

## **ISO Solved Solution**

The ISO Solved solution was build to accomplish the following in most optimised and automated way possible.

1. Measure and manage output
2. Manage the definition and sequence of tasks performed
3. Stimulate employee competitiveness
4. Ensure quality with electronic checklists
5. Eliminate wastage of unnecessary expenses
6. Record and monitor the employees time and activities
7. Collect evidence on the production process (what happened / not happened)
8. Manage and measure your profit per client / order

## **ISO Solved goals to achieve in your company:**

1. Increase your profit
2. Increase productivity
3. Eliminate wastage
4. Optimise and automate

## **How does the ISO solved system accomplish this?**

The ISO Solved system takes the holistic approach by optimising the output of the whole company as far as possible by using various software modules. The solution impacts on the human and process side of the business as one business solution. The integration of all these business process in one business system allows for proper flow of information to the whole company. The bottlenecks are identified and managed to achieve the goals above.

## ISO Solved Modules

Modules may be chosen according to your company's requirements and can be customised according to your needs.

Module name	Why?
<p><b>Electronic Quotes</b></p>	<p>A real-time online quote system to manage client/customer requests for quotations of products/services enabling faster product/service orders and deliveries. Can be customized according to your specific products/services needs.</p> <ul style="list-style-type: none"> <li>• Increase response on quotes issued</li> <li>• Decrease time spent on preparing quotes: automated calculations</li> <li>• Decrease number of substandard quotes</li> <li>• Increase consistency of quotes issued</li> <li>• Increase accessibility of quotes</li> <li>• Increase number of leads able to manage</li> </ul>
<p><b>Implementation time frame:</b></p>	<p>1 Week</p>
<p><b>Sales module</b></p>	<p>A sales module that enables you to know what your sales force is up to. Monitor their schedule and communication with clients, at your convenience, to improve effectiveness and productivity.</p> <ul style="list-style-type: none"> <li>• Manage relationships with clients efficiently</li> <li>• Decrease time spent on client queries</li> <li>• Keep track of progress with leads</li> <li>• Monitor conversion ratio of sales representatives</li> <li>• Decrease appointment rescheduling</li> <li>• Keep record of employee/client exchanges</li> <li>• Job card can be automatically created as soon as Sales Rep takes the responsibility for the possible client.</li> </ul>
<p><b>Implementation time frame:</b></p>	<p>1 Week</p>
<p><b>Time and Attendance</b></p>	<p>Touch screen interface at entrance / exit to record who is going where. When a person comes to the office they click on their name and click on "Came to work" link. When they leave they click on their name and select where they are going to. When they come back they click on their name and that they are back.</p> <p>This is not to be confused with a security access system.</p>

<b>Implementation time frame:</b>	1 Day; needs touch screen, computer with Internet access.
<b>Bank import / accounting module</b>	<p>This module makes the capturing of money received and the communication through the organisation possible. This module supports sales module in that Sales Reports and Commission module requires this Accounting module</p> <ul style="list-style-type: none"> <li>• Manage every transaction in bank account</li> <li>• Decrease confusion regarding money received</li> <li>• Manage client orders</li> <li>• Increase accuracy of statutory submissions</li> <li>• Avoid late statutory submissions</li> <li>• Increase accurate cost allocations</li> </ul>
<b>Implementation time frame:</b>	1 Week
<b>Accounting documents (Invoices, pro forma invoices, receipts, refunds)</b>	<p>The accounting documents module enables accounting documents to be automated and accessible to the correct employees.</p> <ul style="list-style-type: none"> <li>• Decrease time spent on preparing accounting documents</li> <li>• Generate invoices directly from Quotes</li> <li>• Decrease invoice distribution costs</li> <li>• Decrease invoice queries</li> <li>• Ensure consistency of issued invoices</li> </ul>
<b>Implementation time frame:</b>	1 Day
<b>Commission Module</b>	<p>Allocating and paying the right commission at the right time is crucial to ensure continued sales and service delivery</p> <ul style="list-style-type: none"> <li>• Keep record of individuals or businesses that receive commission</li> <li>• Enable commission receivers access to commission reports</li> <li>• Decrease time spent on commission queries</li> <li>• Increase accuracy of commission payments</li> </ul>
<b>Implementation time frame:</b>	2 Days
<b>Job card Administration Module</b>	<p>The Job card Administration Module manages active job cards and assists with initiating the required procedures to complete each job card successfully.</p>

