



AI-ASSISTED CUSTOMER SUCCESS & SERVICE PLATFORM

Integra OneDesk

REQUEST · RESOLVE · RENEW

One web platform for everything that happens after a customer signs — support & work requests with SLAs, implementation tracking, quotations, AMC renewals and invoice visibility — shared by your team, your customers and your distributors, with an AI layer that drafts, summarises and triages alongside your consultants.

ONE REQUEST, END TO END — INSIDE INTEGRA ONEDESK

PORTAL



Request raised

Customer logs it with files · AI suggests priority

SLA



Consultant review

First response in 4 business hrs · ETD set

BILLABLE



Quotation sent

AED 4,200 + VAT · approved in portal

LIVE



In development

Developer assigned · time logged · internal notes



Testing

Linked task closes → customer verification



Customer accepts

CSAT rating · auto-close after 7 days



Invoice & AMC

Outstanding shown in portal · renewal T-60 reminder

Your team

Queues sorted by SLA due, macros, bulk actions, timeline, time logs, approvals

Your customers

Raise & approve requests, approve quotes, see AMC, dues, documents, knowledge base

Your distributors

One login across every customer they resell to — requests, modules, AMC status

Built for Software & ERP Vendors

Request-to-cash thread · billable gating · AMC renewals · implementation go-lives

AI-Assisted

Triage suggestions · thread summaries · customer-reply drafts · health scores

Multi-Tenant & White-Label

Your brand, your domain · cloud or on your own servers · UAE residency

Integra IT Solutions FZE LLC

Integra IT Solutions — formerly Edocs Solutions & Computer Consultants — has spent two decades building ERP, WMS, EDMS, CRM and BPM platforms for organisations that live and die by the clock.

Headquartered in Sharjah, UAE, our systems run inside top-tier courier, logistics and trading enterprises across the GCC, India, Africa and Southeast Asia. We build purpose-built platforms — not generic software bent out of shape — and we run the after-sales side of our own business on the product in this brochure.

Integra OneDesk is the customer-success backbone of the Integra platform suite: the system our consultants, developers and accounts team use every day to serve ERP customers — now offered to other software vendors, implementation partners and IT service companies.

Company at a glance

ORIGIN

Sharjah Publishing City Free Zone, UAE

EXPERIENCE

20+ years · 100+ global clients

REACH

Live deployments across GCC, India, Africa & Southeast Asia

PRODUCT LINES

Courier ERP · Cargo & Logistics · Warehouse WMS
· Integra Finance · Integra OneDesk · Integra AI · EDMS · CRM

DELIVERY

Cloud SaaS or on-premise · UAE data residency · 24/7 support

THE PRODUCT

What is Integra OneDesk?

A complete customer-success platform — from the first support ticket to the AMC renewal — designed around how software vendors and implementation partners actually work: requests that need approval before anyone codes, enhancements that must be quoted before they are built, go-lives with checklists, contracts that quietly expire, and customers who want to see their own status without calling.



Work Requests & SLA

11-state lifecycle enforced server-side, business-hour SLAs per priority, escalation tiers, snooze, tags, macros, bulk actions, linked tickets and a unified timeline.



Customer & Distributor Portals

Customers raise and approve requests, approve quotations, see AMC status, dues and documents, read the knowledge base and chat. Distributors see every customer they cover.



Delivery & Money

Projects, implementation step checklists, tasks and time logs feed quotations, invoices, payments and AMC contracts — so the request-to-cash thread never breaks.

39

SCREENS ACROSS STAFF & PORTAL

220+

REST API ENDPOINTS

11

REQUEST STATES, ONE STATE MACHINE

12

ROLES · 90 PERMISSION KEYS

Benefits at a Glance

One Thread, Not Six Systems

Ticket, quotation, development, testing, acceptance, invoice and renewal are one record with one history — no re-keying between helpdesk, CRM and spreadsheets.

SLAs You Can Defend

Business-hour clocks per priority, paused on hold or when waiting on the customer, with warnings at 80 % and tiered escalation to leads and management.

