

Jetdocs

Standardize your processes with a collaborative ticketing solution in Microsoft Teams

Last updated: Q1 2023



Microsoft Partner

What we'll cover



1

What is Jetdocs and why integrate within Microsoft Teams?

2

Key benefits and use cases across various industries

3

How you can customize Jetdocs to jobs in your organization

4

Discover more with a walkthrough and feature overview

5

Hear from users who love and use Jetdocs every day

6

The impact collaborative ticketing has on your organization

Ticketing has changed.

Jetdocs is your all-in-one ticketing solution, helpdesk, service catalog and workflow builder within Microsoft Teams. By leveraging no-code innovation you can standardize processes and business specific workflows that encourage collaboration and resolve tickets in half the time.



CHALLENGES

You want to build on platforms you have invested in – Microsoft Teams.

Tickets, requests and approvals require multiple users and have back-and-forth. Whether that's IT, Ops, Facilities, Legal or Marketing. **Currently, they're unorganized and being lost in email, forms or messaging threads.**

IDEAL SOLUTION

Modern service requires a collaborative approach with an integrated solution. This is the way multi-touch point tickets are dealt with effectively.

The product must be easy to set up (SSO), can loop in colleagues quickly, and provide robust analytics and reporting across the organization.

DESIRED OUTCOMES

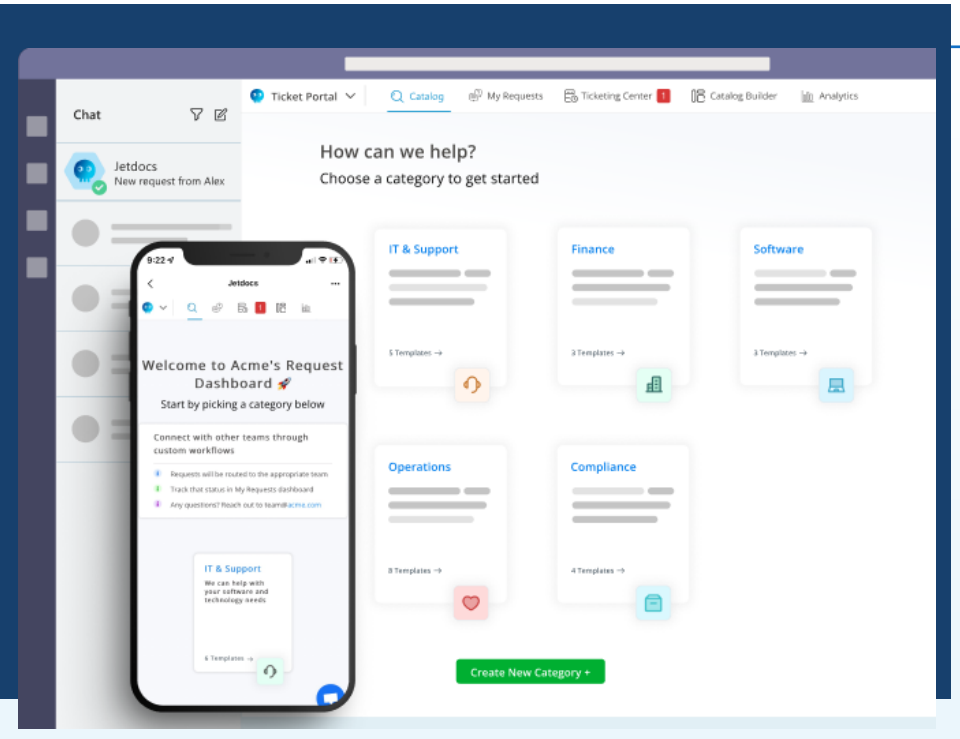
Say goodbye to endless emails, forms, spreadsheets and messaging threads.

Organizations now have standardized processes that keep their teams on track and accountable while providing insights into business lines to drive greater efficiency.



Jetdocs is modern service.

Your all-in-one ticketing solution, helpdesk, service catalog and workflow builder within Microsoft Teams.



1

One central location for your internal teams

Direct all your users to one central location. Catalogs to submit tickets, dashboards to track or resolve tickets and analytics to understand your organization.

2

Bridge time zones and geographic boundaries

Your users **LOVE** it. Try saying that about other ticketing software. Jetdocs uses collaboration to solve tickets and requests across multiple teams and users.