	<ul style="list-style-type: none"> <li>• Manage job cards placed by clients</li> <li>• Decrease time spent on creating job cards</li> <li>• Decrease job cards omitted by error</li> <li>• Ensure effective communication with clients</li> <li>• Allow for different payment methods</li> </ul>
<b>Implementation time frame:</b>	2 Days
<b>Workflow management / Monitoring module</b>	<p>Monitor the productivity and standard of work of employees from anywhere at any time. Manage authorisation of Tasks and electronic checklists.</p> <ul style="list-style-type: none"> <li>• Increase employee accountability</li> <li>• Monitor order execution process</li> <li>• Schedule tasks to successfully execute order</li> <li>• Keep client informed of progress</li> <li>• Minimise delays in order execution</li> <li>• Increase effectiveness of employees</li> <li>• Allocate tasks to required expertise</li> <li>• Manage productivity of employees</li> <li>• View global overview of progress on each order</li> <li>• Checklist manage the quality of the products or services</li> <li>• Accept claims electronically to handle more efficiently</li> <li>• Gather evidence while performing the task</li> <li>• Enforce checking by using authorisation queues</li> </ul>
<b>Implementation time frame:</b>	2 Weeks to 1 Month, subject to depth of integration and resource availability
<b>Electronic Files:</b>	<p>Electronic files save time, effort and space</p> <ul style="list-style-type: none"> <li>• Access files from anywhere</li> <li>• Allow simultaneous access to different parties at different locations</li> <li>• Decrease space used for filing</li> <li>• Decrease risk of misplacing files</li> <li>• Decrease execution delays</li> <li>• Decrease time spent finding files</li> <li>• Increase evidence for queries</li> <li>• Minimise file conversion time</li> </ul>
<b>Implementation time frame:</b>	1 Week

<p><b>Scheduling Appointments</b></p>	<p>With this module you can ensure that employee time is utilised effectively and monitor outputs.</p> <ul style="list-style-type: none"> <li>• Increase productivity of employees</li> <li>• Decrease missed deadlines</li> <li>• Manage time of employees</li> <li>• Increase output capacity</li> <li>• Decrease distance travelled between clients</li> </ul>
<p><b>Implementation time frame:</b></p>	<p>1 Week</p>
<p><b>Document Management (Policies / Procedures / Forms)</b></p>	<p>Control document versioning and track changes in documents, including who made the change and when.</p> <ul style="list-style-type: none"> <li>• Ensure that latest versions are accessible</li> <li>• Keep record of changes in documentation</li> <li>• Automated and integrated use of standardised documentation</li> <li>• Standardised communication</li> <li>• Manage usable versions of templates</li> <li>• Monitor who made changes and when</li> <li>• ISO standards requirements</li> </ul>
<p><b>Implementation time frame:</b></p>	<p>2 Weeks to 1 Month, subject to number of official documents and resource availability</p>
<p><b>Improvement Module</b></p>	<p>The improvement module enables and track the progress made on the initiatives to improve the organisation. In an ISO environment the documented procedures needs to be followed each and every time to be consistent. A deviation from the procedure leads to a non-conformance that needs to be raised. The investigation and fixing of these abnormalities in the system is done through the improvement system.</p> <ul style="list-style-type: none"> <li>• Enough planning is required for each change, large or small</li> <li>• Co-ordinate the effort of different role players in different departments</li> <li>• Gathering and storing evidence of the implementation or changes made</li> <li>• Keep the timelines for each step during the change</li> <li>• Implementation cannot start before the training of the required persons is completed</li> <li>• Able to handle large volume of changes simultaneously</li> </ul>

