



IFS Service Request to Procurement Process Case Study

Automating Service and Procurement Workflows to Enhance Efficiency,
Accuracy, and Financial Control with IFS ERP

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Executive Summary

DH Pace requires a robust system to streamline its service request and procurement processes. The client faced challenges in automating work order creation, managing purchase requisitions, and integrating supplier invoices. Through IFS ERP, implemented by ESS, DH Pace enhanced its service efficiency by automating work tasks, procurement, and supplier invoice processing. This transformation improved workflow efficiency, ensured better supplier collaboration, and reduced manual intervention.

The workflow required an integrated approach to purchase order creation, goods receipt processing, and supplier invoice matching. Additionally, DH Pace needed a mechanism to ensure user groups were correctly identified during the invoicing process. The project aimed to automate these business processes using IFS ERP, reducing manual interventions and ensuring smooth procurement and financial transactions.

Key Takeaway:

- Preferred Supplier Selection
- Automated Processes for External Suppliers
- Email Functionality
- Internal Supplier Assignment
- GPS Filtering Logic
- Document Management Integration

Business Challenge

DH Pace, a nationwide provider of door and security solutions, faced significant challenges in managing its service request and procurement workflows. The existing processes required extensive manual intervention for creating work orders, handling material requests, and managing purchase requisitions. This lack of automation led to delays in converting requisitions into purchase orders, inefficiencies in goods receipt processing, and complexities in supplier invoice matching.

Additionally, ensuring accurate user group identification while invoicing and maintaining data integrity across multiple steps poses operational risks. The company needed an integrated solution to streamline these processes, reduce manual effort, and improve overall efficiency in procurement and financial transactions.

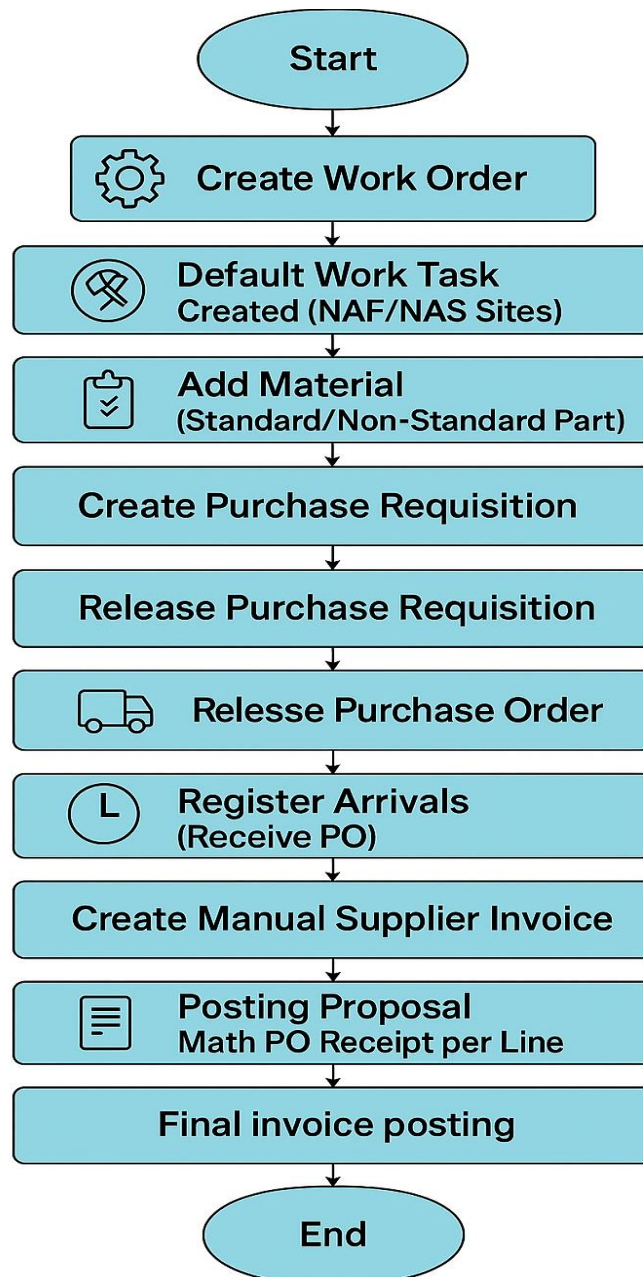
Solution

ESS implemented a comprehensive solution using IFS ERP to automate and streamline DH Pace's service request and procurement workflows. The approach focused on integrating key processes to reduce manual intervention and improve operational efficiency:

- **Work Order Automation:** When a service request is initiated, the system automatically generates a work order and assigns default work tasks for designated sites.
- **Material Request and Purchase Requisition:** Users can add required materials to work tasks and create purchase requisitions directly within the system. These requisitions are validated and released before conversion into purchase orders.
- **Purchase Order and Goods Receipt Integration:** The solution ensures seamless conversion of requisitions into purchase orders, followed by automated goods receipt processing through the Register Arrivals page.
- **Supplier Invoice Processing:** A Manual Supplier Invoice Assistant was introduced to simplify invoice creation and ensure accurate user group identification. The system validates invoices against purchase order receipts before finalization.
- **Invoice Matching and Authorization:** Automated checks ensure invoices move from "Unbalanced" to "Balanced" status, followed by authorization and final posting, reducing errors and improving financial control.