3

Work where your employees already are

As a Tab application and Bot notification system Jetdocs doesn't require context switching and sends relevant notifications when they matter.

Common Use Cases

Jetdocs comes with 80+ templates that can be configured.

Jetdocs offers value for your entire team. Jetdocs typically enters into a company with a common use case that requires an integrated ticketing, helpdesk or service catalog solution.

- IT & Support / E.g. **Support Request**
- Operations / E.g. **Vendor Management**
- Compliance / E.g. **Customer Feedback Request**
- Finance / E.g. **Purchase Approval**
- Customer Experience / E.g. **Customer Refund Request**
- Engineering / E.g. **Create Endpoint Request**
- Marketing / E.g. **Graphic Design Request**
- Legal / E.g. **Contract Review**

With more specific business processes being the natural next step

For example:

- **Recruiting company:** job post request or listing update request
- **High-tech Manufacturing company:** account manager submits ticket to engineering for product support after hearing back from customer
- **IT Service Providers:** pre-sales engineer submits request to sys admin to provision product



Organizations and Industries

Leading organizations around the world (N.A, Europe, Australia & New Zealand) use Jetdocs. The correlation between customers is that they have **adopted Microsoft Teams** and needed a way to standardize processes.

Company Size

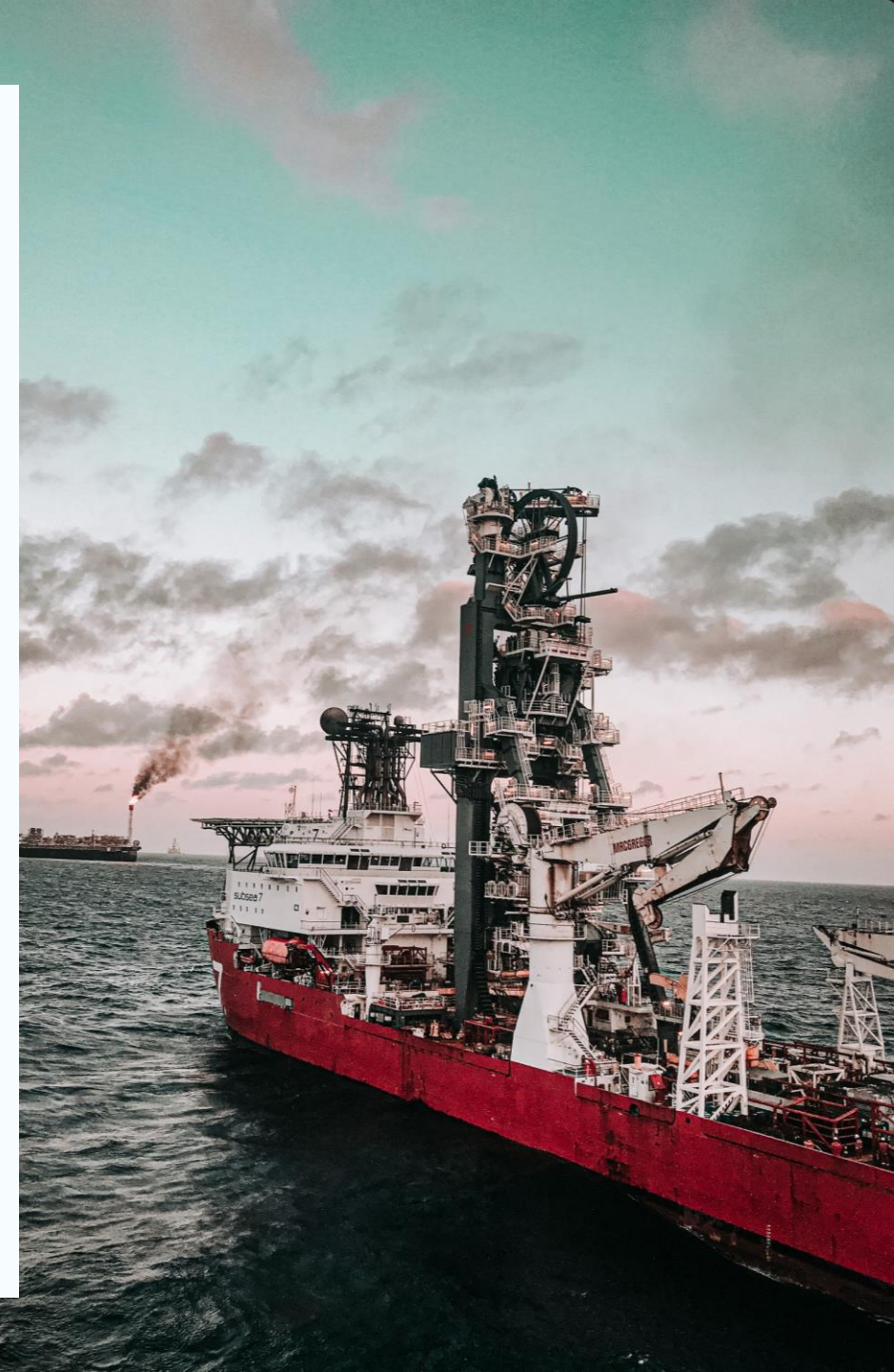
Headcount target size is between 250-2500 employees; however, Jetdocs is well suited for companies between 50-5000 end-users given it's flexibility and ease of use.

