

ISS Group Solutions Overview

Technology for the Changing Workplace

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 *Data-Driven Approval Routing and Workflow Solutions* exclusively for the QAD User Community



What do we see throughout our Client Base?

New and changing workflow/approval Processes to support:

- ❑ A remote and distributed Workforce
- ❑ Elimination of paper forms
- ❑ Standardization and streamlining of Processes
- ❑ Improved Process visibility and control



Who are some of our Clients?

Life Sciences



Industrial/Automotive

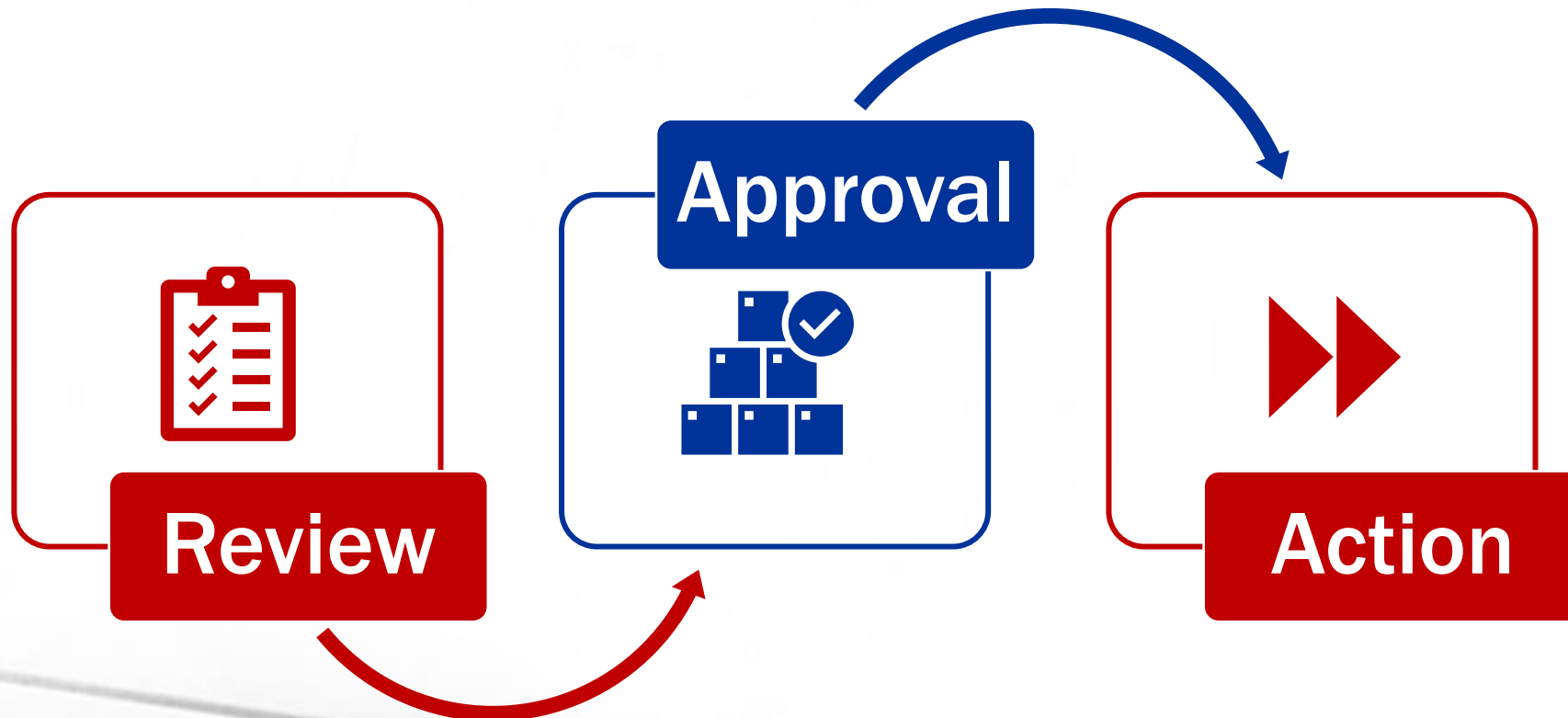


Consumer Products



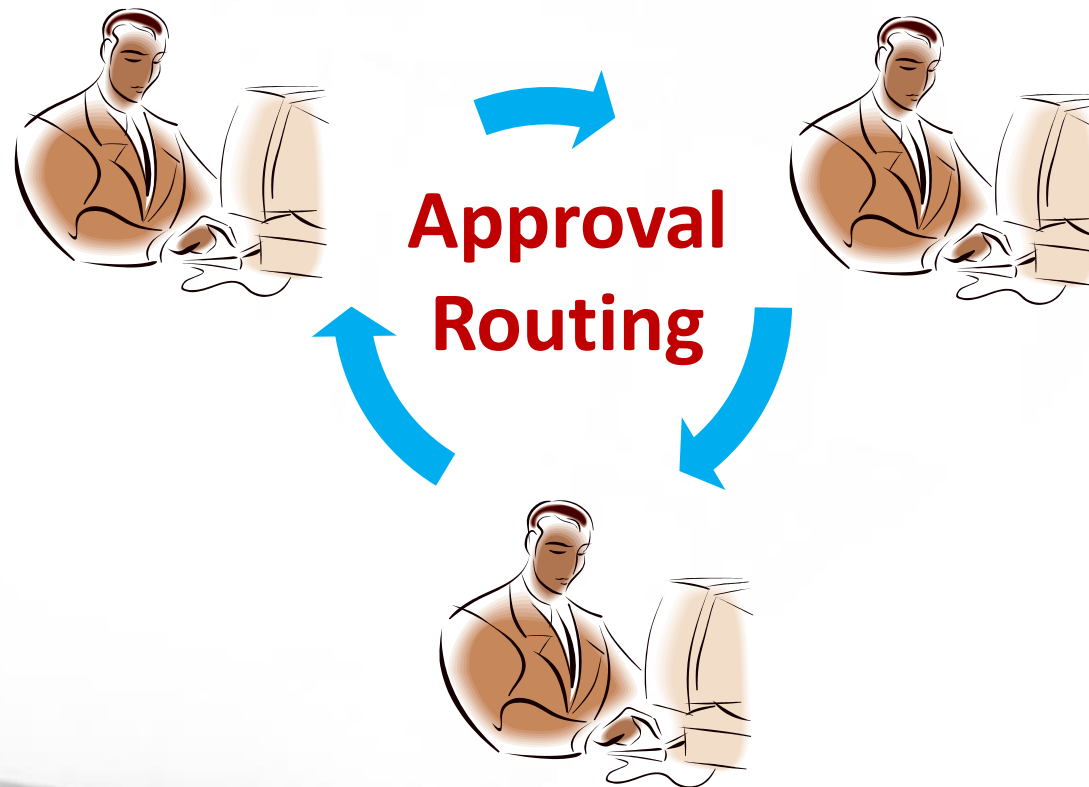
Primary Objective of ISS Group Solutions

To improve the flow and control of **QAD ERP** related Business Processes that require a **Review** and **Approval** activity prior to performing an **Action**



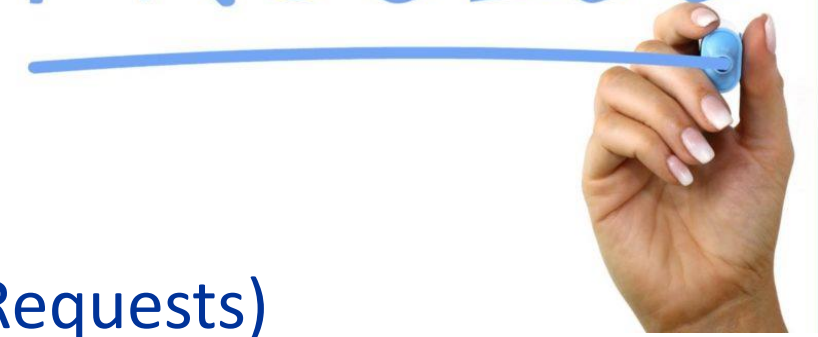
How do we accomplish that Objective?

By providing functionality that creates an **Approval Routing** using configurable routing **Rules** and the **Data** associated with a specific **Process Request**



Examples of Process Requests

PROCESS



- ❖ PO Requisition Approval
- ❖ Supplier Invoice Approval
- ❖ Customer Sales Quote Approval
- ❖ Financial Requests (ie; Project Budgets, Check Requests)
- ❖ Inventory Requests (ie; Unplanned Issues/Receipts, Material Transfers)
- ❖ Production Requests (ie; Scrap Authorization, Assembly Rework)
- ❖ Shipping Requests (ie; Freight Authorizations)
- ❖ Documented QAD DB Updates (ie; Supplier/Customer Maintenance)

Results achieved by our Clients

- ✓ Reduced process cycle time/costs
- ✓ Improved process visibility/tracking
- ✓ Elimination of redundant data entry
- ✓ Reduced auditing costs
- ✓ Implementation of process controls
- ✓ Elimination of paper forms
- ✓ Process standardization



