



Editor's Comments

Ai – the ‘force’ that keeps on giving- or is it?

The global Ai market is expected to reach \$1.81 trillion by 2030 with over 80% of companies declaring that Ai will form at least part of their strategies going forward. From manufacturing where Ai ‘assistants’ are listening for telltale signs of potential ‘fatigue’ in key machinery parts to predict failures. Then all the way to your very own Ai virtual ‘friends’ who learn how to talk to you individually, based on interaction on a personal level. The world will never be the same again.

One effect perhaps overlooked is that the use of Ai and LLP models requires substantial power consumption. By firing up and questioning these models an inordinate amount of power is used, to the extent that future systems leaning on data centre technology, may even look to the potential of small nuclear reactors (Small Modular Reactors SMRs) to become more power self-sufficient! This also could determine the global spread of Ai technology where countries are left behind due to power ‘poverty’.

And what about the much-heralded advantages of Ai and the many specific tools that have evolved in terms of improving business productivity? Some are reporting that the evolving

complexity of Ai is in fact having a detrimental effect on staff productivity. This may well be due to the inevitable learning curve involved in finding the right fit for individual businesses and how to make the most of the technology in such a fast moving platform.

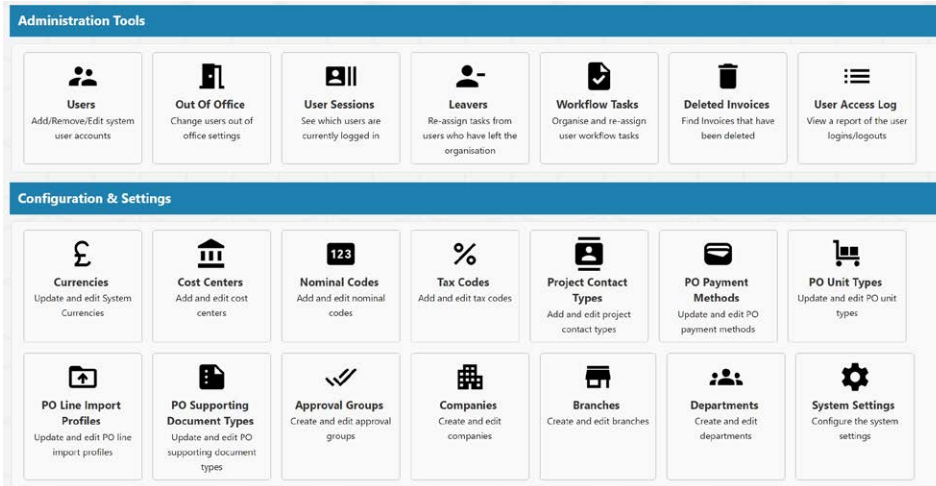
So, Ai may not be the panacea for all. The possible key to successful Ai implementation, is finding the right application for each organisation that works alongside employees, to enhance their abilities to provide faster, more detailed answers, or options, to problems that they face in their work. In that context having an Ai virtual ‘buddy’ is possibly not conducive to team motivation!

New System Features:

As we expand our customer portfolio, new [key features](#) and functions become available, based on genuine customer business needs. These can therefore become generic changes that other new and existing customers can take advantage of. Here are just some of the latest enhancements. If you see relevance of any of these in your current system, contact James Cole (sales@cloudb2b.co.uk) to discuss.

New Admin section

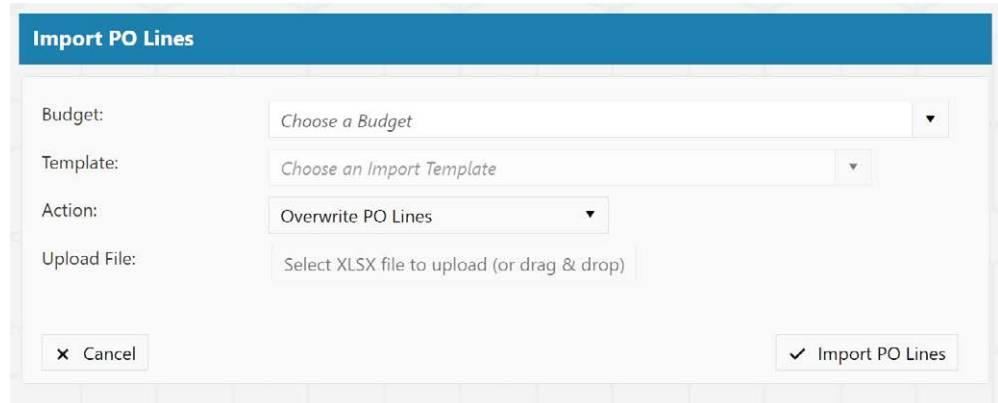
A more visual way of presenting the wide range of system administration tools available to client system controllers to make their use more intuitive.