<b>Implementation time frame:</b>	2 Weeks to 1 Month, subject to number of official documents
<b>Call Centre</b>	<p>Manage multiple calls for various clients across different lists and provide meaningful progress reports</p> <ul style="list-style-type: none"> <li>• Minimise multiple calls for different reasons to the same company</li> <li>• Ensure each operator is aware of previous communication</li> <li>• Provide regular progress reports to clients</li> <li>• Increase effectiveness of each call</li> <li>• Reduce number of calls required to achieve goal</li> <li>• Ensure effective assistance when a company returns a call</li> </ul>
<b>Implementation time frame:</b>	2 Weeks
<b>Email Archive</b>	<p>Automatic archiving of all company emails sent en received with a powerful search facility to access the previous emails for a company or person.</p> <ul style="list-style-type: none"> <li>• No user needed to sort emails according to clients</li> <li>• All emails are available to be downloaded where and when necessary.</li> <li>• No lost or misplaced emails</li> <li>• Use the alerts to be notified of keywords like complaints, compliments, threats or angry emails from clients</li> <li>• The archive automatically keeps the whole email communication record with the person or company.</li> </ul>
<b>Implementation time frame:</b>	1 Weeks
<b>Training</b>	<p>Use the built in training module to compile custom training courses. The monkey-puzzle exams are available online for users to complete. Prove the competency of employees or contractors.</p> <ul style="list-style-type: none"> <li>• Win CCMA cases with proof of training</li> <li>• Keep the training material as controlled documents with the versions of the exams</li> <li>• Track the number of times a candidate writes the exam, the answers given and even the downloads of the material.</li> <li>• View the list of candidates that didn't pass the course to take remedial action</li> <li>• Alerts notify users of new training that they must</li> </ul>

<b>Implementation time frame:</b>	complete 1 Week
<b>Equipment Register</b>	<p>The equipment register keeps record of the products you have sold or installed at your own company or at a client. The service interval can be specified per item to maintain each piece of equipment according to their specified maintenance schedule</p> <ul style="list-style-type: none"> <li>• Link appointments made with the required service intervals.</li> <li>• View appointments for the month on a map to optimise the route to service all clients' equipment.</li> <li>• Use the dynamic inspection/ service sheet to record all equipment serviced as per their location.</li> <li>• Upload proof of service against the full audit trail of maintenance</li> </ul>
<b>Implementation time frame:</b>	1 Week
<b>Stock management</b>	<p>Track all stock transactions from purchasing through delivery into the warehouse shelf. Allocate stock according to the different warehouses and arrange transport where needed.</p> <ul style="list-style-type: none"> <li>• Stock project manager makes decisions like buy more stock based on low stock levels or faster flow rate, send stock back or arrange stock assembly.</li> <li>• Stock transporter arranges all the transport arrangements</li> <li>• Assemblers access their required assemblies per order and their respective timelines.</li> <li>• Warehouses receives, store and dispatch stock based on requirements</li> </ul>
<b>Implementation time frame:</b>	2 Weeks

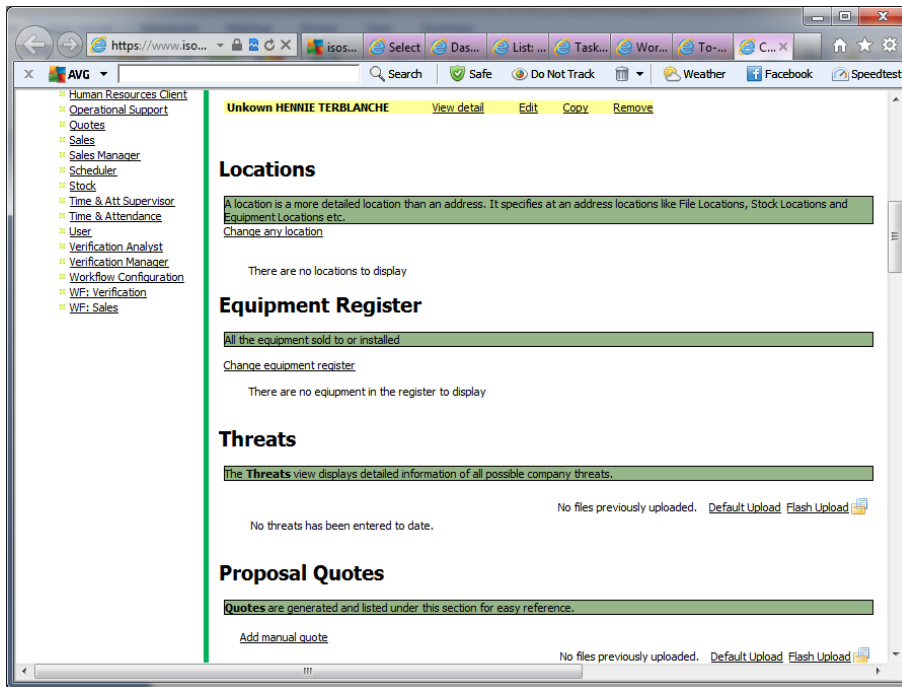
## Why choose ISO Solved?

