Cloud B2B solutions

Purchase orders online

Create digital Purchase Orders on screen, on any device, and much more….

Product Datasheet

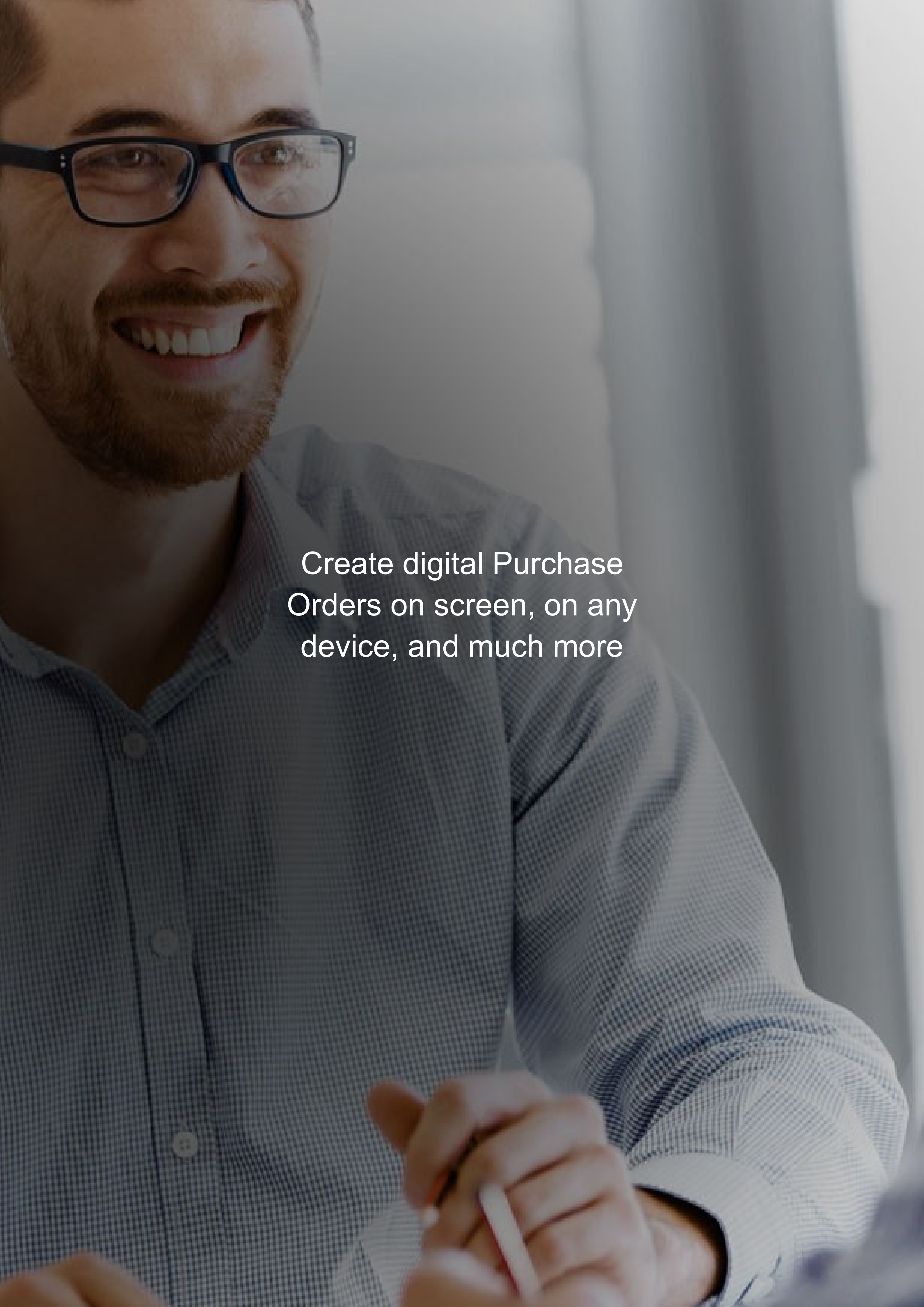
Transform Your Procurement Process

Relying on paper forms or spreadsheets to manage purchasing is no longer practical for most organisations. These approaches often lead to delays, errors, poor budget control, or strained supplier relationships.

