



iPurchase™

PO Requisition Management/Approval

ISS Group Introduction



- Founded in 1986 (www.ISSGroup.com)
 - Founder and CEO, Andrew Weinstein
- 1986 – 2000 sold and implemented various ERP, CRM and eCommerce Solutions to SMB and Fortune 1000 Manufacturers
 - 1995 – 2000 QAD Reseller
 - 1996 released 1st QAD add-on Solution (*MFG/PRO on the Web; Trading Partner Transactions*)
- 1995 – Today have provided add-on Solutions and Implementation Consulting Services to 300+ QAD User Organizations
- Provider of *Procure to Pay (P2P)* and *Business Process Improvement Solutions* exclusively to the QAD User Community

ISS Group Solutions

- **iApprove™** - 'Data-Driven' Workflow/Approval Routing
- **iPurchase™** - Purchase Order Requisition Management/Approval
- **iVoucher™** - Supplier Invoice Reconciliation/Approval
- **iQuote™** - Sales Order Quotation Management/Approval

iPurchase™ : PO Requisition Management/Approval

- ❑ On-Premise or Hosted Solution
- ❑ Auto-create QAD PO upon Requisition Approval
- ❑ 5 methods to create electronic Purchase Order Requisitions
 1. iPurchase™ Workbench
 2. eCommerce Shopping (PunchOut)
 3. Hosted Catalog Management
 4. QAD MRP Action Center
 5. QAD EAM Integration
- ❑ Utilizes ISS Group's 'Data-Driven' Workflow/Approval Routing Technology
- ❑ Approve/Reject Requisition from within eMail
- ❑ Buyers Portal/Supplier Performance (*coming soon!*)
- ❑ Project Budgeting/Spend Tracking
- ❑ Mobile Functionality (Approve Requisition, Reject, Inquiry)

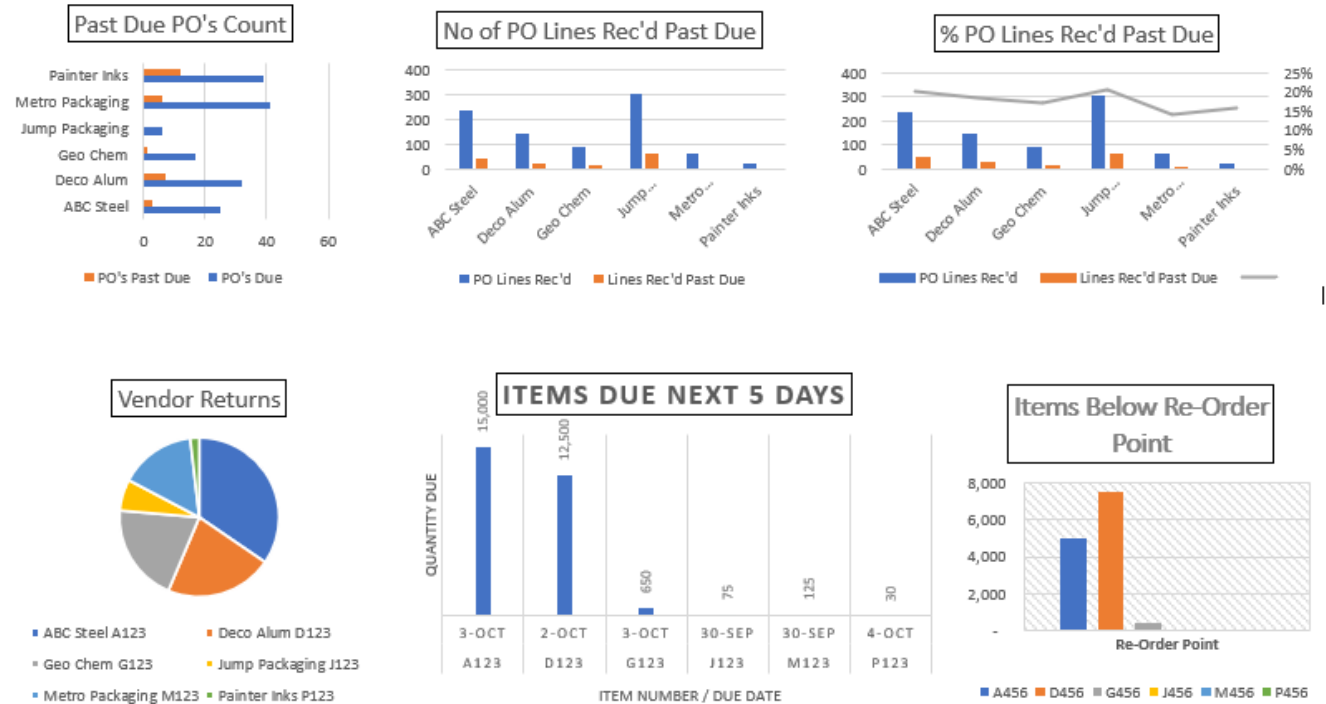
Buyers Portal/Supplier Performance (coming soon!)

