Cloud B2B
solutions

Purchase orders online

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

Transform your Procurement Process

Trying to control the purchasing process using paper forms or spreadsheets is no longer viable for most organisations. Delays, inaccuracies and lack of proper budgetary control, as well as poorer supplier relations, are typical problems.

Cloud B2B's range of UK private, cloud based purchasing solutions, will give you full and proper control over the purchasing process, for companies of all sizes.

And with our custom built data extract facility, you can interface with your accounts system e.g. SAGE, Xero, Quick Books and any system that accepts CSV file import.

Customisation to ensure our main systems meet your business needs is standard, including Workflow approval processes, reports and searches. And not at high cost.

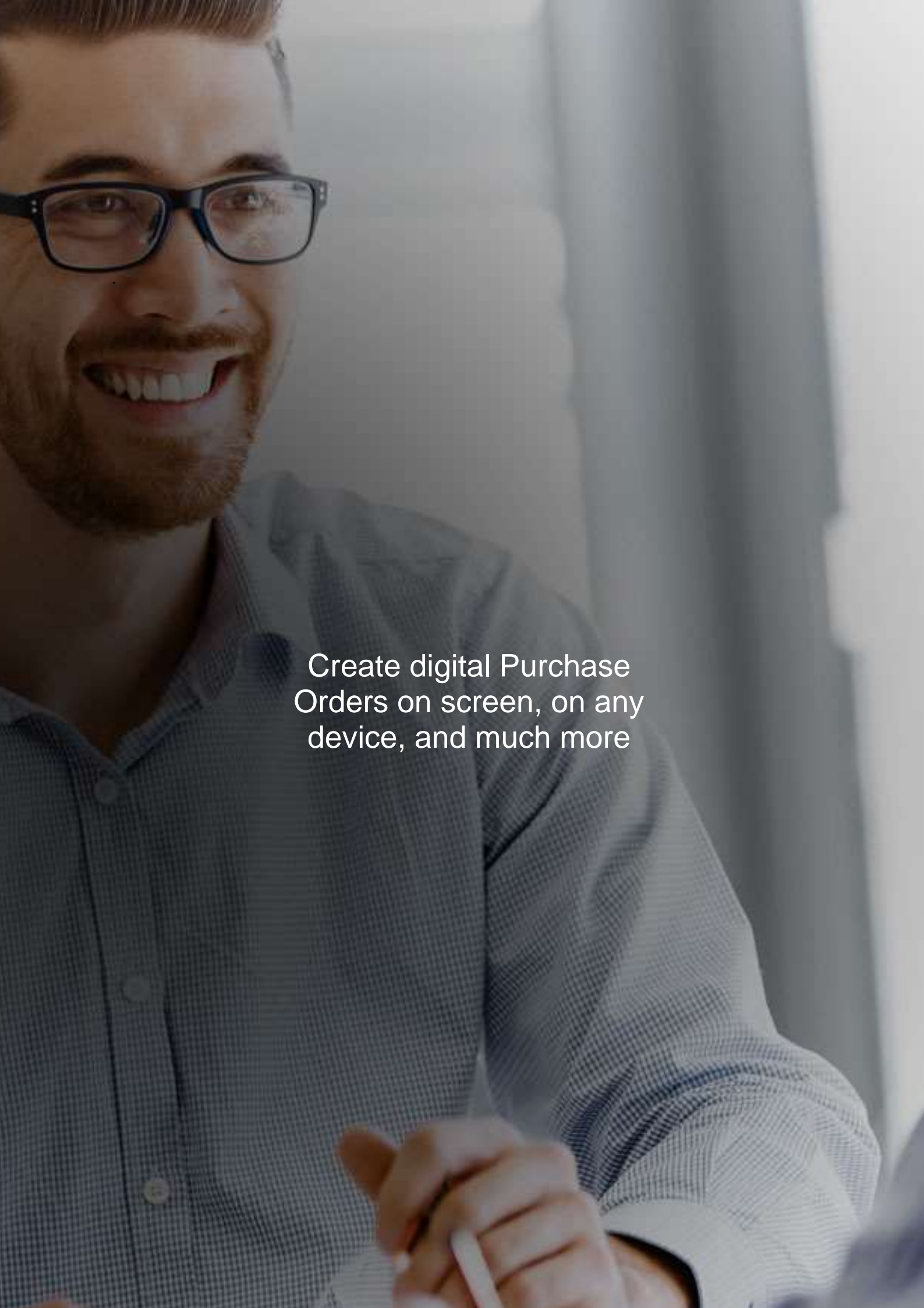## Dashboard for instant overview

Amongst the powerful functions is the opening custom built dashboard, that provides power users with key financial and status overviews, for the whole company (and multi company) departmental and project based activities

Functions and Features

Following this section, are the key functions for our Purchasing and P2P system functions, noting that customisation is available across all our systems, so they fit your business needs. And don't forget to view the Solutions Overview data sheet for generic functionality.

We offer no obligation remote demonstrations of all our generic solutions, that we record and supply to potential clients for review.

Create digital Purchase
Orders on screen, on any
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1. Range of 4 products to suit all requirements

Whatever your size of company, from start up to well established, we will have a solution to fit your needs. From the Simple PO version ideal for smaller companies, to the full custom built PO and Purchase to Pay versions- that include Budget control and Goods receipting modules- to the system that will include Stock Control (available mid 2020). And you can upgrade from one version to another over time if required.

2. Maintain multiple companies / branches / projects *

With the inbuilt administration tool, clients have the ability to add new companies (entities) departments and projects as business changes and expands, and to carry out searches and reports for the whole organisation or relevant parts.

