

Service Definition

Configurable cloud workflow and business automation platform

Service: Workbie

Supplier: Software Advance Limited

Framework: RM1557.15 | Software as a Service

Version 2.2 | October 2026

Workbie brings workflows, records, tasks, documents, reporting and communication into one configurable cloud service. It is designed to reduce manual administration, replace fragmented spreadsheets and give teams a consistent, visible way to manage work from initial enquiry through to completion.

This document describes the standard Workbie service. The final configuration, modules, integrations and implementation scope are agreed with each buyer.

1. Service overview

Workbie is a configurable Software as a Service platform for organisations that need to manage operational processes, records and communication in one place. It combines workflow automation with modular business capabilities, allowing each organisation to configure the service around its established processes rather than forcing teams into a fixed, generic workflow.

The service can support end-to-end processes such as enquiries, referrals, cases, jobs, projects, approvals, supplier activity and customer service. Relevant modules are configured for each deployment, with role-based access, dashboards and reporting matched to the needs of users and managers.

One platform. Clearer workflows. Less manual administration.

What buyers can use Workbie for

- Replace email-and-spreadsheet processes with controlled digital workflows.
- Manage cases, referrals, enquiries, customers, jobs, projects and tasks.
- Centralise forms, documents, notes, messages, approvals and supporting evidence.
- Provide staff, customers, clients, suppliers or other stakeholders with role-appropriate portals.
- Use dashboards and reports to track workload, progress, exceptions and service performance.
- Introduce AI-assisted administration within defined workflows where appropriate.

Service outcomes

Reduce repetitive administration	Workflow rules, task routing, notifications, templates and automated actions reduce avoidable manual steps.
Improve operational visibility	Dashboards provide a current view of work, ownership, status, due dates and exceptions.
Create consistent processes	Configured stages, forms, approvals and permissions provide a repeatable way of working.
Bring scattered information together	Records, communication, documents, tasks and activity history are held against the relevant item.
Adapt without replacing the whole platform	Modules and workflows can be configured and extended as operational needs change.

2. Core service capabilities

Workflow, case and referral management

- Configurable process stages, statuses, ownership rules and approval routes.
- Case, referral, enquiry or service-request records with structured fields and activity history.
- Task creation, prioritisation, comments, attachments, due dates and overdue visibility.
- Notifications and automated actions triggered by defined workflow events.

CRM and stakeholder management

- Lead, prospect, customer, client and stakeholder records.
- Configurable pipelines and board-based views.
- Quotes, invoicing and payment tracking where included in the agreed configuration.
- Central interaction history for email and SMS communication where enabled.

Jobs, projects and operations

- Job creation, planning, scheduling and staff allocation.
- Shared calendars, job instructions, attachments, images, notes and sign-off.
- Project boards, sprints, milestones and Gantt-style planning where required.
- Operational views for work in progress, due work, exceptions and completed activity.

Documents, forms and records

- Digital forms configured around the buyer's process and information requirements.
- Document and image upload, categorisation and association with the relevant record.
- Structured record histories to improve traceability and support audit activity.
- Exportable information and reports for authorised users.

3. Additional modules and integrations

People and workforce administration

- Employee profiles and role-based access management.
- Holiday requests and approvals, overtime, working-hours and time records.
- Clock-in and clock-out functions and a live fire register where configured.

Suppliers, products and stock

- Supplier records, pricing information, contracts and service details.
- Product and stock records to support purchasing and operational visibility.
- Configurable supplier workflows, tasks, reviews and document collection.

Communication and portals

- Integrated email, SMS templates, group messaging and campaign functions where enabled.
- Customer or stakeholder portals with controlled access to progress, documents and actions.
- Central communication history linked to the relevant customer, case, job or project.

Reporting and business intelligence

- Role-specific dashboards for operational staff and managers.
- Real-time reporting on workload, progress, productivity, sales and service activity.
- Exportable reports for management, review and audit purposes.

Integrations and AI-assisted administration

- Integrations with third-party platforms are agreed and assessed during implementation.
- Microsoft 365 and other business-system connections can be included where technically and commercially available.
- AI can support defined administrative activities such as summarisation, drafting, classification and information extraction.

AI is used as an assistant within controlled workflows. Final configuration, permissions and human-review points are agreed with the buyer.

4. Service configuration and implementation

Workbie is supplied as a configurable cloud service. Each implementation begins by understanding the buyer's process, information, user roles, reporting requirements and systems that must be retained or connected.

Typical implementation approach

1. Discovery and workflow definition	Review current processes, forms, spreadsheets, systems, roles, outputs, pain points and reporting needs.
2. Service design	Agree modules, workflow stages, permissions, fields, dashboards, notifications, integrations and data-migration scope.
3. Configuration and build	Configure the buyer's Workbie environment, create agreed workflows and prepare the initial data structure.
4. Testing and training	Test agreed scenarios with nominated users, resolve issues and provide role-appropriate guidance.
5. Controlled go-live	Introduce the service in agreed stages, with existing processes retained in parallel where appropriate.
6. Review and improvement	Review adoption, workflow performance and priorities for separately agreed enhancements.

