ZOHO CATEGORIES BOOST

Department (Zoho)	Category	Sub-Categories
User & Access Management	Login & MFA	Login failure, MFA reset, Password reset, Access denied
	Account Lifecycle	New account, Deactivation, Reactivation
	Onboarding / Offboarding	New joiner setup, Leaver offboarding, Role updates
	Profile / Permissions	Role change, Permission updates, Personal detail corrections
Contracts & Change Log	Contract Issues	Core, Non-Core, AC, Subcontractor, DocuSign issue
	Contract Amendments	Extension, Secondment, Variation
	Change Log	Role change, Salary update, Probation update, Line manager change
	Onboarding Verifications	Background checks (RDC, Navex, First Advantage), ID & references, documents
Time & Expense Management	Time Logs	Submission, Approval, Sync issues
	Expense Logs	Submission, Categories, Receipt upload, Sync with Sage
	Petty Cash	Submission, Sync, Errors
	AP Invoices	Submission, Status, Duplicate error

	Associate Invoices	Upload issue, Status check, IC Trx error
	Supplier Invoices	Submission, Approval, Tax mismatch
Finance & Purchasing	Purchase Orders	Creation, Amendment, Pending approval
	Invoice vs PO Issues	Mismatch, Resubmission, Sync failures
	Sage Sync Failures	Not synced, Partial sync
Project & Performance	Project Setup	New project, Updates, Manager assignment
	Appraisals	Setup issue, Peer review, Reflection, Goal setting
	Training & Compliance	Records update, Training issues
Leave & People Management	Leave Requests	Submission, Approval, Balance check, Reversal
	People Directory	User not showing, Wrong department, Reporting line issue
	Onboarding	Verification pending, Reference issue, Compliance forms
	Account Status	Reactivation, Deactivation
System & IT Support	Device Compliance	Microsoft Intune, Encryption, Company Portal
	Software / OS	MacOS/Windows update, Patch issues
	Email & Outlook	Access issue, Sync with OS
	Integrations	SharePoint, Teams, Bubble, Gleap
	Technical Debt	Rework, performance fixes

	Implementations	New Features
	Bug Reports	Error pages, Data not saving, Slow load, glitches, OS bugs
Knowledge Base Requests	How-To Requests	Step-by-step guidance
	Policy/Compliance Clarification	HR, Finance, IT policies
	Training Material	User guides, Videos, Templates

BOOST – Zoho Ticketing Categories Process Map

Purpose

This process map shows the journey of a support request (ticket) within the ASI Operating System (OS) using Zoho Desk.
Tickets enter through a **single entry point**, are categorised into Departments, routed to the correct team, and resolved with feedback captured into the Knowledge Base for continuous improvement.

High-Level Swimlane

Step	Action	Owner / Department
1	User submits ticket via OS/Zoho	End User
2	Ticket categorised by Department & Category	Zoho Automation
3	Ticket routed to appropriate team	Finance / HR / IT / DevOps / OS Support
4	Team investigates & resolves issue	Assigned Team
5	Resolution communicated to user	Zoho / Assigned Team
6	Knowledge captured for future reference	OS Support Team

Key Notes

- All tickets must enter via a **single entry point** in Zoho to maintain tracking integrity.
- Categories mirror OS workflows: **User & Access, Contracts, Finance, Projects, Leave, IT, Knowledge Base.**
- Automated routing ensures Finance, HR, IT, and DevOps receive

relevant tickets directly.
- Resolved tickets feed into a **central Knowledge Base** to reduce repeat queries.
- **SLAs (response & resolution times)** will be tracked against ticket categories for reporting in the pilot.

Organising ZOho:

1. Departments (Top Level)

Departments = broad owner groups. These should mirrorthe partner functions:

- **OS Support (BOST)** → Core triage & guidance
- **Finance** → Invoices, POs, Sage sync
- **HR / People & Talent** → Contracts, Change Log, Leave
- **IT Support** → Devices, email, MFA
- **DevOps** → OS bugs, integrations, Bubble, Gleap

Each ticket must live in **one Department**. Sarju will make sure it's assigned to the right one.

