



eWorkplace Apps

Acumatica 2023
SUMMIT

Quality Management Suite for Acumatica

January 30th, 2023



Agenda

- Introduction
- Who is EWPA
- Why QMS
- QMS for Distributors
- QMS Extending into Manufacturing
- Beyond Testing
- Demo - Quality Management Suite for Acumatica
- End User Experience
- Q & A



Speakers



Ralph Kubek

Director of Sales & Services



Abhilash Nair

Director of Product Management



Surrendra Dudani

Vice President of Professional Services

Who is in the room

- Partners
 - Sales
 - Implementors
- End users
 - General users
 - Quality Team



Who is eWorkplace Apps

Bringing 30 Years of Industry Leadership to Acumatica



Manufacturing & Distribution ERP Solutions and Expertise



Manufacturing & Distribution ERP & IP Solutions



ERP Solution Tailoring



Full-Service Deployment & Support



Software Validation Services



Cloud & IT Services



System Integration



eWorkplace Apps

Manufacturing & Distribution Solutions for Acumatica



Process Manufacturing Suite for Acumatica



Quality Management Suite for Acumatica



Acumatica Center of Excellence



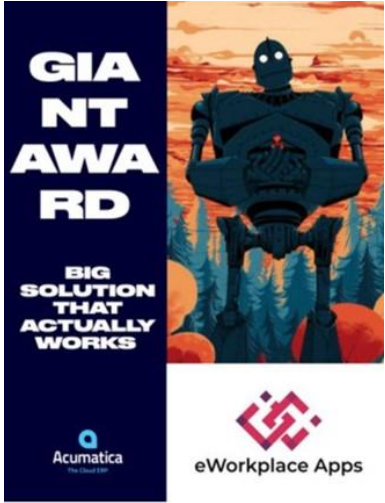
Quality Management Suite for Acumatica

Natively Built within Acumatica:

- Developed using Acumatica toolset
- Same Acumatica database
- Fully integrated with Acumatica ERP



Awards & Certifications



Why QMS?

Streamline and systematize **internal quality needs**

Fully **integrate Quality Management** with every facet of your business

Meet **customer requirements** and satisfaction

Meet industry, regulatory, and **compliance requirements**



Internal Quality Needs



Set testing standards, record results, and evaluate for material



Quarantine material and gate operations



Setup a formal non-conformance corrective and preventative actions process



Get control over ERP foundation such as receiving with inspections and checklist



Get an analysis of vendor quality performance

Integrated Quality Management

Integrate	Fully integrate quality management with accounting, purchasing, manufacturing, distribution, shipping, etc.
Automate	Automate workflows, tasks, and alerts across departments
Simplify	Have all employees work off a single database / source of truth
Eliminate	Eliminate manual data entry, spreadsheets, and multiple data sources

Customer Requirements



PROVIDE COA AND RELATED
DOCUMENTATION



VALIDATE TESTING /
INSPECTION NEEDED DURING
SHIPPING



GAIN CONTROL OVER
CUSTOMER INITIATED
QUALITY ISSUES (NC)

Industry and Regulatory Requirements

1

Report on recall/
traceability

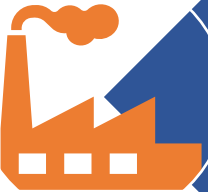
2

Get a digital record
of test results

3

Get digital records
of the NC and CAPA
process

Industry-Specific Compliance Requirements



Manufacturing / Distribution

- ISO 9001 (2000, 2008, 2015)