Internal and Service Teams

IT, Operations, Facilities, Support/Success, Legal, Finance, Compliance, Marketing, General Admin

Industries

- Professional Services
- Manufacturing
- Natural Resources and Energy
- IT Service Providers
- Financial Services
- Government
- Hotels and Hospitality
- Education
- Non-Profits



What can Jetdocs do for your customer?

Jetdocs is an all-in-one product that handles many jobs depending on what your customer values most.

In need of a modern ticketing system or helpdesk

Whether it's IT, Ops, Facilities or Legal – your customer is using antiquated systems or a combination of multiple tools that are unproductive, expensive and unorganized. Jetdocs is their answer to modern service.

Need a central service catalog

As organizations scale, they start to reach critical points where structure is needed. They don't know who to reach out to and need a central self-serve catalog to submit and answer service requests.

Approval workflows

Approvals are one of the biggest causes of endless email chains or messaging threads. Build structure around approvals with dynamic and conditional fields that route approvals to the right person.

Consolidate multiple forms

Form here, form there. Oftentimes forms are created as one-offs and no one ever touches them again because they can't find it. Create processes around intake forms and capture mechanisms.

Eliminate multiple tools

Old systems that require multiple logins, are in several locations and are not integrated alongside your customer's employees. Plus other tools like forms, messaging threads and spreadsheets.

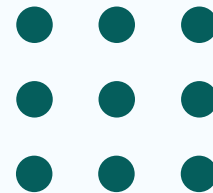
System to handle work orders

Phone calls, texts, emails, threads, forms, paper. Facilities and other departments often lag in productivity tools that create overall drag for the entire organization. They need a solution that is easy to use and easy to track.





Jetdocs Product Walkthrough



Organization

Workspace Two

Welcome to Acme's Request Dashboard 🚀

Start by picking a category below

Connect with other teams through custom workflows

- 📘 Requests will be routed to the appropriate team
- 📈 Track that status in My Requests dashboard
- 📧 Any questions? Reach out to team@acme.com

Operations

We keep this place running smoothly. All requests related to production and procurement

11 Templates →



Accounting & Finance

We are the numbers people. For help with reimbursements, claims and purchase orders

12 Templates →



Legal

For all help related to contracts, legal advice, NDAs and more

7 Templates →



Facilities & Office Management

Our team home! Questions about restocks, building access and how to make it better

9 Templates →



Marketing & Content

We help get our name out. We help with content, graphics, and social media

8 Templates →



Your completely customizable catalog. Bring all your teams to the same place. This entire interface can be accessed through a Tab in Microsoft Teams or a web application (O365 SSO)

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, Coast Ventures

Input 2

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

Text Required Conditionally Shown

Input 3

Choose your IT lead

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

Microsoft Teams | Search | Jetdocs New AD

Activity | Chat | Calendar | Teams | Calls | Files | Jetdocs | Apps

Jetdocs | Ticket Portal | Catalog | My Requests | Ticketing Center 1 | Catalog Builder | Analytics | Andrew Dolinski andrew@jetdocs.io

Priority Center

Tickets appear here when you or your group are responsible for the next step in the approval or process

