



Implementation Partner for ERP & AI Systems

SoftRobot TicketingOS · SAP S/4HANA · Odoo Enterprise · Microsoft Dynamics 365

Software installation · Data migration · BPM mapping · User rights · Training · Customization · AI agents/chatbots

1. Master Implementation & Integration Execution Flow (Ticket-Driven)

| ID | Department | Process | Activity | Action | Progress % |
|------|-------------------|----------|--|--|------------|
| I001 | Sales / Pre-Sales | LEAD | Client inquiry | Consultation call, requirement capture (→ auto ticket) | 5 |
| I002 | Discovery | ASSESS | Current state audit | Process mapping, infrastructure review, systems inventory | 10 |
| I003 | Legal | CONTRACT | Proposal & MSA | Scope of work, pricing (fixed/hourly), payment schedule, NDA | 15 |
| I004 | Project Mgmt | PLAN | Implementation plan | Timeline, resources, sprint plan, risk register, governance | 20 |
| I005 | Integration | INSTALL | Software installation & system integration | Set up environments (sandbox/dev/prod), connect APIs, ERP middleware | 30 |
| I006 | Data | MIGRATE | Master & transaction data migration | Extract → clean → transform → load → validate (repeat) | 40 |

| ID | Department | Process | Activity | Action | Progress % |
|------|----------------|----------------------|--|---|------------|
| I007 | Consulting | BPM MAPPING | Business Process Mapping | Map as-is → to-be workflows → align software capabilities | 50 |
| I008 | Tech | CUSTOMIZE | Customization (forms, reports, workflows, AI agents) | Develop / configure fields, rules, dashboards, NLP chatbots | 65 |
| I009 | Security | USER RIGHTS | Define roles & permissions | Role-based access (RBAC), hierarchies, approval matrices | 70 |
| I010 | QA | UAT & SYSTEM TESTING | User Acceptance Testing | Business process simulation, bug tracking, performance testing | 80 |
| I011 | Training | TRAIN | End-user & admin training | Role-specific sessions, videos, documentation, certification | 85 |
| I012 | Deployment | GO LIVE | Production cutover | Final data load, go-live checklist, communication | 90 |
| I013 | Support | HYPERCARE | Post-go-live stabilization | Dedicated support, issue ticketing, performance monitoring | 95 |
| I014 | Client Success | CLOSURE | Project sign-off & AMC | Final acceptance, warranty start, handover to AMC/retainer team | 100 |

📁 Every project phase is a ticket in our system – from lead to AMC. Zero manual follow-up.

2. Service-Specific Workflows (By System)

SoftRobot

TicketingOS

Kickoff → Process
Discovery → AI
Agent Configuration
→ Chatbot Training
→ Role Setup →
Sandbox Testing →
User Training → Go-
Live → AMC

SAP S/4HANA

ASAP/Activate:
Project Prep →
Business Blueprint →
Realization
(configure) → Final
Prep → Go-Live &
Support

Odoo

Enterprise

Business Need
Analysis → Full
Featured Prototype
→ Data Import / Dev
→ Validation &
Training →
Deployment

MS Dynamics 365

Business Requirements → Solution Design → Config/Customization → Data
Migration → Integration → UAT → Training → Go-Live

Critical Control Points (Implementation & Integration)

- **Scope freeze:** Avoid uncontrolled change orders.
- **Data readiness:** Legacy data must be 90% cleaned before migration.
- **UAT success:** No critical defects; user acceptance signed.
- **Backup & rollback plan:** Production cutover with fallback.

3. Milestone-Based Billing (Implementation Project)

| Milestone | Condition | Payment % |
|---|-------------------------------------|-----------|
| Contract & advance | Signed MSA + PO | 30% |
| Kick-off & discovery | Project plan approved | 10% |
| Data migration & customization complete | Data load, reports, AI agents ready | 20% |
| UAT passed & user rights defined | User acceptance, roles signed | 20% |
| Go-live & hypercare | Production cutover, ticket closure | 15% |

| Milestone | Condition | Payment % |
|-----------------------------|-------------------------------|-----------|
| Project closure & AMC start | Final acceptance, AMC invoice | 5% |

💰 Recurring revenue: Annual AMC (20-30% of implementation fee) + time & material for change requests.

4. ERP & TicketingOS Module Mapping (System Integrator Stack)

🎯 Core Modules

Lead/CRM · Discovery & Audit · Contract Mgmt · Project Planning · Integration (API/EDI) · Data Migration (ETL) · BPM Engine · Customization Studio · User Rights Mgmt · UAT Portal · Training LMS · Deployment Orchestration · Hypercare Ticketing · AMC Billing · Client Portal

🤖 AI Engine

- Fit-Gap Analyzer: compares requirements to product capabilities
- Auto-test scripts for UAT
- Chatbot for training & support
- Migration script generator
- Anomaly detection in logs

5. AI-Based Automation for System Integrators

| Function | AI Automation |
|--------------------------------|---|
| Lead Qualification (Pre-Sales) | Scans requirements doc → recommends best-fit product (SoftRobot / SAP / Odoo / MSD) + effort estimate |
| Fit-Gap Analysis (Advisory) | Compares client BPM to product capabilities → generates report with config vs customize recommendations |
| Data Migration Mapping | AI reads source schema (SQL/Excel) → suggests target mapping, transformation rules, data quality flags |
| User Rights Generator | From role descriptions → suggests RBAC, segregation of duties, approval workflows |

| Function | AI Automation |
|--------------------------------|---|
| UAT Script Generator | From process flows → AI writes test cases, auto-runs regression tests in sandbox |
| Knowledge Base Builder | From project docs → auto generates user manual, FAQ, video scripts, chatbot training data |
| Post-Go-Live Anomaly Detection | Monitors system logs, ticket volume, performance → predicts critical incidents before they happen |
| Change Request Estimation | From description → AI predicts hours, impact, risk level |

🗣️ AI CoPilot for consultants: Reduce discovery, documentation, and testing effort by up to 50%.

6. Final System Integrator Architecture

Lead → Discovery → Contract → Plan → Install/Integrate → Migrate Data → Map BPM → Customize → User Rights → UAT → Train → Go-Live → Hypercare → AMC

Internal Stack: Lead CRM → Engagement Mgt → Project Ticketing → Integration/ETL → Customization Engine → User Admin → UAT Portal → Training LMS → Deployment Orchestrator → AMC Billing

🗣️ **AI TicketingOS:** AI Fit-Gap · AI Data Mapping · AI User Rights · AI UAT · AI Knowledge · AI Anomaly Detection

Traceability (Audit & Governance)

Client Requirement ticket – signed BRD, traceable to every config decision

Data migration ticket – source → transform → load

Customization ticket – change request, approval, implementation, testing

User rights ticket – each role approved by client, audit trail

logs,
sign-off


UAT ticket – each test case
passed/failed, evidence attached

Go-live ticket – checklist with
client signature, warranty start



Implementation Partner Dashboards

- **Project Health:** % milestones on-time, budget variance, open risks
- **Resource Utilisation:** consultants billable % (target 70-85%)
- **Pipeline:** lead value by stage, win rate, avg deal size
- **Ticket Metrics:** UAT defect density, hypercare ticket trend, MTTR
- **Client Success:** CSAT, renewal rate, AMC revenue growth

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Full lifecycle from lead to AMC. Built on AI TicketingOS. Print to PDF (Ctrl+P) → Save as PDF.