



Providing Solutions to Improve Business Processes™

iPurchase™ Overview

July 13, 2016

ISS Group Introduction

- Founded in 1986 (www.ISSGroup.com)

- CEO, Andrew Weinstein



- VP R&D, Frank Salesi



- Has provided solutions/services to 300+ QAD user organizations since 1995
- Provider of web-based Business Process Improvement Solutions exclusively to the QAD User Community

Some of our Clients...

Medical Device



Industrial/ Automotive



Consumer Products

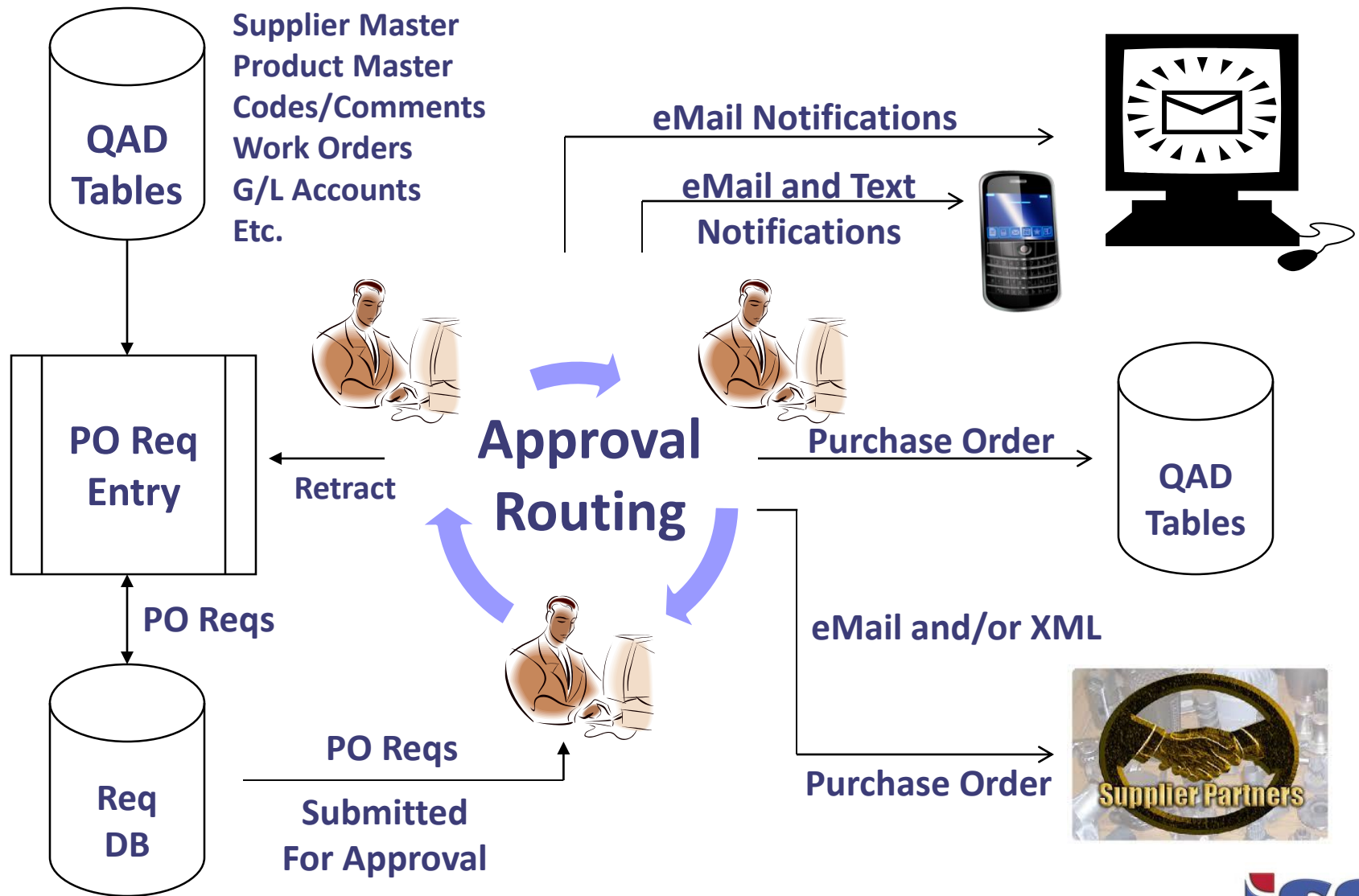


iPurchase: Solution Objectives

- ✓ Decrease Purchasing Cycle Time/Costs
- ✓ Control the PO Approval Process
- ✓ Increase PO Volume without Overhead
- ✓ Eliminate 'Maverick' Spend
- ✓ Improve Supplier Relationships
- ✓ Perform Purchasing Analytics
- ✓ Track Project Budgets/Spend
- ✓ Improve PO Documentation Handling and Control
- ✓ Maintain SOX and FDA Compliance