We have 5 years experience in running an ISO accredited organisation. The software development was a natural progression towards a simpler, cost- and time effective way to the various scenarios we encountered and problems we addressed. We understand the rules to conduct business by and can assist you from an IT perspective to accomplish your goals and ultimately realise more profit.

If you decide to take our offer, the following steps can be taken to implement the modules. The sequence is determined by the areas where the most saving can be realised.

## Why our workflow module?

### 1. Integrated system links with the other modules;





**Commission arrangement**  
The commission arrangement is listed below.  
Set a new arrangement. No files previously uploaded. [Default Upload](#) [Flash Upload](#)  
There are no commission arrangements for this entity

**Accounting Documents**  
Displays all the accounting documents of this company.  
No files previously uploaded. [Default Upload](#) [Flash Upload](#)

**Client**  
No documents generated

**Supplier**  
No documents generated

**Client Payment History**  
Displays the Payment History of amounts received from this company.  
No files previously uploaded. [Default Upload](#) [Flash Upload](#)

Date	Amount
------	--------

Ref No	Invoice No	Date	Total	Status	Download	View rows	Send Email	Copy
5421	6710	13 Nov 2012	6,897.09	Generated				

**Sales Responsible Person(s)**  
The Responsible Person(s) are listed below.  
Give this company to me as Responsible Person. No files previously uploaded. [Default Upload](#) [Flash Upload](#)  
There are no sales responsible person linked to this entity

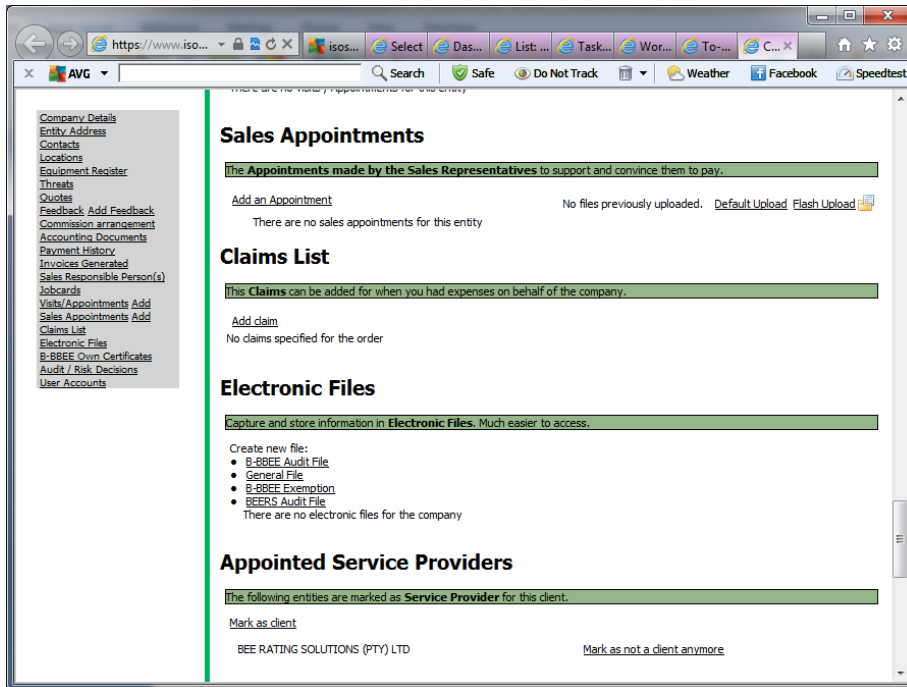
**Jobcards**  
Lists the jobcards which needs to be executed for this company.