The screenshot shows two main sections: 'Administration Tools' and 'Configuration & Settings'. 'Administration Tools' includes: Users, Out Of Office, User Sessions, Leavers, Workflow Tasks, Deleted Invoices, and User Access Log. 'Configuration & Settings' includes: Currencies, Cost Centers, Nominal Codes, Tax Codes, Project Contact Types, PO Payment Methods, PO Unit Types, PO Line Import Profiles, PO Supporting Document Types, Approval Groups, Companies, Branches, Departments, and System Settings.

Import PO Lines

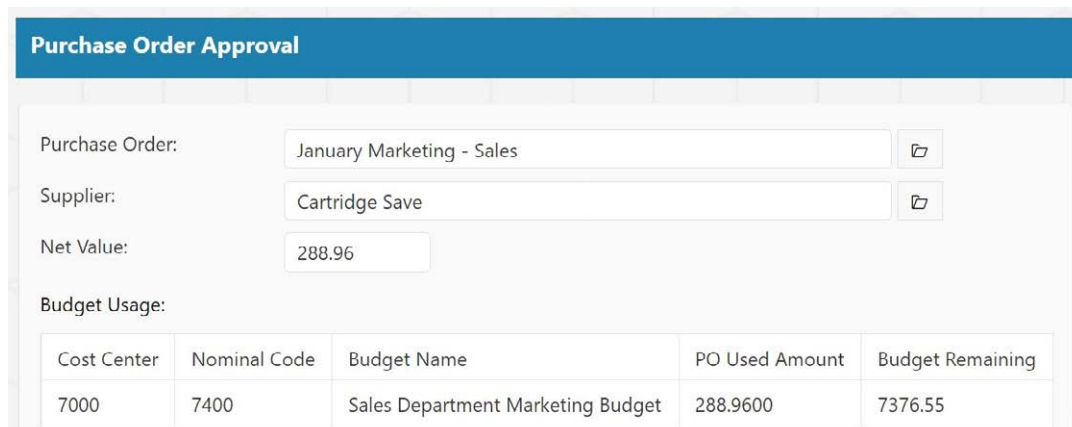
This feature allows users to import PO lines from an imported template document rather than adding them manually to the PO on a line-by-line basis. This saves users time if they are creating a particularly long purchase order. It also allows the potential for them to create template documents for regular orders that can simply be imported into the system when required (e.g. from an offline Quotation or Estimate). The admin user will set up the import template e.g. assigning the columns and setting an appropriate name for the template, for PO creators to select the pre-defined configuration template and easily import Lines to their Purchase Order.



The 'Import PO Lines' form contains the following fields:

- Budget: Choose a Budget
- Template: Choose an Import Template
- Action: Overwrite PO Lines
- Upload File: Select XLSX file to upload (or drag & drop)

Buttons: Cancel, Import PO Lines



The 'Purchase Order Approval' form shows the following details:

- Purchase Order: January Marketing - Sales
- Supplier: Cartridge Save
- Net Value: 288.96

Budget Usage:

Cost Center	Nominal Code	Budget Name	PO Used Amount	Budget Remaining
7000	7400	Sales Department Marketing Budget	288.9600	7376.55

Budget usage grid appears on PO approval task

(Applicable to those with budget control function deployed)

The budget usage grid is present to provide the approver with critical information relating to the budget(s) used on the PO. It displays the cost center, nominal code, budget name and usage values.

New Company Purchase Order

Supplier & Delivery | Order Items

Company: Demo Company One ⓘ

Title: Enter a title ⓘ

Supplier: Choose a Supplier ⓘ

Supplier Contact: Choose a Supplier Contact ⓘ

Internal PO (don't send to supplier)?

Justification: Optional, enter a justification for approval ⓘ
For Internal Use Only

Special Instructions: Optional, enter any special instructions for the supplier ⓘ
To be Displayed on the PO

Special Instructions

Add any special instructions or notes related to this Purchase Order, such as delivery details e.g 'deliver to main reception'. This will be displayed on the Purchase Order document under 'Special Instructions' to the supplier.

Tooltips Added

Where you see question mark symbols beside a function, click on the symbol to reveal hints and tips as to the functions use. Another training tool to help with system use!

Payment method filter for Purchase Orders

PO creators can select on PO creation the payment method used for a purchase. Now this can be reported on as a new option in the search filter menu providing key financial information. Especially useful for Company Credit Card tracking and reporting.