Save TIME,
Save MONEY,
Improve PRODUCTIVITY!

iPurchase™: Real-time Integrated with QAD



iPurchase™: Deployment Options

LAN

Single Server

- iPurchase DB
- QAD DB ('n' Domains)
- Progress Webspeed Transaction Broker
- Apache/ISS Web Server

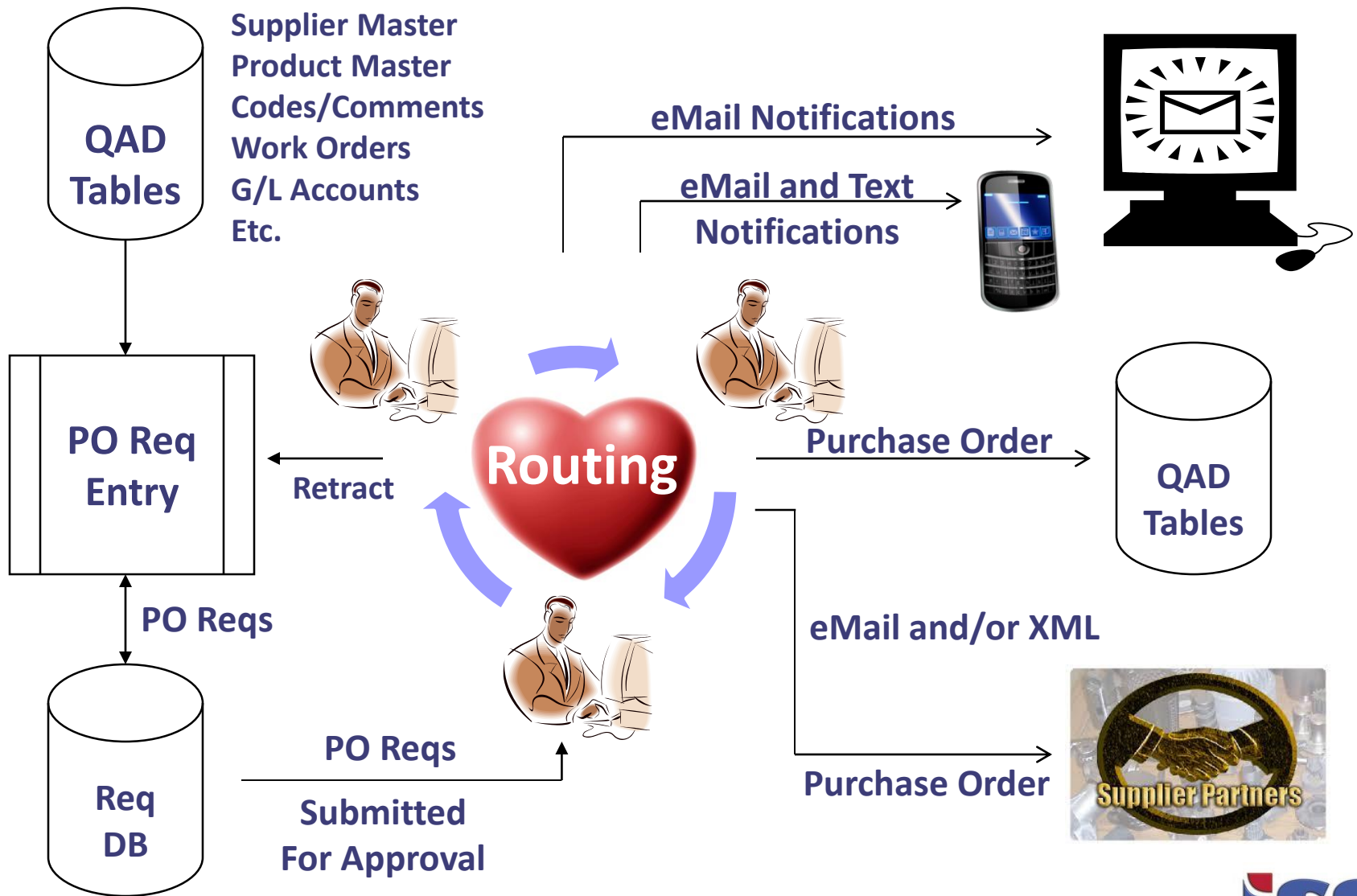
'n' Servers separating the components listed above with 'n' instances of QAD (same version or different versions)