Type	Date placed	Jobcard No	Amount	Recurring	Paidup	Completed	Follow Up Date
Verification	13 Nov 2012	2666	R11380.16	No	13 Nov 2012	Not yet	14 Nov 2012

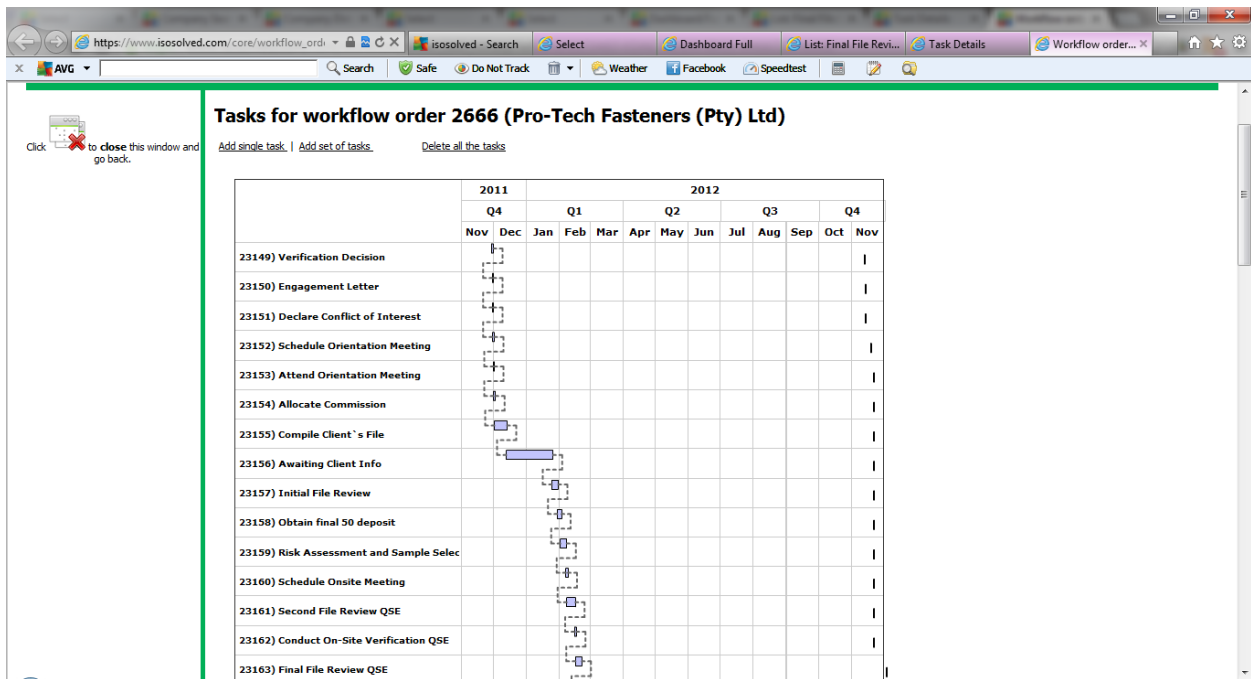
External Tasks Link to email to client:  (Click on the "External Tasks Link" next to the Tasks to view)

**Operational Visits / Appointments Arranged**  
Lists the visits and their details below.  
[Add Visit / Appointment](#). No files previously uploaded. [Default Upload](#) [Flash Upload](#)  
There are no Visits / Appointments for this entity

**Sales Appointments**



2. Project planning of every order to:
  - a. Ensure accurate delivery dates;
  - b. Efficient client communication;
  - c. Enable sales personnel to work with client on scheduling;



**Corrie Vermeer** 0 Points this month Go Back

You are responsible for: (but has not started the tasks)

Job Card No: 1213 LATE 298	<b>SURAFIELD CC</b> Task: Receive Completed EME Application Last feedback: Send EME application completed. Workflow order task 19532 (Corrie Vermeer - 12/11/2012 9:26:00 AM)	Start this task	Transfer
Job Card No: 119 LATE 143	<b>delete Demo Company - Dev1234</b> Task: Issue EME Certificate SP3 Last feedback: APPROVED: - Authorised workflow order task: Issue EME Certificate SP3 (2094) fo (Corrie Vermeer - 12/4/2012 12:43:00 AM)	Start this task	Transfer
Job Card No: 119 LATE 70	<b>delete Demo Company - Dev1234</b> Task: Prepare certificate for posting Last feedback: APPROVED: - Authorised workflow order task: Issue EME Certificate SP3 (2094) fo (Corrie Vermeer - 12/4/2012 12:43:00 AM)	Start this task	Transfer

