



Source-to-Pay Marketplace Service definition document

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proactis



An introduction to the Marketplace 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.

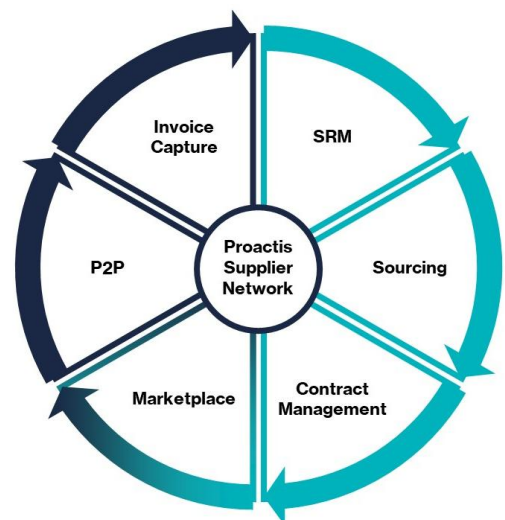
Once implemented, users own and manage the system themselves without needing to rely on Proactis as their requirements change.

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.

The Marketplace module

This document concentrates on the Marketplace module. This can be implemented as an integrated add-on to your ERP system or 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.

Overview

The Proactis Marketplace is a comprehensive catalogue management system designed to provide a single entry point for users to access in-house catalogues, external marketplaces and supplier websites via “punch-out” connections. It acts as a central repository of approved goods and services, ensuring that employees buy from correct vendors at pre-negotiated prices.



Key features and functional capabilities of the Marketplace module include:

- **Central Electronic Catalogue:** The system hosts content-rich item information, including extensive descriptions, images, and technical attachments such as specifications or safety details. It supports product classification hierarchies (like UNSPSC and CPV) to automate financial coding and improve spend analysis.
- **Website “Punch-Out” Connections:** These connections allow users to access external eCommerce sites - such as Amazon - directly from within their purchasing platform. Items are selected on the supplier’s site, but the shopping cart is pulled back into the internal system for authorisation and compliance checks before an order is placed.
- **Intuitive Shopping Experience:** The module features a user-friendly interface with natural language search capabilities, enabling users to browse and compare items quickly with minimal training. Users can build mixed-content shopping carts from multiple suppliers and save them as “favourites” or “shopping lists” for faster future purchasing.
- **Supplier Self-Service and Managed Services:** Suppliers can independently maintain their own content, pricing, and promotional materials through the Proactis Supplier Network. Alternatively, Proactis offers fully managed catalogue services, where they handle the procurement and management of content directly with suppliers.
- **Contract and Financial Integration:** By linking items directly to contracts, the system ensures users access pre-negotiated rates and aids in monitoring budget adherence. It automatically assigns financial product coding (such as cost centres or general ledger categories) to items to simplify accounting processes.
- **Robust Governance and Control:** Administrators can configure customised “Catalogue Views” based on user roles or departments, restricting access to specific products or preferred vendors. All new content or updates undergo a dual approval process involving both the supplier and the buying organisation to ensure data accuracy and policy compliance.

By centralising and industrialising the purchasing process, the Marketplace reduces administrative overhead, eliminates paper-based catalogues, and significantly mitigates the risk of maverick or off-contract spend.

Principle features and functions

- **Central Electronic Catalogue:** Proactis Marketplace acts as a single entry point for all authorised supplier and in-house catalogues, acting as a central repository for approved goods and services
- **Intuitive Search Experience:** The interface utilises natural language search, allowing users to browse, compare, and discover products using everyday terms and phrases
- **“Punchout” Catalogue Integration:** Marketplace supports industry-standard connections (such as OCI) to external websites, enabling real-time access to pricing and availability from vendors like Amazon or Lyreco while maintaining internal oversight
- **Guided Buying:** An intuitive, step-by-step guide helps users navigate the procurement process to find the right products based on predefined criteria, ensuring adherence to preferred supplier agreements
- **Customisable Catalogue Views:** Administrators can tailor the user experience by controlling the visibility of specific products, categories or suppliers based on a user’s role, department, or company policy
- **Supplier Self-Service Portals:** Suppliers are empowered to independently manage their own product listings, including descriptions, images, and pricing, which reduces the administrative burden on procurement teams
- **Collaborative Content Approval:** To ensure data accuracy, the marketplace uses a dual approval process where supplier updates are held in a staging environment for review by the buying organisation before going live
- **Mixed Content Shopping Carts:** Users have the flexibility to select items from multiple suppliers and consolidate them into a single, unified shopping cart for processing
- **Financial Product Coding:** The catalogue supports the direct assignment of general ledger categories or cost centres to specific products, ensuring every purchase is automatically and accurately coded
- **Linkage to Contracted Terms:** By linking items directly to contracts, the system ensures users always access pre-negotiated pricing while allowing teams to track spend against contract limits

Benefits and outcomes

- **Reduced Administrative Overhead:** Providing a single, accessible interface for ordering streamlines the process and minimises manual clerical effort

- **Mitigation of Maverick Spend:** Linking catalogue items to contracted terms prevents maverick or off-contract purchases, ensuring employees use approved suppliers/items/rates
- **Cost Efficiency and Savings:** Marketplace drives cost efficiency through increased supplier competition and strategic sourcing, directly reducing overall expenditure
- **Enforced Policy Compliance:** Administrators can restrict users to predefined product lists and approved vendors, ensuring all buying activity aligns with corporate policies
- **Improved Order Accuracy:** Centralising product information ensures that the correct items are ordered every time, significantly reducing ordering and invoicing errors
- **Accelerated Procurement Cycles:** Seamless integration with P2P or ERP systems facilitates a faster data flow for purchase orders and approvals, reducing time from request to fulfilment
- **Informed Purchasing Decisions:** Users are empowered to make confident choices through access to detailed product descriptions, high-quality images, web links, technical attachments and compliance certificates
- **Enhanced User Adoption:** The familiar, user-friendly interface requires minimal training and creates a consistent shopping experience that encourages employees to stay within the system
- **Strengthened Financial Oversight:** Integrated financial coding ensures that purchases are automatically aligned with specific budgets, simplifying the accounting process
- **Increased Negotiation Power:** The ability to compare prices, contract terms, and product options across a wide range of vendors strengthens the procurement team's ability to negotiate more favourable terms

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.