# ISS GROUP®

**Streamlining the way your business performs business**

## Project Snapshot

### MTF Biologics - Customer Credit Authorizations

## Who is MTF Biologics?

MTF Biologics (www.mtfbiologics.org) is a global nonprofit organization headquartered in Edison, NJ providing services, resources, and expertise to healthcare providers, clinicians, and scientists for the purpose of saving lives and advancing medicine through transplantation science and research.

MTF has been using the ISS Group (ISSG) *Data-Driven* **Approval Routing and Workflow Technology** for QAD ERP since 2014 for approving PO Requisitions and creating QAD Purchase Orders.

MTF is currently operating QAD 2014EE in the QAD Cloud.

> *"By implementing the iApprove solution, we have achieved all of our stated objectives and for the first time ever, MTF has a completely empty Credit Que….!"*
>
> Tessa Bolton
> Supervisor, Customer Service
> Specialty Support,

MTF had a vital need to improve the process of creating and approving **Customer Credit Authorizations** for both Inventory & Non-Inventory credits and streamlining the associated creation of credit memos and inventory transactions in QAD.

Says Tessa Bolton Supervisor, Customer Service Specialty Support, *"We had a laborious, multi-step process with a consistent backlog"* which included the following inefficiencies:

- Requests funneled to one department for investigation, to another for data entry, then back for completion
- Tracking in large excel sheets to prevent duplications, manual trend analysis
- Hard copy or excel based forms, transmitted via email, prone to human error
- Lengthy cycle turnaround time of several weeks

## Solution

Due to MTF having years of success using the ISSG approval routing technology for their Purchasing Processes, to address the credit authorization challenges outlined above MTF turned to ISSG for assistance. ISSG proposed utilizing the ISSG iApprove™ Solution to achieve the following key objectives:

- Provide customized web credit authorization forms with real-time data import from QAD
- Provide multiple Forms submission channels for minimized customer contact
  ➢    (Customer Service, Finance, Contracts) "Credit at point of contact"
- Streamline the approval routing for improved cycle turnaround time
- Improve process visibility for Field
- Expand reporting capability
- Provide for real-time management of credits at month-end
- Automated QAD credit memo creation upon credit approval

The ISSG iApprove™ Solution is a Business Process Approval Routing and Workflow Solution that provides for the creation and routing of web-based Process Request Forms. The *Data-Driven* Approval Routing and Workflow Technology built into the iApprove™ Solution alerts a list of Users **based on the data** associated with a **QAD Integrated Process**, and then performs an **Action** upon final **approval or rejection** of that Process Request.

Integrated Processes include Process Requests such as Purchase Order Approval, Supplier Invoice Approval, Customer Credit Authorizations, Inventory Lot Hold/Release, Scrap Authorizations, Expense requests, etc. Actions that can be performed upon approval/rejection of a Process Request include sending emails with attachments, sending workflow instructions, updating the QAD DB, and creating validated QAD transactions such as Purchase Orders, Sales Orders, Vouchers, Credit Memos, Inventory Transactions, etc.

## Results

The Bottom Line – Says Tessa, *"By implementing the iApprove solution, we have achieved all of our stated objectives and for the first time ever, MTF has a completely empty Credit Que….!"*

- Go-Live – 6.28.22
- Processed avg. 150 Credits/Mth since Go-Live
- Significantly improved customer experience
- Reduction in manual steps increased accuracy and throughput, reduced work hours, and improved credit management
- Increased Field visibility and allowed Field to approve Credits
- Standardized Contracts review process
- Completely Eliminated Credits backlog!

**About ISS Group**

ISS Group (ISSG) has been providing Solutions and Services to the QAD User Community since 1995. ISSG provides *Data-Driven* Approval Routing and Workflow Solutions for QAD User Organizations to improve the 'flow and control' of QAD Integrated Processes.

Please visit the ISSG website at www.ISSGroup.com for more information about ISSG and the ISSG Solutions for QAD.