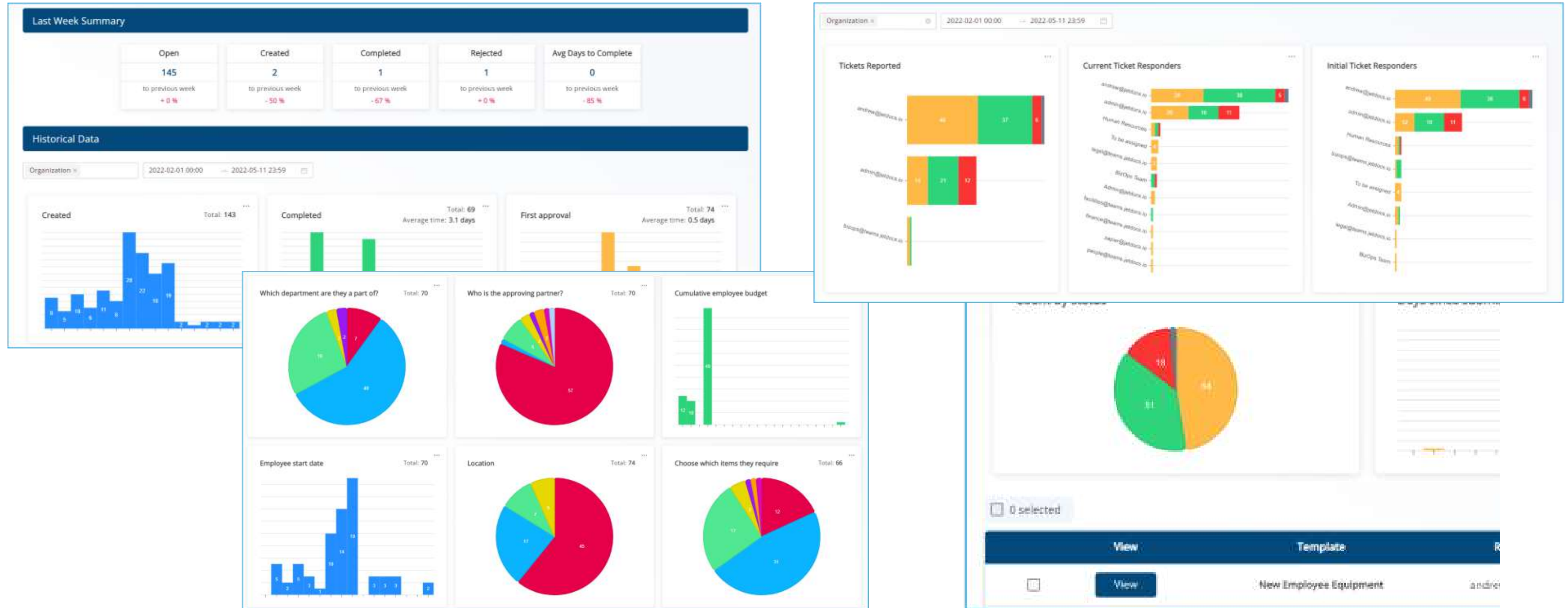
Human Resources and People

Brief desc

Preview Display

Allow requests to be handled on a first come first serve basis by multiple members of the same team.

Analytics and understanding your data



Understand how your teams are operating, properly plan and leverage your resources and gain insights that were previously impossible

Branding, custom notifications and role permissions

Organization Branding

Customize the welcome text and information your users will see


Catalog

Header

Welcome to Acme's Request Dashboard 


Subheader


Start by picking a category below


Welcome to Acme's Request Dashboard 




Start by picking a category below






Your getting started tips, tricks and info

 To submit a request start by selecting the relevant Category and Template

 If you have any questions reach out to team@acme.com

 If you would like to add a template or need different role permissions, reach out to team@acme.com

User Email	Role
andrew@jetdocs.io	
admin@jetdocs.io	Admin 
alex.kovalev.ak2@gmail.com	Admin 
andrew.d@jetdocs.io	Admin 