ISS Group Solutions

iPurchase[™] - PO Requisition Management/Approval

iVoucher[™] - Supplier Invoice Reconciliation/Approval

iQuote[™] - Customer Sales Quote Management/Approval

iApprove[™] - Process Request Creation/Approval

- Inventory Processes (ie; Unplanned Issues/Receipts, Material Transfers)
- Financial Processes (ie; Project Budgets, Check Requests)
- Production Processes (ie; Scrap Authorization, Assembly Rework)
- 'Triggered' QAD DB Changes (ie; Supplier/Customer Maintenance)

All Solutions integrate with QAD out of the box!



iApprove™ : Process Request Creation/Approval

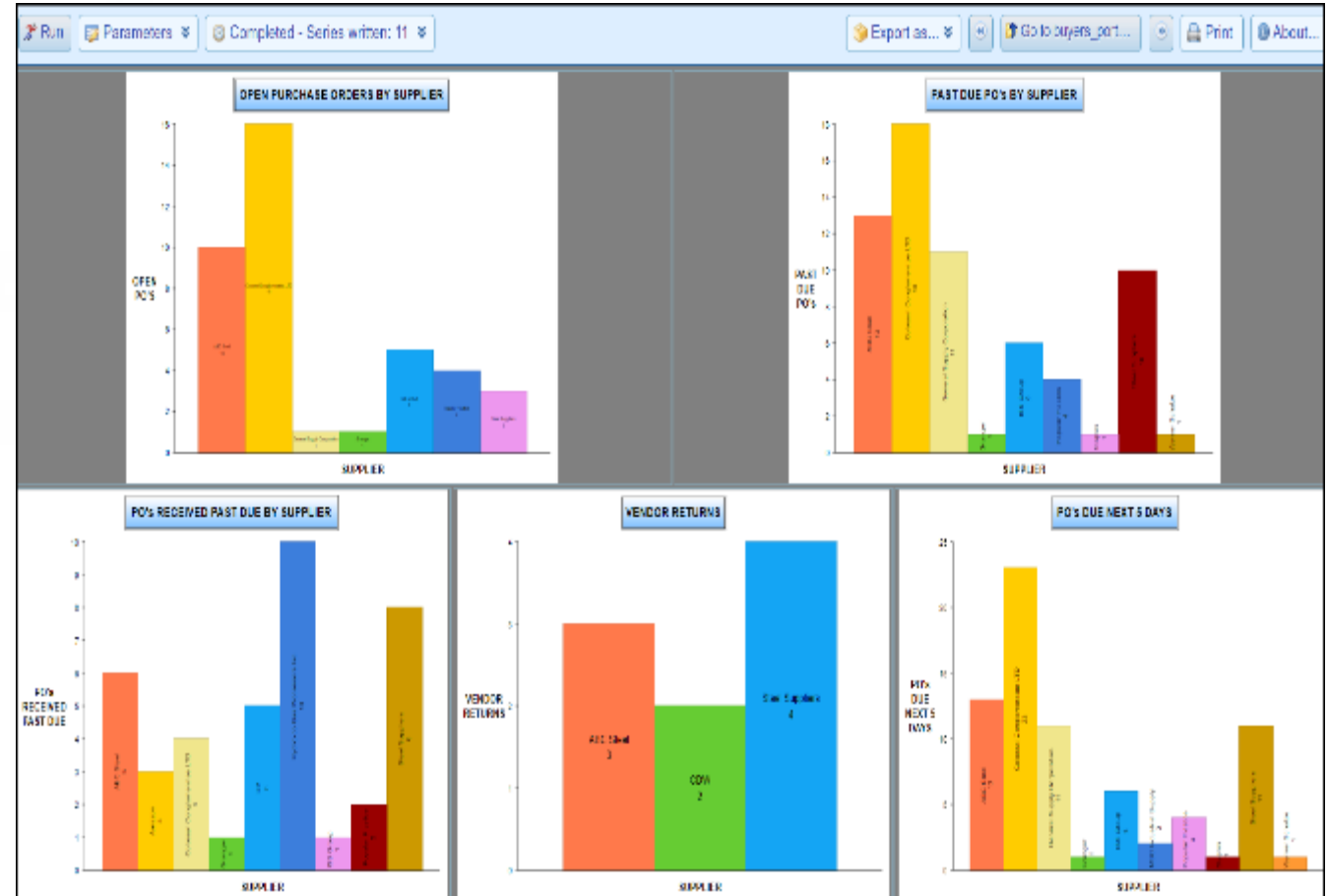
- ❑ On-Premise or Hosted Solution
- ❑ Route electronic Process Requests for review and change/approval
 - An electronic Process Request can be created manually by a User completing a **web form** such as a PO Requisition or an Unplanned Issue, or it can be created programmatically by a **triggering event** (ie; a change of data in a QAD data attribute such as a Supplier Remit To Address or a Sales Order Price Change).
- ❑ Utilizes ISS Group's **Data-Driven Approval Routing & Workflow Technology**
- ❑ Perform an **Action** upon Process Request Approval (ie; create QAD PO, create QAD SO, update QAD DB attribute, release a Supplier/Customer from hold, etc.)
- ❑ Multi-Channel, Sequential and Group Approvals, Out of Office Functionality
- ❑ Approve/Reject directly from Approver's eMail and/or Mobile Device