This integrated solution delivered a robust, user-friendly workflow that enhanced procurement accuracy, accelerated service operations, and minimized manual effort.

FLOW CHART



Implementation

ESS followed a structured deployment process to ensure seamless adoption and measurable outcomes:

The implementation of the solution for DH Pace was executed through a structured, multi-phase approach to ensure accuracy, efficiency, and minimal disruption to ongoing operations. The steps included:

1. Requirements Gathering and Process Mapping

- Conducted workshops with DH Pace stakeholders to document existing workflows for service requests, procurement, and invoicing.
- Identified pain points such as manual work order creation, delayed purchase requisition approvals, and invoice mismatches.

2. System Configuration and Customization

- Configured IFS ERP modules to automate work order generation upon service request creation.
- Developed logic for default work task assignment to specific sites (NAF and NAS).
- Customized purchase requisition workflows to enforce approval before conversion into purchase orders.

3. Integration of Procurement and Financial Processes

- Enabled seamless conversion of requisitions into purchase orders with status updates to “Released.”
- Configured the Register Arrivals page for efficient goods receipt processing and automatic PO closure.
- Implemented the Manual Supplier Invoice Assistant for accurate invoice creation and user group validation.

4. Validation and Testing

- Performed unit testing for each workflow component, including work order automation, requisition approval, and invoice matching.
- Conducted User Acceptance Testing (UAT) to validate real-world scenarios and incorporate client feedback.

5. Training and Knowledge Transfer

- Delivered role-based training sessions for DH Pace teams to ensure smooth adoption of new processes.
- Provided detailed documentation and quick reference guides for day-to-day operations.

6. Go-Live and Post-Implementation Support

- Executed a phased go-live strategy with continuous monitoring of system performance.
- Offered post-implementation support to resolve issues promptly and optimize SQL queries for better performance.

7. Performance Optimization and Scalability

- Tuned database queries to handle large datasets efficiently.
- Established a roadmap for future enhancements, including mobile integration and Planning & Scheduling Optimization (PSO).

Results / Metrics

The implementation of IFS ERP by ESS delivered measurable improvements across DH Pace's service and procurement operations:

- **Automated Work Order Management:** Reduced manual intervention in service request handling, accelerating work order creation and task assignment.

- **Streamlined Procurement Workflow:** Enabled seamless material requisition, purchase order creation, and goods receipt processing, reducing cycle times significantly.
- **Enhanced Invoice Processing:** Automated invoice matching and validation improved accuracy and reduced errors in financial transactions.
- **Improved Data Accuracy:** Ensured correct supplier assignments and user group identification during invoicing, minimizing discrepancies.
- **Operational Efficiency Gains:** Reduced processing time for work tasks and purchase requisitions, leading to faster service delivery and improved customer satisfaction.

These outcomes collectively strengthened DH Pace's ability to manage complex service operations while maintaining financial control and compliance.

Conclusion

The collaboration between DH Pace and ESS successfully transformed critical service and procurement workflows through the implementation of IFS ERP. By automating work order creation, streamlining purchase requisition and order processes, and integrating supplier invoice validation, DH Pace achieved significant operational improvements. These enhancements reduced manual intervention, improved data accuracy, and accelerated financial transactions, enabling the company to deliver services more efficiently and reliably.

The project not only addressed immediate challenges but also established a scalable foundation for future advancements, including mobile integration and advanced scheduling optimization. ESS's expertise and structured approach ensured a smooth transition, positioning DH Pace for continued growth and operational excellence.

About ESS

Enterprise Software Solutions Inc. (ESS) is a premier enterprise resource management (ERP) implementation and support company, recognized for delivering successful projects across **manufacturing, distribution, and service** verticals for over **15 years**.

As a dedicated **IFS Gold Partner**, ESS specializes in comprehensive ERP implementation and migration services across **manufacturing, construction, and service** sectors.

Core Services and Expertise

ESS offers complete, end-to-end ERP services, including:

- Full-cycle ERP implementation — from IFS Cloud licensing and customization to deployment support across service, manufacturing, and finance modules.
- Post-implementation support and managed services.
- Seamless third-party integration using APIs and middleware.
- Robust data migration and transformation solutions.

With **over 50 years of combined team experience**, ESS has successfully implemented and customized ERP systems for industries including **service, engineering, manufacturing, and distribution**. ESS also has deep expertise in **Epicor P21 ERP** implementation.

Technical Proficiency

ESS is widely known for its ability to:

- Bridge legacy and modern ERP platforms — synchronizing systems like IFS and Baan.
- Leverage deep technical knowledge in **RESTful APIs** and **IFS customization**.
- Develop proprietary extensions around **Microsoft, SAP, BAAN**, and **IFS** technologies.
- Enable **predictive maintenance** through IFS ERP implementations.

Mission and Focus

ESS's mission is to reduce client risk by ensuring **flawless, on-time delivery** through proven experience, technical innovation, and proprietary extensions.

We help organizations overcome challenges such as:

- Growth bottlenecks and scalability limitations.
- Risks from end-of-life or unsupported legacy systems.
- Manual, error-prone customer integrations.
- Rising operational costs from outdated technologies.

By combining strong industry expertise with modern ERP innovation, **ESS ensures every client's investment delivers a long-term strategic advantage**.

Global Presence

ESS operates globally, with offices located in **Kansas (USA)** and **Hyderabad (India)**.