WAN

Single Server or 'n' Servers outlined above hosting iPurchase, Progress and Web components connected to:

1. 'n' instances of QAD (same version) with Progress App. Server
2. 'n' instances of QAD (different versions) with Progress App. Server

Approval Routing: The 'Heart' of iPurchase™



AART™: Advanced Approval Routing Technology

- ❑ Route electronic PO Requisitions for review and change/approval
- ❑ **Configurable User Defined Routing Rules based on any Data within PO Requisition, Unlimited Number of Rules**
- ❑ Dynamic Routing upon Requisition Submission
- ❑ Multi-path, Sequential and Group Approvals, Out of Office Designation
- ❑ Retract and re-submit PO Requisition
- ❑ Re-Routing Upon PO Requisition Change
- ❑ History of all PO Requisition Approval Attempts
- ❑ PO Requisition Queue for Approvers
- ❑ User/Time Date Stamp Auditability

AART™ : What's a Rule?

- ❑ Rules can be based on any and all of the data within the PO Requisition.
- ❑ Rules are User defined conditions using **and's** and **or's** which work together to determine the list of People or Groups required to review, change and approve/reject a PO Requisition.
 - **Example of a simple Rule**
 - All PO Requisitions greater than \$10,000, John (CEO) or Joe (CFO) needs to approve Requisition
 - **Example of a complicated Rule**
 - 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 someone from the Accounting Group needs to approve Requisition

iPurchase™ : Highlighted Features

- Create Supplier Request for Quotation (RFQ)**
- Update PO Requisition and/or Supplier Catalog with RFQ Pricing data**
- Create electronic Purchase Order Requisitions for routing and approval**
- Utilizes AART™ for Requisition Approval Workflow**
- Auto create QAD Purchase Order upon Requisition approval**
- eCommerce Shopping with all Major Suppliers (Punchouts)**
- Supplier Catalog Management (for non-Punchout Suppliers)**
- Project Budgeting/Spend Tracking**
- Fully Integrated QAD Accounting (charge PO to multiple Expense Accounts)**
- Purchasing Analytics (UNSPSC) / Process Metrics**
- Mobile Functionality**

New iPurchase™ Features

- ✓ New Mobile Interface
- ✓ Req. approval/reject from eMail
- ✓ Text Message Alerts
- ✓ Blanket PO's
- ✓ Graphical Rules Maintenance
- ✓ Requisition Archiving
- ✓ Consolidated Requisition's into single PO
- ✓ Social Media Integration
- ✓ Microsoft Lync Integration (Presence, Chat)



iPurchase Pricing

One-time iPurchase License Fee:

<u>Functionality*</u>	<u>up to 25 users</u>	<u>26-100 users</u>	<u>100+ users</u>
Base Functionality	\$5,000	\$200/user	\$150
Punchout Functionality	\$2,500	\$100	\$75
Catalog Functionality	\$2,500	\$100	\$75
Mobile Functionality	\$1,750	\$70	\$40
Project Budgeting Functionality	\$1,750	\$70	\$40

iPurchase Annual Maintenance – 18% of calculated License Fee.

Users above 25 can be purchased in increments of 10.

If Base, Punchout, Catalog purchased together - \$50/user discount up to 100 Users

Progress – \$3,750 (\$3,000 License, \$750 Annual Maintenance)