Sort: Date Submitted	Reporter	Assigned To	Date Submitted	Latest Activity
Customer Response Request Compliance and QA Preview: Need assistance getting back to customer P2 SLA 4 days overdue Breached	andrew@jetdocs.io	andrew@jetdocs.io	Nov 8 at 3:50 pm 6 days ago	Nov 8 at 3:51 pm 0 comments
New Employee Equipment Facilities & Office Management Preview: New equipment needed Outstanding P2	andrew@jetdocs.io	andrew@jetdocs.io	Nov 8 at 3:01 pm 6 days ago	Nov 8 at 3:01 pm 0 comments
Graphic Design Request Marketing & Content Preview: Require updated conference package P2 SLA 8 days overdue Breached	andrew@jetdocs.io	Art Team	Nov 4 at 10:18 am 10 days ago	Nov 10 at 8:20 am 3 comments
Customer Response Request Compliance and QA Preview: Need help responding to customer P3 SLA 3 days left (77% complete) Caution	andrew@jetdocs.io	andrew@jetdocs.io	Nov 2 at 2:23 pm 12 days ago	Nov 14 at 9:57 am 1 comments Withdrawal
Customer Response Request Compliance and QA				

Focus on what matters with our Priority Center and smart dashboards. Available for teams responding as well as those submitting requests!

Microsoft Teams | Search

Activity | Chat | Calendar | Teams | Calls | Files | Jetdocs | Apps

Jetdocs

Ticket Portal | Catalog | My Requests | Ticketing Center 1 | Catalog Builder | Analytics

Request Queue / Customer Response Request / Need help responding to customer

[Approve](#)
[Reject](#)
[Edit](#)
...
▼ P3 SLA 3 days left (77% complete)
⚠ Caution

Approval Steps

Latest step: andrew@jetdocs.io assigned this ticket to themselves.

1	andrew@jetdocs.io	Confirm compliance is looking at	✓
2	andrew@jetdocs.io	Provide appropriate response and comments back	✓
3	andrew@jetdocs.io	Complete once both parties have agreed	✓

