

# Welcome to the Fall 2022 MWUG Conference

Improving the Flow and Control of QAD integrated Processes  
Create a *Data-Driven* Approval Routing and Workflow  
using QAD datapoints

Data-Driven  
rules create  
*variable* routings  
to satisfy complex  
approval policies



Fully Documented  
Audit Trails for  
SOX and FDA  
Compliance

Out-of-the-box  
integration with all  
versions of QAD

Create validated  
QAD  
transactions  
upon approval

Approve/Reject  
directly from within  
email and Mobile  
device





# Data-Driven Approval Routing and Workflow Solutions for QAD



## Data-Driven Approval Routing and Workflow Solutions for QAD

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 QAD datapoints*) 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 (i.e., Purchase Order, Unplanned Issue, Voucher, Credit Memo, etc.), updating a QAD Master Table (ie; Supplier, Customer), sending email communications with workflow instructions and related documentation.

### Summarized Solution Features List

Each of the ISSG Solutions offers *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 4th Solution, iApprove™, is a 'platform' for creating and routing ALL 'other' Process Requests as the examples listed above.

**Examples of Process Requests**

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**Financial Requests**  
(i.e., Supplier Invoices, Credit Authorizations, Project Budgets, Expenses)

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**Inventory Requests**  
(i.e., Purchase Orders, Unplanned Issues/ Receipts, Lot Hold/Release)

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**Production Requests**  
(i.e., Scrap Authorization, Assembly Rework)

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**Shipping Requests**  
(i.e., Freight Authorizations)

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**QAD Master Table Updates**  
(i.e., Supplier Maintenance, Customer Maintenance)

## 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 MRP Action Center</b>		<b>QAD Best Pricing and Volume Discounting</b>	
<b>Supplier Portal Mobile</b>	<b>G/L Coding of non-PO based Invoices</b>	<b>Customer Signature Capture on Quote</b>	
<b>Approve/Reject directly from eMail</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>Approval Status Visibility</b>	<b>Approval Status Visibility</b>	<b>Approval Status Visibility</b>	<b>Fully Documented Audit Trails</b>