Goods Order Inventory

ENTERPRISE PROCUREMENT & INVENTORY PLATFORM

SIX HUNDRED SITES. THREE BROKEN SYSTEMS. ONE PAPER TRAIL NOBODY COULD FOLLOW.

A world-renowned imaging and document management organization, operating across multiple business sites with highly distributed procurement and inventory needs, faced mounting inefficiencies driven by manual workflows, disconnected systems, and paper-based approval processes. GOIS was engaged to unify these operations on a single platform - mobile-first requisitions, structured approvals, scan-based receiving, automated three-way invoice reconciliation, and real-time inventory visibility.

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Reduced PO Time	Near Zero Manual Entry	Real-Time Accuracy	Accelerated Billing	Unified Systems

A GLOBAL OPERATOR, RUNNING ON A PATCHWORK OF SYSTEMS.

The client is a global leader in imaging technology, providing outsourced business process and document management services across multiple sites and a large distributed workforce. Their supply chain demands tight coordination between employees, managers, vendors, and finance systems.

MULTI-SITE OPERATION	LARGE WORKFORCE	COMPLEX VENDORS
Globally distributed	**Hundreds of employees**	**Legacy AS400 + separate AP**
Facilities requiring unified oversight across every location.	Spanning procurement, warehouse, and finance teams.	No unified platform connecting them.

> Prior to GOIS, the client relied on a combination of manual processes and legacy systems - including an AS400 platform for vendor and item master data, and a separate accounts-payable system for invoice processing. The absence of a unified procurement and inventory platform created significant operational friction.

SIX FAULT LINES, RUNNING THE LENGTH OF THE SUPPLY CHAIN.

During discovery, the client surfaced a comprehensive set of operational pain points spanning the entire procure-to-pay and inventory lifecycle.

FRAGMENTED PROCUREMENT

Globally distributed

- Manual, paper-based purchase requests with no digital tracking
- Requisition-to-PO conversion was entirely manual and error-prone
- No visibility into order status once submitted to vendors

APPROVAL BOTTLENECKS

Hundreds of employees

- Approval chains were informal, untracked, and easily bypassed
- No ability to edit requisitions mid-approval without restarting
- Rejected orders left no documented audit trail

MANUAL ORDER MANAGEMENT

Legacy AS400 + separate AP

- Staff relied on spreadsheets and phone calls to place orders
- Vendor assignments were inconsistent across sites
- No mobile capability- all ordering required desk access

GOODS RECEIPT GAPS

No scan-based receiving

- Vendor shorts, overs, and damages were recorded informally
- Received quantities often mismatched PO quantities in records
- Put-away process was ad-hoc, with frequent misplacement

INVOICE RECONCILIATION

3-way match done manually

- Invoice matching against PO and receipt was fully manual
- Discrepancies discovered late- often post-payment
- AP system was siloed from procurement data

BILLING COMPLEXITY

Markup calculated outside the system

- Markup rules applied manually in spreadsheets per billing cycle
- Billing reports generated manually and emailed, with frequent errors
- No automated trigger for billing report distribution

> These challenges were compounding - manual entries introduced errors that cascaded downstream into billing, auditing, and vendor relationship management, creating a cycle of operational friction that was difficult to break without a unified platform.

SIX MODULES. EACH ONE BUILT AGAINST A DOCUMENTED PAIN POINT.

GOIS addressed the client's challenges through a modular implementation tailored to their specific workflows and integration requirements.

User Access & Site Management

Role-based, location-aware access control

- Role-based login with site and location selection at sign-in
- Seamless sync with Active Directory via AS400 integration
- Admin portal for centralized setup of users, roles, and location hierarchies

Approval Module – Procurement Workflow

End-to-end digital requisition to PO

- Employee browses catalog on mobile, selects vendors, submits requisition
- Approved requisition auto-converts to PO and transmits to vendor
- Automatic routing to manager- with edit, approve, or reject capability
- PO templates reduce repetitive data entry for recurring orders

Movement + PutAway – Goods Receipt

Scan-based receiving with full traceability

- Vendor communicates shorts, overs, or damages at point of delivery
- Goods confirmation tied directly to the originating PO
- Warehouse staff scan items to specific storage locations in real time
- PutAway module guides structured location assignment

Invoice & Cost Capture

Automated 3-way reconciliation

- Vendors upload invoices pre-delivery, enabling early cost visibility
- 3-way match: PO vs. Invoice vs. Goods Receipt- discrepancies flagged
- Costs automatically captured against goods receipts- no manual keying
- Approved invoices auto-sync to AP system via integration