andrew@jetdocs.io raised this on Nov 2, 2022 at 2:23 pm

Title or short summary
Need help responding to customer

Status
Outstanding

Request Title
Need help responding to customer

Ticket Template
Customer Response Request

Category
Compliance and QA

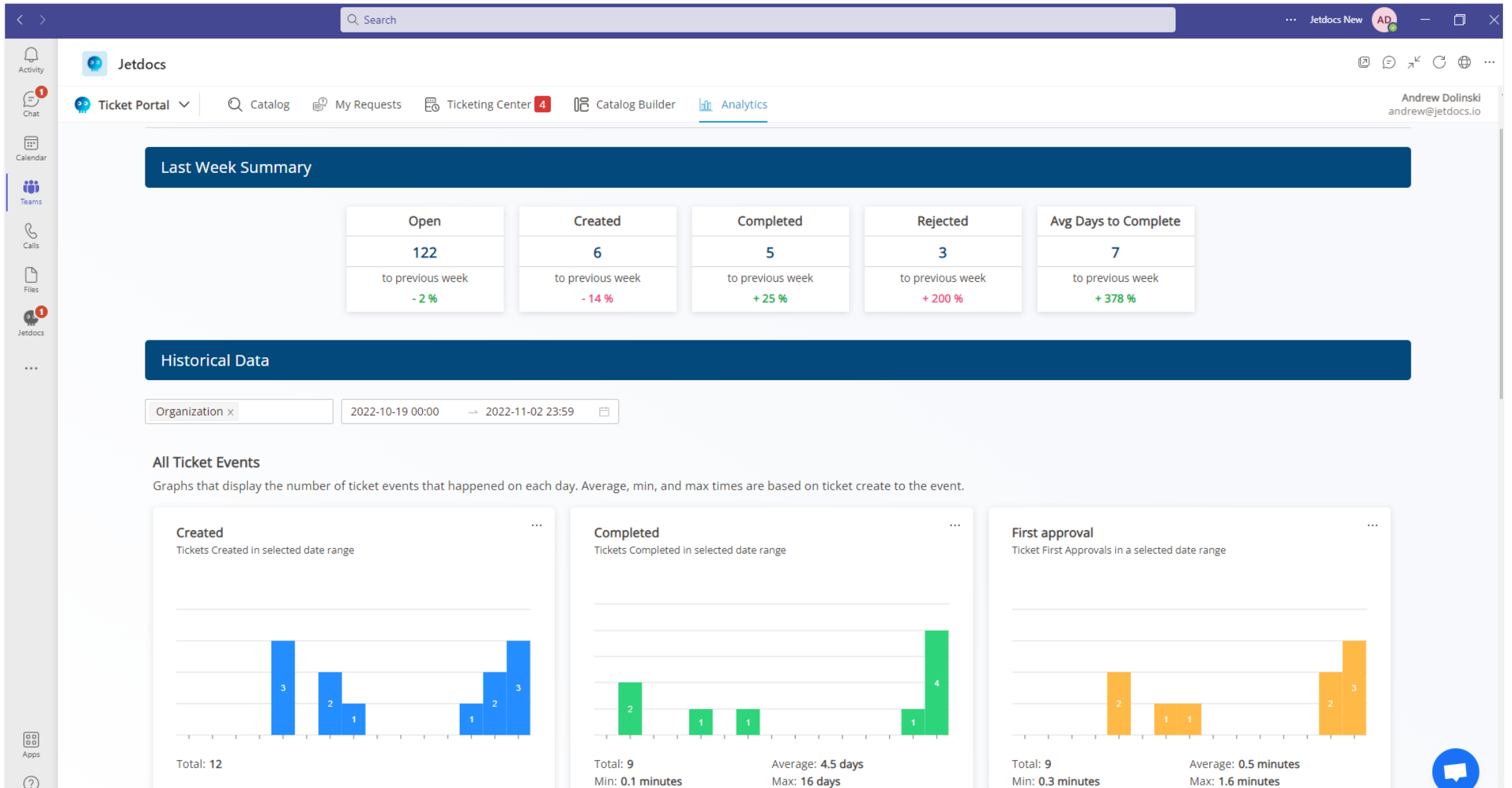
Tags
Withdrawal

[Edit](#)

Requester
andrew@jetdocs.io

Assignee

Quick Approval and Reject CTAs make it easy to standardize workflows. Feature rich with powerful SLAs, priorities and tag functionality.



Above is the Jetdocs Operations Dashboard that acts as your central command center. View stats and time series data across your organization, categories and templates.

Jetdocs New AD

Search

Activity

Chat

Calendar

Teams

Calls

Files

Jetdocs

Apps

Jetdocs

Ticket Portal

Catalog

My Requests

Ticketing Center 4

Catalog Builder

Analytics

Andrew Dolinski
andrew@jetdocs.io

Dashboard **Aggregate Responses** Users All Tickets

Aggregate Responses By Template

Organization / Facilities & Office Man... 2022-01-01 00:00 → 2022-11-02 23:59

Which department are they a part of?

Department	Count
Red	59
Blue	23
Green	7
Other	1

Total: 94

Who is the approving partner?

Partner	Count
Red	77
Green	5
Other	12

Total: 94

Cumulative employee budget

Category	Value
1	14
2	20
3	59

Total: 96

Employee start date

Location

Location	Count
Green	16
Yellow	5
Other	13

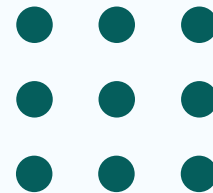
Choose which items they require

Item	Count
Purple	3
Red	5
Other	12

In our Aggregate Responses tab, you can understand the data your users are submitting, which provides you with critical business insights and helps understand your processes.



Feature List



Integrations, Login and Admin
Microsoft Teams Integration
Slack Integration
Zapier Integration
Automatic user import (roster fetch)
Single sign-on (SSO)
Customizable End-User Catalog
Multiple Workspaces
Role permissions
Organizational Admin
Admin
Editor
Member

Ticketing Center & My Requests
Dynamic dashboards
General Queue
Priority Center
Related Tickets
View Only Tickets
Dynamic SLAs
Caution, Warning and Breached tags
Workflow step progress bars
Powerful search and filters
Data preview for contents of ticket
Tags
Activity Log & Audit Trail
Status changes
Approved
Rejected
Assigned
Edited
Re-opened
Cancelled
Archived
Un-Archived
@Mention and loop in coworkers
Comments
Private Comments
Attach files
Attach links
Export .docx / .xls