All Purchase Orders

Company: Demo Company One

Supplier: Search for supplier

Created By: Finance Admin

Assigned To: Finance Admin

Created From: [Calendar] Created To: [Calendar] Quick Date

Payment Method: [Dropdown]

Status:

Internal?

Sorting

Payment Type Name

Credit Card

Direct Debit

Standard Account

Standing Order

Purchase Order Lines

PO Line Budget: Choose a Budget

PO Supplier: Search for supplier

Nominal Code: [Dropdown]

PO Status:

Sorting

Nominal Code	Name
<input type="checkbox"/> Check All	
<input type="checkbox"/> 0000	Default
<input type="checkbox"/> 5100	Raw Materials
<input type="checkbox"/> 5200	Direct Labour Costs
<input type="checkbox"/> 5300	Equipment Maintenance
<input type="checkbox"/> 5400	Packaging & Labeling
<input type="checkbox"/> 5500	Outsourced Services

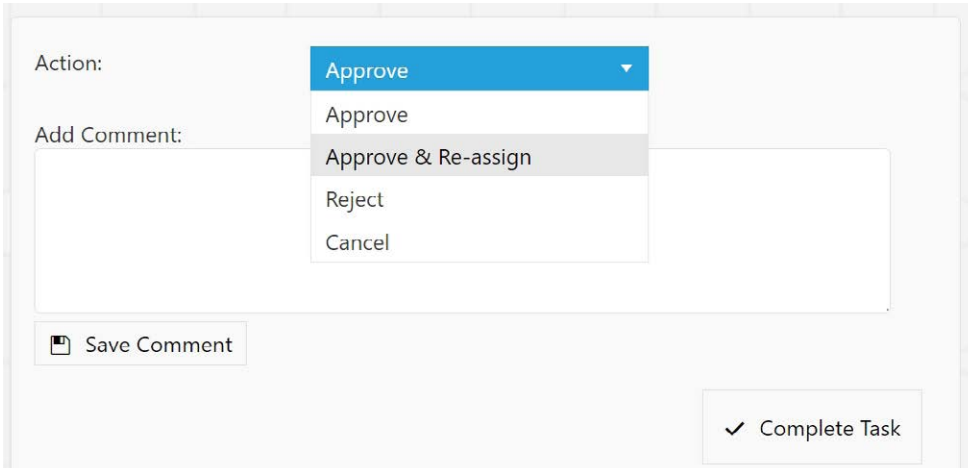
Search

Nominal Code filter for PO Lines

For those selecting nominal codes at line level PO creation, there is now a drop down list that is admin level created and editable, to reduce user errors.

PO Escalation feature (Approve and re assign)

This is available for instances where a particular type of purchase may require further or different authorisation. If another approver is selected outside the set approval rules, they will get a new approval task. If that new approver approves the task, it will follow the standard workflow already in place, by either sending the PO on to the next level of workflow, or to the supplier (if enabled).



Note: PO's can only be escalated to users that have the "PO Escalation" permission enabled on their account and can only be escalated to users they have access to (i.e. department managers).

People Focus

Nick Clark, Systems Developer & Support Assistant

Nick joined Cloud B2B in March 2023 and is a key member of the development and support team. Having previously worked for Autoglass, Nick has made the move into IT as a developer to satisfy his passion for IT and technology.



Nick is an integral member of our development and production team, specialising in designing and implementing systems tailored to meet each client's unique needs. In addition to developing custom solutions, Nick plays a critical role in scoping enhancements for existing client systems, ensuring that updates align with current system functionalities. With a passion for building accurate, client-focused solutions, Nick brings both technical skill and dedication to every project and thrives on staying up to date with the latest technologies and coding practices, continuously expanding his expertise to deliver tailored solutions for our customers.

Outside of work, Nick is an avid supporter of Arsenal FC, regularly going to matches and supporting them! When he is away from the excitement of a match, he can be found kayaking and enjoying other outdoor activities such as visiting areas of natural beauty for hikes. He makes a point of never visiting the same place twice to experience something new each time he goes travelling.

Case History - Wintle Heating & Plumbing

Wintle Heating & Plumbing, established in 1966, has grown to be one of the largest combined heating, plumbing, and electrical contractors within the Anglian and East Midlands Area. As a consequence, in growing the business, the company faced challenges in managing a wide range of services and suppliers across multiple locations. Ensuring fiscal controls, standardising purchasing practices, and maintaining efficiency across various departments were becoming increasingly complex.