Ticket Statuses					
Event type	Notify Submitter	Notify Current Responder	Notify Additional Users	Bot	Email
New Ticket assigned to First Point of Contact	<input type="radio"/>	<input checked="" type="checkbox"/>	All ticket responders 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket Reassigned to New Responder	<input type="radio"/>	<input checked="" type="checkbox"/>	All responders and vie... 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket Rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	None 	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticket Cancelled	<input type="radio"/>	<input checked="" type="checkbox"/>	None 	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Quickly access the small but important details. Welcome your users, notify based on events and quickly provision users.



HOW DO JETDOCS USERS DESCRIBE THEIR EXPERIENCE?

**"LOVE", "HAPPY" AND
"EXCITED" ARE SOME OF THE
COMMON WORDS WE HEAR**



Scaling start-ups, established businesses and Fortune 500s trust Jetdocs

- "...my whole team is very **excited** about using Jetdocs. It has really improved our productivity!"
- "...Just a quick response – **WE LOVE JETDOCS!** It works so great for our little team. Have a great day."
- "...Thanks for your carefulness. Jetdocs is going pretty well, even if I'm a beginner, I was able to **learn everything quickly**. In particular, me and my team exploit jetdocs to communicate and **solve any need with other business units of our company**."
- "The new reporting **looks great**. Thanks for the update."
- "We are **loving** Jetdocs"
- "Jetdocs is our business operating system. It gives me the lego or piping for my ecommerce business. It also allows me to tell my employees what they do for our business"
- "...**it's been great so far**, still getting it set up in our workflow, but it has real potential"
- "All is going well with the system. **Very happy**"
- "Just want to say that we are **very happy** with Jetdocs and it has been working well for us."
- "Wow hi! **Love it** so far. I just started team implementation today so will follow up on how ease of use goes!"

 **GUARANTEED SUCCESS & GETTING IN TOUCH**



GUARANTEE YOUR SUCCESS

**3-MONTH SUCCESS PILOT +
JETDOCS LAUNCHPAD +
ONBOARDING SPECIALISTS**

THREE PRONGED SUCCESS SYSTEM

3 MONTH SUCCESS PILOT

- Jetdocs works on 1-year annual contracts. We dedicate the first 3 months to a paid success pilot. Organization's can cancel anytime.
- While our support is always attentive, during this period there is extra focus on how you want to structure your rollout, features, training and questions.

LAUNCHPAD AND ACADEMY

- The **Launchpad** quickly introduces your users to Jetdocs and outlines what they can expect based on their role permissions (Admin, Editor or Member).
- The **Jetdocs Academy** is a detailed training ground that provides in-depth videos with step-by-step guidance.

PERSONAL ONBOARDING + CHAT

- Virtual onboarding session with a few select users or all relevant teams. This is a great way to make sure your employees are on the same page as they begin their Jetdocs journey
- Within the Jetdocs application we offer chat support that links directly to our support or senior staff.



BONUS: ROADMAP & FEEDBACK

From the Jetdocs application link to our roadmap where you can find recent feature releases, upcoming ideas as well as a place to submit product feedback.