- ❑ 1st release - December 2020
- ❑ Business Intelligence (BI)
- ❑ Supplier Collaboration
- ❑ Process Alerts (ie; Requisitions *stuck* in Approval process, Budget alerts, ...)
- ❑ BI powered by  **CYBERSCIENCE**
driving business intelligence
- ❑ Supplier Performance Metrics
- ❑ Key Purchasing Metrics
- ❑ Supplier Management

Company XYZ

Purchasing Dashboard for September 24, 2020

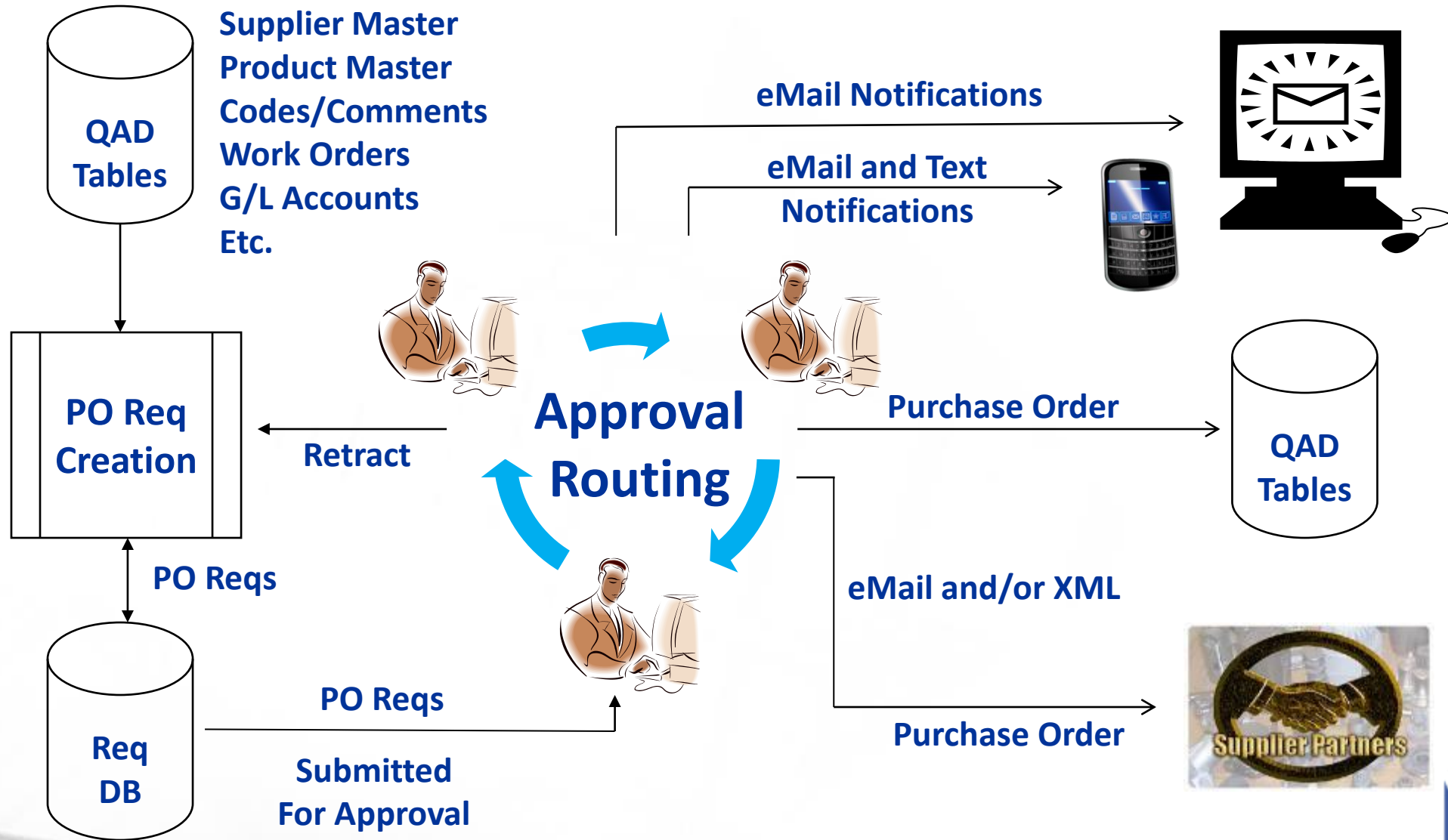
Key Purchasing Metrics



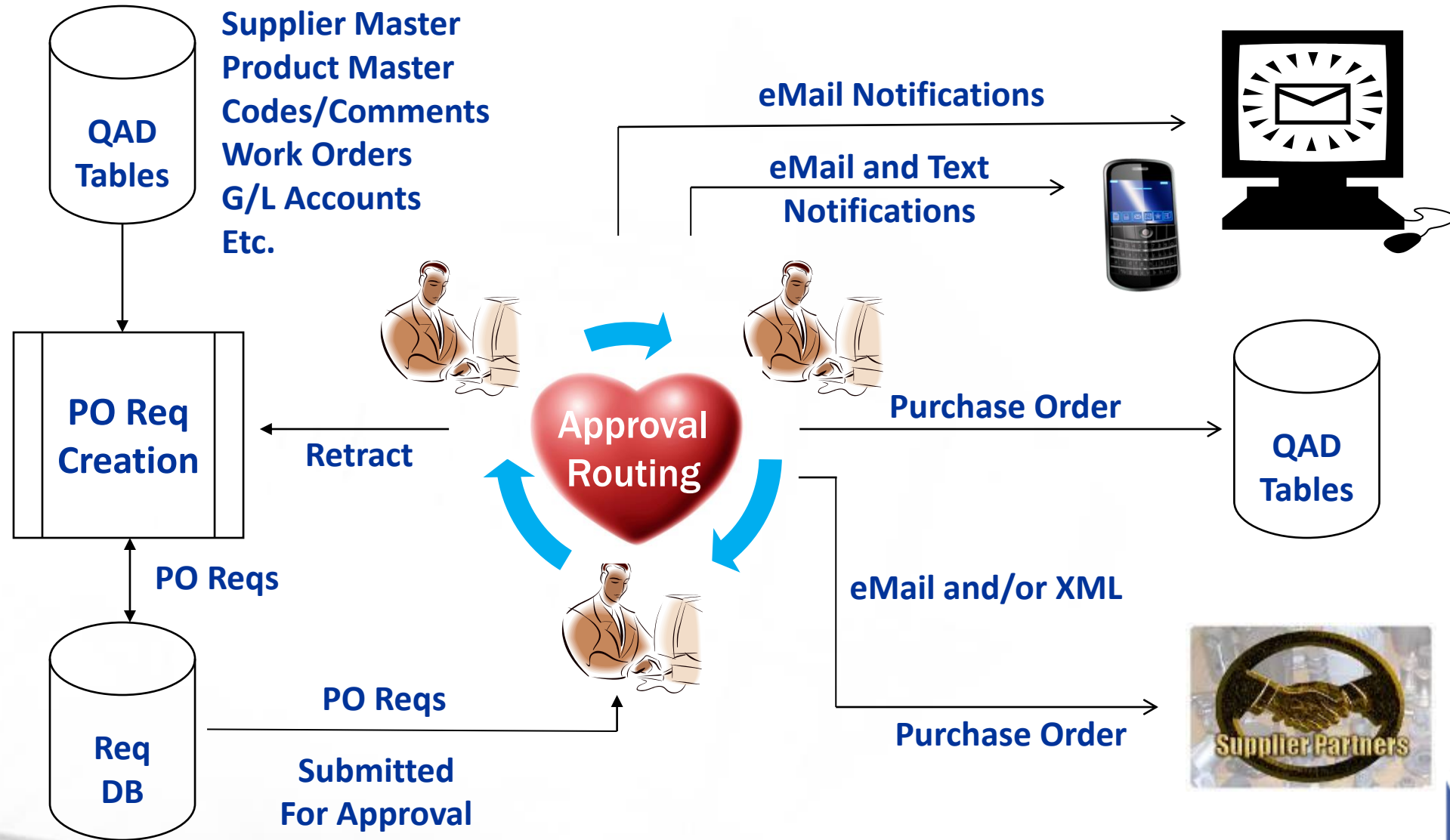
The above graphs/charts are linked to the iPurchase Buyers Portal. Click on the metric to drill down for more information.



iPurchase™ : Real-time integrated with QAD

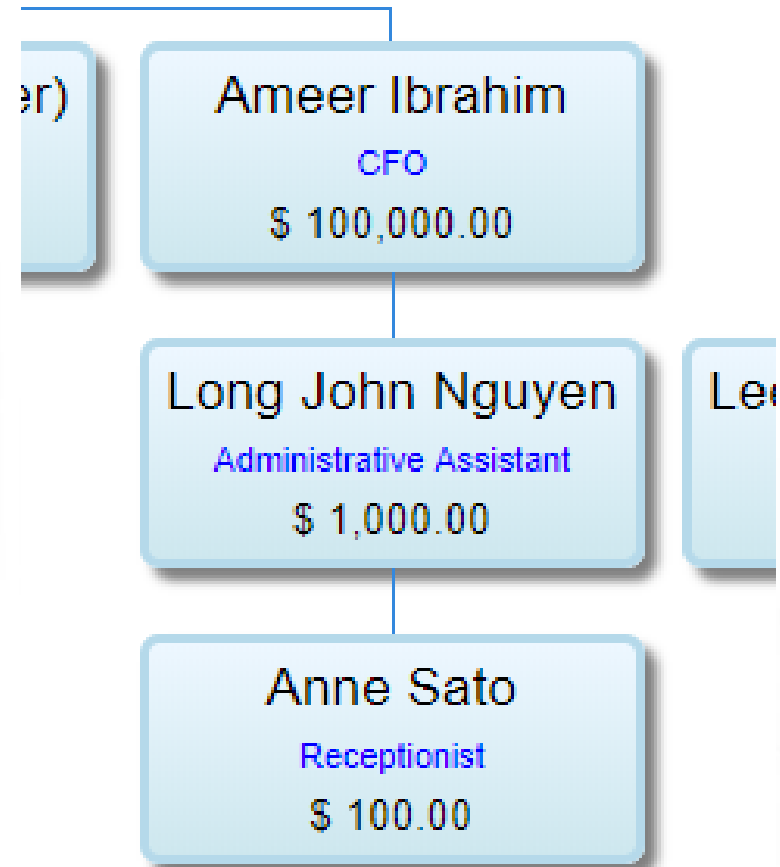


Approval Routing: The Heart of iPurchase™



Supervisor Escalation Approvals

This is one of two approval methodologies provided by *iPurchase*™. Both methodologies can be used together or one or the other can be used. This methodology is a simple methodology that uses an Organizational chart setup within *iPurchase*™ (along with the Users spending authority level) and a Requisitions total cost. In the example shown on this slide, Anne Sato has a spending authority level of \$100. If Anne creates a Requisition over \$100 then Long John Nguyen will need to approve the Requisition. If Anne creates a Requisition over \$1000, then Ameer will need to approve in addition to Long John. And so on...