Aerospace

- AS9100 rec C/D



Food & Beverage

- HACCP, ISO 22000, SQF 2000



Automotive

- ISO / TS 16949



Medical & Life Sciences

- ISO 13485, FDA 21 CFR Part 11 / Part 820



Oil, Gas, Chemical

- ISO / TS 29001



Outcome From Using QMS



Ensure item meet specification – Quality Testing

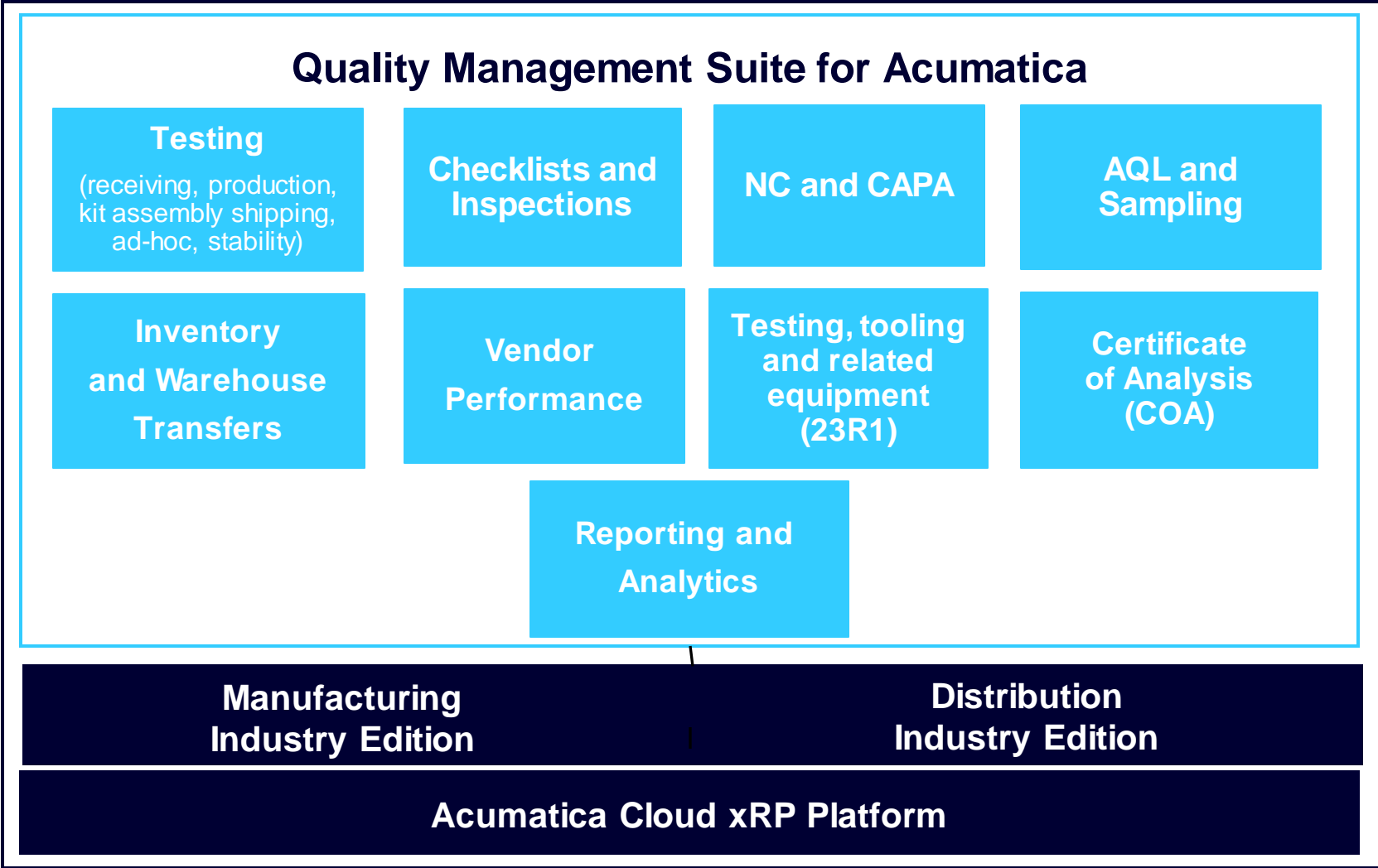


Standard operating procedures are followed – Inspection and checklist lists



Document actions needed – non-conformance and corrective and preventative action

Get the Most with Quality Management Suite for Acumatica



Quality Management Suite – Roadmap

2022 R2



Acumatica 2022 R2

Acumatica 2022 R2

- Standard AQL & percentage-based sampling
- Partial production QC
- General inquiries for enriching the product
- NC and CAPA enhancements
- Two-step warehouse QC
- Enhancements in QC order screen
- Preassigned lot in-process QC