Cloud B2B's range of UK-based cloud purchasing solutions gives organisations of all sizes complete visibility and control over the entire purchasing process.

Our custom-built data extract facility allows seamless integration with your accounts system, including Sage, Xero, QuickBooks and any platform that supports CSV file imports.

Tailoring the system to your business is standard. Approval workflows, reports and searches can all be configured to match your requirements, without the high costs usually associated with bespoke solutions.



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Functions & Features

The following section outlines the key features of our Purchasing and P2P system. All of our solutions can be customised to align with your specific business requirements. For a wider perspective, please refer to the Solutions Overview datasheet, which details our core functionality.

We also offer no-obligation remote demonstrations for all of our solutions. These sessions are recorded and shared with prospective clients for convenient review at a later time.

1. Range of Products to Suit All Requirements

Whether you are a start-up or a well-established company, we have a solution to match your needs. Options range from the Simple PO version, ideal for smaller businesses, through to fully-customised PO and Purchase-to-Pay solutions that include Budget Control and Goods Receipting modules. You can also upgrade seamlessly from one version to another as your requirements evolve.

	SIMPLE PO	FULL PO	POPIA & GR
Companies * (see notes)	1	Unlimited	Unlimited
Approval Workflow(s)	✓ Point to Point	✓ Customised	✓ Customised
Searches & Reports	✓ Standard	✓ Customised	✓ Customised
User Admin Controls	✓	✓	✓
Invoice Processing	✗	✗	✓
Budget Control	✗	✓	✓ + Invoices
Goods Receipting	✗	✓	✓ + Invoices
Integration Export	✗	✗	✓

2. Easy Purchase Order raising Process

The simple process allows users to raise orders by Company, Department, or Project, including details such as budget, delivery date, and other key information. Order lines can be added manually or through a price list import facility, with the flexibility to apply different budgets to each line. As lines are added, the system provides an ongoing total spend before submission for approval.

Purchase order raisers can recall orders during the internal approval process, and a Duplicate PO feature makes it easy to re-issue regular orders. Users can locate a previous PO, make changes, and submit it for approval. The system creates a new PO number while keeping the original archived.

Purchase orders online

Purchase Order

Subject: Head Office Cleaning Suppliers February WK1	**Ordered by:** Finance Admin
Date: 05 February 2026	**PO Number:** 2026-6

Supplier Cloud Cleaning Supplies Example Address Line 1 Example Address Line 2 Example Town Example County Example Postcode Tel. no.: 0123456789 **Contact(s):** John Smith (CloudCleaningSupplies@democompany.cloud)	**To be delivered by:** 06 February 2026 **Deliver to:** Castle Hill House High Street Huntingdon CAMBS PE29 3TE Tel. no.: 01480356702 **What3Words:** ///streamers.announced.surprise **Delivery Contact:** Finance Admin (finance.admin@democompany.cloud) 01480 356702

Special instructions:

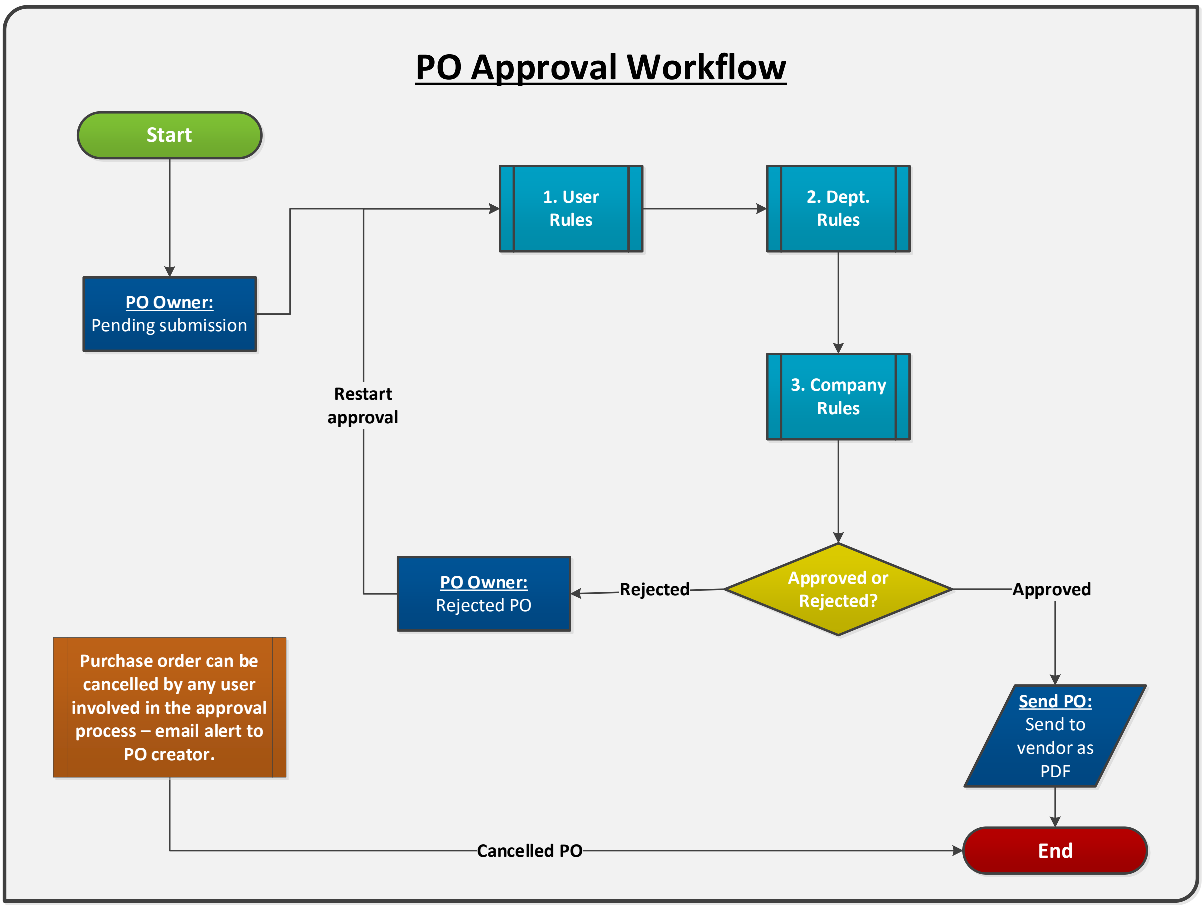
Description:	Qty:	Unit Type:	Unit Cost:	Tax Band:	Sub Total:	VAT:	Total:
563692 - All Purpose Cloths (Large) Blue	5.00	Pack(s)	5.80	20%	29.00	5.80	34.80
505502 - Heavy weight Black Rubber Gloves, Extra Large	10.00	Each	33.76	20%	337.60	67.52	405.12
824063 - Kitchen Cleaner Sanitiser Odourless 750ml	2.00	Bottle(s)	3.10	0%	6.20	0.00	6.20
Currency: British Pounds				**Totals:**	**£372.80**	**£73.32**	**£446.12**

Payment Terms: As per terms of purchase **Invoice To:** Castle Hill House High Street Huntingdon CAMBS PE29 3TE Please email invoices to accounts@democompany.cloud	**Associated Documents (file names):** None.

Terms:
Default Terms and Conditions

3. Custom Approvals for POs, Invoices, & Credit Notes*

The system includes fully customised workflows as part of the initial setup. Approval rules can be configured based on values, roles, or individuals to reflect each client's specific business requirements. For example, purchase order creators submit orders into workflow when ready, with or without supporting documentation.



Approvers are automatically notified by email when an order requires their attention and can review both summary information and full order details before taking action. Orders can be approved, progressing them to the next approval stage or issuing them to the supplier, cancelled if a project has been stopped, or rejected if the order is unsuitable.

Rejected orders can be returned to the creator with comments, allowing the creator to review, amend, and resubmit the order for approval. This creates a clear internal audit trail and enables a structured conversation until all parties are satisfied. The same tailored workflow approach is also available for supplier invoices and credit notes.

** Not available in the Simple PO version*

4. Full Budget Control Module*

Budgetary control is a core component of our main systems. Finance teams can allocate budgets across the entire organisation, including by department or project, with key details such as relevant nominal codes. These budgets are then made available to the appropriate users within the system.