Nothing Built Unpaid

Billable requests cannot enter development without a customer-approved quotation. The rule is in the server, not in a reminder.

No AMC Lapses Unnoticed

Contracts flip to Expiring at T-60 and remind Accounts, the consultant and the customer at 60/30/15/7 days. Outstanding dues surface in the portal.

AI That Assists, Never Decides

Triage, thread summaries and reply drafts are suggestions a human confirms. Every call is logged with tokens and latency.

Multi-Tenant by Design

Row-level tenancy on every table, separate staff and portal auth realms, white-label branding — your logo, colours and domain.

Modules



Major Features

- ✓ Browser-based, responsive — nothing to install
- ✓ Staff, Customer and Distributor logins in separate security realms
- ✓ 11-state request lifecycle, illegal transitions blocked
- ✓ Business-hour SLAs, 80 % warnings, escalation tiers
- ✓ Internal vs customer comment streams, stripped at the API
- ✓ Tags, saved views, macros, bulk actions
- ✓ Linked & duplicate tickets, unified timeline
- ✓ Snooze while waiting on customer — SLA pauses
- ✓ Quotation draft → send → portal approval → development
- ✓ AMC lifecycle with T-60 / 30 / 15 / 7 reminders
- ✓ Invoices, payments, outstanding & AMC dues in portal
- ✓ Implementation checklists: Kickoff → Go-Live → Support
- ✓ Tasks with subtasks linked to requests and go-live steps
- ✓ Knowledge base for staff and customers, global search
- ✓ CSAT rating on every closed request
- ✓ Auto-assignment rules, customer allocation grid
- ✓ Per-customer module allocation gates portal requests
- ✓ Internal IT tickets with asset register
- ✓ Multi-step approval workflows
- ✓ Customer health score, recomputed nightly
- ✓ AI triage, summarise, reply-draft (Gemini or Claude)
- ✓ Live ticket updates and chat over WebSockets
- ✓ Management reports with XLSX export
- ✓ Audit trail on every create, update and delete
- ✓ White-label theming, logo and SMTP per tenant

The Request Lifecycle, Enforced

Every support ticket, bug, enhancement, data fix or training request is a **Work Request** moving through one server-side state machine. Illegal moves are refused with the allowed next steps; every transition is audited and fires the notifications, SLA timers and portal updates behind it.



Also: **On Hold** from any active state with reason (SLA pauses) · **Reopened** within the verification window returns to development with full history · **Internal** type for IT/helpdesk tickets with no customer.

SLA & Escalation

Priority	First response	Resolution target
CRITICAL	2 business hrs	1 business day
HIGH	4 business hrs	3 business days
MEDIUM	8 business hrs	7 business days
LOW	16 business hrs	15 business days

- ✓ Targets configurable per tenant; clocks run on **your business hours and weekend** (Fri/Sat default)
- ✓ Warning at 80 % to the assignee; breach notifies assignee + Team Leader; tiered escalation to PM and Management after configurable hours
- ✓ Clock pauses in On Hold, Customer Verification and while **snoozed waiting on the customer**
- ✓ Auto-assignment rules route new requests by customer allocation, module or round-robin

Fields that matter

Subject, customer, requested-by contact, application module (from the customer's allocated modules), priority, category (Bug · Enhancement · Support · Data · Training), rich-text business requirement, expected date, consultant ETD visible to the customer, consultant and developer, billable flag, quotation link, attachments, tags, linked assets.

Agent productivity

Unified Timeline

Status changes, comments, time logs, attachments, links and AI actions in one chronological view.

Two Comment Streams

Internal and customer-visible on one thread; internal notes stripped in the API, not just hidden.

Macros

Canned responses that can also set status, tags and assignee in one click.

Tags & Saved Views

Normalised tags with autocomplete; personal and shared filter views for queues.

Bulk Actions

Reassign, tag, close or delete many requests at once, each change audited.

Linked Tickets

Related and duplicate links; close duplicates against the master.

Time Logs

Billable / non-billable hours per request, rolled up to request and customer effort reports.

Live Updates

Open tickets refresh in real time over WebSockets; in-app and email notifications per preference.