2023 R1



Acumatica 2023 R1

Acumatica 2023 R1

- QC on inventory adjustment
- Vendor certification
- QC on non-stock items
- Sampling of serial tracked items
- Pre-Assigned lot in-process QC
- QMS Mobile

RX



Acumatica Future Releases

Acumatica Future Releases

- Inspection in process manufacturing
- Approval workflow
- Advanced revision control
- Health and Safety Management
- Training and Skills Management



QMS for Distributors



Where QMS in Distribution



Receiving- Ensure quality products are received and only quality products are stored in the inventory



Kit Assembly- Validate item is assembled correctly and meets kit specifications



Shipping- Ship quality products so it meets customer specifications. Product meets complied with customer specifications



Ad-Hoc (Stability Testing)- Validating and testing items that are stored for a certain period of time to make sure that it still meets quality specifications throughout its life

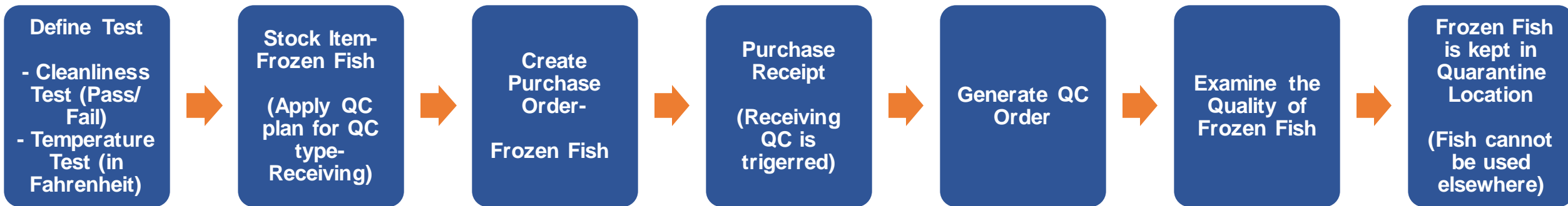


Inventory Transfers- Ensure that while inventory transfer any damage doesn't incur

Receiving QC – Incoming Inspection on Good Receipts and Testing Process

QC Planning

QC Transaction



- **QC Passed**- Fish is moved out of Quarantine Location.
- **QC Failed**- Either return to vendor or scrap.

Kit Assembly- Testing Process

QC Planning

QC Transaction

Define Tests
- Seal Test

Stock Item-
Pack of 2
Oz Tuna
pouch

(Apply QC
plan for QC
type kitting)

Kit
Assembly

(Kitting QC
is triggered)