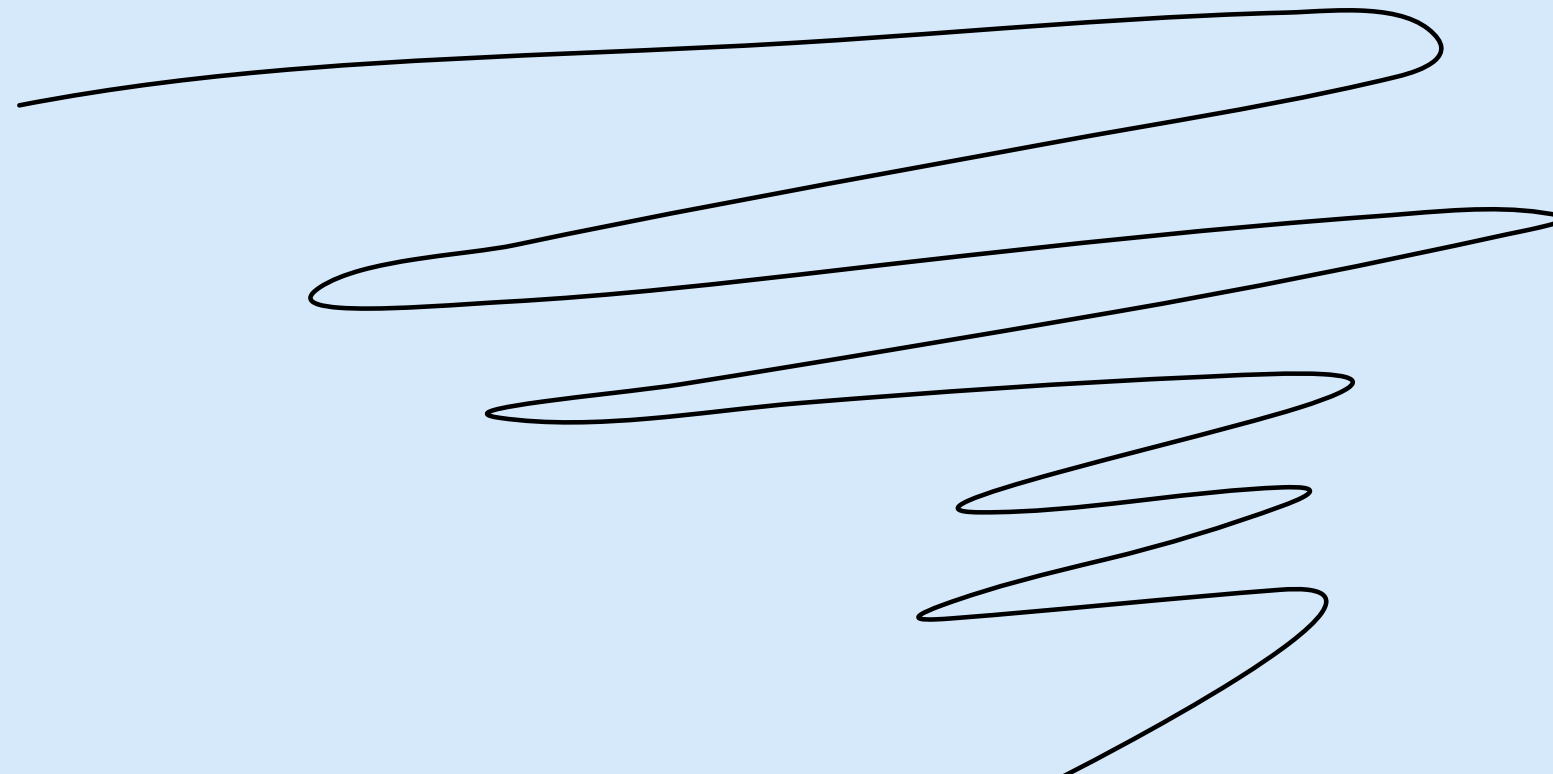
SINGLE SIGN-ON (SSO) AND LIGHTNING FAST USER PROVISIONING

role permissions

	MEMBER	EDITOR	ADMIN
Teams/Slack/Web Application Integration	✓	✓	✓
Single Sign-On (SSO)	✓	✓	✓
Catalog	✓	✓	✓
My Requests	✓	✓	✓
Ticketing Center	✓	✓	✓
User Groups	—	✓	✓
Catalog Builder & Conditionals	—	✓	✓
Analytics (Ops Dashboard, Responses, Users)	—	—	✓
Role Permissions	—	—	✓
Custom Catalog Branding	—	—	✓
Notification Preferences	—	—	✓



Get workflow ready in ~~months~~ hours.



Reach out to andrew-d@jetdocs.io
Head of Solutions