Self-Service Your Customers Will Actually Use

The two things customers ask for first — “*where is my request?*” and “*what do I owe / when does my contract end?*” — answered without a phone call. Portal users authenticate in a separate realm and only ever see records flagged visible for their own company.

Customer Portal

- ✓ **Raise requests** with attachments against the modules allocated to the company; AI triage suggests priority to your consultant
- ✓ **Approve or reject** requests raised by colleagues (Customer Admin), and **approve quotations** online — the approval unlocks development
- ✓ **Track status**, ETD and customer-visible comments; accept or reopen at verification; rate the experience (CSAT)
- ✓ **Snooze-aware**: when you are waiting on the customer, they see it and the SLA clock pauses
- ✓ **Billing**: invoices, payments, total outstanding and AMC dues — shown only when finance visibility is switched on for that customer
- ✓ **AMC status**, shared documents, upcoming meetings, knowledge-base articles and a company page with their own contacts
- ✓ **Chat** with your team per company, with read receipts and request-scoped threads

Distributor Portal

- ✓ One login spanning **every customer the distributor covers** — requests, allocated modules and AMC status per customer
- ✓ Raise requests **on behalf of** a customer; the thread stays visible to both
- ✓ Staff manage distributor-customer coverage and can issue portal logins

Request-to-cash, closed



What this means for you

- ✓ Fewer “any update?” emails — status, ETD and comments are self-served
- ✓ Quotations approved with an audit trail, not a WhatsApp “ok”
- ✓ Dues and AMC expiry visible to the customer every time they log in
- ✓ Distributors stop forwarding tickets by email
- ✓ Internal notes can never leak — enforced in the API
- ✓ CSAT on every closed request, summarised per customer

PORTAL ROLES

Customer Admin

Customer User

Distributor

TARGET

≥ 80 % of requests raised via portal by month 6 — one of the five success metrics OneDesk is designed around.

Implementations, Projects, Tasks & Time

Go-lives and enhancements are tracked with the same discipline as tickets — and linked to them, so a developer's task, the request it came from and the hours it took are one picture.



Implementation Tracker

Every onboarding is a checklist of steps with planned and actual dates, owner and remarks. Default template seeded: **Kickoff → Requirement Study → Configuration → Data Migration → UAT → Training → Go-Live → Post Go-Live Support**. Percent complete is computed from steps; attachments and notes stay with the implementation. Admin-only delete, single or bulk.



Projects & Project Tasks

Implementation, enhancement, migration or other; planned → in progress → on hold → completed, with manager, budget hours, target and actual dates. Tasks with assignee, estimate, due date, dependencies and blocked status.



Personal Task Ledger

Tasks linked to work requests or implementation steps, with one-level subtasks that auto-complete the parent. PMs and admins see the whole team's workload; everyone else sees their own. Closing a linked task moves its request to Customer Verification.



Time Logs & Effort

Hours against requests or project tasks, billable or not, with notes. Roll-ups per request, per customer and per consultant feed utilisation and effort reports.

Calendar

- ✓ Meetings, site visits, trainings, internal events and leave on one calendar
- ✓ Customer link, attendees, location or meeting link, reminder offsets
- ✓ Task and subtask due dates appear alongside events
- ✓ Reminders delivered in-app and by email to attendees

Documents & Notes

- ✓ Attach files to requests, implementations, tasks and customers — versioned per logical document
- ✓ Customer-visible flag per document; portal downloads via short-lived signed URLs
- ✓ 25 MB uploads, extension whitelist, virus-scan hook ready
- ✓ Append-only notes on tasks and implementations, always addable even when closed

Customer Allocation Grid

Any number of Consultants, Team Leaders and Project Managers per customer (minimum one consultant). Drives auto-assignment, escalation targets and who sees what.

Customer Modules

Allocate the application modules each customer owns. Portal and distributor requests can only be raised against allocated modules.