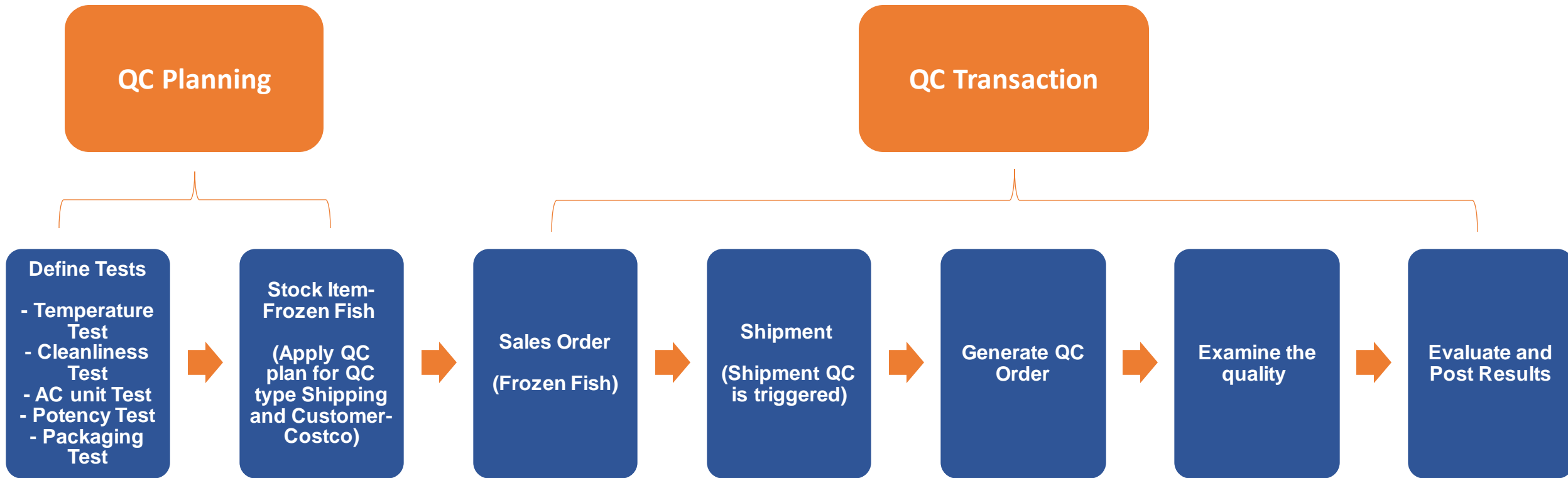
Generate
QC Order

Examine
the quality

Evaluate
and Post
Results



Shipping – Testing and Inspection Process



- **QC Passed**- Frozen Fish can be shipped.
- **QC Failed**- Frozen Fish cannot be shipped



