

Service Definition Document

Invoice Capture (Proactis)

GCloud15



Contents

Contents	2
About Moore Insight.....	3
Experts In Our Field.....	3
All About People	3
Delivering Excellence	3
Our Winning Team.....	3
Flexibility Of Resources to Support You	3
Meeting Standards of Excellence	4
Benefits of Working with Us	4
Previous Experience.....	5
How Our Service Works	5
Onboarding and Offboarding	5
What you can expect from us	5
What we can expect from you	6
Invoice Capture (Proactis)	7
Proactis	7
Overview of Source-to-Pay	7
The Sourcing module	9
Implementation	12
Support.....	12
Service Assurance	13
Further Information	14



About Moore Insight

Experts In Our Field

For more than 30 years, Moore Insight has delivered flexible, high-quality change management, technology, and business advisory services to organisations across both the UK public and private sectors. We specialise in the review, enhancement, procurement, implementation, and ongoing support of Enterprise Resource Planning (ERP).

All About People

People are at the centre of everything we do: our clients, our colleagues, and the communities we serve. Our aim is to develop solutions that inspire and empower individuals and organisations to reach their full potential.

As a member of the Moore Global network, an international association of more than 260 professional services firms across 116 countries, we share a collective commitment to providing innovative, client-focused services that enable organisations worldwide to achieve exceptional outcomes for their customers and citizens.

Delivering Excellence

We have established a strong reputation for enabling meaningful and lasting transformation, guiding organisations through some of the most complex system replacement and improvement programmes within the public sector, including central and local government, higher education, healthcare, and emergency services, as well as across private and not-for-profit sectors.

At the core of our ethos is the belief in truly “making systems work.” We go beyond the technology to gain a deep understanding of the business, operational, and regulatory environments in which our clients operate. As a result, our clients consistently realise measurable benefits from their transformation programmes, such as significantly improved and streamlined ways of working, enhanced financial and management reporting, improved service delivery, and substantial cost savings.

Our Winning Team

We operate through blended, highly skilled teams comprised of both permanent employees and trusted associates, enabling us to draw on a wide range of capabilities and provide the flexibility required to meet each client’s unique needs.

Flexibility Of Resources to Support You

Our core consultancy team is complemented by a network of more than 50 specialist associates. In addition, we collaborate with software providers and consultancy partners across the UK and internationally, ensuring that we can deliver a tailored, comprehensive service to our clients.

Our consultants are hand-selected for their expertise and are committed to working collaboratively with our clients. Through this joint approach, we are able to leverage local



knowledge, strengthen team integration, and promote the exchange of skills and insight. This collaborative model is one of our particular strengths.

From the outset, our specialist team will work closely with you to understand your business needs and guide you through the methodology we apply to achieve the best possible solution.

Meeting Standards of Excellence

To uphold the highest professional standards, we have built a team whose expertise is grounded in both recognised qualifications and deep practical experience. Our consultants hold credentials such as CIMA, ACCA, ICAEW, CIPFA, CIPD, PRINCE2, CISM, and CISA, reflecting the breadth and depth of capability within the organisation. This combination of professional accreditation and real-world experience ensures that the services we deliver are aligned with your business needs and meet the standards of excellence you expect.

Benefits of Working with Us

- We are seasoned practitioners across the professional disciplines that ERP systems support—including accountancy, finance, human resource management, procurement, and payroll—bringing both specialist knowledge and hands-on expertise.
- Our team has extensive experience within the UK public sector and a strong understanding of government structures, operational processes, and the relevant legislative and regulatory frameworks that underpin them.
- We deliver services in close partnership with our clients, working as integrated teams to ensure smooth navigation of business systems and effective knowledge transfer. We take pride in communicating best practice in clear, accessible language that is easily understood by both internal users and external third parties.
- We are deeply committed to unlocking business value from both change management initiatives and technology-led improvements. We are equally comfortable providing part-time strategic and operational advisory support as we are acting as full implementation partners and project managers.
- Quality underpins everything we do and is supported by our accreditations, including ISO9001 for Quality Management Systems and Cyber Essentials Plus. Each engagement is overseen by a designated Client Delivery Director who ensures quality outcomes and high levels of client satisfaction.
- While we are fully equipped to deliver services remotely, we also provide on-site support where appropriate. Our consultants are mobile and able to work across the UK as required.
- We operate as an ethical and environmentally responsible employer and partner. We are recognised as a “Great Place to Work” and are committed to fair and inclusive employment practices, demonstrated through our Real Living Wage and Disability



Confident Employer status. We prioritise prompt payment of suppliers and maintain a zero-tolerance stance on modern slavery within our supply chain.

