Integration Process Document

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Applicable Teams: Sales, Account Management, Onboarding, Backend Development

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I. PRE-SALES STAGE

1. Requirement Initiation

- The client raises an integration or custom development requirement.
- This requirement is communicated to the **Salesperson**.

2. Requirement Understanding

- The **Salesperson** thoroughly understands (sales initiates the mail)
  - The client's use case
  - The exact business need behind the integration request and initiates a separate integration mail thread

Email Thread (Any kind Integration/API related meeting)
Subject: Company Name × Anantya.ai | Integration **To: rose@anantya.ai** **Cc: support@anantya.ai, mokshika@anantya.ai, Priyanka@anantya.ai, lakshay@anantya.ai** **KSA:** shaheeba@connectsaudi.com **Bahrain:** Iman.m@mobishastra.com, Wasif@mobishastra.com Hi Team, Greetings of the day! I'm initiating an email thread for all integration-related conversations.

If required priyanka@anantya.ai & divyanshu@anantya.ai will be looped to take forward the requirement request.

3. Preparation of Scope of Work (SOW)

- Based on the client discussion, the **Central Support team** prepares a detailed **SOW document**.
- This SOW includes:
  - Objective of integration
  - Key technical or workflow requirements
  - Any third-party dependencies (if applicable)

4. Feasibility Evaluation

- **Central Support team will**:
  - Coordinate with the **Development Team** to validate technical feasibility via feasibility ticket creation.
  - Collects:
    - **Feasibility Status** (Yes/No/Conditional)
    - **Cost Estimate** for the integration
    - **Estimated Timeline**

5. Approval & Communication

- The integration costing and timeline are sent to **Yashika Ma'am** for approval.
- Once approved:
  - The final integration details are shared with the **Account Manager**, **Salesperson**, and **Client**.
- Delivery of the integration will be done post onboarding, all the integration communication remains over the integration email thread.

II. POST-SALES STAGE

The account manager will initiate a separate email thread to start the integration discussion post the account credentials are shared & panel training is done.

Client: Email Thread 3 (Any kind Integration/API related meeting)
Subject: Company Name × Anantya.ai | Integration **To: Client id, priyanka@anantya.ai** **Cc: support@anantya.ai** **divyanshu@anantya.ai, sales person, mokshika@anantya.ai, lakshay@anantya.ai** **KSA:** shaheeba@connectsaudi.com **Bahrain:** Iman.m@mobishastra.com, Wasif@mobishastra.com Hi Team, Greetings of the day! I'm initiating a separate thread for all integration-related conversations. @Priyanka (loop ID) from the team will be overseeing the process.

1. Preparation of Scope of Work (SOW)

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  - Collects:
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    - **Cost Estimate** for the integration
    - **Estimated Timeline**

3. Approval & Communication

- The integration costing and timeline are sent to **Yashika Ma'am** for approval.
- Once approved:
  - The final integration details are shared with the **Account Manager**, **Salesperson**, and **Client** on the same mail thread.
- The signed SOW will be shared by the client.
- Invoice will be created for the integration requirement.

4. Initiation of Integration

- The Central Support Team will create an Account Related Requirement ticket.

- Backend will **not** begin the integration unless: Integration brief and invoice number are filled in the Account Related Requirement Ticket.

5. Progress Updates & Completion

- The Central Support Team shall be responsible for:
  Providing timely updates to the Account Manager and Client regarding the integration status.
- Coordinating with the Backend Team to ensure the integration is completed within the defined timelines.
- Escalating any delays or technical issues immediately to the concerned stakeholders.

6. Delivery of the Integration

- The completed integration will be delivered to the Client upon successful testing and validation.
- A meeting or walkthrough session will be scheduled with the client, if required, to explain the implementation and address any queries.

7. Payment Confirmation

- The Account Manager must ensure payment confirmation is received within one week after the delivery of the integration.
- Any delay in payment confirmation should be escalated to the sales person for necessary action

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Key Contacts

- **Account Manager/Salesperson** – First point of contact for the client
- **Rose/Priyanka** – Feasibility, onboarding coordination, ticketing, progress tracking
- **Rose/Backend Team** – Technical implementation
- **Rose:** All the escalations
- **Yashika Ma’am** – Final approval on costing.

Integration Process Document- Africa

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I. PRE-SALES STAGE

1. Requirement Initiation

- The client raises an integration or custom development requirement.
- This requirement is communicated to the **Salesperson | Sales Head | Ronak**.

2. Requirement Understanding

- The **Salesperson** thoroughly understands (sales initiates the mail)
  - The client's use case
  - The exact business need behind the integration request and initiates a separate integration mail thread

Email Thread (Any kind Integration/API related meeting)
Subject: Company Name × Anantya.ai | Integration **To: ronak@anantya.ai** **Cc: support@anantya.ai, Priyanka@anantya.ai, Country Head, allabakshu@telkosh.com** **Egypt :** nada@telkosh.com **DRC :** liliane@telkosh.com **Kenya :** ian@telkosh.com **Zambia :** ronald@telkosh.com **Tanzania :** hassan@telkosh.com **|** gift.ditopile@telkosh.com Hi Team, Greetings of the day! I'm initiating an email thread for all integration-related conversations.

If required priyanka@anantya.ai will be looped to take forward the requirement request.

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    - Collects:
        - **Feasibility Status** (Yes/No/Conditional)
        - **Cost Estimate** for the integration
        - **Estimated Timeline**

5. Approval & Communication

- The integration base costing and timeline are sent to **Yashika Ma'am** for approval.
- The integration's Final sales costing will be sent to **Allabhasku Sir/Ronak** for approval.
- Once approved:
    - The final integration details are shared with the **Account Manager**, **Ronak, Salesperson**, and **Client**.
- Delivery of the integration will be done post onboarding, all the integration communication remains over the integration email thread.

II. POST-SALES STAGE

The account manager will initiate a separate email thread to start the integration discussion post the account credentials are shared & panel training is done.

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I’m initiating a separate thread for all integration-related conversations. @Priyanka (loop ID) from the team will be overseeing the process.

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3. Approval & Communication

- The integration base costing and timeline are sent to **Yashika Ma’am** for approval.
- Once approved:
  - The final integration details are shared with the **Account Manager**, **Ronak** , **Salesperson**, **Sales Head/Country Head** and **Client** on the same mail thread.
- The signed SOW will be shared by the client.
- Invoice will be created for the integration requirement.

4. Initiation of Integration

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  Backend will **not** begin the integration unless: Integration brief and invoice number are filled in the Account Related Requirement Ticket.

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Key Contacts

- **Account Manager/Salesperson** – First point of contact for the client
- **Ronak** – Feasibility, onboarding coordination, ticketing, progress tracking , Panel Trainings, Demonstrations
- **Allabakshu Sir** – Final approval on costing.