QMS for Distribution Product Demonstration

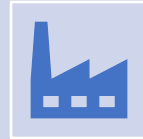




QC Extending into Manufacturing



Where QMS in Manufacturing – in addition to distribution

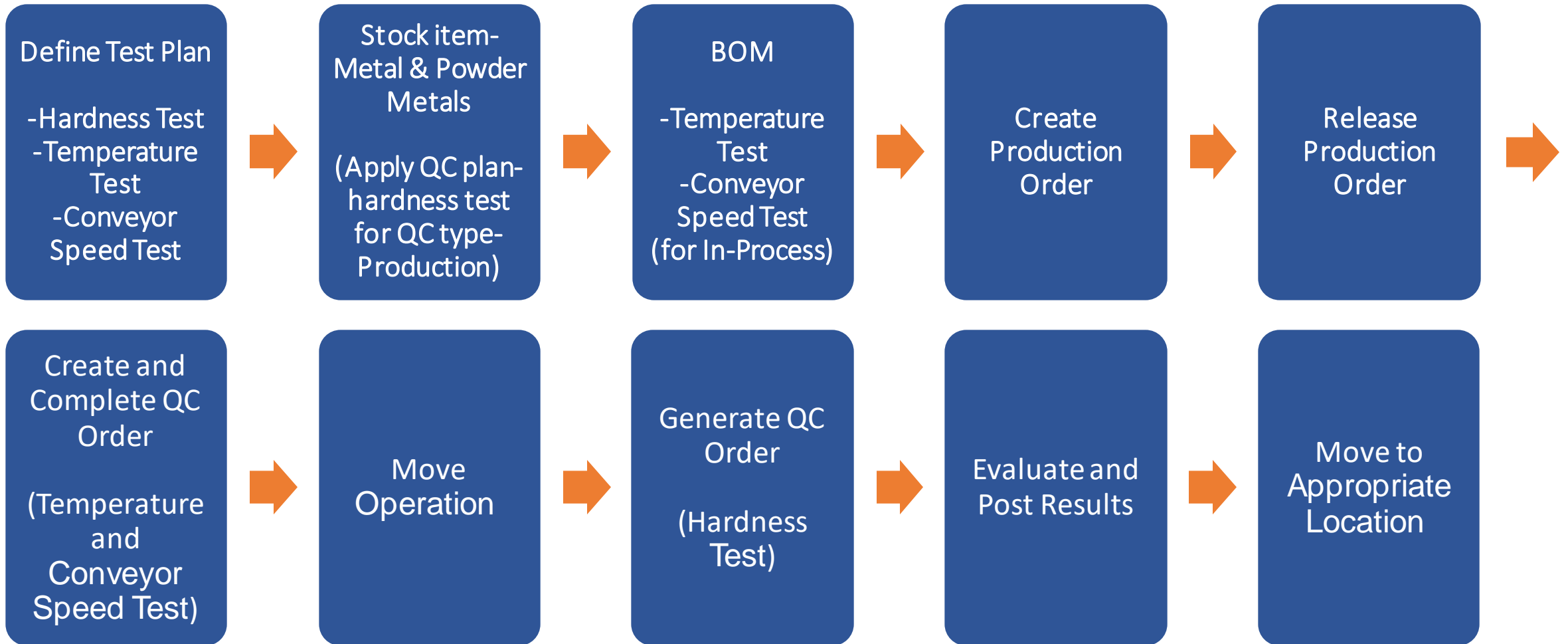


In process QC- Reduce waste by identifying issues at early stage during manufacturing process in manufacturing process



QC at completion on finished good – As an end result, we want to make only quality products are put in the inventory

Production and In-Process – Testing and Inspection Process





QMS for Manufacturing Product Demonstration





Beyond Testing

Control Deviations/ Generate Reports/ Performance Analysis/ Stability Testing

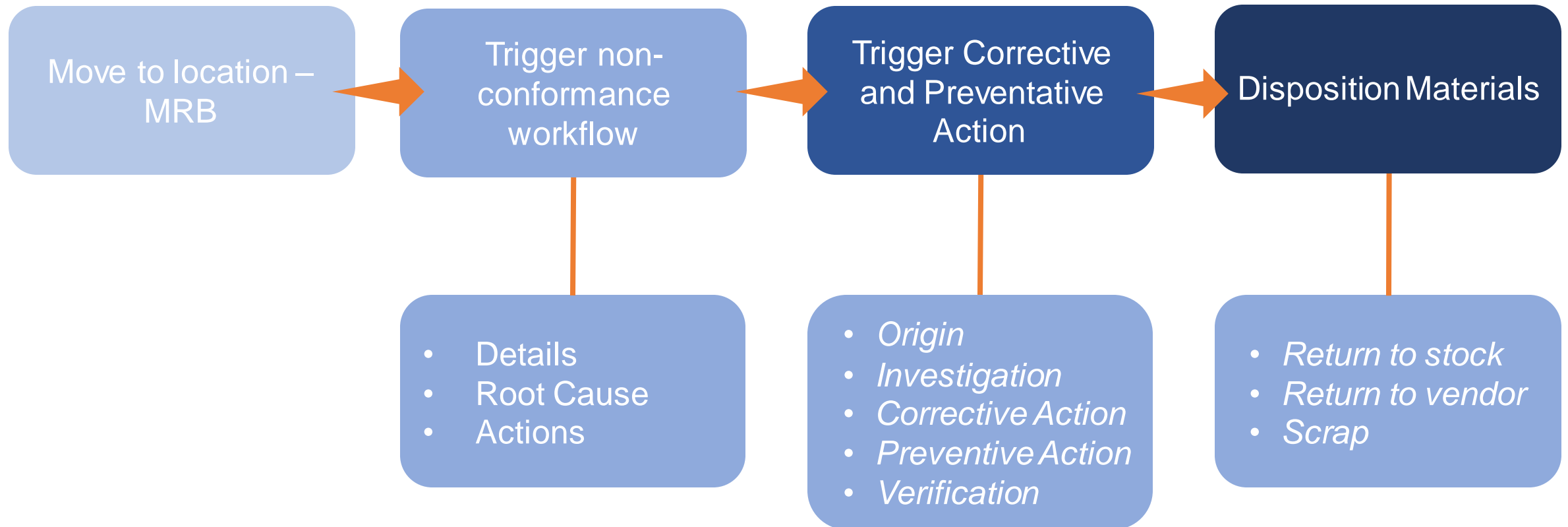
**Non-Conformance/
Corrective and Preventive
Action
(NC/ CAPA)**