When raising a purchase order, users have fill visibility of the remaining budget and are prevented from submitting orders that exceed the available allocation. Budgets can also be configured to expire at a future date and can be made unavailable at administrator level at any time. Budget usage and remaining spend are also displayed within the dashboard for ongoing monitoring and control.

** Not available in the Simple PO version*

5. Full Goods Receipting Function*

The Goods Receipting module within the system allows users to upload delivery notes or supporting documentation, including scanned copies with signatures, and link them directly to the relevant purchase order. The system automatically identifies any unreceipted order lines and presents only these for processing ensuring accuracy and efficiency.

Purchase orders online

Internal Delivery Note

GRN-2025-34

Receipted Date/Time:	Receipted By:
24/09/2025 14:01	Finance Admin

Line No.:	PO Number:	Description:	Qty:
1	2025-37	Item 1 Comment: All items delivered successfully	5

Receipting lines can also be allocated to any purchase order for a selected supplier, with item quantities tracked to support the management of part deliveries. Once a purchase order has been fully receipted, it is either closed within the POP version or progresses directly into automatic invoice approval within the POPIA solution.

** Not available in the Simple PO version*

6. Supplier Price List Import Function

Where clients have agreed pricing arrangements with suppliers for goods or services, these price lists can be imported into the system. Purchase Order creators can then select items directly from the imported list, with item descriptions and prices automatically populated, leaving only quantities to be entered. This streamlines the ordering process and reduces the risk of manual errors.

When revised price lists are agreed with suppliers, updated versions can be reimported into the system, automatically replacing the previous lists to ensure pricing remains accurate and up to date.

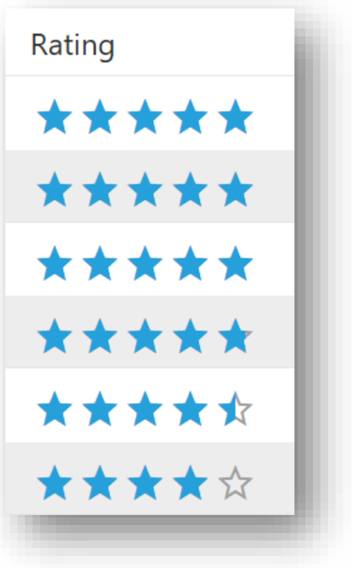
7. Upload Documents in a Wide Range of Formats

The system provides secure document upload and storage, allowing users to attach supporting documentation to purchase orders, invoices, and other transactions. A wide range of file formats is supported, ensuring users can work with documents in their original format without the need for conversion.

Supported formats include common office documents, emails, images and media files such as DOCX, PDF, XLSX, TXT, MSG, OFT, PNG, JPEG, TIFF, and MP4. This flexibility makes it easy to store contracts, invoices, correspondence, and supporting evidence in one central location, improving auditability and information accessibility.

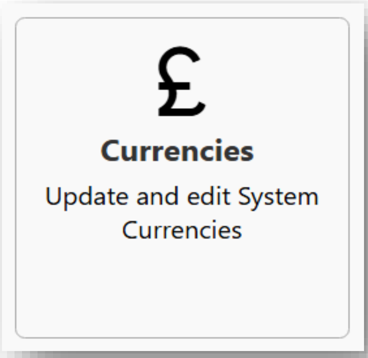
8. Rate Supplier Performance by Purchase

A standard feature within the system allows purchase order creators to rate supplier performance for each purchase on a scale from 1 (not so good) to 5 (excellent). When submitting a rating, users are required to provide a supporting reason, ensuring a clear audit trail is maintained.



This functionality enables organisations to identify recurring supplier issues, such as repeated late deliveries or service concerns, allowing performance to be monitored over time and addressed proactively with suppliers. Supplier ratings are also displayed within the dashboard, providing ongoing visibility of supplier performance across the business.