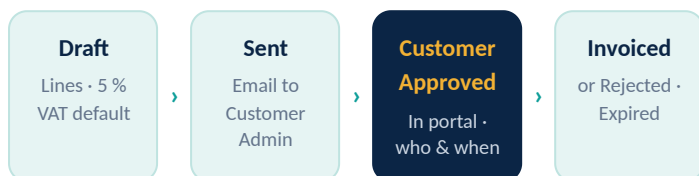
Health Score

Five weighted factors — open requests, SLA breaches, AMC status, outstanding and engagement — recomputed nightly and shown on the customer record and dashboards.

Quotations, AMC & Billing Visibility

OneDesk is not an accounting system — Integra Finance is. OneDesk owns the commercial steps that sit between a request and the ledger: quoting, approval, contract renewal and showing the customer what is due.

Quotations



- ✓ Per-tenant sequence numbers that never collide, even with soft-deleted drafts
- ✓ Linked to the billable request — approval moves it from Awaiting Quotation to In Development automatically
- ✓ Sales can draft; Accounts issue; Customer Admin approves — three roles, one record

AMC Contracts

Status	When	Who is told
ACTIVE	Start to T-60 days	—
EXPIRING	Flipped automatically at T-60	Accounts · consultant · Customer Admin at T-60 / 30 / 15 / 7
EXPIRED	End date passed	Dashboard “expiring 90 days” and renewal pipeline report
RENEWED	New contract links to the old	Renewal chain preserved

Invoices & Payments

- ✓ Raise invoices in OneDesk (Sales · AMC · Service) or import from your accounts software by CSV / XLSX
- ✓ Record payments against invoices; balance and ageing maintained
- ✓ Unbilled and unpaid AMC counted as outstanding alongside invoices
- ✓ Staff dashboard: outstanding total, split Invoices-due and AMC-due tiles
- ✓ Overdue flags notify Accounts and the PM

Finance visibility, per customer

A single switch on the customer record decides whether their portal shows money at all. When on, the portal dashboard carries a **Total outstanding** tile, a polite dues banner and a billing page with invoices, payments and AMC dues.

Report: Outstanding Ageing

Current · 30 · 60 · 90 · 90+ per customer, exportable to XLSX together with the AMC renewal pipeline.

100%

BILLABLE WORK CARRIES AN APPROVED QUOTATION

T-60

AMC FLIPS TO EXPIRING AUTOMATICALLY

4

RENEWAL REMINDERS · 60 / 30 / 15 / 7 DAYS

AED

DEFAULT CURRENCY · DD-MM-YYYY · ASIA/DUBAI

Everything Else the Service Desk Needs

Knowledge Base

Articles for staff and for customers, published to the portal and covered by the global search across requests, customers and articles.

Chat & Messages

One real-time channel per customer between your team and theirs; messages tagged to a request ("Regarding...") and answered in context. Read receipts included.

Internal IT Tickets & Assets

Internal-type requests have no customer and never reach the portal. An asset register (active · in repair · retired · lost) links assets to their tickets.

Approval Workflows

A generic multi-step approval primitive: request → ordered steps → decide. Actionable, approved and rejected events notify the right people.

Employees & Leave

Employee directory with reporting lines; sick / casual / unpaid leave with policy balances, weekend-aware day counts, approvals, auto-conversion of exhausted balance to unpaid. Daily birthday and anniversary greetings.

Master Data

Generic master framework — application modules and more — add/edit for PMs, delete reserved for Super Admin.

Dashboards

Management

Open requests by status and priority, SLA compliance %, outstanding (AED), AMC expiring in 90 days, implementations % complete, team utilisation, 14-day trend.

Consultant / Developer

My queue sorted by SLA due, today's meetings, my pending verifications, my tasks.

Customer Portal

My open requests, AMC status, outstanding and dues (if enabled), shared documents, upcoming meetings.

Reports & exports

SERVICE

Request Ageing · SLA Compliance · CSAT Summary · Effort by Customer

COMMERCIAL

AMC Renewal Pipeline · Outstanding Ageing

PEOPLE

Leave Summary · Team Utilisation (logged vs capacity)

FORMAT

On-screen with charts, one-click **XLSX download**, filters by customer, consultant and date range

NOTIFICATIONS

19 event types across requests, SLA, approvals, AMC, invoices, quotations, leave, HR, calendar and chat — in-app always, email per user preference, delivered through a queue so a slow mail server never slows a save.