**Traceability and CoA
Reports**

Vendor Performance

Ad-Hoc Testing and Stability

Non-Conformance and Corrective and Preventive Action



Traceability



After entering Lot Number of Powder metals (Raw material)

Using Lot Traceability you can Trace-

1. Which lot number of Powder Metals was used in production.
2. Which serial and lot number of Hardened Parts was generated.
3. Sold to which customer and when.

Documentation/ Recall/ Vendor Performance





Let Us Look At The Product



Customers

cbdMD™



REVBIO

Customers

cbdMDTM



Casey Lassiter
ERP Manager, cbdMD

Parting Thoughts

What's Next

- Adding CAPA (Corrective and Preventive Action) and SCAR (Supplier Corrective Action Request)

What We Like

- Inbound products are automatically placed into a quality hold status ensuring compliance to our positive release program prompting the quality team to perform and document testing quickly and accurately with extra info such as third-party COA's and POs.
- Centralized document management for safety and compliance.
- What surprised me the most is how well I can use the QMS module with other Acumatica core functions – especially for triggered notifications to kick-off upstream activities.

Our Wish List

- Supplier qualification, this is a stand-alone, manual process.



Our QMS Journey

Before Acumatica QMS

- Before Acumatica, our QC process was based on emails and Google Sheets for data and releases.
- Our main issue was communication between departments over product status, i.e., awaiting COA, when it has moved to released, quarantined, etc.



After Acumatica QMS

- Accurate labor tracking for in-house testing by linking quality directly to a SKU in the BOM with insights into product costing.
- Absolute control over product status as it flows through Acumatica eliminating confusion and unneeded “touches.” Product receipts are placed directly into the quality hold location in Acumatica until testing is complete and the product is released.
- Create hard stops on products without a COA
- Streamlined the process from production orders to inspection to product release to stock or quarantine location.
- Business events trigger emails to the quality department when a product is ready for inspection with automated emails to need-to-know parties when a product is released or rejected.
- Quality documents stored online for visibility and record-keeping.
- We insert various tests and test methods and dictate which tests relate to each product through different quality plans.
- Defined minor, major, and critical defects for testing based on our RQL.

Selection and Implementation Process

Selection and Implementation

- Previously used NetSuite with no QMS solution (paper-based with a shared drive).
- Evaluated Isolocity, Master Control, Tulip, and a custom stand-alone solution.
- cbdMD purchased Acumatica in early 2022
- Go-live with Acumatica and QMS on August 1, 2022
- We implemented the QMS application during the full implementation of Acumatica ERP, but the QMS Solution itself only took a few weeks.
- The only thing I would do differently would be the addition of out-of-the-box product movement and quality status notifications like the ones I have made for our released and quarantined products. These were added using Acumatica business events.




Implementation Goals

- The main goal was to put process controls in place to ensure product safety. The Acumatica QMS application allows us to show that all quality attributes, tests, and documentations are in place supporting our positive release program, assuring product safety and regulatory compliance all in the system of record.



Resources


Acumatica Marketplace

 **Mitchell, Valence**
Blytheco

★★★★★ **QMS for Acumatica was outstanding**

May 23rd, 2022

I'm a senior project manager for ERP project implementations. Working with EWPA through this Acumatica project has been amazing. Their QMS implementation was great. At every turn, if there was a question from the client, their weekly working sessions allowed them to quickly address and resolve any items that arose. EWPA make the partnership effortless. Amazing work to all involved.