Implementation - \$12,000 for 10 days of services, \$150/Hr. additional services

Requisition Approval Routing

Audit Trail Retract Quote EMT Contracts

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

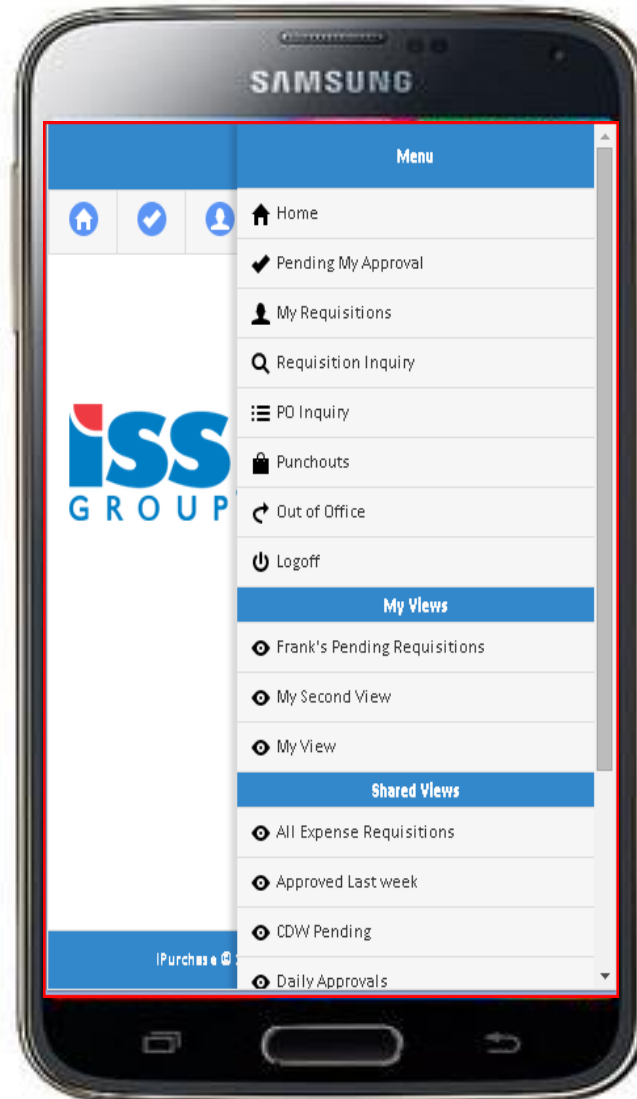
Activated On	Level	Approver	Approved By	Status	Notes	Last Notified
Approval Attempt: 1 Submitted On 01/12/16 5:02:41 pm						
01/12/16 5:02 pm	50	Supervisor 1 - up to \$10K		Pending		01/12/16 5:02 pm
	51	Supervisor 2 - up to \$2MM				
	100	Robert Y - All Capex Requests				
	200	Sr Director - over \$25K				

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

New Mobile Interface



Supplier eCommerce Shopping (Punchouts)

Close

Punch Out Vendors



These are just some of the Suppliers our Clients are purchasing from via Punchouts

Supplier Catalog Management

Favorites:
 Supplier: **Add Item**

Keywords:
 Segment:

Sort By:
 Family:
 Class:
 Component:

Item Information						Price	Qty
	1007373	12oz White Sqwincher Logo'd Wax Coated Paper Cold Cup					
View Product Details on Supplier Website							
Supplier	Fastenal	Min Ord Qty	100	Lead Time	0	0.1004\$	<input type="text"/>
Manufacturer	SQWINCHER 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							
Supplier	Fastenal	Min Ord Qty	5000	Lead Time	0	0.0492\$	<input type="text"/>
Manufacturer	SQWINCHER 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							
Supplier	Fastenal	Min Ord Qty	1	Lead Time	0	12.733\$	<input type="text"/>
Manufacturer	3M PRODUCTS 3.07074E+13	Max Order Qty		UOM	EA		
UNSPSC	48101905 - Food service cups or mugs	Order Multiple Q...		List Price	12.733\$		



Budgeting/Spend Tracking

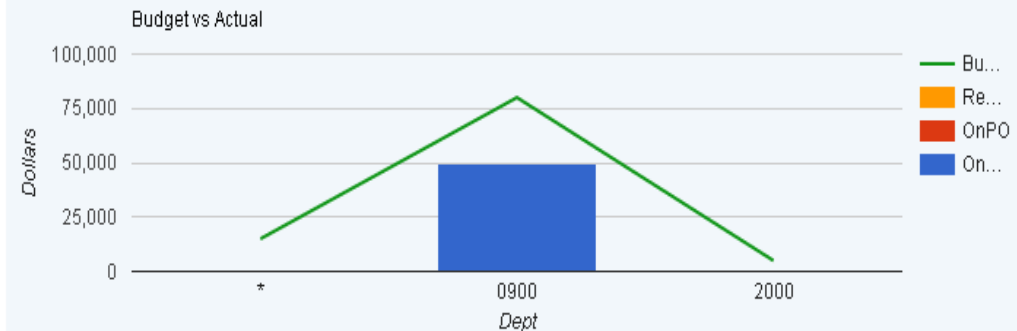
[Save](#)
[Clear](#)
[Delete](#)
[Add New Dept](#)
[Refresh](#)
[Reset Budget](#)
[Excel](#)

Domain: **demo1** Budget Maintenance

Budget Code:

Budget Amount:

Parent Budget Code:



Action	Dept	Name	Amount	Opening Bal	Pending Reqs	Open POs	Receipts	Act Balance	Est Balance
	*	Non-Budgeted Departments	15,000	0	0	0	0	15,000	15,000
Edit Delete View Details	0900	Software Products	80,000	0	50,000	0	0	80,000	30,000
Edit Delete	2000	OPERATIONS	5,000	0	0	0	0	5,000	5,000

