

From Ticket Backlog to Instant Resolution: AI in Supplier Support

Vlad Ciocan










VP, Customer Success & Performance
apexanalytix

Jack Passmore

Global Solutions Consultant & Partner Manager
apexanalytix



Session Agenda

-  **The Problem** Why supplier support needs automation
-  **Introducing the Agent** What it is and how it fits
-  **How It Works** End-to-end process flow
-  **Security & Threat Detection** Authentication and safeguards
-  **Use Cases in Action** Live walkthrough of real scenarios
-  **Escalation & Handoff** Human-AI collaboration
-  **Knowledgebase & Config** Setup and customization
-  **Getting Started** Implementation overview
-  **Q&A** Open discussion

The Challenge

Supplier helpdesk teams at large enterprises face mounting pressure from rising ticket volumes, creating a cycle of slower responses, inconsistent answers, and escalating costs.

1000s

of repetitive tickets
per week

The same invoice and payment
status questions asked repeatedly

8-24h

average response
time

Each requires manual lookup
and a composed reply

60%+

of tickets are
routine inquiries

Taking humans away from
complex, high-value work

Introducing the Ticket Response Agent

Part of the apexanalytix platform

A GenAI-powered agent that integrates with your existing helpdesk platform to automatically read, classify, and respond to supplier inquiries — using real-time portal data and your own document knowledgebase.

This is not a keyword-matching chatbot. It pulls live transactional data and understands context to deliver personalized, data-informed responses.



Integrates with Freshdesk, Zendesk, ServiceNow, or email



Queries live portal data for invoice, payment, and vendor details



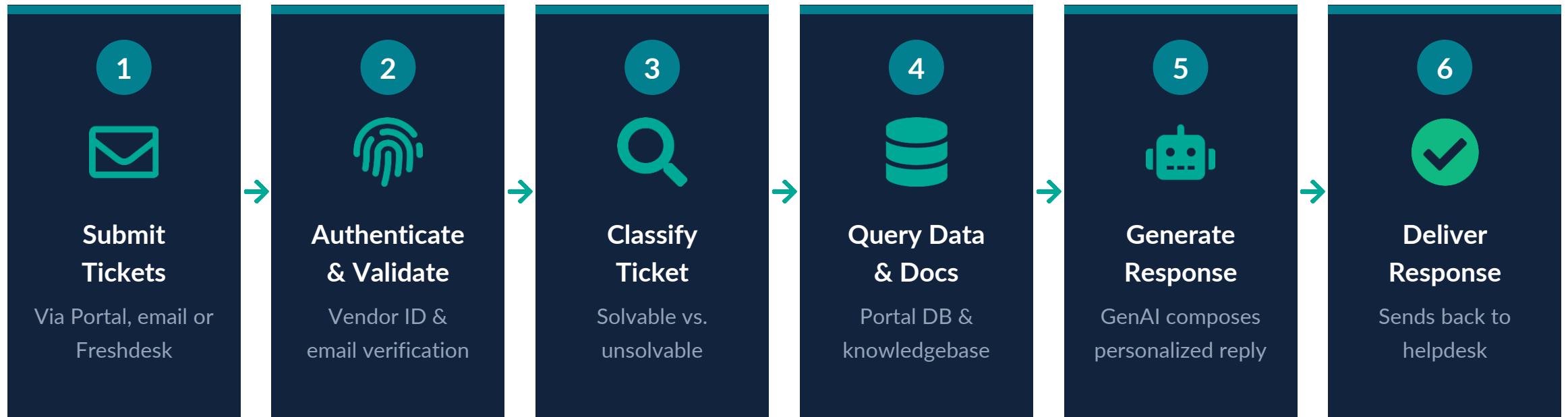
Searches client-specific document knowledgebases



Fully automated responses with no human intervention needed

How It Works

End-to-end automated ticket processing pipeline



Ticket Classification

The agent determines what it can and cannot solve before responding



Fully Solvable by Agent

- Invoice Status Inquiry
- Payment Status Inquiry
- Payment Details Inquiry
- Remittance Details Inquiry
- How-to questions
- General support from knowledgebase

Requirements: English, no negative sentiment, no external system references



Routed to Human Agent

- Document/certificate requests
- Payment delay or past-due inquiries
- Invoice/PO issues & discrepancies
- Vendor record updates
- Registration status inquiries
- Block removal requests
- Non-English tickets

Security & Threat Detection

Multi-Layer Authentication

- ✓ Vendor number verified against portal database
- ✓ Requester email mapped to vendor record
- ✓ Cross-vendor access attempts blocked
- ✓ Freshdesk contact fallback for missing vendor IDs