9. Supports Multi-Currency



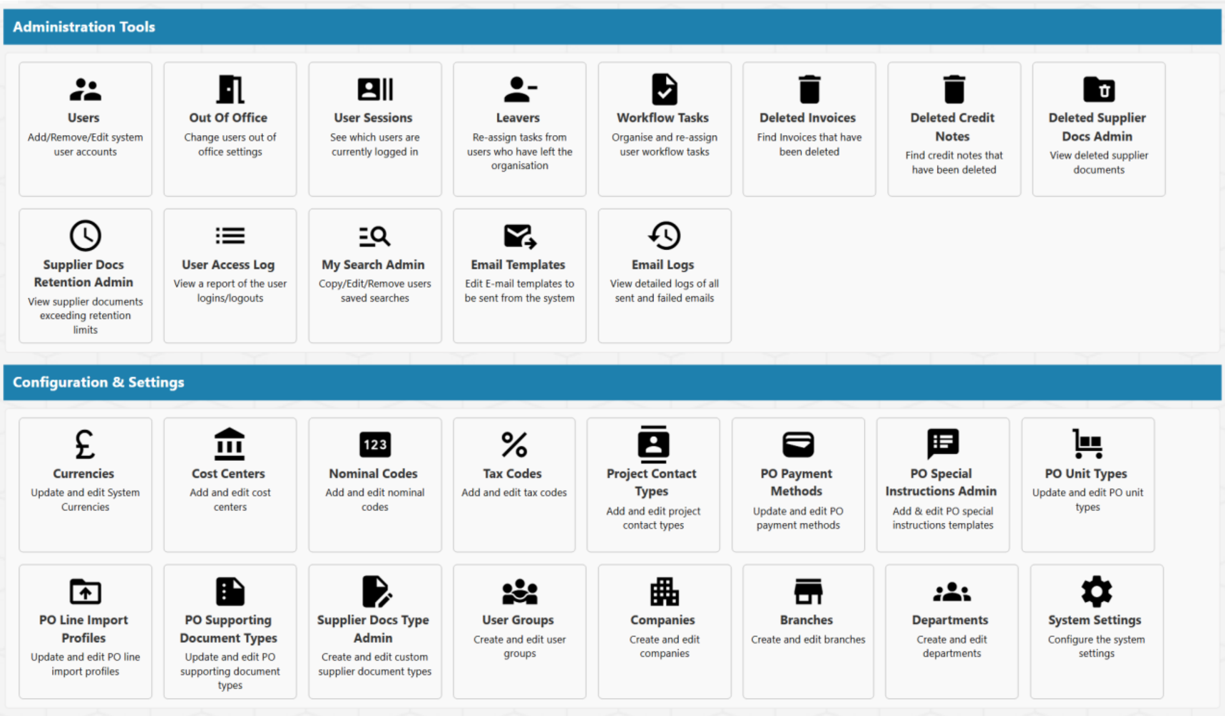
Our purchase order solutions support multiple currencies, with values calculated to four decimal places. While all budgets are maintained in Pounds Sterling in the background, the system automatically applies the correct exchange rate to the selected transaction currency, such as US Dollars or Euros.

Exchange rates are sourced via an automated link to the Customs and Excise website and are updated on a monthly basis. Clients also have the option to perform manual updates more frequently if required, ensuring accurate and up-to-date currency conversions at all times.

10. Full Administration Tools

Using the built-in administration tools, clients can easily add new companies (entities), departments and projects as their organisation evolves and grows. This ensures the system continues to reflect the structure of the business over time.

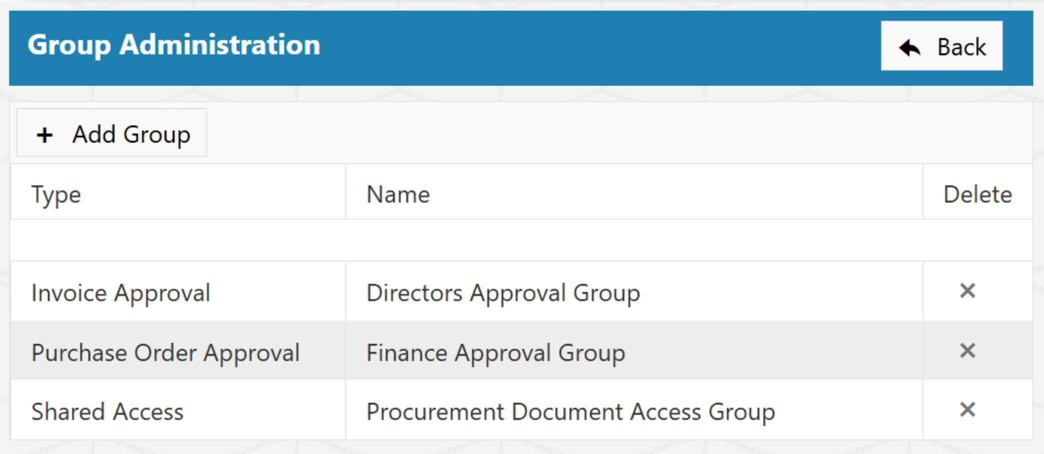
Administrators can control various items within the system such as Nominal/Cost Codes, Approval Rules, and User Permissions.