Previous Experience

You can find testimonials from clients and case studies on our website:

<https://www.moore-insight.com/main-case-studies>

How Our Service Works

Onboarding and Offboarding

Once the service has been commissioned, we will schedule a formal kick-off meeting to introduce members of our consulting team and to meet your key stakeholders. During this session, we will outline the overall delivery approach, confirm expectations, establish communication channels, and address any logistical or administrative considerations such as access to shared workspaces. This introductory phase provides a valuable opportunity for us to gain familiarity with your organisational culture, governance requirements, and preferred working methods.

Upon completion of the project, we will arrange a project closure meeting to verify that all final activities and agreed deliverables have been completed to your satisfaction. This session will include a full handover, documentation of lessons learned, and confirmation of effective knowledge transfer. We will provide a record of the outcomes to support future reference within your organisation. The closure meeting also offers a forum to discuss any follow-on services, transition arrangements, or additional support you may require.

Any additional onboarding or offboarding activities will be undertaken in accordance with the provisions set out within the Order Form of the Call-Off Contract.

What you can expect from us

- We will take the time to understand your organisation's strategic priorities, objectives, and operational context to ensure that the services we deliver are aligned with your core requirements.
- We will apply proven methodologies and recognised best practices, adapting them to the unique needs of your organisation. From Day One, we will undertake a structured discovery phase and work with you to define a transparent and mutually agreed implementation and communication plan, ensuring effective progress monitoring against key milestones.
- You will be assigned a dedicated Client Delivery Director who will maintain regular strategic engagement with your Senior Responsible Officer or Project Sponsor. Where appropriate, they will participate in project boards, manage the client relationship, monitor delivery satisfaction, and serve as the escalation point for any issues not resolved at project-team level.
- We will safeguard continuity of service and maintain quality throughout the duration of the engagement. Consultant time will be scheduled in alignment with your needs, and named resources will be identified at the outset within the project plan. Should a



change in personnel be required, we will ensure replacement consultants are of equivalent or greater expertise and will seek your approval in advance of any change.

- We will provide knowledge and skills transfer throughout delivery to equip your team with the capabilities needed to adopt and manage new systems, processes, or ways of working. This may include joint working, shadowing, and hands-on learning.
- We will deploy and maintain a secure online collaborative workspace for project documentation, communication, dashboards, and reporting, ensuring transparency, auditability, and a single authoritative source of information.

What we can expect from you

- Establish suitable project controls and governance arrangements, including development of a project plan. Where these are not yet in place, we ask that you participate collaboratively during project initiation to define them.
- Engage actively in project activities, including workshops, interviews, consultation sessions, and decision-making points.
- Ensure that key personnel are available in accordance with the agreed delivery schedule and resource plan, and that backfill arrangements are made where appropriate to minimise disruption to business-as-usual functions.
- Provide timely access to business systems, information, data, and networks where required for the successful completion of project deliverables.
- Review outputs, provide feedback, and formally sign off deliverables in alignment with agreed timelines.



Invoice Capture (Proactis)

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 Sourcing module

This document concentrates on the Invoice Capture module. This can be implemented standalone 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

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.

Key components and functional capabilities of the module include:



Advanced Capture Technology: The system utilises Intelligent Data Capture (IDC), an AI-driven engine that extracts data from electronic invoices (scanned images, .pdf, .doc, .docx, .xml, etc) without requiring specific templates for every supplier. This is supported by a latest-generation OCR engine for scanned paper documents and an XML gateway for uniform processing of electronic submissions.

Robust Validation and Accuracy: Upon capture, the system extracts header-level data such as supplier name, invoice numbers, dates and amounts & values. It applies validation rules to flag duplicate invoices, verify mathematical totals and ensure that any quoted Purchase Order number is open and valid within the ERP system or P2P module. To aid user verification, each extracted field is colour-coded in the interface.

Centralised Query Desk: Any invoice that fails validation (eg missing a PO number, incorrect supplier details or future dated) is routed to a Query Desk. This hub allows Invoice Capture users to resolve exceptions through customisable templates and automated reminders, facilitating collaboration with suppliers and/or internal stakeholders to support “No PO, No Pay” policies.

