

# Do You See What I See?

## What's New in QAD 2022

Webinar: December 15, 2022 2:00 PM

**WE ARE  
STRATEGIC**



# Do You See What I See? What's New in QAD 2022

## Today's Panel



Manager, Solution Architecture  
**Martin Shertzinger**



Sr. Solutions Architect  
**Amy Vasquez**



Sr. Solutions Architect  
**Amanda Goodson**



Sr. Director, Marketing  
**Barbara Ware**



Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022



# What's In Store for This Sleigh Ride

- **What's New?**
- **Cozy up to Adaptive UX**
- **Unwrap Action Centers and Analytics**
- **Shine Lights on Holly Jolly Favorite Improvements in Recent Releases**
- **Jingle the Bells of QAD Digital Commerce**
- **Go Rockin' Around Lot Trace Workbench**





# About Strategic:

- **Established:** 1992
- **Employees:** 125+
- **Locations:** USA (5), Ireland, UK  
India, Thailand, Denmark
- **Customers:** 1300+ Companies Served
  - 800+ full implementations
  - 500+ life science customers
  - 200+ reached exit strategy
- **Products:**
  - QAD Adaptive ERP
  - Quality Management Systems
  - ERP Integration Adaptors & Extensions
  - FDA Validation Toolkits/Protocols
- **Services:**
  - Implementations & Upgrades
  - Integrations & Development
  - Usage Assessments
  - Managed Services (QAD and EDI)
  - QAD Help Desk (helpSERV)
  - Staff Augmentation



Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022





# What's New

# Key Functional Enhancements

2022

- **Financials**
  - **GL and Reporting**
    - Budget improvements
    - New GL allocations
  - **Accounts Receivable**
    - Self-Billing
  - **Fixed Assets and Taxes**
- **Operations**
  - **Improved visibility in planning data**
    - Material Planning Summary
    - Work Center Load Summary
  - **Serialization support**
    - **Production Activity Reporting**
      - Pack create; receive and backflush by pack
      - Inventory and packaging actions



# Key Functional Enhancements

2022.1

- **Analytics**
  - Brand new experience and capability
- **Supplier Relations Ship Management (SRM)**
  - Integration with QAD Adaptive ERP
- **Procure To Pay – Purchasing**
  - Continued movement to AUX
  - New Features
- **Global Trade and Transportation Execution (GTTE)**
  - Transportation Execution
  - Global Trade
- **Digital Supply Chain Planning (DSCP)**
  - Public Cloud (AWS)



# Key Functional Enhancements

2022.1

- **Enterprise Quality Management System (EQMS)**
  - Auto – Compliance – FMEA-MSR
  - Life Science – Compliance
  - Public Cloud (Amazon Web Services -AWS)
- **Enterprise Asset Management (EAM)**
  - Adaptive UX Uplift close to completion
- **Manufacturing and Material handling**
  - Continued movement to AUX
  - Lot Trace Workbench improvements
- **Digital Commerce (WebJaguar)**
  - Rebranded
- **Production Execution 4.0**
  - Limited Availability





# Amanda's New Favorites

- **Adaptive UX**
- **Action Centers/Analytics**
- **Holly Jolly Favorites**



- 
- **QAD Digital Commerce**
  - **Lot Trace Workbench**
  - **Holly Jolly Favorites**

# Amy's New Favorites

The background features a teal-tinted image of a snow-covered pine branch. A large white triangle is positioned in the top right corner, pointing towards the center of the image.

# QAD Digital Commerce



# QAD Digital Commerce



- QAD Digital Commerce is a powerful and flexible cloud-based solution for e-commerce and marketing automation. It supports B2B and B2C businesses in a wide range of industries, including wholesalers, distributors, manufacturers and industrial
- Tames the complexity of selling your products online and managing your customers, inventory, shipments and invoices
- Offers CRM, email marketing, marketing automation, lead nurturing, product reviews, loyalty program, punch-out integration, single sign-on, online catalog, quoting, private and public content, inventory and more



# Value of Digital Transformation for B2B

- Become easier to do business with
- Standard digital commerce solution for QAD
- Meet customer expectation to conduct business online, on mobile device, without a sales rep
- Provide online buying and inquiries outside of normal business hours, 24/7
- Improve customer satisfaction and retention
- Stay competitive in market



Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022



# QAD Digital Commerce Functionality

QAD Digital Commerce has created a leading SaaS commerce and marketing automation platform that includes innovative all-in-one modules

- Catalog / Category / Page Manager
- Products Manager
  - Product Kitting (front end and admin)
  - Product Processing (inverse of kitting)
- Basic Product PIM with unlimited products fields
- Faceted Search Management with Search Metrics
- Advanced Products configurator Manager
- Customer Manager
  - Main Account / Sub-Account management
  - Budget and manager approval management
  - Customer Group and Region Management
- Business Rule Builder Module
- PO (Purchase Order Management)
- Supplier Management
- Order Management
- Order Processing
- Advanced Quote Management
  - Quote Approval
- Inventory Management
- Advanced Site Configuration
- Advanced User and User Group Management
  - User Personalization and User Auditing
- Layout Manager
- Multi-Store Management
- Multilingual Management
- Tax Management
- User Dashboard Management
- Multi-Warehouse Management
- Fulfillment Management
- Sales Rep Management with Sales Rep Dashboard
- PDF Catalog Builder and presentation Manager
- Marketplace Manager with Seller Portal
- ERP Integration Management via Business Rule Builder
- SEO Tools and Affiliate Management
- 3rd Party Integration Management
- Advanced Shipping rule management and configuration
- Punchout and SSO Manager
- Reporting Tools
- Dynamic Imaging Management
- Order once, Ship to many
- API Enabled
- Subscription Manager
- Protected Level Manager
- Advanced Sales and Promo Manager
- Email Marketing and Leads Nurturing Manager
- CRM Manager (accounts/Contacts/Tasks)
- Advanced Form Builder with auto-Responder
- Automated Scheduler Manager
- Quick Order Form, including Barcode Scanning layout
- Bar-Code label Generation Manager
- Support and Tickets Management
- RMA Management
- Store/Dealer/Sales Rep Locator Manager
- Amazon Marketplace Integration Manager
- MyTradeZone Marketplace Integration Manager
- Payment Gateway Integration
- Digital and Electronic Product Support
- Gift Card Management
- Loyalty and Incentive Program Manager
- Mobile friendly Admin Management
- Highly personalized admin experience with users preferences