Catalog & Catalog Builder
Fully-customizable Catalog experience
Unlimited Requests, Tickets and Issues
80+ global templates
Get started from existing templates
Conditional workflows
Conditional data fields
Conditional approval steps
General queue
Approval flows
Data Types
Text
Checkbox
Cascading multi-select
Date
Dynamic company user
Currency
Custom table grid
Responder only fields
Default priority levels
SLA breach notifications
Restrict template visibility
Preview fields

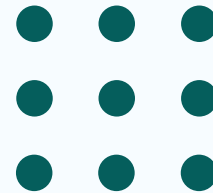
Analytics
Dashboard
Created count
Complete count
First approval count
Rejected count
Cancelled count
Create to Complete time
Create to First Approval time
Create to Assign (Queue) time
Assign to Complete (Queue) time
Create to Complete (Queue) time
Aggregate Submissions/Responses
User Resource Planning
Tickets reported by user
Ticket responders by user (current)
Ticket responders by user (initial)
All Tickets
Count by Status
Days since submission
Days to completion

Sidebar
User Management
Workspace Roles
Organization Users
User Groups
Organization Settings
Notifications
Branding
Priority & SLA
Tag Management
Profile & Integrations
Zapier API Key
Customize first / last

Support
Live onboarding
Live chat
Launchpad - intro videos for different roles
Jetdocs Academy - detailed videos
Documentation and knowledge base



Comparisons





vs.

Email

<input checked="" type="checkbox"/> Jetdocs core function is approvals & multi-step workflows and we make them efficient.	<input checked="" type="checkbox"/> Emails are terrible for approvals & multi-step workflows
<input checked="" type="checkbox"/> Jetdocs has built in filters for advanced searching and proper attachment management so nothing gets lost.	<input checked="" type="checkbox"/> Email is difficult to organize and search through, especially if there are large numbers of messages and attachments.
<input checked="" type="checkbox"/> Jetdocs comes with 7 different field types, including text, tables, checklists etc.	<input checked="" type="checkbox"/> Emails are generally text-based and have limited formatting options.
<input checked="" type="checkbox"/> We have advanced analytics built in for your tickets where you can find data to take appropriate decisions.	<input checked="" type="checkbox"/> No analytics to check the performance of the employees and organization
<input checked="" type="checkbox"/> Everything in Jetdocs is within Jetdocs, attachments, documents and everything you create.	<input checked="" type="checkbox"/> Emails are not centralized, attachments stored in different servers, files get lost.
<input checked="" type="checkbox"/> Seamless integrations with 1000's of other applications with Zapier.	<input checked="" type="checkbox"/> No proper integrations for teams ticketing.





VS. Messaging Threads

<input checked="" type="checkbox"/> Clear and timely tracking of the tickets.	<input checked="" type="checkbox"/> Difficulty in tracking the progress of ticket.
<input checked="" type="checkbox"/> A proper activity log is maintained for tickets so everything is transparent.	<input checked="" type="checkbox"/> Finding ticket history is similar to finding needle in a haystack.
<input checked="" type="checkbox"/> Proper analytics that gives insight on everything you need to know about tickets.	<input checked="" type="checkbox"/> No proper analytics for tickets solved, resolution time, agents and much more like Jetdocs.
<input checked="" type="checkbox"/> Properly organized tickets with built-in filters to find appropriate tickets.	<input checked="" type="checkbox"/> Poorly organized tickets overwhelm the employees.
<input checked="" type="checkbox"/> Built for internal ticketing with features such as SLAs, approval steps, catalog, templates etc.	<input checked="" type="checkbox"/> No proper SLAs, Catalog, Approval Steps required for proper internal ticketing.
<input checked="" type="checkbox"/> Integrating with other applications is easy with 1200+ integrations via Zapier.	<input checked="" type="checkbox"/> Setting up integrations for ticketing only is a nightmare.
<input checked="" type="checkbox"/> Extremely efficient and built for internal ticketing.	<input checked="" type="checkbox"/> Extremely inefficient compared to a dedicated internal ticketing

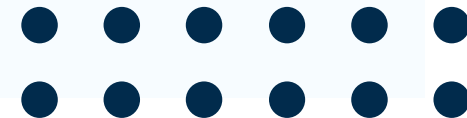




vs.