3. Full budget control module *

Budgetary control is a key part of our main systems. Finance can set budgets for the whole company, departments and even projects, with key items such as relevant nominal codes, that are then made available for use to relevant system users. Users have full visibility as to spend available when raising a PO and will be prevented raising one if over the budget available. Budgets can also be made to 'time out' in the future and can be made unavailable at Admin level at any time. Budget use is also part of the dashboard facility.

Not available in the Simple PO version

4. Full goods receipting function *

In the main systems the Goods Receipting (GRN / delivery note) module allows users to import documentation (usually scanned to capture signatures) and to associate these with the relevant purchase order. The system will automatically check lines on a PO that have not been receipted and present only these for action. The system allows lines to be allocated to any purchase order for a chosen supplier, and keeps a count of items, allowing for part deliveries. Once fully receipted a PO is either closed (POP version) or powers into invoice auto approval (POPIA).

5. Custom data exports for import to client accounts / ERP systems

Data can be exported from our systems in CSV file format, which can be imported to any modern accounts or ERP system. The columns and headings contained in the export will be customised to match the requirements of the target system. This is particularly valuable in the Purchase to Pay (POPIA) version where approved supplier invoices and credit notes can be imported to the clients' accounts system for payment. Our system will not allow items to be exported more than once and keeps a file record of all exports for due diligence.

6. 2 step purchase order raising process

The easy to use 2 tab 'on screen' template allows users to raise orders by Company, Department or Project, and with a relevant budget, delivery date and other key information. Order lines can be added as required either manually or using the price list import facility. And lines can have different budgets applied to each for flexibility. The system also provides an ongoing total spend as lines are added, prior to approval submission. PO raisers can also recall PO's in the internal approval process. There is also a Duplicate PO facility for instances where regular PO's for same items are placed with a supplier; the user can locate an older PO, make changes and submit for approval (the system will create a new PO number and not alter the archived version). Prior to submission for approval, raisers can add supporting documents e.g. quotes and also Supplier Supporting documents, as attachments.

7. Custom approval workflows for po's, invoices, credit notes *

The main systems have customised workflow as part of the system set up. Rules – values or person(s) - will be set up to meet individual client business needs. For example Purchase order creators submit to workflow PO's when they are ready, with or without supporting documentation. Approvers are alerted to orders that require approval by email and can review summary detail as well as the full PO, before deciding action. Orders can be approved (which will then move to the next level of approval or go by email to the supplier) but can also be cancelled (e.g. a project has been shelved) or rejected. The approver can then send the PO back to the raiser with relevant comments. The creator can then review, make changes to the PO if relevant and resubmit for approval. In this way an internal 'conversation' can be held till all parties are content. Tailored workflow will also apply to supplier invoices and credits.

8. Supplier price list import function

Where clients have arrangements with suppliers for goods and services at set prices, these can be imported. This means that a Purchase Order creator can pick (and be restricted to pick) from the imported list, and the system will automatically load the items with description for them – they just select the quantity- making it faster and more accurate. When new price lists are agreed, the new list can be re imported which will overwrite the older list.

9. Rate supplier performance by purchase

A generic feature where PO creators can rate a supplier for each purchase occasion between 1 (not so good) and 5 (excellent). When giving a rating the user must give a valid audit trail reason for the score. The value for this feature is that the reviews for a supplier can indicate issues e.g. consistent late delivery, that can be regularly checked and action taken to correct with that supplier. Supplier ratings are also part of the user Dashboard facility.

* Not available in the Simple PO version

10. Template import for suppliers, nominal codes, cost centres

As a standard part of system set up, we provide import templates for the importation of key sets of information available in current client systems e.g. list of all current suppliers, all nominal and cost centre codes. These will be imported by us as part of the system build to be available to users at system go live. Clients will also be able to set up additional ones on a one by one basis or make changes to these data sets via the Administration tool kit.

11. Supports multi currency

Our PO solutions all support multiple currencies, to 4 decimal places. The systems will always work in Pounds Sterling in the background (for budget reasons) but will apply the relevant exchange rate conversion to the currency used e.g. USD, Euro etc.; these conversion rates are available via our link to Customs & Excise web site which will update the rate automatically monthly, although clients can evoke a manual update more frequently.

12. Archive section for import of data from current systems *

If a Client already has a digital system, but wishes to change to our platform, then we can import legacy data from the existing solution into an archive section, so that all information is in one system.

Not available in the Simple PO version

13. Multiple advanced searches incl. Global system search

Standard searches across all meta data in the system are readily available in our PO solutions, with the ability to export results in multiple formats e.g. Excel, CSV, PDF, and also to run reports. Searches are customised in terms of display columns that can also be filtered by multiple criteria, and groupings changed using 'drag and drop' functionality.
Global search is a 'quick find' option for use when you want to review a specific item (e.g. a Purchase Order number) or where you want a range results to be found e.g. give me all purchase orders related to 'paper'.

14. Email alert for all tasks plus daily reminder

In common with all our systems, communication with users is via email. So as soon as an action e.g. to approve a PO or Invoice, is set, the system sends an email with the subject of the requirement to the relevant person in the workflow for them to activate. For Tasks, users set a relevant action (PO related or otherwise) with date and time, and the system will again email them at the relevant future date for that Task to be undertaken.
Each morning the system will automatically check all users for outstanding tasks and if there are any, email the user again telling the number of tasks and giving them a direct link into the system.

15. Out of office function

Whilst our cloud systems can be accessed 24 x 7 from anywhere, users can set periods when their own tasks can be performed by somebody else in the organisation e.g. away on business or leave. On return date, the system reverts to sending tasks in the normal way.

Not available in the Simple PO version