SUCCESS METRICS BUILT IN

- ✓ First-response SLA ≥ 90 %
- ✓ ≥ 80 % requests via portal
- ✓ AMC renewal ≥ 95 %, zero lapses
- ✓ Resolution time -30 %
- ✓ 100 % billable work quoted first

An AI Layer That Works Alongside Your Consultants

OneDesk puts large-language-model assistance exactly where a support consultant loses time — reading a new request, catching up on a long thread, and writing the customer update. Suggestions only; a human confirms. Keys live on the server, never in the browser, and every call is logged.



Request Triage

On creation, the AI proposes category, priority and a set of clarifying questions for the consultant — drawn from the subject, requirement and attachments. The consultant accepts or edits.



Summarise Thread

One click turns a long request history — comments, status changes, time logs — into a short brief for a hand-over, an escalation or a management review.



Reply Draft

Drafts a customer-facing status update from the internal notes, in the right tone, with nothing internal leaking. The consultant edits, then posts to the customer stream.

Provider Choice • Your Key

Google Gemini by default, Anthropic Claude when you want deeper reasoning — switch with one setting, bring your own API key. AI access is a permission (**ai.use**) you grant per role, and usage (prompt hash, tokens, latency) is recorded in an AI usage ledger for cost control.

Health Score, Not Guesswork

Each customer carries a nightly-computed health score from five weighted signals — open and breached requests, AMC status, outstanding, engagement — so account reviews start with a number, and churn risk shows on the dashboard before the renewal call.

Built for where customer success is going

Customers expect answers in the channel they are already in, on the device in their hand, with the finance picture attached. OneDesk is upgraded on a published roadmap so customers receive these as releases, not re-implementations.



WhatsApp & Teams Notifications

Status changes, SLA alerts and AMC reminders in the channels customers already read; architecture already event-driven.



Live Accounts Sync

Two-way sync with Integra Finance and other accounting systems through the sync queue — invoices and payments without CSV.



External Calendar Sync

Google and Microsoft 365 calendars for meetings, visits and reminders.



Mobile App

Approvals, queue and notifications on the phone, on the same API the web app uses today.



2FA & SSO

TOTP second factor for staff (schema ready) and single sign-on for enterprise tenants.



Arabic Interface & HRMS Link

Right-to-left Arabic UI on the existing i18n dictionary; Nexus HRMS integration replacing the built-in leave module.

Roadmap items are planned enhancements and are released progressively; timing is shared with customers under agreement.

Enterprise-Grade Foundation



Multi-Tenant Platform

Every business table carries the tenant; a database-level extension filters every query. White-label SaaS is configuration, not a rewrite. Cloud SaaS or on-premise.



Two Security Realms

Staff and portal users authenticate against separate endpoints with separate token audiences — a portal user can never hold a staff token. Short-lived access tokens with rotating refresh, bcrypt, logout after 5 failures, rate-limited login.



Roles & Permissions

12 seeded roles, 90 permission keys in *module.action* form, enforced by a guard on every endpoint and mirrored in the UI. Roles are data — tenants can customise.



Audit Trail

Every create, update and delete on business entities records who, when and the before/after diff. Soft deletes everywhere; hard deletes only by retention jobs.



API-First

One REST API (/api/v1, 220+ endpoints) serves the web app today and mobile or integrations tomorrow. Consistent envelopes, pagination, search and stable error codes.



Operations

Health endpoint covering database and queue, structured request-ID logging, error tracking hooks, daily database backup script with 30-day retention, documented ops log.

Multi-tenant

PostgreSQL 16 • Redis 7

Node.js • TypeScript

Queue-driven side effects

WebSockets

UAE data residency

Browser-based • responsive

Connects to Integra Finance • Ontrack ERP • WMS



Ready to run your customer desk on **one thread?**

Book a live demonstration with your own customers, a week of real requests and an expiring AMC contract. We will show you the portal, the SLA clock, quotation approval and the AI assistant on your data.

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