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 Approval Routing & Workflow Technology*
- ❑ Approve/Reject Requisition from within Approver's eMail
- ❑ Buyer's Portal/Supplier Performance
- ❑ Project Budgeting/Spend Tracking
- ❑ Mobile Functionality (Approve Requisition, Reject, Inquiry)

The *iPurchase*™ Buyer's Portal is Here!

- ☐ BI powered by  **CYBERSOURCE**
driving business intelligence
 - Supplier Performance Metrics
 - Key Purchasing Metrics
- ☐ Supplier Collaboration*
- ☐ Process Alerts* (ie; Requisitions *stuck* in Approval process, Budget alerts, ...)



* To be released Q2/Q3 2021

iVoucher™: Supplier Invoice Reconciliation/Approval

- ❑ Hosted Solution developed by Easy Access and resold by ISS Group
- ❑ Multiple versions available (ie; iVoucher™ Lite)
- ❑ Creates QAD A/P Vouchers upon Supplier Invoice Approval
- ❑ OCR Invoice data capture **and managed data validation service**
- ❑ 2-way and 3-way electronic PO/receipt/invoice reconciliation
- ❑ **Line-Item Pairing/Matching of PO based Invoices with QAD POs/Receipts**
- ❑ G/L Coding of non-PO based Invoices
- ❑ Configurable Rules Based Approval Workflow
- ❑ Document storage of Invoice and related documents
- ❑ Accrual Reporting and more...

iQuote™ : Sales Order Quotation Management/Approval

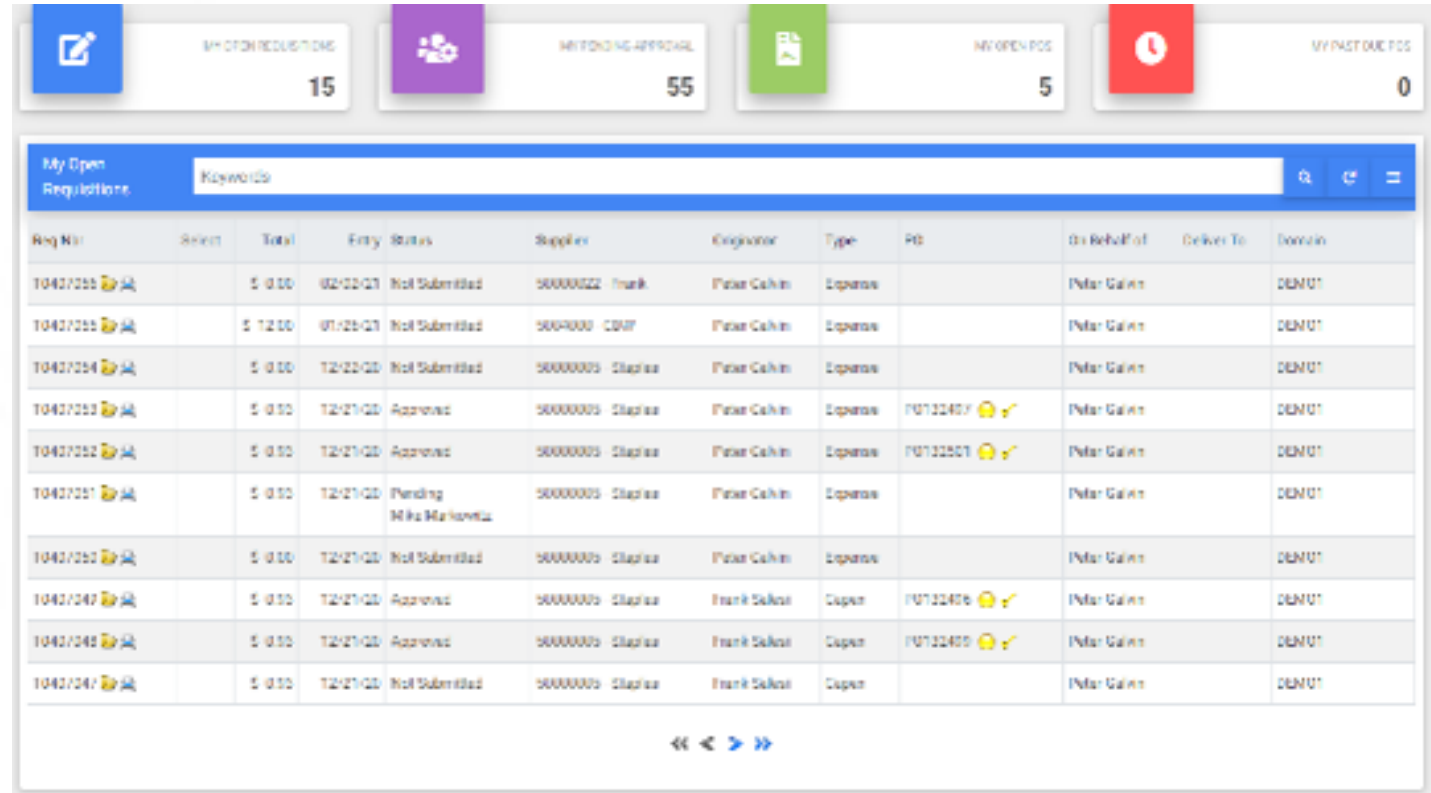
- ❑ On-Premise or Hosted Solution
- ❑ Creates QAD Sales Orders upon Sales Quote Approval
- ❑ Create electronic Sales Order Quotations
 1. Intuitive Customer/Contact Search
 2. Integration with CRM
 3. Pre-defined Quote Templates
 4. QAD Best Pricing and Volume Discounting
- ❑ **Utilizes ISS Group's *Data-Driven* Approval Routing & Workflow Technology**
- ❑ Customer Signature Capture on Quote Print
- ❑ Quote Inquiry
- ❑ Sales Order Inquiry
- ❑ Pricing Inquiry