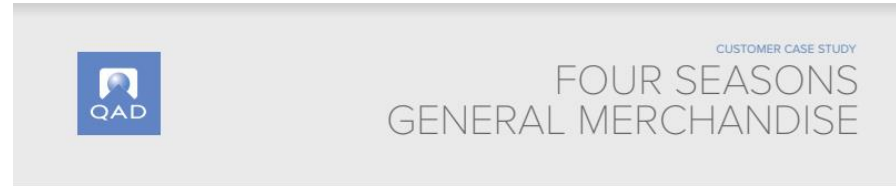
# What Are Customers Saying **4sgm.com** wholesale online store

“We now have a modern platform that meets our needs, our customers’ expectations and can easily scale with our business.”

Mahmoud Paridehpour  
VP eCommerce and Information Systems  
Four Seasons General Merchandise

## RESULTS

- Streamlined workflows and processes, saved time and money
- Improved online shopping experience, increased sales
- Flexible platform continues to grow with the business



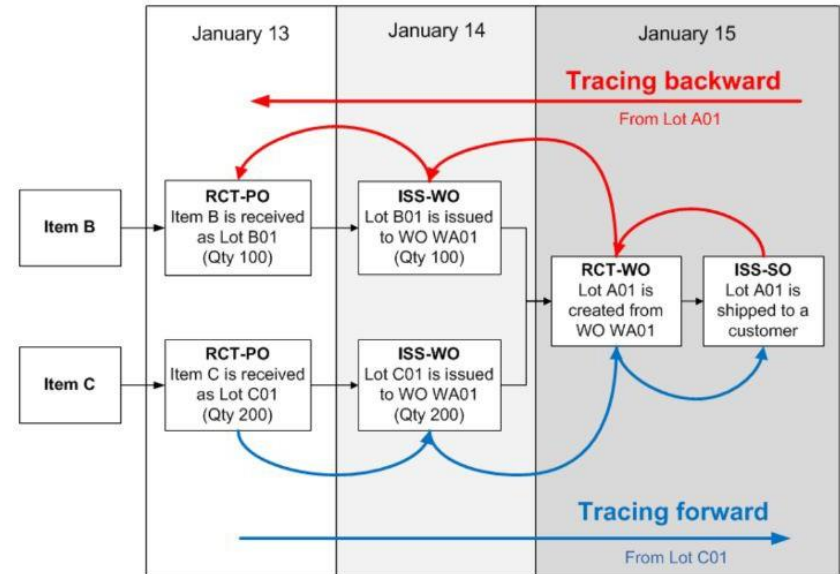
The background features a teal-tinted photograph of snow-covered pine branches. A large, white, diagonal shape cuts across the top right corner of the image.

# Lot Trace Workbench



# Lot Trace Workbench Overview

- Real-time and efficient response to product quality and safety problems
  - Origin of problems
  - Impact of problems
- Additional value in Adaptive UX
  - Bulk and Individual actions



# What is new in this release?

## Actions

- Inventory Detail grid
  - Issue Unplanned
  - Scrap
  - Transfer
  - Bulk Edit
  - Bulk Transfer
- Serials grid
  - Issue Unplanned Pack
  - Scrap Pack
  - Transfer Pack
  - Bulk Transfer Pack

Inventory Detail

Actions More

Description	Site	Location	Lot/Serial
Extra Virgin 500 ml...	10-400	040	04510-A
Extra Virgin Olive Oil	10-400	020	70210-A
Olives, Fresh	10-400	040	80220-A

Issue Unplanned  
Scrap  
Transfer  
Bulk Edit  
Bulk Transfer

Serials

Actions More

Issue Unplanned Pack	Pack Code	Master Serial	Master Pack Stage	Site	Location	Item	Description	Lot/Serial	
Scrap Pack	PL01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910	
Transfer Pack	Aggregated	TO01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910
Bulk Transfer Pack	Aggregated	TO01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910
10100A000289	Aggregated	TO01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910
10100A000290	Aggregated	BX01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910
10100A000291	Aggregated	BX01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910
10100A000292	Aggregated	BX01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910
10100A000293	Aggregated	BX01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910
10100A000294	Aggregated	BX01	10100A000287	Active	10-400	010	04512	Extra Virgin 750 ml	GFT28910

# Enhancements Overview and Value

- The Problem
  - Users could view issues, but not take direct action
  - Extra steps to export to Excel for further analysis



## Value and Differentiators

- Workbench is now actionable
- Inventory disposition is more efficient and effective

## The Solution

- Inventory actions are embedded in the Workbench
- Inventory transactions can be performed for non-serialized and serialized inventory

# Keep in Mind

- To Improve Performance
  - Filter before running trace
  - Reduce levels
  - Reduce Max Workfile
- Repetitive manufacturing
  - Recommend using discrete orders
- Work in Progress Lot Trace
  - Capabilities not yet implemented in the Lot Trace Workbench







# Strategic

INFORMATION GROUP

[www.strategic.com](http://www.strategic.com)

