



# Data-Driven Approval Routing and Workflow Solutions for QAD

**Data-Driven Approval Routing and Workflow Solutions for QAD** are Solutions integrated with QAD that allow QAD end-user organizations to create Process Requests and to configure simple, as well as complex approval routing rules (*using the data that is part of the Process Request*) to route those Requests for Approval/Rejection.

Upon final Approval/Rejection of a Process Request an Action is programmatically performed, including creating a QAD Transaction (ie; Purchase Order, Unplanned Issue, Voucher, Journal Entry, etc.), updating a QAD Master Table (ie; Supplier, Customer), sending email communications with workflow instructions and related documentation...

Examples of Process Requests include:

- Financial Requests (ie; Supplier Invoices, Customer Credit, Project Budgets, Expenses, JEs)
- Inventory Requests (ie; Purchase Orders, Unplanned Issues/Receipts, Material Transfers)
- Production Requests (ie; Scrap Authorization, Assembly Rework)
- Shipping Requests (ie; Freight Authorizations)
- Documented QAD DB Updates (ie; Supplier Maintenance, Customer Maintenance)

The following is a summarized feature list for each of the ISSG Solutions offering **Data-Driven Approval Routing and Workflow** functionality. 3 of the 4 Solutions provide advanced functionality to satisfy the requirements for a specific Process (Purchasing, Supplier Invoices, Customer Sales Quotes), while the 4<sup>th</sup> Solution, iApprove™, is a 'platform' for creating and routing ALL 'other' Process Requests as the examples listed above.

## iPurchase™    iVoucher™    iQuote™    iApprove™

<b>PO Requisition Management/Approval</b>	<b>Supplier Invoice Reconciliation/Approval</b>	<b>Sales Quote Management/Approval</b>	<b>Process Request Creation/Approval</b>
<b>Cloud or On-Premise</b>	<b>Cloud</b>	<b>Cloud or On-Premise</b>	<b>Cloud or On-Premise</b>
<b>Integrated with QAD</b>	<b>Integrated with QAD</b>	<b>Integrated with QAD</b>	<b>Integrated with QAD</b>
<b>Action upon approval of PO Requisition, creates QAD PO</b>	<b>Action upon approval of Supplier Invoice, Creates QAD Voucher</b>	<b>Action upon approval of Customer Quote, Creates QAD SO</b>	<b>Action performed is based on the specific Process Request (see Examples above)</b>
<b>PunchOut Shopping Hosted Catalogs</b>	<b>Managed OCR Service</b>	<b>Pre-defined Quote Templates</b>	<b>Convert paper forms and spreadsheets into Web-based Process Requests</b>
<b>Project Budgeting</b>	<b>PO Line Item Pairing/Matching</b>	<b>QAD Best Pricing and Volume Discounting</b>	
<b>MRP Action Center</b>	<b>G/L Coding of non-PO based Invoices</b>	<b>Customer Signature Capture on Quote</b>	
<b>Buyers Portal/BI Mobile</b>	<b>Approve/Reject directly from eMail</b>	<b>Approve/Reject directly from eMail</b>	<b>Programmatically create Process Requests via QAD DB Triggers</b>
<b>Approve/Reject directly from eMail</b>	<b>Approval Status Visibility</b>	<b>Approval Status Visibility</b>	<b>Fully Documented Audit Trails</b>
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