CheckOut + Replication – Inventory

Real-time stock intelligence

- Live inventory dashboard across all locations
- Stock adjustments and inter-location transfers with full audit trail
- Cycle count process built in- replacing manual spreadsheets
- Supports both internal issue and external sale models

Billing Module

Automated markup & report distribution

- Markup rules applied at item or category level on goods receipts
- Reports emailed to billing team on schedule or event-trigger
- System auto-generates billing reports with marked-up values
- Eliminates manual calculations, reduces billing cycle time

CH.04 — SYSTEMS INTEGRATION

THREE SILOED SYSTEMS. ONE UNIFIED DATA FLOW.

AS400- Vendor directory & Active Directory, exchanged via SFTP or EDI.

Integration modes: API (real-time) · EDI (structured B2B) · SFTP (batch)

AP System- Approved, PO-linked invoices for straight-through processing.

CH.05 — HOW IT WORKS

SEVEN STAGES. ONE CONTINUOUS FLOW FROM MASTER CATALOG TO CONSOLIDATED BILL.

GOIS was configured to mirror the client's real-world operating model rather than force a change to it. The platform spans the complete procure-to-pay and inventory lifecycle across roughly 600 sites in the United States, each with its own locations, vendors, and billing arrangements.

Catalog
Governed master items & pricing

Requisition
Raised at site vs. catalog

Approval
Rules, hierarchy, limits

PO
Auto-generated & sent

Receiving
Scan-based, put-away

Billing
Automated, consolidated

One governed flow from the master catalog through to an automated, consolidated bill each stage feeds the next with no re-keying in between.

Catalog Management

A governed Master Company catalog, replicated to 600 site companies

- Multiple units of measure per item Each, Case, Box, Pallet, or packaged configurations like Box of 6 or Case of 24
- Cost, price, and margin maintained centrally so downstream billing always calculates against one agreed set of figures
- Each of the ~600 U.S. sites modeled as its own company (Site #1 → Company 1, and so on), keeping inventory, transactions, and billing cleanly separated under unified oversight
- Barcodes, QR codes, and labels held at the item level for scan-based receiving, put-away, movement, and checkout
- Custom billing rule per item- Passthrough, No Billing, Consumption, or Click Use- with billing cycles and Click Use pricing defined alongside it
- Controlled, rule-based replication distributes items, vendors, categories, and pricing from the Master Company to all sites or a selected subset- central changes propagate outward automatically, eliminating the manual per-site edits that caused drift

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Procurement

Requisition through PO, with punch-out catalogs and geography-aware approvals

- Users raise requisitions against the replicated catalog, seeing only items, vendors, and pricing valid for their site
- Users raise requisitions against the replicated catalog, seeing only items, vendors, and pricing valid for their site
- Approved requisitions convert directly into a PO no re-entry and transmit by email, cXML, API, or EDI
- Punch-out integration with Staples and Uline pulls live catalog items and current pricing directly into GOIS
- A defined reject workflow captures the outcome for orders that shouldn't proceed

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Receiving Workflow

Scan-based receiving at the dock, with directed put-away

- Zebra (or comparable) mobile computers confirm received quantities against the originating PO in real time
- Scan-and-confirm put-away records where stock actually landed, keeping the warehouse picture accurate from the moment goods arrive
- Automatic directed put-aways tell staff exactly which locations and bins each item should go to

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Warehouse Management

Bin-level control from receipt through movement, counting, and consumption

- Advanced warehousing with bin support gives precise, location-level visibility of every item
- Stock movement between bins is captured with a full audit trail
- Purchase UOM and Storage UOM are handled independently bought by the pallet, stored and tracked in smaller units, reconciled automatically
- Cycle counts and physical counts are built into the workflow, replacing periodic manual spreadsheet reconciliation

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Consumption Process

Job-based checkout that automatically drives billing

- Stock checkout for specific jobs attributes each consumption to the consuming job or cost center- traceable to its purpose, across Each, Case, Box, and Pallet units
- Automated billing calculation applies the corresponding item margin at the moment of consumption, removing the manual markup step that previously introduced errors and delay