Forms

<input checked="" type="checkbox"/> Jetdocs templates and forms all reside in one Catalog for easy access.	<input checked="" type="checkbox"/> Forms are scattered and employees don't know where to locate previously created ones.
<input checked="" type="checkbox"/> Managing multi step approvals and SLAs is extremely easy with Jetdocs.	<input checked="" type="checkbox"/> Managing multistep workflows is next to impossible in forms without manual steps.
<input checked="" type="checkbox"/> Proper analytics that gives insight on everything you need to know about tickets.	<input checked="" type="checkbox"/> Analytics limited and not built for internal ticketing needs.
<input checked="" type="checkbox"/> Full integration with Microsoft Teams & Slack, everything from creating templates submitting tickets and more!	<input checked="" type="checkbox"/> Extremely limited integration options available to teams, and slack, mostly only view responses.
<input checked="" type="checkbox"/> Having multiple teams within a single workflow is simple and can be automatically be done.	<input checked="" type="checkbox"/> Form responses need to be forwarded to each team manually adding extra friction on every step.
<input checked="" type="checkbox"/> Activity logs, progresses are automatically recorded.	<input checked="" type="checkbox"/> Every activity log has to be manually kept, such as forwarding, new team involvement etc.
<input checked="" type="checkbox"/> Templates, steps, SLAs and every other feature built for internal ticketing.	<input checked="" type="checkbox"/> Built for completely different use-case and repurposing it requires time and capital investments.

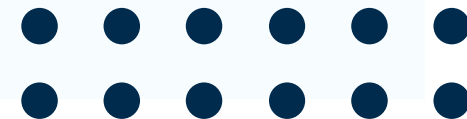




vs.

Spreadsheets

<input checked="" type="checkbox"/> Jetdocs is efficient, fill the form and the information goes where it's supposed to go.	<input checked="" type="checkbox"/> Spreadsheets are extremely inefficient with multiple data entry steps that are time consuming.
<input checked="" type="checkbox"/> Teams are easy to setup and only takes minutes to set permission levels.	<input checked="" type="checkbox"/> Managing users is a nightmare in spreadsheets, worse when multiple teams are involved in a ticket.
<input checked="" type="checkbox"/> Proper analytics that gives insight on everything you need to know about tickets.	<input checked="" type="checkbox"/> No analytics whatsoever to give you insight on ticket handling and performance.
<input checked="" type="checkbox"/> Full integration with Microsoft Teams & Slack, everything from creating templates submitting tickets and more!	<input checked="" type="checkbox"/> No prebuilt integrations with MS Teams & Slack except shared documents anyone in the org can access.
<input checked="" type="checkbox"/> As many workflows can be created with no added hassle whatsoever.	<input checked="" type="checkbox"/> As the number of workflows increases, the more complicated & unusable it becomes.
<input checked="" type="checkbox"/> Integrates with 1200+ applications via Zapier.	Integrating with other applications is nightmare.
<input checked="" type="checkbox"/> Templates, steps, SLAs and every other feature built for internal ticketing.	<input checked="" type="checkbox"/> No feature built for internal ticketing and massive overhead to the organization.

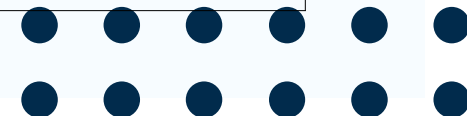




vs.

ServiceNow

<input checked="" type="checkbox"/> Built for everyone and everyone in the company, anyone can create and attend the workflows and processes.	<input checked="" type="checkbox"/> Built for complex IT teams with complex requirements and setup.
<input checked="" type="checkbox"/> Extremely easy to setup and even someone with 0 experience can work with the platform.	<input checked="" type="checkbox"/> Massive overhead involved to set it up for the first time and to teach teams all the short codes and features.
<input checked="" type="checkbox"/> Integrations with slack and teams is as easy as clicking few buttons and no extra work involved.	<input checked="" type="checkbox"/> Integrations with slack and teams are complicated and require an IT team to figure out for most businesses.
<input checked="" type="checkbox"/> Workflow automations are easy and anyone can build them.	<input checked="" type="checkbox"/> Building workflows & processes is time consuming and require dedicated IT personnel to do it properly.
<input checked="" type="checkbox"/> Jetdocs costs fractions of Servicenow while delivering better internal ticketing experience.	<input checked="" type="checkbox"/> Price per agent is relatively high, and require additional costs to setup everything with the IT department.
<input checked="" type="checkbox"/> Training employees to use Jetdocs is as easy as watching 20 minutes worth of documentation videos.	<input checked="" type="checkbox"/> Training employees typically require third party consultants and more external help
<input checked="" type="checkbox"/> Very generous free plan for small teams.	<input checked="" type="checkbox"/> No free plans regardless of team size.

