



Source-to-Pay Supplier Relationship Management Service definition document

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proactis



An introduction to the Supplier Relationship Management 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.



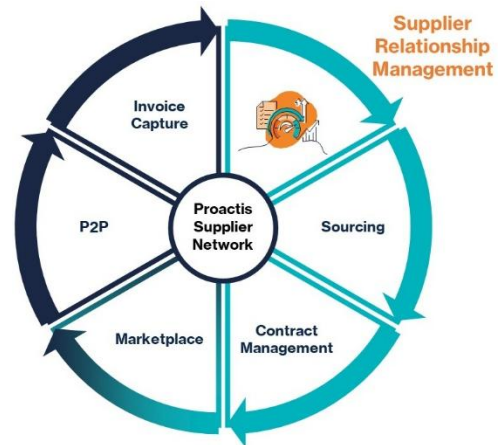
We will provide buyers, on request, with a history of the functional enhancements that have been implemented since this document was last amended.

The Supplier Relationship Management module

This document concentrates on the Supplier Relationship Management 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.

Overview

The Proactis Supplier Relationship Management (SRM) module is a centralised, workflow-driven platform designed to oversee the entire supplier lifecycle, from initial identification and onboarding to ongoing performance and risk management. By automating routine administrative tasks and fostering closer collaboration with the supply base, the module allows procurement teams to focus on strategic initiatives and innovation.



Key components of the SRM module include:

- **Streamlined Onboarding and Qualification:** The system simplifies adding new vendors through automated supplier invitations and self-service registration. It utilises a questionnaire library and sophisticated scoring systems to vet suppliers against specific business rules, such as financial standing, safety standards, and insurance requirements. Suppliers progress through statuses ranging from “pending” to “approved” or “suspended”.
- **Supplier Self-Service Portal:** A dedicated, secure portal that empowers suppliers to independently maintain their own company profiles, manage compliance documentation, such as insurance certificates, and upload promotional content. This self-service model significantly reduces the administrative burden on the buying organisation while improving data accuracy.
- **Performance Management and KPIs:** Procurement teams can track and evaluate Key Performance Indicators (KPIs) - examples include on-time delivery, product quality and cost efficiency - through real-time dashboards and reports. A performance review wizard guides users through standardised assessments, helping to identify high-performing partners and address issues proactively.
- **Risk Mitigation:** The module provides real-time insights into the supply chain by consolidating financial health data and compliance records. Automated alerts and notifications inform stakeholders of critical issues, such as expiring certifications or performance failures, ensuring the organisation remains compliant and resilient.
- **Single Source of Truth:** SRM integrates seamlessly with ERP and Finance systems, ensuring supplier data fidelity across the entire organisation. Bi-directional synchronisation between the SRM module and the ERP vendor master eliminates manual data re-keying and prevents discrepancies.

- **Transactional Efficiency:** The module facilitates daily operations with features like “PO Flip,” which allows suppliers to convert electronic purchase orders directly into invoices within the portal, accelerating the payment cycle and reducing manual entry errors.

In essence, Proactis’ SRM module acts as a digital bridge between an organisation and its vendors, ensuring that only vetted, compliant and high-performing suppliers are used, while providing the transparency needed to drive mutual value in the procurement process.

Principle features and functions

- **Centralised Supplier Directory:** The SRM module provides a structured, unified repository for all supplier information, acting as a “single source of truth” for the entire organisation
- **Automated Onboarding and Qualification:** Procurement teams can use automated invitations and digital workflows to guide new suppliers through selection and adoption processes, replacing manual paperwork
- **Supplier Self-Service Portal:** Through the Proactis Supplier Network vendors independently maintain their company profiles, upload documentation, and track their own transaction statuses
- **Sophisticated Questionnaire Management:** The system includes a customer library of predefined sections and questions to vet suppliers against specific criteria, such as financial standing or environmental practices
- **Rigorous Compliance Monitoring:** SRM tracks critical certifications and documents, utilising a review schedule that generates automated alerts when items approach their expiry date
- **Performance and KPI Tracking:** Users can benchmark suppliers using category-specific Key Performance Indicators and standardised performance review wizards to identify high/low performing partners
- **Bidirectional ERP Integration:** The module synchronises data with Finance and ERP systems to ensure supplier data fidelity, automatically updating approved vendor records across all line-of-business applications
- **Advanced Directory Search:** Users can perform deep searches across all meta-data and classifications to discover potential suppliers for under-resourced categories both inside their existing suppliers and across the entire Proactis Supplier Network
- **Transactional Automation (PO Flip):** Integrated functionality allows suppliers to view/accept digital Purchase Orders and instantly “flip” them into accurate electronic invoices within the portal
- **Multi-Stage Approval Workflows:** Customisable internal workflows can be triggered based on user-defined criteria, such as risk classification or supplier category, ensuring a thorough vetting process