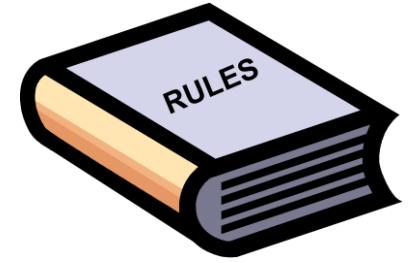


'Data-Driven' Workflow and Approval Routing

This is the second approval routing methodology provided by iPurchase™ for routing electronic PO Requisitions for review and change/approval.

- ❑ **Configurable User Defined Routing Rules based on any Data within PO Requisition, Unlimited Number of Rules**
- ❑ Approve/Reject Requisition directly from eMail and/or Mobile Device
- ❑ Multi-channel, Sequential and Group Approvals
- ❑ Out of Office Functionality
- ❑ Retract and re-submit PO Requisition for approval, Unlimited approval attempts
- ❑ Auto Re-Routing Upon PO Requisition Change
- ❑ History of all PO Requisition Approval Attempts
- ❑ User/Time/Date Stamp Audit Trail on all iPurchase data fields

Examples of Rules



➤ Example of a *simple* Rule using a **single data attribute**

All PO Requisitions greater than **\$10,000***, John (CEO) or Joe (CFO) needs to approve Requisition

➤ Example of a more *complicated* Rule using **multiple data attributes**

All 'Expense' **Type*** PO Requisitions greater than **\$10,000*** for the following **Cost Centers*** (a,b,c,d) and for the Ohio or the Cleveland **Plant*** being **Shipped*** UPS or FedEx, OR the **Project Code*** begins with an 'M', OR the **G/L Account Code*** is ≥ 8000 and ≤ 8999 , OR **Supplier*** is ISS Group, then Sam, Jane, John, and one member from the Accounting Group needs to approve Requisition

*Data Attribute

Requisition Approval Routing

Audit Trail Domain: **demo1** Requisition Workbench

Req#: T0404369 Entry Date: 01/12/2016 Need Date: 01/31/2016 Perf Date: 01/31/2016 Type: Capex

Header Information | Header Notes/Attachments | Master Comments | Approval History | Blanket Information **Pending**

Add Approver: **Add** Remove Approver: **Remove** **Emergency Approval**

Activated On	Level	Approver	Approved By	Status	Notes	Last Notified
Approval Attempt: 1 Submitted On 01/12/16 5:02:41 pm						
01/12/16 5:02 pm	50	Supervisor 1 - up to \$10K		Pending		01/12/16 5:02 pm
	51	Supervisor 2 - up to \$2MM				
	100	Robert Y - All Capex Requests				
	200	Sr Director - over \$25K				

View Deleted Items

Line	Item	Due	Acct-Dept	Project	Qty	Cost	Ext Cost
001	Spare Part 111 - Spare Part 111 20102104 - Rock drill spare parts or accessories	01/31/16	8200-0900	test 1	1.00	25,000.00	\$ 25,000.00
Total \$ 25,000.00							

eMail Notification to Approvers

From: Frank Salesi
To: Frank Salesi
Subject: Approval Required for Requisition T0403804 Needed 09/24/14

iPurchase

Supervisor 1
Delegates for Supervisor 1:
Scott Carpenters

Frank Salesi has submitted a requisition that requires your approval.

Actions: **View Approve Reject**

If questions arise, please contact it helpdesk@issgroup.net

Requisition	Orig/ODO/Deliver	Supplier	Ship To	Bill To
T0403804	Frank Salesi Frank Salesi Frank Salesi	5004000 - CDW Ms. Danielle Gregory (p) 805-923-1254	10000 - Quality Products Inc. - Quality Products Inc.	10000 - 10000 - Acme Company

Req Type	Freight	Ship Via	PO Required	Site
Expense Req	Our Company	UNITED PARCEL SERVICE	Yes	10000

Buyer	Entry Date	Need Date	Status	Approved Date	Total Cost	PO Number
Craig Wolfis	2014-09-17	2014-09-24	Pending		1,000.00 USD	

Line	Item	Qty	Cost	Ext Cost	Dept	Acct	Project	Due Date
1	22-100 CORD,POWER,UK1	100.00 EA	10.00	1,000.00	2000 OPERATIONS	0300/ RENT		2014-09-24

Activated On	Level	User/Group	Status	Approver	Approved Date	Last Notified
2014-09-17T13:06:52.000-04:00	10.00	Supervisor 1				2014-09-17T13:06:52.000-04:00
	36.00	Bob Buckley				
	36.00	Alex Chen				
	40.00	Finance Group				

Text Message Notification to Approvers

1 of 2

FRM:frank@[njhitmen.org](mailto:frank@njhitmen.org)

MSG:View Req: "<http://goo.gl/dyllaS>"

Frank Salesi has submitted a req that requires your approval.