 **Jones, Kelly**
Trace Minerals Research

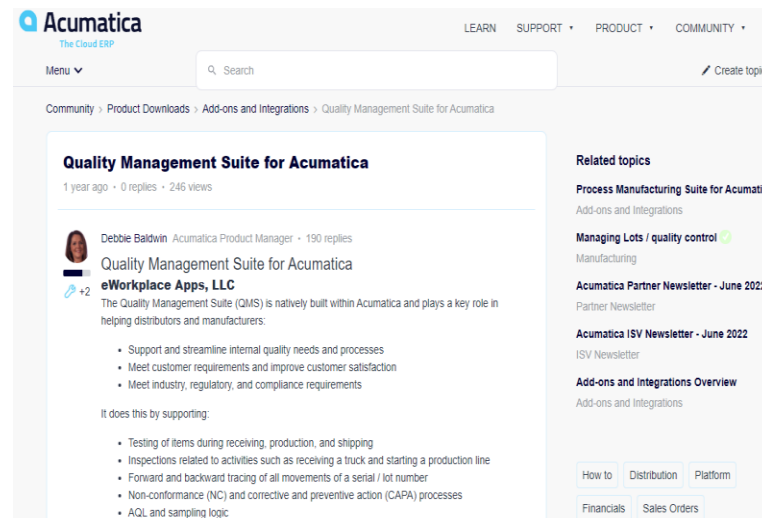
★★★★★ **Great for Managing Testing Plans**

February 10th, 2022

We were in need of a good QMS program to help us manage all the raw material and finished product testing we do. We also needed to be able to have a better database for that testing. This product has been great and has allowed us to build that database and also have Certificate of Analysis that look professional to provide to our customers. This has also been great for managing all of the calibration required for many of our tools and equipment. This solution is still missing some things that other popular QMS solutions offer, but I have been impressed on their plan for future releases that will include some of those items.

[LINK](#)

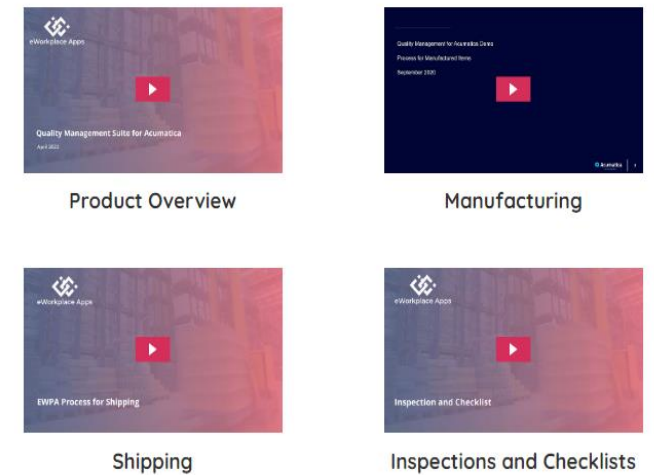
Acumatica Community



The screenshot shows the Acumatica Community forum page. The main topic is "Quality Management Suite for Acumatica" with 190 replies and 246 views. The post is by Debbie Baldwin, Acumatica Product Manager. The content describes the QMS as a native feature of Acumatica that helps distributors and manufacturers. It lists several benefits: supporting internal quality needs, meeting customer requirements, and ensuring compliance. A list of supported activities includes testing, inspections, tracking, and non-conformance processes.

[LINK](#)

eWorkplace Apps Website



The image displays four video thumbnails from the eWorkplace Apps website. Each thumbnail features a red play button in the center. The titles of the videos are: "Product Overview", "Manufacturing", "Shipping", and "Inspections and Checklists".

[LINK](#)



eWorkplace Apps

Questions

Customer Testimonials



Since 1972 Trace Mineral's branded products have been recognized around the world as a pioneer of ionic trace mineral products that have supported consumers in living healthy lives.