Benefits and outcomes

- **Reduced Administrative Burden:** By empowering suppliers to self-serve and automating routine tasks, the module significantly lowers the clerical workload on procurement and AP departments
- **Enhanced Risk Mitigation:** Proactive monitoring of financial health, performance metrics and compliance data allows for the early identification and documentation of supply chain risks
- **Improved Data Accuracy:** Bidirectional synchronisation and supplier-managed profiles eliminate manual re-keying, reducing information redundancy and the risk of erroneous entries
- **Strict Regulatory Adherence:** The system ensures the supply base remains compliant with legal, safety and environmental standards by proactively tracking audits and certifications
- **Strengthened Supplier Relationships:** Centralised communication tools and transparent processes foster greater trust, collaboration and mutual value between buyers and vendors
- **Informed Strategic Decision-Making:** Real-time data and analytics provide early insights into supplier innovation and performance trends, supporting better procurement strategies
- **Increased Transactional Efficiency:** Features like “PO Flip” and real-time account visibility accelerate payment cycles, reduce errors and drive down enquiries into the AP department
- **Optimised Supply base:** Advanced search tools and the tracking of both existing and potential suppliers help organisations identify the best partners to reduce exposure in high-risk categories
- **Audit Trail Transparency:** Every action, from registration to document approval, is logged with a comprehensive audit trail, ensuring full governance and accountability
- **Greater Supply Chain Resilience:** Ongoing monitoring and standardised reviews lead to improved quality and delivery by ensuring suppliers meet or exceed performance expectations

The Proactis Supplier Network

The Proactis Supplier Network (PSN) is a secure, collaborative online hub designed to facilitate effortless interaction between buying organisations and their global supply base. It serves as a single point of access where suppliers can manage their relationships with multiple Proactis customers through a unified, consistent platform.



Key aspects of the Proactis Supplier Network include:

- **Massive Scale and Accessibility:** The network is free for suppliers to join and currently hosts approximately 2 million suppliers. It is accessible via all common web browsers on multiple devices ensuring users can conduct business from any location.
- **Centralised Profile and Document Management:** Suppliers can self-register and maintain a single profile - including company details, electronic brochures and terms of business - which can be shared with all their clients simultaneously. A robust document upload facility allows for the central management of certifications and insurance documents; the system automatically generates expiry alerts to remind suppliers to provide updated versions.
- **Streamlined Sourcing and Collaboration:** The portal enables suppliers to view open tender opportunities, respond to RFx events, and complete qualification questionnaires electronically. Efficiency is further enhanced through two-way instant messaging and dialogue functions that centralise all communication within the relevant sourcing or contract record for auditing purposes.
- **Transactional Efficiency:** When integrated with P2P (Purchase-to-Pay) modules, suppliers can receive digital Purchase Orders directly through the portal. A “PO Flip” feature allows suppliers to instantly convert these orders into accurate electronic invoices, while the Account Visibility tool lets them track the real-time status of their transactions from receipt through to payment.
- **Operational Reliability and Security:** The network conforms to a standard SLA of 99.9% availability. All data exchanges are secured via HTTPS encryption, and supplier organisations can manage multiple user contacts with role-based permissions to ensure sensitive information is only accessed by authorised personnel.

By automating routine administrative tasks and providing a “single source of truth” for supplier data, the PSN reduces the clerical burden on procurement teams while fostering stronger, more transparent partnerships.

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.