Supplier:

(Con't) 2 of 2

[5004000](#) - CDW

Amount: 1,000.00 USD

(End)

Supplier PO Receipt Confirmation



Confirmation Number for PO PO2972:

Email Address:

Confirm/Update Delivery Dates Below

PO Nbr	Line	Status	Item	Desc	Qty Ord	Qty Rcvd	Qty Rtn'd	Qty Inv	Qty Open	UM	Cost	Delivery Date
PO2972	1	Open	22-100	CORD,POWER	100.0	0.0	0.0	0.0	100.0	EA	0.93	03/20/19
PO2972	2	Open	22-110	CORD,POWER,EUROPE,WEST	50.0	0.0	0.0	0.0	50.0	EA	0.80	03/20/19

Comments

For questions please email [Mike Markowitz](mailto:mike.markowitz@issgroup.com).

What is a PunchOut?

- ❑ **PunchOut** is functionality provided by an e-Procurement application such as *iPurchase*™ that allows a Requisitioner to access a Supplier's website for the purpose of *requisitioning* material.
- ❑ Once the Requisitioner has completed requisitioning material on the Supplier's website the 'shopping cart' is transferred back into the Procurement application creating a PO Requisition for approval routing and subsequent creation of a Purchase Order.

What are the benefits of PunchOut functionality?

- ✓ Requisitioners are provided Contract Pricing (ie; Pricing negotiated between your Company and your Supplier)
- ✓ Real-time Inventory Availability
- ✓ Functionality of a Suppliers Website (ie; Order History)
- ✓ Accurate Material Data (ie; Descriptions, other Material attributes)
- ✓ 'Other' data provided by Supplier when transferring the 'Shopping Cart' back to the Procurement Application (ie; UNSPSC Code)
- ✓ Simplify and Streamline the requisitioning Process

Supplier eCommerce Shopping (PunchOut)



What are MRP Action Messages and Planned Orders?

- ❑ Action messages suggest courses of action to resolve problems found by MRP.
- ❑ Action messages recommend the actions a planner should take to balance supply with demand, such as rescheduling, canceling, or releasing orders.
- ❑ MRP produces orders based on demand. The status of these orders is planned. They can be for manufactured, purchased items, and work orders:
 - You release the orders for manufactured items as work orders
 - You release the orders for purchased parts as requisitions
- ❑ Planned orders can be changed by subsequent MRP runs.

What is the QAD MRP Action Center?

The QAD MRP Action Center is functionality provided by *iPurchase*™ to assist a Buyer in managing and tracking the Action Messages created for purchased material by QAD's MRP.

Action Messages processed include:

MRP Action Message

Cancel Purchase Order
(De-) Expedite Purchase Order
Past Due Purchase Order
Release Due for Planned Order
Release Past Due Planned Order

iPurchase Action Taken

Cancels QAD PO Line Item(s)
Revises QAD PO Line Item Due Date
Revises QAD PO Line Item Due Date
Creates iPurchase PO Requisition
Creates iPurchase PO Requisition

Why Simplify the Management of MRP Planned Orders?

- ✓ Buyers spending too much time managing and tracking QAD MRP Action Messages (using tools such as Excel)!
- ✓ Buyers spending too much time processing a Planned Order created by MRP into a Purchase Order (multiple steps required to create PO).
- ✓ Planned Orders not processed due to 'missed' Action Messages.
- ✓ MRP Purchase Orders not updated due to 'missed' Action Messages.

QAD MRP Action Center

Close MRP Action Center

Buyer Code Item Site Supplier Number Start Date End Date Code

Hide "No Supplier" Hide Ignored Items Hide Processed Hide Can't Process Process User Process Date

	Buyer	Part	Supplier	Site	Nbr/Ln	Qty	Min/Max Mult	To/From	Detail	Status	Results
	LLD	22-100 CORD,POWER	5004000 CDW	10000	402302 0	50	1 / 10000 250 EA	12/20/11 12/21/11	1007-Release past due for Purchase Requisition	SUCCESS	Added to line 1 on requisition T0406223
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03040032 0	100	0 / 0 0 EA	04/07/94 04/08/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03040033 0	1,000	0 / 0 0 EA	04/14/94 04/15/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03040034 0	1,100	0 / 0 0 EA	04/21/94 04/22/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03040035 0	1,365	0 / 0 0 EA	04/28/94 04/29/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03040036 0	1,250	0 / 0 0 EA	05/05/94 05/06/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03040037 0	1,250	0 / 0 0 EA	05/12/94 05/13/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03040038 0	2,100	0 / 0 0 EA	05/19/94 05/20/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	03100093 0	4,000	0 / 0 0 EA	06/02/94 06/03/94	1007-Release past due for Purchase Requisition		
<input type="checkbox"/>		22-110 CORD,POWER,EUROPE,WEST	5004000 CDW	10000	09070003 402202	985,735	0 / 0 0 EA	01/16/19 01/17/19	1007-Release past due for Planned Order		
<input type="checkbox"/>		22-120	5004000	10000	03030110	20	0 / 0	05/05/94	1007-Release past due for		

Submit Requisition after successful processing: Show Requisition after successful processing: Split Requisition using order multiple:

What is Hosted Catalog Management?