What's coming in 2022 from ISS Group?

In addition to adding features to the **iPurchase™ Buyer's Portal**, and more functionality in each of our Solutions as being requested by our Clients, ISSG is incorporating **Bootstrap Technology** into our **iPurchase™** and **iApprove™** Solutions!

Expected Release of Bootstrap version:

- **iPurchase™ - 1.1.22**
- **iApprove™ - 7.1.22**



The screenshot displays the 'My Open Requisitions' section of the iPurchase Buyer's Portal. At the top, there are four summary cards: 'MY OPEN REQUISITIONS' (15), 'MY PENDING APPROVAL' (55), 'MY OPEN POs' (5), and 'MY PAST DUE POs' (0). Below these is a search bar and a table of requisitions.

Req. No.	Select	Total	Entry	Status	Supplier	Engineer	Type	PO	On Behalf Of	Deliver To	Domain
10407055		\$ 0.00	02/02/21	Not Submitted	50000022 Frank	Peter Galvin	Expense		Peter Galvin		DEN01
10407055		\$ 12.00	01/29/21	Not Submitted	50000000 CDW	Peter Galvin	Expense		Peter Galvin		DEN01
10407054		\$ 0.00	12/22/20	Not Submitted	50000000 Staples	Peter Galvin	Expense		Peter Galvin		DEN01
10407053		\$ 0.00	12/21/20	Approved	50000000 Staples	Peter Galvin	Expense	PO122407	Peter Galvin		DEN01
10407052		\$ 0.00	12/21/20	Approved	50000000 Staples	Peter Galvin	Expense	PO122501	Peter Galvin		DEN01
10407051		\$ 0.00	12/21/20	Pending Mike Markowitz	50000000 Staples	Peter Galvin	Expense		Peter Galvin		DEN01
10407050		\$ 0.00	12/21/20	Not Submitted	50000000 Staples	Peter Galvin	Expense		Peter Galvin		DEN01
10407049		\$ 0.00	12/21/20	Approved	50000000 Staples	Frank Salas	Expense	PO122406	Peter Galvin		DEN01
10407048		\$ 0.00	12/21/20	Approved	50000000 Staples	Frank Salas	Expense	PO122400	Peter Galvin		DEN01
10407047		\$ 0.00	12/21/20	Not Submitted	50000000 Staples	Frank Salas	Expense		Peter Galvin		DEN01

Stay tuned...

For more information and to request a demo!

Please visit our website at:

www.ISSGroup.com



Questions?

Contact Andy Weinstein at:

aweinstein@issgroup.net

Thank you!