



Source-to-Pay Sourcing Service definition document

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proactis



An introduction to the Sourcing module

Proactis Source-to-Pay solutions

Solution: scope and supporting services

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Proactis

Proactis is an established international business, headquartered in the UK. The company services many industries and about 50% of its total business comes from the UK public sector; it is an extremely important market.

Principle customers are across local government, central government, charities and not-for-profit, higher education, health services, and housing providers.

The solutions Proactis provide are designed, developed, implemented and supported by the company. Proactis has also developed partner network. These partners include resellers, as well as specialist referral businesses.

Proactis' public sector customers can engage with the company in planning the future direction of its solutions.

Overview of Source-to-Pay

Proactis Source-to-Pay is a cloud-based solution and has been designed from the ground up to be commercial off-the-shelf software (COTS). Source-to-Pay (S2P) is a modular, highly configurable platform and the underlying applications require minimal customisation.

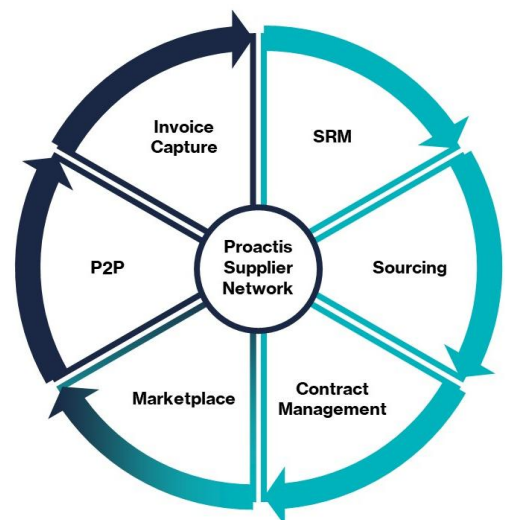
Once implemented, users own and manage the system themselves without needing to rely on Proactis as their requirements change.

This diagram shows the full Source-to-Pay solution. It encourages collaboration across departments to streamline processes and bring greater procurement and spend control both internally and with external partners.

Workflow controls, transparency, accountability and auditability reduce risk and provide the added assurance of compliance with organisational processes and access to data for reporting purposes.

S2P helps align procurement and finance departments, as well as enhancing the collaboration with suppliers to better serve the needs of all parties.

Customers can choose to have all or some of the modules deployed together as part of a platform.



Continuous improvement

Proactis is investing substantially in the continued development and improvement of each module. This investment delivers regular product updates; and all customers receive these updates.

Updates may change the user interface and experience, often referred to as UI/UX. They will certainly change various features and functions and add new capabilities.

We will provide buyers, on request, with a history of the functional enhancements that have been implemented since this document was last amended.

This document concentrates on the Sourcing module. This can be implemented with other Proactis modules to fully meet defined requirements. It will also integrate with other third-party products as may be required to create the correct, complete working environment.

Proactis Sourcing is a workflow-driven, collaborative platform designed to manage the entire tendering and procurement process, from the initial expression of need to the final contract award. It combines the sophistication needed for complex, multi-stage projects with an intuitive user experience that guides users through a defined and compliant process.

- **Sourcing Project Manager:** This tool enables sourcing events to be managed as projects with defined milestones, dependencies, and roles. It utilises templates to standardise processes across the organisation and provides a visual progress chart for real-time monitoring of tasks and participating suppliers.
- **RFx Manager:** This feature streamlines the creation and publishing of supplier request documents, such as RFIs, RFPs, and ITTs. It includes a questionnaire designer that supports autoscoreing, conditional questions, individual and moderated scoring methodologies.
- **Frameworks and Dynamic Markets:** The module supports the establishment and management of procurement frameworks and Dynamic Markets. This allows buyers to award multiple successful bidders to a framework and run mini-competitions or call-offs using ready-made project templates.
- **Auction Manager:** For competitive bidding, this tool supports standard and transformational (where suppliers compete on a “best value” basis) reverse auction formats. With buyers monitoring the event via live bidding graphs.
- **Quick Quote Manager:** Designed for smaller, one-time purchases, this tool provides a fast way to obtain multiple competitive bids. It is fully integrated with our P2P module, allowing a preferred quote to be instantly transformed into a Purchase Order.
- **Supplier Engagement:** The module is integrated with the Proactis Supplier Network, enabling electronic publishing to community portals and automated communication for acceptance or rejection letters.
- **Integrated Notice Publication:** Proactis Sourcing features integrated functionality for publishing both PA2023 (FTS) and PCR2015 (Contracts Finder) notices. This process is highly streamlined through the automatic population of key data, which eliminates the need for double-keying

information and significantly reduces manual clerical errors. Further, Proactis Sourcing will validate the Notice content for errors prior to pushing it for publication, thus ensuring it will not fail to publish.

By industrialising the approach to tendering, the Sourcing module ensures consistent compliance with regulatory requirements and internal policies while creating a comprehensive audit trail of all actions. This results in increased cost savings through enhanced competition, reduced supplier risk, and significantly lower administrative overhead.