- ❑ Hosted Catalog Management is a module of the *iPurchase*[™] Solution developed for the purpose of providing similar 'shopping' functionality offered by PunchOut functionality with the exception that the Suppliers catalog is stored within *iPurchase*[™] vs in the Supplier's website.
- ❑ Catalogs are Excel files in a specified format and include Item number, Item description, price, minimum order qty, max order qty, UNSPSC, etc.
- ❑ Catalogs can be searched through via Keyword(s) and segments of the UNSPSC (United Nations Special Product and Services Code).
- ❑ Catalog favorites (templates) can be created for purchasing of recurring Items.
- ❑ A multi-Supplier shopping cart can be created and upon checkout a Requisition will be created per Supplier.













Supplier Catalog Management

Apply Filter Clear Filter Import Catalog Export Catalog Import Cart Add To Cart View Cart Domain: demo1 Catalog Requisition

Favorites: Supplier: Add Item

Keywords: paper Segment:

Sort By: Part Number (Ascending) Family: Class: Component:

Item Information						Price	Qty
	1007373   	12oz White Squincher Logo'd Wax Coated Paper Cold Cup					
View Product Details on Supplier Website						0.1004\$	<input type="text"/>
Supplier	Fastenal	Min Ord Qty	100	Lead Time	0		
Manufacturer	SOWINCHER CORPORATION 200101	Max Order Qty		UOM	EA		
UNSPSC	48101905 - Food service cups or mugs	Order Multiple Q...	100	List Price	0.1004\$		
	1007375   	7oz White Plastic Lined Paper Cold Cup					
View Product Details on Supplier Website						0.0492\$	<input type="text"/>
Supplier	Fastenal	Min Ord Qty	5000	Lead Time	0		
Manufacturer	SOWINCHER CORPORATION 200201	Max Order Qty		UOM	EA		
UNSPSC	48101905 - Food service cups or mugs	Order Multiple Q...	5000	List Price	0.0492\$		
	1007417   	1530-1 1" x 10yd Paper Micropore Surgical Tape 12Ct					
View Product Details on Supplier Website						12.733\$	<input type="text"/>
Supplier	Fastenal	Min Ord Qty	1	Lead Time	0		
Manufacturer	3M PRODUCTS 3.02074E+13	Max Order Qty		UOM	EA		
UNSPSC	48101905 - Food service cups or mugs	Order Multiple Q...		List Price	12.733\$		

Navigation: << < > >>

Req Inquiry New Req Catalogs Punchouts PO Inquiry Budgets Admin COF User Profile Help Log Off ISS Group

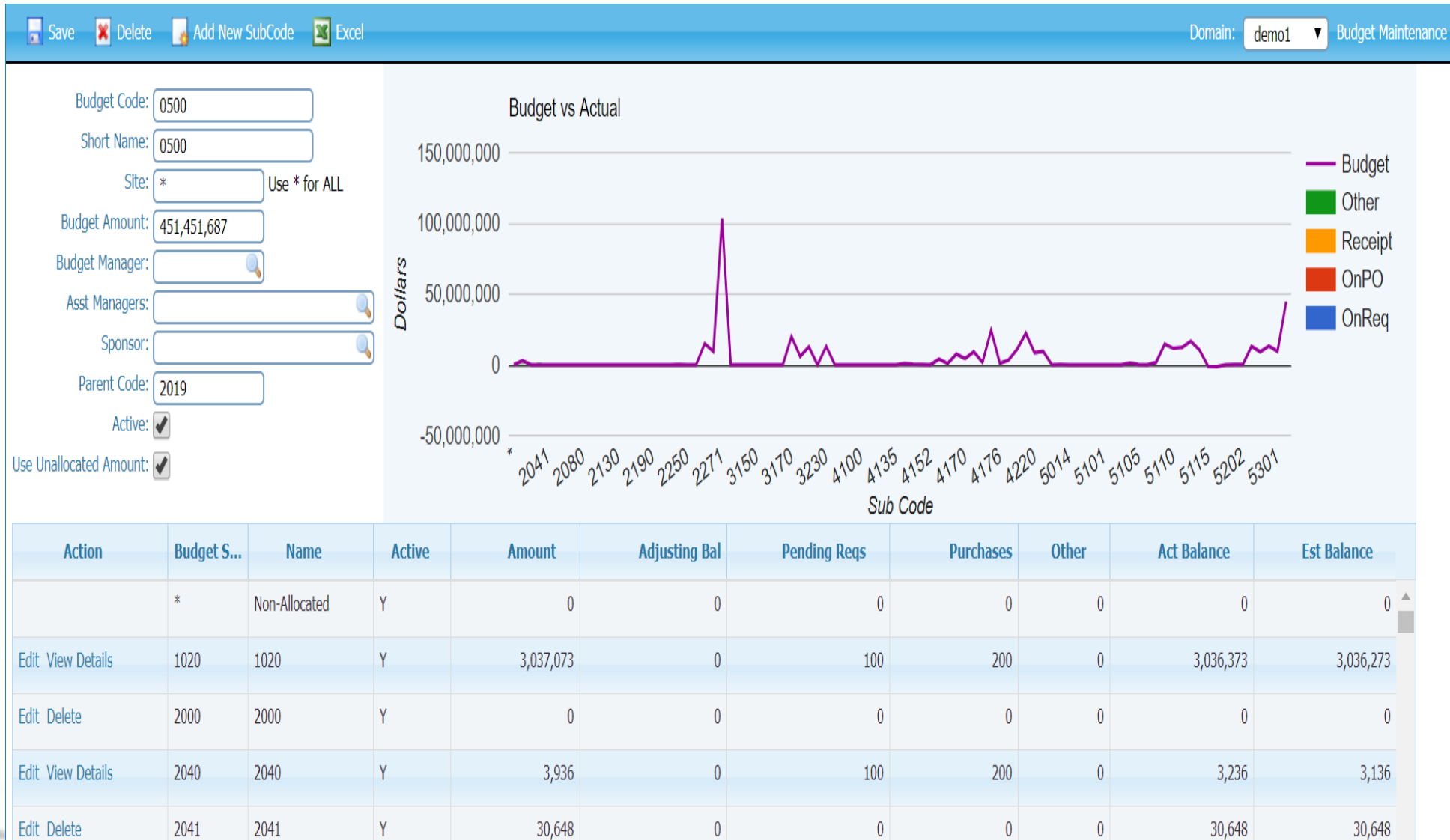
What is *iPurchase*[™] Budgeting?