Other possible tasks

Job Card No: 89 LATE 209	<b>Dollatella Veertien CC t/a Forklift Truck OFS</b> Task: Prepare certificate for posting Last feedback: Completed workflow order task 367 (Megan Payne - 6/7/2012 8:31:00 AM)	Start this task
Job Card No: 89 LATE 207	<b>New Forest Vegetable Farm CC</b> Task: Prepare certificate for posting Last feedback: Johan Gouws - Contacted - In process to comply through another agency. (Sales Rep Imprit - 12/1/2012 9:37:00 AM)	Start this task

**Corrie Vermeer** 0 Points this month Click to close this window and go back.

Busy with: **delete Demo Company - Dev1234**  
Order No: 119  
LATE 143  
Last feedback: Issue EME Certificate SP3 started. Workflow order task 2074 (Corrie Vermeer - 1/8/2013 9:17:00 AM)

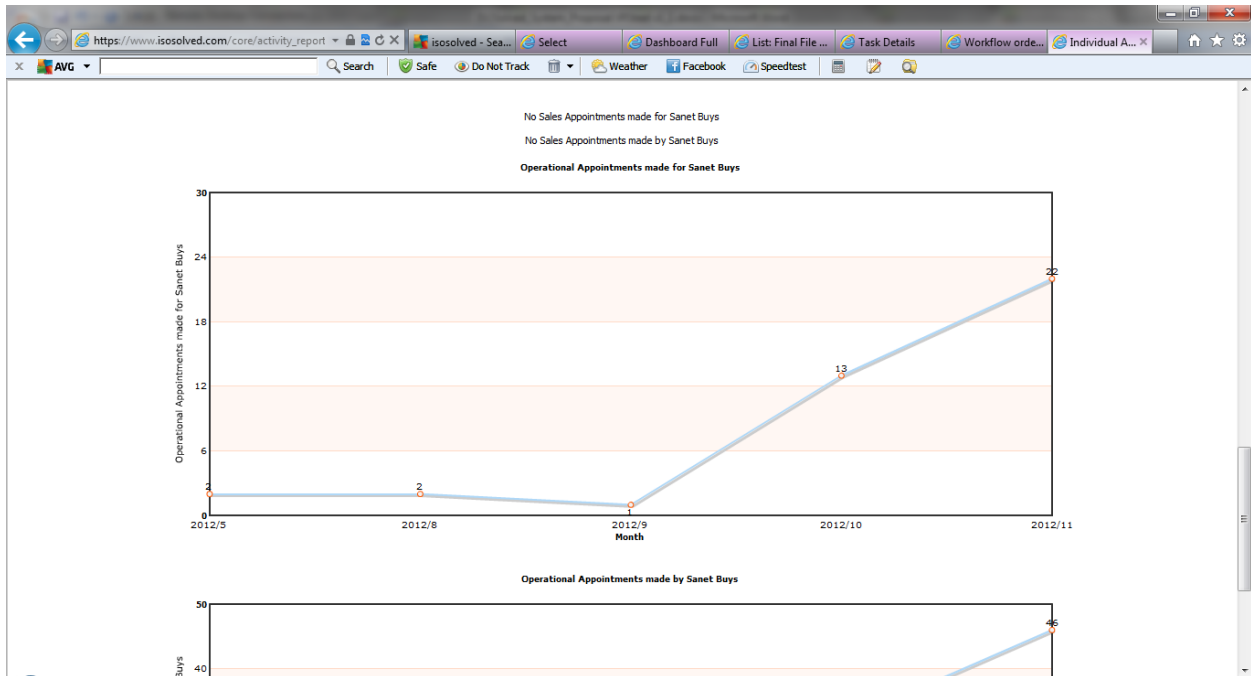
Task: Issue EME Certificate SP3 (1 point) Detail