Trace's implementation of eWorkplace Apps integrated process and quality management solution into its current Acumatica accounting and distribution systems will provide Trace with a complete ERP system that will allow it to continue to meet and surpass its goals in manufacturing and quality. This will be accomplished by using a quality system to quarantine and test items throughout the receiving, production and shipping process and ensure tight control of production via a formula module that supports both powder and liquid formulas and bill or materials that supports multiple pack sizes.

-- Kelly Jones, Director of Quality and Purchasing, Trace Minerals

Customer Testimonials



“Our main goal was to process controls in place to ensure product safety. The Acumatica QMS application really allows us to show that all quality attributes, tests and documentation are in place supporting our positive release program, assuring product safety and regulatory compliance all in the system of record. We’ve streamlined our process from starting a production order to finishing a production order”.

~Dustin Dickerson, ERP Analyst, cbdMd

Customer Testimonials



Since 1985, Dutchland, Inc has been an innovative leader in producing precast prestressed concrete environmental structures.

The use of eWorkplace Apps Quality Management solution, built within Acumatica's manufacturing system will provide Dutchland with a defined, controlled, and documented process to test and evaluate products during the production process to ensure each pour meets defined specification and shipped to its customers.

-- Brad Tekely, Director of Operations, Dutchland Incorporated

Customer Testimonials



Integration of the cloud-based Quality Module into our daily processing routine to allow us to comply with cGMP standards seemed a daunting challenge. Working with eWorkplace personnel has made the transition as seamless as possible. Their expertise and willingness/ability to find time to support our integration has greatly exceeded my expectations and made the integration process much easier and effective.”

-- John Cote, Director of Quality, Carolina Components Group

Customer Testimonials



“Having a robust quality management system that works effectively across all our SKUs and can be managed all in one place, and provides a massively beneficial lot recall report, is an imperative for any growing company like ours. eWorkplace App’s Quality Management Suite for Acumatica will be the backbone of our quality program.”

“Seamless integration is an imperative. It makes it so all inventory movements are traceable, quality inputs happen at every process level and are documented. You can’t do that on spreadsheets and with inventory tracking alone.”

-- Adam Lappe, Quality Manager, Lakanto Foods USA

Partner Testimonials



"I'm a senior project manager for ERP project implementations. Working with EWPA through this Acumatica project has been amazing. Their attention to detail and the level of quality placed on their product with the customer satisfaction as their overall goal was nothing short of amazing. Their system was very user friendly and seamlessly interacted with the ERP system. Overall, the client was very pleased with the product."

"I'm a senior project manager for ERP project implementations. Working with EWPA through this Acumatica project has been amazing. Their QMS implementation was great. At every turn, if there was a question from the client, their weekly working sessions allowed them to quickly address and resolve any items that arose. EWPA make the partnership effortless. Amazing work to all involved."

-- Mitchell, Valence, Project Manager, Blytheco

Customer Testimonials



Sun Ten founder Dr. Hong-yen Hsu was recognized as the “Father of Scientific Chinese Herbal Extraction” and over the last 70 years Sun Ten has grown into a pharmaceutical grade manufacture with facilities and exports to more than 20 countries including United States, England, Canada, Japan, Malaysia. Singapore, Australia, and Switzerland.

Sun Ten’s acquisition and implementation of Acumatica and eWorkplace Apps integrated process and quality management solution with its ability to control both powder and liquid formula’s, handle multiple pack sizes and control the production of our products along with the ability to quarantine and test products will provide us an ERP solution that help ensure we meet our goals in the areas of safety, quality, efficacy, and consistency

-- Jeff Hsu, eCommerce Supervisor

Thank you for your time!



eWorkplace Apps

For more information, contact:

Ralph Kubek

rkubek@eworkplaceapps.com

(949) 591-8671

www.eworkplaceapps.com