- ❑ *iPurchase*[™] Budgeting is a module of the *iPurchase*[™] Solution developed for the purpose of tracking and controlling Spend against pre-determined Budgets
- ❑ 2-level budgets can be setup (ie; Total Budget, Sub-Budgets), that are validated upon Requisition line item creation
- ❑ A Requisition that exceeds a Budget/Sub-Budget 'Actual' Balance (plus tolerance) will allow the Requisition to be created but will not allow the Requisition to be submitted for approval
- ❑ A Budget Manager, Asst. Manager, and Sponsor can all be assigned to a Budget and are used for Budget maintenance security as well as approval routing

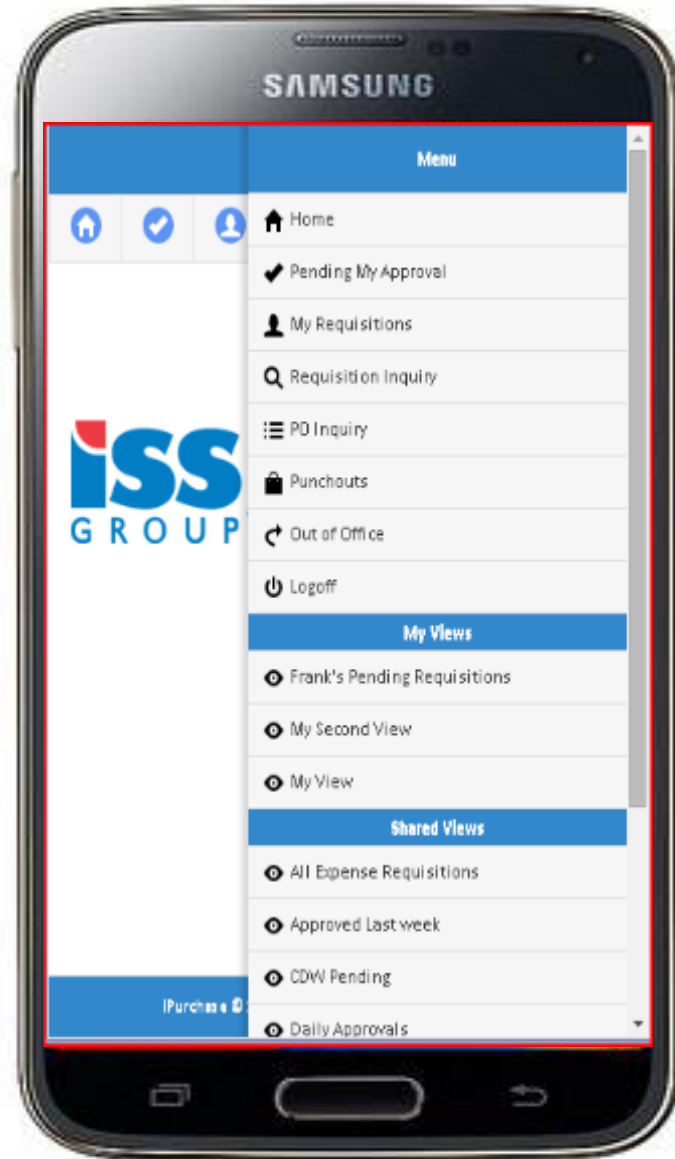
What is *iPurchase*[™] Budgeting?