Flexible Service Options:

- *SaaS Solution:* Managed in-house by the organisation’s own Accounts Payable team using Proactis technology.
- *Managed Service:* A fully outsourced model where Proactis handles the initial data capture, validation and query initiation.
- *Hybrid:* A combined approach where the organisation handles the physical scanning of documents while Proactis performs the data extraction.



Seamless P2P Integration: While the module handles data capture, it does not handle coding or matching itself. Instead, it passes validated data directly into the Proactis P2P modules “invoice trays”, where it undergoes automated 2-way or 3-way matching before being posted to the finance system as “OK to Pay”.

Ultimately, the module provides a scalable framework that allows organisations to handle significant increases in invoice volumes without increasing headcount, while simultaneously reducing human error and enabling early payment discount opportunities through accelerated cycles.

Principle features and functions

- **Freeform Intelligent Data Capture:** Proactis Invoice Capture utilises AI and machine learning to automatically locate and extract data from electronic invoices without requiring specific templates for every supplier or invoice format
- **Multi-Channel Input Support:** The module handles various invoice sources, including direct email (PDF and Word attachments), XML feeds and scanned documents (images)
- **Advanced Validation Engine:** Captured data is automatically verified to ensure correct suppliers are identified, values total correctly and duplicate invoices are flagged
- **Purchase Order Verification:** The system enhances “No PO, No Pay” policies by validating that a quoted PO number is open and valid within the ERP or P2P system before registration
- **Centralised Query Desk:** AP users can manage validation errors through a dedicated hub featuring customisable templates and automated reminders for collaborating with suppliers
- **Smart User Interface:** Each extracted data field is colour-coded, allowing users to easily verify captured information against the digital image of the invoice
- **Direct P2P and ERP Integration:** Validated data is passed seamlessly into client ERP/Finance systems or Proactis P2P invoice trays for automated matching and posting
- **Flexible Delivery Models:** Organisations can choose between a fully SaaS solution for in-house management, a Managed Service for full outsourcing of capture and validation or a hybrid mode combining both

Benefits and outcomes

- **Process Efficiency and Time Savings:** Automating data extraction allows AP staff to move away from manual keying and focus on higher-value activities
- **Scalability for Growth:** The system enables organisations to handle significantly higher transactional volumes without a corresponding increase in AP headcount
- **Enforcement of Procurement Discipline:** By acting as a gatekeeper, Invoice Capture flags and rejects invoices without valid POs, ensuring strict adherence to corporate policies
- **Significant Reduction in Human Error:** Digitising the capture of header-level data eliminates the risks and discrepancies typically associated with manual entry
- **Mitigation of Financial Risk:** The Invoice Capture validation engine automatically prevents redundant or incorrect payments by checking for duplicate invoices and verifying mathematical totals
- **Accelerated Payment Cycles:** Approved and matched transactions are posted directly as “OK to Pay,” helping organisations avoid late fees and capture early payment discounts



- **Enhanced Visibility and Insights:** Real-time dashboards provide actionable data on AP performance, such as straight-through processing rates and exception trends
- **Strengthened Supplier Collaboration:** Tools like the Query Desk and Proactis Supplier Network allow vendors to track their invoice status in real time, reducing enquiries to the AP department
- **Reduced Document Storage Requirements:** The shift to electronic management significantly lowers the costs associated with physical on-site and off-site document storage
- **Lower Procurement Costs:** Faster, more accurate payment cycles can lead to lower future supplier prices as the organisation becomes “easy to do business with”



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 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.



Further Information

For more information about this or any of our G-Cloud services or to discuss your requirements in more detail, please email info@moore-insight.com and we will be happy to contact you.

Please include the following information in your email so that we can get the best people to deal with your request.

- The name of this service
- The name of your organisation
- Your name and contact details
- A brief description of your business situation
- Your preferred timescales for starting the work





MOORE Insight

Moore Insight have been supporting organisations to transform their Enterprise Resource Planning and back-off systems for over 30 years.

We have a strong reputation for delivering true and innovative transformation, having dealt with some of the most complex systems replacement and improvement programmes across the public and private sectors.

Our ethos is to 'make systems work' by going beyond the technology to gain a deep understanding of our clients' business and regulatory requirements.

Our clients have realised benefits from their change programmes including significantly improved and efficient ways of working, better financial and management information, better service delivery, and cost savings.



02079524690



info@moore-insight.com



www.moore-insight.com

Copyright © 2026 Moore Insight. All rights reserved.

Moore Insight is a trading name of Moore Stephens Insight Limited. Registered in England No. 07909149.