Data migration

Migration support can be provided for agreed data from legacy systems, spreadsheets or structured exports. The buyer and Software Advance Limited agree the source data, cleansing responsibilities, mapping, validation and acceptance approach before migration activity begins.

Configuration boundaries

The standard service is configurable. Any non-standard development, complex integration, third-party licence, API charge, migration activity or new module is assessed, scoped and agreed separately before work starts.

5. Hosting, support and service operation

Cloud delivery model

Workbie is delivered as a fully managed SaaS platform with cloud hosting, monitoring, automated backups, maintenance and scalable performance. The agreed commercial documents define the buyer's service configuration, subscription, implementation work and any third-party services.

Support channels and incident handling

- Issues can be raised through the in-platform ticketing function or by telephone.
- Incidents are triaged, prioritised and assigned to the appropriate team.
- Defined workflows are used for recurring support and service-management activities.
- Incident closure information is recorded and can be provided where applicable.

Maintenance and updates

- Regular application updates and service improvements.
- Security patches deployed according to assessed risk and priority.
- Planned maintenance communicated in advance where service impact is expected.

Account and access management

- Role-based permissions and access structures.
- Verification before account information is discussed or administrative changes are made.
- Logging of administrative activity and periodic review of elevated permissions.

Buyer responsibilities

- Nominate an authorised service owner and appropriate testing contacts.
- Provide accurate requirements, timely decisions and lawful access to agreed data and systems.
- Manage its users, acceptable use, data accuracy and internal change communications.
- Maintain licences and permissions for third-party systems that the buyer asks Workbie to connect to.

6. Security, monitoring and information management

Workbie applies layered security controls across hosting, application access, administration and support. The detailed responsibilities, data-processing terms and any buyer-specific security requirements are documented during contracting and implementation.

Security controls described by the service

- Role-based access control and least-privilege principles.
- Multi-step authentication for administrative tools where configured.
- Continuous monitoring using firewalls, logs and alerting.
- Investigation of unusual activity and response to confirmed compromise.
- Risk-based vulnerability assessment and patch management.
- Restricted access to management interfaces and periodic access reviews.

Data ownership and export

Buyer data remains the buyer's data. Authorised exports can be provided or enabled in an agreed format. Migration assistance, complex transformation and offboarding work may be separately chargeable where it falls outside the standard subscription.

Backup and recovery

Automated backups form part of the managed cloud service. Specific retention, recovery objectives and any buyer-specific continuity requirements are confirmed in the applicable order, call-off contract or service schedule.

Accessibility and usability

Workbie configurations are designed for clear navigation, consistent workflows and role-appropriate screens. Any mandatory accessibility standard, assistive-technology requirement or user-research obligation should be identified in the buyer's requirements so it can be assessed and included in the agreed scope.

7. Service scope, options and exclusions

Included within the standard service

- Access to the agreed Workbie modules and configured workflows.
- Managed cloud hosting, monitoring, backups, maintenance and security updates.
- Role-based user access and agreed dashboards and reports.
- Standard support through the agreed channels.

Available as separately agreed services

- Discovery, workflow mapping and implementation services.
- Data migration, cleansing, transformation and validation assistance.
- Non-standard modules, complex integrations and buyer-specific development.
- Additional training, process redesign, reporting and ongoing improvement work.

Typical exclusions unless expressly included

- Hardware, devices, connectivity and end-user equipment.
- Third-party licences, SMS usage, e-signature fees, API charges and external supplier costs.
- Unsupported access to third-party systems or integrations where the required API or permission is unavailable.
- General consultancy, staffing or services unrelated to the Workbie cloud service.

Commercial model

Pricing is based on the selected Workbie service, implementation scope, configuration, data migration, integrations, support requirements and third-party costs. The final price and payment profile are stated in the buyer's order form or call-off contract.

8. Supplier and contact information

Service name	Workbie
Supplier	Software Advance Limited
Company number	08606605
VAT number	450014154
Framework	G-Cloud 15 - RM1557.15
Service category	Software as a Service
Website	workbie.com
Buyer contact	service@workbie.com
Telephone	03333 660077
Registered address	67 Bolton Road, Ashton in Makerfield, Wigan, WN4 8AA

Why Workbie

- A modular platform that can cover multiple connected operational workflows.
- Configuration around the organisation's established process and terminology.
- One place for records, tasks, documents, communication and reporting.
- A managed service with implementation, support and separately agreed improvement options.

Workbie helps organisations fix the process first, automate the administration and use AI where it counts.

Document note: This service definition provides an overview of the Workbie service. The applicable G-Cloud 15 framework terms, buyer requirements, order form, call-off contract and agreed service schedule take precedence where they provide more specific obligations.