



Source-to-Pay Contract Management Service definition document

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An introduction to the Contract 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 Contract Management module

This document concentrates on the Contract 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

Proactis Contract Management is a central, online repository designed to manage the entire lifecycle of supplier contracts, frameworks, and agreements. The solution aims to increase the proportion of spend “under management” by ensuring pre-negotiated terms are visible and utilised across the organisation, thereby reducing the risk associated with contract expiry or non-compliance.



Key features and functional capabilities include:

- **Contract Repository:** The module provides a single source of truth for all contract-related information and documentation. It supports multiple contract types - including framework agreements, call-off/blanket agreements, sub-contracts, NDAs, purchase agreements - and allows for custom attributes and multiple attachments - for sharing with suppliers externally and internal organisation content.
- **Streamlined Document creation:** Users can generate contracts using pre-approved templates ensuring legal and policy compliance.
- **Event and Timeline Monitoring:** The system automates the tracking of critical milestones through scheduled review reminders and renewal alerts. These notifications are sent via email to the appropriate stakeholders, ensuring that no contract expires or misses a compliance check without warning.
- **Performance Management and KPIs:** Procurement teams can build a library of Key Performance Indicators (KPIs) to monitor supplier and organisational compliance. Contract performance is displayed using a visual RAG rating system, allowing managers to identify underperforming agreements at a glance through dashboards and reports.
- **Strategic Integrations:**
 - *with Sourcing:* Awarded tenders from the Sourcing module can be used to automatically generate contract records, eliminating manual data re-entry
 - *with Purchase-to-Pay (P2P):* Seamless integration allows users to requisition goods directly against a contract record, providing at-a-glance visibility of current spend versus the outstanding contract value
- **Governance and Execution:** The solution maintains a complete audit trail of all user interactions, views, and edits. It further accelerates execution through native or integrated electronic signatures (using DocuSign or Adobe Sign), providing a secure, legally binding record of signatures.

- **Supplier Collaboration:** A dedicated Supplier Portal facilitates two-way communication, allowing vendors to view their own contract records, track performance metrics, and upload required documents such as insurance certifications or accreditations.

In summary, the Contract Management module acts as a disciplined management tool that ensures negotiated savings are realised while protecting the organisation from legal and financial risks throughout the contract lifecycle.

Principle features and functions

- **Centralised Electronic Repository:** Proactis Contract Management provides a secure, unified hub for all contract-related information, documents, and history, ensuring a “single source of truth” across the organisation
- **Document Creation:** Users can generate contracts using pre-approved templates and standardised reminder tasks and KPIs to ensure legal consistency and policy compliance
- **Support for Multiple Contract Types:** The system manages diverse agreements, including frameworks, call-off, NDAs, sub-contracts and price lists
- **Scheduled Event and Timeline Monitoring:** Automated event schedules drive reminders for critical milestones, such as renewals, appraisals and compliance check timelines
- **Performance Management and KPIs:** Procurement teams can define a library of Key Performance Indicators (KPIs) and track supplier compliance using a visual RAG rating system
- **Direct Sourcing Integration:** The Contract Management module can automatically generate a contract record from an awarded sourcing project, pulling in pricing, item data and attachments eliminating manual re-entry
- **Purchasing (P2P) Integration:** Full two-way integration allows users to access contracts directly from the purchasing system, providing real-time visibility of spend against contract value
- **Electronic Signature Support:** The platform simplifies execution through natively integrated electronic signing (DocuSign / Adobe Sign), providing a secure record of signatures
- **Variation and Defect Management:** Dedicated workflows allow for the systematic tracking, documentation and approval of contract modifications, extensions and supplier defects
- **Audit Trails:** Every system action, document view and edit is logged with a time-stamped record, maintaining a comprehensive history of all contract iterations

Benefits and outcomes

- **Increased Spend Under Management:** Improved visibility ensures corporate agreements are consistently utilised, driving a higher proportion of on-contract spend and realised savings
- **Proactive Risk Mitigation:** Centralised data and automated alerts help organisations avoid missed deadlines, financial penalties, and compliance violations
- **Efficiency Gains and Strategic Focus:** Automation of creation, review and approval processes significantly reduces manual clerical tasks, allowing staff to focus on high-value initiatives
- **Consistency and Accuracy:** The use of standardised templates ensures agreements are created uniformly, minimising human error and adhering to legal standards
- **Faster Turnaround Times:** Integrated workflows and automated notifications for approvals accelerate the contract lifecycle from negotiation to execution
- **Enhanced Data Insights:** Reporting and analytics tools provide real-time visibility into spending patterns and performance levels, which are vital for informed strategic decisions
- **Improved Compliance Management:** Automated checks ensure contracts adhere to regulatory standards, preparing the organisation for audits and fostering stakeholder confidence
- **Strengthened Collaboration:** Shared platforms and integrated “dialogue” features reduce silos between teams and ensure all parties remain aligned on contract terms
- **Significant Cost Savings:** By reducing unintended contract renewals and costly errors, the system delivers substantial savings in time and financial resources
- **Scalability for Growth:** The automated nature of the solution allows organisations to manage an increasing volume of contracts efficiently without a corresponding increase in headcount

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.