Automatic Threat Detection

- ✗ Requests for sensitive data (TIN, SSN, bank details)
- ⚠ Cross-vendor data access attempts
- 🛡 Malicious instruction injection attempts



No Public Cloud

All data hosted on private infrastructure



No Unauthorized Access

Vendor-level segmentation



No Data Tampering

Client-controlled knowledgebases

Use Case: Invoice Status Inquiry

The most common ticket type – fully automated with data-rich responses

- 1 Supplier submits ticket: "Please provide invoice status"
- 2 Agent authenticates vendor and validates the request
- 3 Agent queries portal database for invoice E258470222 / PO PO432109
- 4 Agent responds with detailed table: invoice number, date, amounts, PO, status, payment due date
- 5 Supplier follows up: "How many open invoices do I have?" – Agent responds with all 3 open invoices

Ticket Status: **Agent Responded** | Group: **AI Agent Group** | Multi-turn conversation supported

Use Case: Payment & Remittance Inquiry

Agent identifies payment issues and provides actionable guidance to the supplier

- 1 Supplier submits ticket: "When will I receive payment for this invoice?"
- 2 Agent authenticates the vendor and retrieves invoice R658257585 / PO PO987654
- 3 Agent queries payment data – finds invoice is blocked due to pricing and/or quantity issues
- 4 Agent explains the blocked status and the payment due date (2025-02-07)
- 5 Agent advises supplier to contact their Representative/Requestor to resolve pricing discrepancies

Ticket Status: **Agent Responded** | Group: **AI Agent Group** | Blocked invoices explained with next steps

Use Case: Unsolvable Ticket Routing

Agent recognizes requests outside its scope and routes them to the right human team

- 1 Supplier submits ticket: "Can you update the invoice to include our VAT number? XX123456789"
- 2 Agent authenticates the vendor – user is valid and authorized
- 3 Agent classifies ticket as an update request – falls outside solvable categories
- 4 Agent sends canned acknowledgment: "We have received your ticket and are currently investigating the matter"
- 5 Ticket tagged as `Unsolvable_Ticket_Issue`, status set to Need Review, assigned to Customer Support group

Ticket Status: **Need Review** | Tag: **Unsolvable_Ticket_Issue** | Human agent sees full context on why it was escalated

Use Case: Document-Based Guidance

Agent draws from uploaded documentation to guide suppliers through processes

- 1 Supplier submits ticket: "How do I update my company's mailing address?"
- 2 Agent authenticates the vendor – user is valid and authorized
- 3 Agent classifies the ticket as a how-to / guidance request – fully solvable
- 4 Agent searches the knowledgebase and retrieves relevant user guide documentation
- 5 Agent responds with step-by-step instructions for making the address change through the portal

Ticket Status: **Resolved** | Category: **Vendor Record Maintenance** | No human intervention needed

Freshdesk Demonstration

Ticket Response Agent Walkthrough

Escalation & Human Handoff

The agent is designed to complement human teams – handling volume so your people can focus on complexity



Unauthorized User Request

Vendor number cannot be authenticated – ticket routed for identity verification



Unsolvable Ticket Issue

Ticket type falls outside agent's capabilities – classified and routed with context



Escalation Threshold Exceeded

Configurable threshold reached (e.g., 2 exchanges) without resolution



Security Threat Detected

Sensitive data request, cross-vendor access, or malicious instruction detected



AI System Error

Internal processing error (DB connection, document retrieval failure)

Every exception tag is fully configurable. Human agents receive full context on why each ticket was escalated – enabling faster, more informed resolution.

Knowledgebase & Configuration



Document Knowledgebase

Public policies
Compliance requirements
Private documentation
User guides & manuals

*~10 sec to learn new docs
(<50 pages)*



Portal Data

Vendor profiles
Invoice data
Vendor activity
Compliance status
Risk data

*Real-time queries
against live data*



Configuration Options

Email and Freshdesk Integration
Group assignments
Canned responses
Escalation thresholds
Valid domains

*All settings fully
customizable per client*

User segmentation supported – different user types receive only the information they are authorized to see.

Getting Started

A proven path to production

1

Integration Setup

Connect to your existing helpdesk system via API – Freshdesk or email inbox

2

Configuration

Define prompts, field mappings, escalation rules, valid domains, and scheduling frequency

3

Knowledgebase Upload

Upload policies, user guides, and documentation – learned by the agent in seconds to minutes

4

Validation & Go-Live

Test with real ticket scenarios, refine classification rules, and deploy to production

From Ticket Backlog to Instant Resolution: AI in Supplier Support

Vlad Ciocan

VP, Customer Success & Performance
apexanalytix

Jack Passmore

Global Solutions Consultant & Partner Manager
apexanalytix