11. User Groups for Enhanced Collaboration

User Groups allow organisations to structure collaboration and approvals in a flexible and efficient way. Approval Groups can be created for purchase orders, invoices, and credit notes, where approval tasks are sent to a group rather than an individual. Any user within the group can approve the task, with the first approval completing the process, removing bottlenecks and keeping workflows moving.

The system also supports Shared Access Groups, which enable users to collaborate around documents. When a document is uploaded by one member of the group, it becomes visible to all other group members, who can view and index the document as required. This ensures relevant information is easily shared while maintaining controlled access.



12. Email Alert for All Tasks Plus Daily Reminders

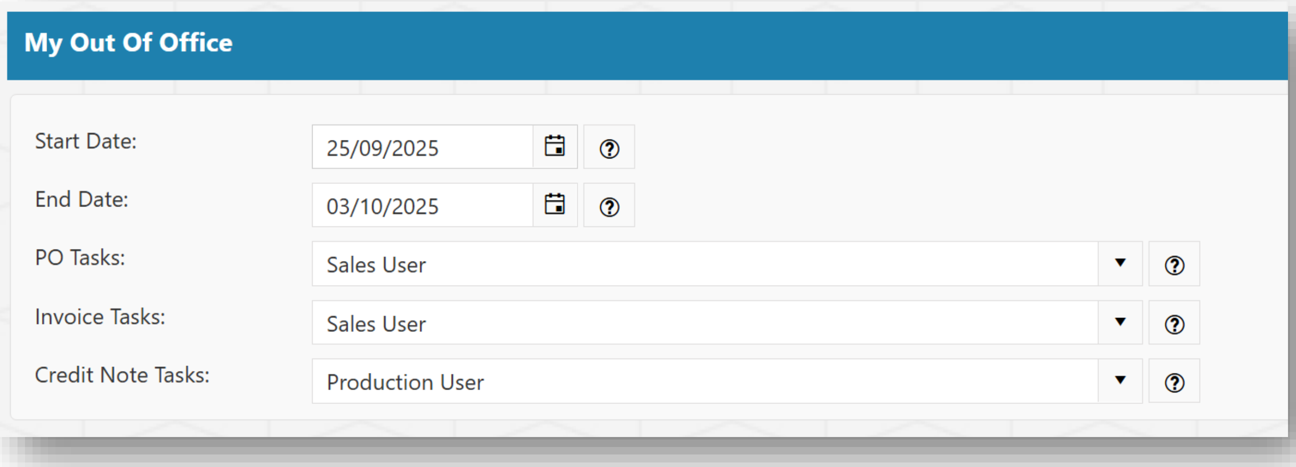
All system communications with users are managed via email. When an action is required, such as approving a purchase order or invoice, the system automatically sends an email notification to the relevant user in the workflow, with a clear subject line indicating the required action.

Users can also create tasks within the system whether related to purchase orders or other activities, and assign a specific date and time. At the scheduled time, the system sends a reminder email to prompt the user to complete the task, helping to ensure deadlines and actions are not missed.

13. Out of Office Function

Although our cloud systems can be accessed at any time from any location, users can specify periods when their workflow tasks are redirected to another person within the organisation, for example while they are away on business or on leave.

Once the user returns, the system automatically restores task notifications and approvals to the original user, ensuring continuity without the need for manual intervention.



14. Multiple Advanced Searches Including Global System Search

Our purchase order solutions provide standard searches across all system metadata, with the ability to export results in multiple formats include Excel, CSV, and PDF, as well as to generate reports. Search views can be customised by selecting the columns to display, applying multiple filter criteria and adjusting groupings using simple drag-and-drop functionality.