- ❑ An approval workflow can be created to control the creation as well as any revisions to be made to a Budget
- ❑ Estimated and Actual Budget balances are maintained based on the status of Requisitions (ie; Estimated is based on Pending Requisitions)
- ❑ All transactions that effect a Budget (ie; creation, Requisitions charged, etc.) are stored for audit purposes

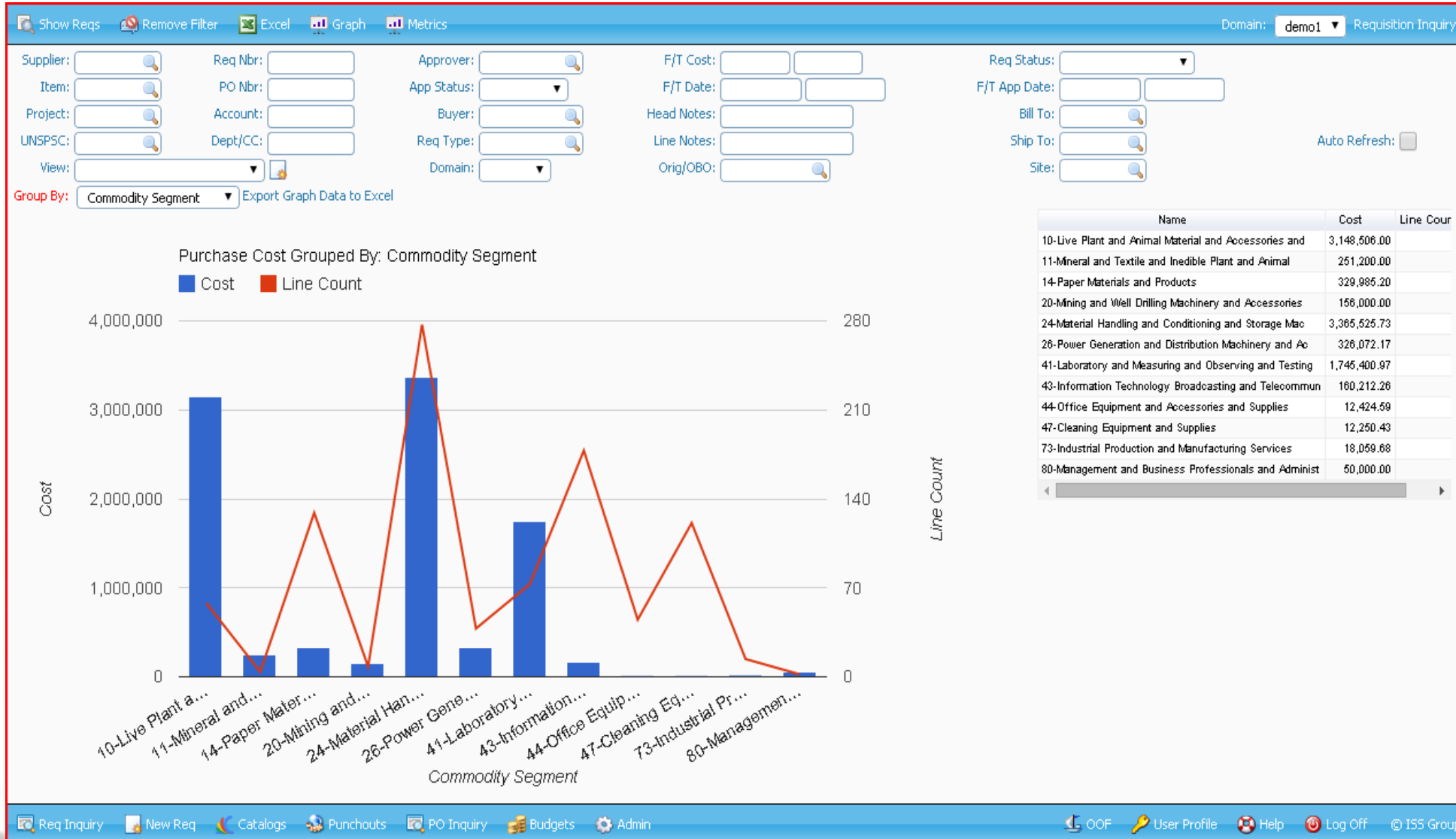
Budgeting/Spend Tracking



Mobile Interface



Purchasing Analytics



Process Metrics

Cycle Time By Month Excel				Activity Detail By Originator Excel				
Year/Month	Rejected	Approved	Avg Hours	User	Approved	Rejected	Avg Hours	Rejection Codes
2014-05		7	2.8	Frank Salesi	693	22	9.8	13 Incorrect Account 6 Unknown 3 Incorrect Pricing
2014-04		38	1.7	Craig Wolffis	7		0.0	
2014-03		3	3.0	Scott Carpents	2		0.0	
2014-02		127	0.1					

Rejection Code Analysis Excel		Approver Activity Summary Excel			
Count	Rej Code	User Name	Approved Reqs	Rejected Reqs	Avg Hours
13	Incorrect Account	Supervisor 1	194	13	80.7
6	Unknown	Alex Chen	77	2	2.7
3	Incorrect Pricing	Craig Wolffis	70	1	2.8
		Bob Carter	36		2.2

Activity Summary by Originator Excel					
Name	Rejected	Tot Rej	Approved	Pending	Not Submitted
Scott Carpents			2		
Frank Salesi	10	22	693	145	1,033
Craig Wolffis			7	3	

More information on ISSG and to request a demo!

Please visit our website at:

www.ISSGroup.net



Questions?

Contact Andy Weinstein at:

aweinstein@issgroup.net

Thank you!