Principle features and functions

- **Sourcing Project Manager:** Allows users to define and manage each sourcing event as a project, including sequencing iterative events with defined milestones, dependencies, approvals, escalations and visual progress charts
- **RFx Manager:** The system enables the creation of reusable templates for supplier request documents such as RFIs, RFPs and ITTs, facilitating a structured process from expression of need to final award
- **Sophisticated Scoring and Weighting:** The module supports diverse scoring methodologies, including auto and manual scoring for grouped questionnaire sections and custom weightings to objectively evaluate qualitative criteria, concluding with optional moderation reviews
- **Auction Manager:** Users can conduct competitive reverse auctions, supporting both Standard (price-only) and Evaluated (price and quality) formats with live bidding graphs
- **Quick Quote Manager:** Provides a fast way to obtain multiple competitive bids for one-time and/or low-value purchases of well-defined goods and services
- **Framework and Dynamic Market Management:** Proactis Sourcing supports the establishment and management of Procurement Frameworks and Dynamic Markets, including mini-competitions and call-offs against approved bidders
- **Integrated Notice Publication:** Proactis includes integrated functionality to publish notices directly to the PA2023/PSR2024 Find-a-Tender Service (FTS) and legacy Contracts Finder (PCR2015) portals, supporting automated data population for all notice types
- **Project Wizard:** A guided wizard assists users in selecting the most appropriate, compliant project template based on predefined business rules like spend thresholds
- **Direct Contract Generation:** Once a project is awarded, the system can automatically generate contract record(s), pulling in items, pricing and supplier data from the RFx, eliminating manual re-keying
- **Centralised Repository and Audit Trail:** All information regarding historic, current and pending sourcing events is stored in one location with a dedicated history tab providing a comprehensive audit trail

Benefits and outcomes

- **Increased Savings:** Proactis Sourcing drives cost reductions by encouraging the use of competitive sourcing methods across a greater percentage of organisational spend
- **Industrialisation of Procurement:** By using standardised templates and workflows, organisations can establish high standards for all tenders and significantly save time for end-users
- **Reduced Administrative Overhead:** Automation of Notice publication, document creation and contract generation reduces the clerical workload across the entire organisation, whilst increasing compliance with client standards
- **Consistent Regulatory Compliance:** Embedded rules and integrated Notice publication ensure that all sourcing activity remains compliant with both internal policies and national legislation
- **Upstream Risk Reduction:** Internal and external compliance requirements are integrated into the early stages of a project, identifying and mitigating supplier risk sooner
- **Accelerated Evaluation Cycles:** Automated scoring methods and comparison wizards allow evaluators to quickly calculate results and identify best-performing supplier proposals
- **Maintained Project Momentum:** Automated notifications, alerts and task reminders keep internal and external stakeholders informed, ensuring projects progress according to schedule
- **Improved Data Integrity:** The automated transfer of data between sourcing events and contract records ensures consistency and reduces the likelihood of manual errors
- **Reliable Audit Compliance:** The detailed history of every action provides a robust audit trail to justify procurement decisions during internal or external reviews
- **Strengthened Supply Chain Resilience:** Integrating sourcing with the Purchase-to-Pay (P2P) module ensures that only fully vetted and approved suppliers are available for ordering, safeguarding the supply chain

Implementation

The solution is implemented by an experienced Proactis project team. The team will typically include a project manager, a solution consultant and a technical consultant.

Proactis works with the customer to define and agree the deliverables and will then configure the solution and get it ready for user acceptance testing. Proactis follows best practice implementation processes to ensure that the configured solution reflects the customers' requirements.

Proactis can evidence a track record of delivering its solutions on time and to budget.



Training

Comprehensive training is always provided. This is tailored to meet the customers' needs. There are a range of standard facilities and how these are used is determined during implementation planning. The key components are:

- Train-the-trainer sessions
- E-learning via the Proactis online Training Academy
- Bespoke courses
- Long-term access to continuation learning

Support

Proactis provides comprehensive support services. Core performance measures are:

- Service availability
- Response to service calls



These are covered by our global service standards.

The services are provided on a fully maintained basis which means that the customer will automatically receive all updates to the applications. It is also means that the service infrastructure is adjusted to meet increasing demand for the services. All updates and upgrades occur outside of normal working hours.

All customers are provided with a named account manager.

The Service Desk

Customers contact the service desk using the service portal or by email. Services are provided to Proactis customers and to their suppliers. The service portal is open 24x7 and normal working hours are 0900 to 1730, Monday to Friday.

Calls are allocated priorities from P1 to P4, consistent with standard industry practice. There are defined timelines for each call priority and there is a clearly signposted escalation path, should this be necessary.

The Application Managed Service

Our optional Application Managed Service (AMS) has three levels of activity intended to align with different customer requirements. Our experienced professionals work alongside the customer to manage, monitor and optimise the solutions.

AMS packages include a range of enhanced services including access to a monthly bank of consultancy hours which customers can use in different ways. The principal aim is to increase the capacity of the customer's own team.

Service Assurance

Continuity and security of service are extremely important. All software is developed in a highly secure environment. This is audited as part of our company's accreditations.

For production/live running, essential tests are completed annually. These include:

- Application penetration tests
- Disaster recovery testing
- Testing of the business continuity plan

Proactis can issue customer-facing versions of these test outcomes upon request.

Proactis provides appropriate RTO and RPO measures. These are currently 6 hours and 30 minutes respectively.

Policies and Procedures

Proactis maintains fully up-to-date policies and procedures that address software development, information security, privacy, data protection, system access, quality and so on. These policies are available to customers to examine. Customers can also request access to HR related policies including equality, health and safety, confidentiality, etc.