A global search option is also available, allowing users to quickly locate specific items such as a purchase order number, or to return broader results, for example, all purchase orders relating to a particular product or category.

15. Template Import for Suppliers, Nominal Codes & Cost Centres

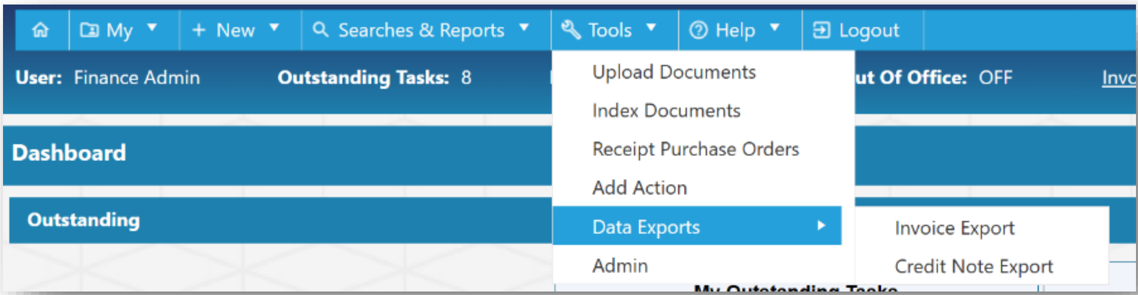
As part of the standard system setup, we provide import templates to bring across key data from existing client systems, including supplier lists, nominal codes and cost centre structures. These datasets are imported by our team during the system build, ensuring they are fully in place and ready for users at go live.

Clients can also add new entries individually or maintain and update existing datasets at any time through the built-in administration tools.

16. Custom Data Exports for Import to Client Accounts / ERP Systems

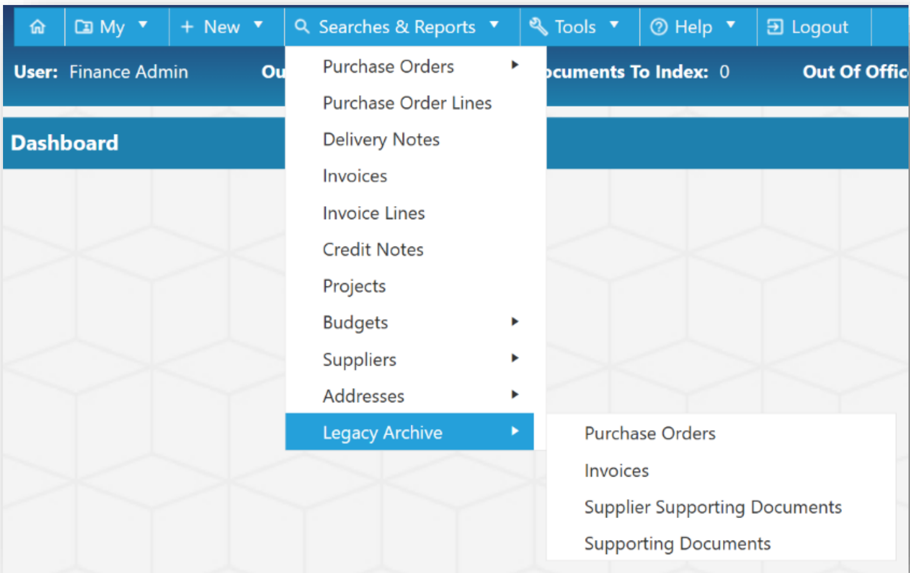
Data can be exported from our systems in CSV format, allowing straightforward import into any modern accounts or ERP platform. Export columns and headings can be customised to match the specific requirements of the target system, ensuring a seamless integration process. In addition, the system supports API based integration with accounts packages such as Xero. Integration with Sage is also available, although this would require custom development.

This functionality is particularly valuable within the Purchase to Pay (POPIA) solution, where approved supplier invoices and credit notes can be transferred directly into the client's accounts system for payment. To maintain accuracy and control, the system prevents items from being exported more than once and maintains a complete audit record of all export activity.



17. Archive Section for Import of Data from Current Systems

If a client is migrating from an existing digital system, legacy data can be imported into a dedicated archive section within our platform. This ensures historical information remains accessible and securely stored, allowing all purchasing records to be maintained within a single, central system.



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