Tom Wintle, Commercial Manager at Wintle Heating & Plumbing, recognised the need for a more streamlined and efficient purchasing system to replace their existing processes. Their goal was to implement a solution that could provide greater control over approvals and reporting whilst keeping IT overheads low.

Upon researching potential solutions, Tom discovered Cloud B2B's cloud-based Purchase Order software. The comprehensive range of functionalities and the flexibility of the licensing model offered by Cloud B2B immediately stood out. After a series of remote demonstration sessions, Wintle Heating & Plumbing decided to implement the full Purchase Order transactional solution from Cloud B2B.

The implementation process began with a detailed specification session, followed by the development of a tailored test system. This allowed Wintle Heating & Plumbing to thoroughly evaluate the system before full deployment. Key features such as the Budget module, which ensures correct allocation of nominal codes at the budget level, and the ability to associate delivery notes with the corresponding PO's using the Goods Receipting module, were integral to their requirements.

The system went live initially at Wintle Heating & Plumbing's head office, where it was rigorously tested to ensure it met all operational needs and gained acceptance among users. Following the successful trial at the head office, the system was rolled out with a license pool of 3 concurrent users.

To further address practical needs, additional features were added to the system, including Group Approval, Bulk Receipting lines on a Purchase Order, and the ability to receipt without a formal document. This flexibility ensured that the system could evolve with the company's requirements.

The new system has significantly enhanced visibility into financial performance across all branches. The insistence that suppliers use genuine PO numbers has improved supplier invoice management, saving time and reducing errors. The comprehensive reporting suite has facilitated more accurate forecasting of monthly profitability and better control of expenditures.

Importing supplier agreed price lists and specifications has streamlined the purchase order process by automatically creating a purchase order from an offline template, making it faster and more accurate. The structured format has benefited the procurement of everything from office supplies to essential equipment.

Tom Wintle and his team are pleased with the improved efficiency and control the Cloud B2B system has brought to their operations. The cloud-based solution will support Wintle Heating & Plumbing's continued growth and commitment to excellence in the heating, plumbing, and electrical contracting industry.

Tom commented:

"In a fast moving business like ours, Cloud B2B's system has provided a customised solution that has improved all aspects of the purchasing process. I can highly recommend them for their quality of work and understanding our business needs, and continued support".



Wintle Heating & Plumbing Ltd | Mansion Close | Moulton Park | Northampton | Northamptonshire | NN3 6RU

www.wintle.co.uk

Welcoming new clients

We are excited to announce that several new clients have joined the Cloud B2B family!



Global Service Group Ltd

Full Purchase Order System

A national delivery service offering a large variety of specialist logistical solutions. GSGRP recently implemented a system covering the purchase order workflow process for around 20 users.



Roddy New Homes Construction Ltd

Full Purchase Order System with Invoice Approval

A family-run housebuilder, creating homes with sustainable materials. Roddy New Homes required a system to handle the complete purchase order process for 10 users. Shortly after implementation, they asked us to add invoice approval features to the system.



JRS Mechanical Services Limited

Full Purchase Order System with Invoice Approval

A building engineering client working with a wide array of end users. JRS Mechanical Services have around 10 users using the system to handle their full procurement and invoice approval process.



Kaicedo Buying & Selling of Real Estate

Full Purchase Order System with Invoice Approval

A real estate partner based in Dubai, Kaicedo were an existing client who required a new system to supersede their existing one. The system covers full purchase order processes with invoice approval for 7 users.

Have a Brilliant Idea? Share It with Us!



Got an idea to enhance our products? Share it through our suggestion box! If we adopt your idea, you'll receive a year's annual support for your system completely free as our way of saying thanks. Help us keep improving and shaping Cloud B2B to benefit everyone in our community!

[Scan the QR code to submit a suggestion.](#)

Cloud B2B - capable of more than you may know!

Whilst providing innovative systems in the Purchasing, HR, and Contracts Management arena, we can also provide high level solutions for one off or ongoing projects. Using our abilities in understanding what can be complex, multi-platform requirements, B2B's team have been employed to provide practical, economic solutions to a number of [clients](#) such as Bimson Haulage (subject of a case history in our last summer edition).

Graham Light (Chairman) commented "whilst we may be a small company, our abilities to provide more specialised solutions, often in a tight timeframe, that help reduce cost and unnecessary complexity, has and will continue to be an attractive proposition for many clients.

We can invariably be more 'swift of foot' than many larger organisations, offering much better value without compromising quality, performance and ongoing support"



Contact Daniel Page (01480 356702) to discuss any solution requirements you may be considering to see what we can provide.



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