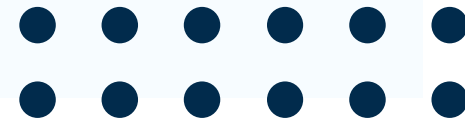




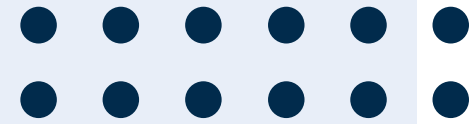
vs.

Zendesk

<input checked="" type="checkbox"/> Built for internal ticketing & communication, all features centered towards internal ticketing.	<input checked="" type="checkbox"/> Primarily built for external ticketing and feature set revolve around external use cases.
<input checked="" type="checkbox"/> Extremely easy to setup and even someone with 0 experience can work with the platform.	<input checked="" type="checkbox"/> Massive overhead involved to set it up for the first time and to teach teams all the short codes and features.
<input checked="" type="checkbox"/> Direct integrations to teams and slack, not just shortcodes but the entire interface.	Integrations to Teams and Slack involve shortcodes, unnecessary approval steps and is not user friendly.
<input checked="" type="checkbox"/> Workflow automations are easy and anyone can build them.	<input checked="" type="checkbox"/> Building workflows & processes is time consuming and require dedicated IT personnel to do it properly.
<input checked="" type="checkbox"/> Price per agent is competitive and fractions of what Zendesk costs.	<input checked="" type="checkbox"/> Price per agent is industry high for something that is not even built for internal ticketing.
<input checked="" type="checkbox"/> All essential features are built in and third parties not required to use the app to full potential.	<input checked="" type="checkbox"/> Third party providers (costs extra) required for basic ticketing features like round robin and more!
<input checked="" type="checkbox"/> Very generous free plan for some teams with not much requirements.	<input checked="" type="checkbox"/> No free plans regardless of team size.



Common Questions



How do I get set up?

Jetdocs can be installed from the Microsoft Teams Marketplace or the AppSource. Jetdocs is a tab and bot application that once installed, automatically fetches the list of users in each channel it's added to.

How to assign roles?

Jetdocs has a global admin called Organizational Admin. These Admins have full privileges and can assign users Admin, Editor or Member roles to the rest of the users.

Editors are a unique role who can build templates and workflows.

What about pricing?

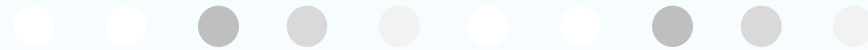
We have multiple tiers based on the total number of end users your customer has.

Reach out to Jetdocs or your reseller partner for more information.





“When we came across Jetdocs I just had this eureka moment. This is exactly what we’re looking for because it’s simple, it’s approachable, it’s customizable and it doesn’t have a big overhead.”

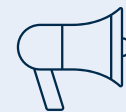


Erik Finch

Director of Strategy
BOUNDLESS IMMIGRATION



BOUNDLESS



Listen for yourself



Watch Clip #1



Watch Clip #2

When users LOVE ticketing we know we're helping you succeed



 **Khizar K.**

"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"

– Co-founder, E-commerce/Manufacturing company

 **Lisa S.**

"My whole team is very excited about using Jetdocs. It has really improved our productivity!" – Legal team, Fortune 500 company

♥ "Just a quick response – **WE LOVE JETDOCS!** It works so great for our team."

♥ "We are loving Jetdocs"

😊 "All is going well with the system. **Very happy**"

♥ "Wow hi! **Love it so far.** I just started team implementation today"



Resolutions times across IT, HR and Facilities were cut **by 50%**

Astra Polymers is a worldwide leader in high-quality masterbatch (plastics manufacturing). While additive, compound and color masterbatches are the output, there are hundreds of employees that work together to make this happen.

They needed a solution provided a central location to streamline ticket management, provide analytics to upper management and be integrated within Microsoft Teams.



Implement collaborative ticketing with Jetdocs today

That's modern service.