Cancel / Return Transfer Send to authorise

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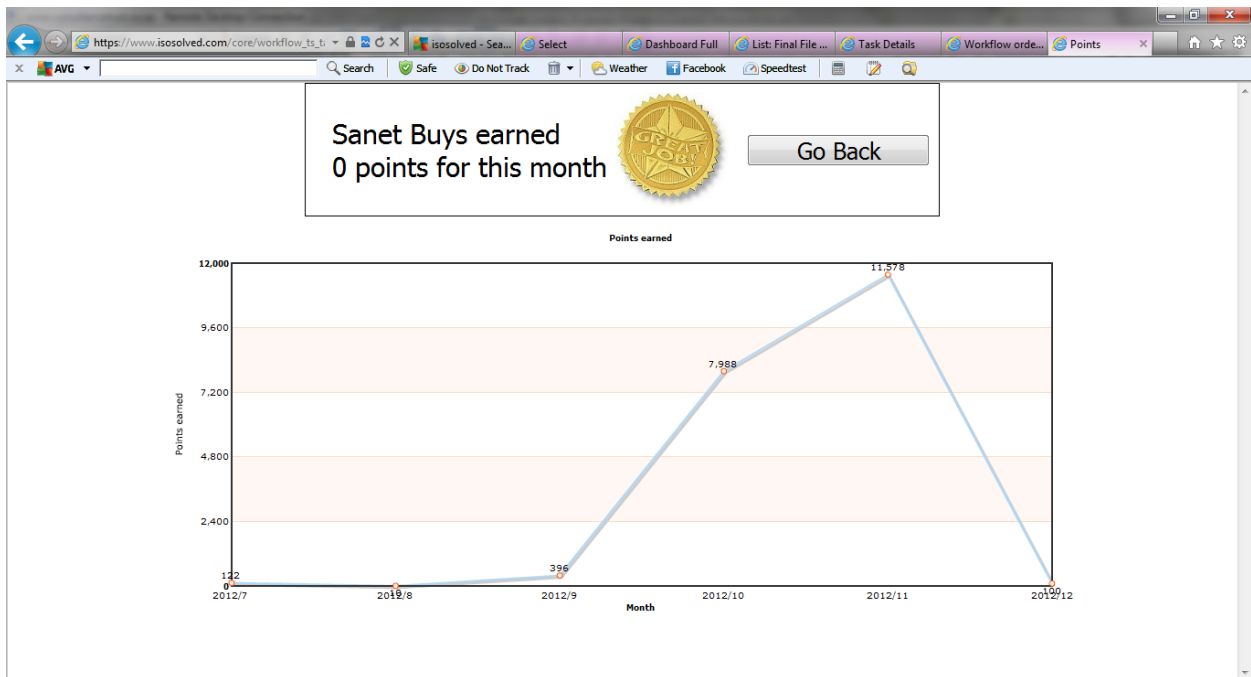
Continue with LAST client Continue with ANY client

Choose the next task from the list



3. Points system to monitor the output of personnel to:

- d. Improve employee productivity and increase employee capacity by a substantial factor;
- e. Unlock many management hours;
- f. Get consistency and quality;



4. Monthly Coaching to assist with optimisation:
  - g. Coaching assist with the initial implementation;
  - h. Coaching at intervals ensure the progress made during the ongoing improvement;
5. Easy implementation with data capturing assistance
6. Simplify
  - i. Human resources;
  - j. Training and monkey puzzles (Competency);
  - k. Claims for expenses;
  - l. Quality management;
  - m. Checklists;
  - n. Documentation administration;
  - o. And many more.
7. All savings and optimisation leads to more profit.

### **Price (includes access to all the modules above)**

R5 000 per month while turnover is less than R10 Million per annum. 4 Hours of coaching p.m. included.

R10 000 per month between R10 Million and R35 Million per annum. 6 Hours of coaching p.m. included.

R20 000 per month if turnover is above R35 Million per annum. 8 Hours of coaching p.m. included.

R40 000 per month if turnover is above R150 Million per annum. 12 Hours of coaching p.m. included.

No limitation on the number of users on the system.

Service level agreement is available on request.

Best Regards  
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