2. Categories & Subcategories (Within Departments)

These give structure inside each department.
Example:
Finance Department

- Purchase Orders → Creation, Amendment, Approval
- Invoices → AP, Associate, Supplier
- Sage Sync → Failures, Duplicates

HR Department

- Contracts → Core, Non-Core, Associate Consultant, Subcontractor
- Amendments → Extension, Secondment, Variation
- Change Log → Role, Salary, Probation, Line Manager
- Leave → Requests, Reversals, Balances

IT Department

- Access → Login, MFA, Email
- Device Compliance → Intune, Encryption, Company Portal
- Software/OS → Updates, Patches
- Integrations → SharePoint, Teams

Ticket / Task Layout (BOOST)

Core Identification Fields

- Ticket ID (auto)
- Subject / Short Description
- Detailed Description (open text)
- Attachments (optional) - but mandatory if error reported
- Contact Name / Email

Categorisation Fields (Mandatory)

- Department (Finance, HR/P&T, IT, DevOps, OS Support)
- Category (Access, Contracts, Invoices, Leave, etc.)
- Subcategory (MFA reset, Contract extension, Supplier invoice, Leave reversal)
- Classification:
  - **Incident** (user error/one-off problem)
  - **Bug** (system error that needs DevOps fix)
  - **Service Request** (standard request, SOP-driven)
  - **Change Request** (contract/system/HR/Finance change)
  - **Implementation/Enhancement** (new Dev work, feature request)
  - **How-To/Query** (guidance/clarification)

Operational Control Fields

- Status (New, In Progress, Waiting on User, On Hold, Escalated, Resolved, Closed)
- Priority (Low, Medium, High, Critical)
- Channel (OS Support Hub, Email, Teams, Phone, Manual)
- Owner (auto-assigned by Department queue)
- Due Date / SLA Timer (auto by Zoho)

Dependency & Relationship Fields

- Linked Ticket/Task (dependency tracking)
- Parent/Child Ticket (hierarchy support)
- Escalation Flag (auto when Escalated)
- Knowledge Base Link (attach SOP or KB article)

Resolution & Closure Fields

- Resolution Notes (mandatory for Resolved/Closed)
- Resolution Type (SOP Followed, Custom Action, Escalation Decision)
- Feedback Log (auto prompt to user: "Was your query resolved?" Yes/No + comments)
- KB Update Required (checkbox → Process Manager for SOP/KB update)

3. Ticket Fields (Standard for ALL Tickets)

To make reports and dashboards meaningful, you'll need mandatory fields:

- **Department** (Finance / HR / IT / DevOps / OS Support)
- **Category** (e.g., Contract Issue, Expense Log, Access)
- **Subcategory** (e.g., Extension, Supplier Invoice, MFA Reset)
- **Priority** (Low / Medium / High / Critical)
- **Status** (New, In Progress, Waiting on User, Escalated, Closed)
- **SLA Clock** (Zoho auto-tracks this: response & resolution)

4. Roles & Permissions

- **Eliza (Business Partner Manager)** → Admin: full visibility, reporting, SLA dashboards.
- **Raj (Process Manager)** → Admin: category/process configuration.
- **Sarju (BOOST Assistant)** → Manager: access all tickets, re-assign,

share with partners, export reports.
- **Partners (Finance, HR, IT, DevOps)** → Agents: only see their own Department tickets.
- **End Users (Staff & Consultants)** → Customers: can only see and track their own tickets.

5. Dashboards
- **Eliza & Raj** → holistic view (all depts., SLAs, CSAT).
- **Sarju** → daily operational dashboard (all tickets, escalations, overdue).
- **Partners** → departmental dashboards (Finance: invoices, HR: contracts, etc.).
- **Leadership (Expert Panel)** → monthly SLA/CSAT overview (high-level only).

6. Knowledge Base Integration
- Tickets → Resolution → KB Article (if new/recurring).
- Categories must **match KB sections** (Finance KB, HR KB, IT KB…).
- This ensures self-service success can be measured.

In summary:
- **Departments** = Who owns the ticket.
- **Categories/Subcategories** = What type of issue it is.
- **Ticket fields** = Data for reporting.
- **Roles** = Who sees what.
- **Dashboards** = How progress is tracked.
- **KB link** = How repeat tickets reduce.