Date	User	Type	Req Nbr/Line	PO Nbr/Line	Dept	Item	Qty	Cost	Extended
12/11/2015 14:57:57.343	Frank Salesi	REQ_SUB	T0404366-2		0900	Spare Part 11	1	25,000.00	25,000.00
12/11/2015 14:57:57.341	Frank Salesi	REQ_SUB	T0404366-1		0900	Spare Part 10	1	25,000.00	25,000.00
12/11/2015 14:57:51.090	Frank Salesi	REQ_RET	T0404366-2		0900	Spare Part 11	-1	25,000.00	(25,000.00)
12/11/2015 14:57:51.088	Frank Salesi	REQ_RET	T0404366-1		0900	Spare Part 10	-1	25,000.00	(25,000.00)

Purchasing Analytics

Show Reqs Remove Filter Excel Graph Metrics
Domain: **demo1** Requisition Inquiry

Supplier: Req Nbr: Approver: F/T Cost: Req Status:

Item: PO Nbr: App Status: F/T Date: F/T App Date:

Project: Account: Buyer: Head Notes: Bill To:

UNSPSC: Dept/CC: Req Type: Line Notes: Ship To: Auto Refresh:

View: Domain: Orig/OBO: Site:

Group By: **Commodity Segment** Export Graph Data to Excel

Purchase Cost Grouped By: Commodity Segment

■ Cost ■ Line Count

Commodity Segment	Cost	Line Count
10-Live Plant a...	3,148,506.00	280
11-Mineral and ...	251,200.00	20
14-Paper Mater...	329,985.20	140
20-Mining and ...	158,000.00	20
24-Material Han...	3,365,525.73	280
26-Power Gene...	326,072.17	20
41-Laboratory ...	1,746,400.97	140
43-Information...	160,212.26	20
44-Office Equip...	12,424.59	140
47-Cleaning Eq...	12,250.43	20
73-Industrial Pr...	18,059.68	20
80-Management...	50,000.00	20

Name	Cost	Line Count
10-Live Plant and Animal Material and Accessories and	3,148,506.00	
11-Mineral and Textile and Inedible Plant and Animal	251,200.00	
14-Paper Materials and Products	329,985.20	
20-Mining and Well Drilling Machinery and Accessories	158,000.00	
24-Material Handling and Conditioning and Storage Mac	3,365,525.73	
26-Power Generation and Distribution Machinery and Ac	326,072.17	
41-Laboratory and Measuring and Observing and Testing	1,746,400.97	
43-Information Technology Broadcasting and Telecommun	160,212.26	
44-Office Equipment and Accessories and Supplies	12,424.59	
47-Cleaning Equipment and Supplies	12,250.43	
73-Industrial Production and Manufacturing Services	18,059.68	
80-Management and Business Professionals and Administ	50,000.00	

Commodity Segment

Process Metrics

Cycle Time By Month [Excel](#)

Year/Month	Rejected	Approved	Avg Hours
2014-05		7	2.8
2014-04		38	1.7
2014-03		3	3.0
2014-02		127	0.1

Activity Detail By Originator [Excel](#)

User	Approved	Rejected	Avg Hours	Rejection Codes
Frank Salesi	693	22	9.8	13 Incorrect Account 6 Unknown 3 Incorrect Pricing
Craig Wolffis	7		0.0	
Scott Carpenters	2		0.0	

Rejection Code Analysis [Excel](#)

Count	Rej Code
13	Incorrect Account
6	Unknown
3	Incorrect Pricing

Approver Activity Summary [Excel](#)

User Name	Approved Reqs	Rejected Reqs	Avg Hours
Supervisor 1	194	13	80.7
Alex Chen	77	2	2.7
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 Carpenters			2		
Frank Salesi	10	22	693	145	1,033
Craig Wolffis			7	3	

eMail Notification to Approvers

File Message

Ignore X Delete Reply Reply All Forward Meeting IM More

Financials To Manager Done Create New

Team E-mail

Reply & Delete

Rules OneNote Actions

Move

Mark Unread

Categorize Tags

Follow Up

Translate

Find Related Select

Zoom

Zoom

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

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

Sent: Wed 9/17/2014 1:07

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, please contact helpdesk@issgroup.net

Requisition	Orig/OBO/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 Wolffis	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	8300/ 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						

Approve or Reject directly from eMail

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)

More information on ISSG and our Solutions

Please visit our website at:

www.ISSGroup.com

Questions?

Contact Andy Weinstein at:

aweinstein@issgroup.net

Thank you!