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Billing

Automated, multi-model billing consolidated into one monthly statement

- Passthrough billing is created automatically on receiving
- Resource (equipment) management tracks billable assets, not just consumable stock
- A consolidated monthly statement combines passthrough, consumption, and click-use charges across hundreds of items and multiple site companies
- Consumption billing is created automatically on checkout, carrying the item's margin
- Click-Use pricing is calculated automatically from imported equipment counter data

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Systems Integration

GOIS as the connective layer across enterprise and vendor systems

- AS400 provides vendor and item master data, keeping GOIS aligned with the system of record
- Azure Entra handles identity and access, so users sign in through the organization's existing directory
- Staples and Uline connect as punch-out catalogs so external vendor content flows straight into procurement
- API, EDI, and cXML carry electronic purchase orders and structured data exchange with vendors and downstream systems

CH.06 — APPROVAL GOVERNANCE

EVERY BILLABLE APPROVAL, GOVERNED BY THE SAME RULES.

Rules-driven routing by site, vendor, category, and dollar value - the same attributes that govern billing - keeps commercial and approval logic aligned. Sequential and parallel paths move requisitions up the chain, or fan them out to several approvers at once. Threshold-based escalation advances items automatically once a value crosses a configured limit.

Level	Role	Approver	Threshold $ Limit	Pre-Approval Limit
Level 1	Site Manager	Ron	$500	-
Level 2	Area Manager	Daisy	$1,000	$500
Level 3	Director	Kate	$5,000	$1,000
Level 4	VP	Joseph	$50,000	$10,000
Level 5	Finance RVP	Harry	$250,000	-
Level 5	President	Edward	over $250,000	-

Representative six-level approval hierarchy - each role carries its own spending threshold and pre-approval limit, so a requisition escalates only as far up the chain as its value requires.

NOTIFICATIONS

Nothing sits unseen

- Real-time alerts to the current approver the moment an item lands in their queue
- Reminders and escalation notices chase pending approvals and flag items approaching a cut-off
- Outcome notifications confirm approve, reject, or return decisions back to requester and finance

DELEGATION

Leave never stalls billing

- Time-boxed delegation lets an approver assign their rights to a deputy for a defined period
- Delegated limits stay within the delegator's ceiling never exceeding actual authority granted
- Every delegated action is attributed to both parties

AUDIT TRAIL

Fully reconciled, end to end

- Full, tamper-evident history per item submission, edit, approval, rejection, delegation, escalation
- Rejections and returns are documented, not discarded reason and responsible approver retained
- Every billable charge traces back to the approval that authorised it

CH.07 — RESULTS & BUSINESS IMPACT

SIX SYSTEMS' WORTH OF FRICTION, REPLACED BY ONE FLOW.

Globally distributed

Procurement cycle time, through a full digital workflow from requisition to PO.

Hundreds of employees

Manual data entry, via automated cost capture and invoice integration.

Legacy AS400 + separate AP

Real-time inventory visibility across all operational locations.

Improved

Billing accuracy, with system-driven markup and automated report distribution.

Unified

Three enterprise systems AS400, AP System, Active Directory under one data flow.

Empowered

Staff, with mobile-first tools for ordering, receiving, and inventory management.

> A note on measurement. Specific before/after metrics, adoption rates, and ROI figures can be added following go-live measurement. GOIS recommends a 90-day post-implementation review to capture quantitative outcomes and inform continuous improvement roadmap priorities.

KEY DIFFERENTIATORS.

End-to-End Coverage

Single platform spanning requisition, approval, PO, receiving, invoice, and inventory no integration gaps between modules.

Mobile-First Design

Field employees create and track orders from any device, removing desk dependency entirely.

Flexible Integration

API, EDI, and SFTP/Flat File options accommodate existing AS400 and AP infrastructure without requiring system replacement.

Modular Implementation

Clients adopt only the modules they need keeping deployment focused and ROI measurable from day one.

Configurable Approvals

Managers edit, approve, or reject orders with full audit trail, supporting compliance and governance requirements.

Vendor Collaboration

Vendors communicate receipt exceptions and upload invoices pre-delivery reducing back-and-forth and accelerating reconciliation.

ABOUT GOIS

GOIS is an enterprise inventory and procurement management platform purpose-built for organizations operating across multiple sites, complex vendor networks, and integrated financial systems. GOIS delivers end-to-end procure-to-pay automation, real-time inventory intelligence, and flexible integration capabilities helping operations teams eliminate manual processes, reduce costs, and gain full visibility across their supply chain.

READY TO TRANSFORM YOUR OPERATIONS?

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