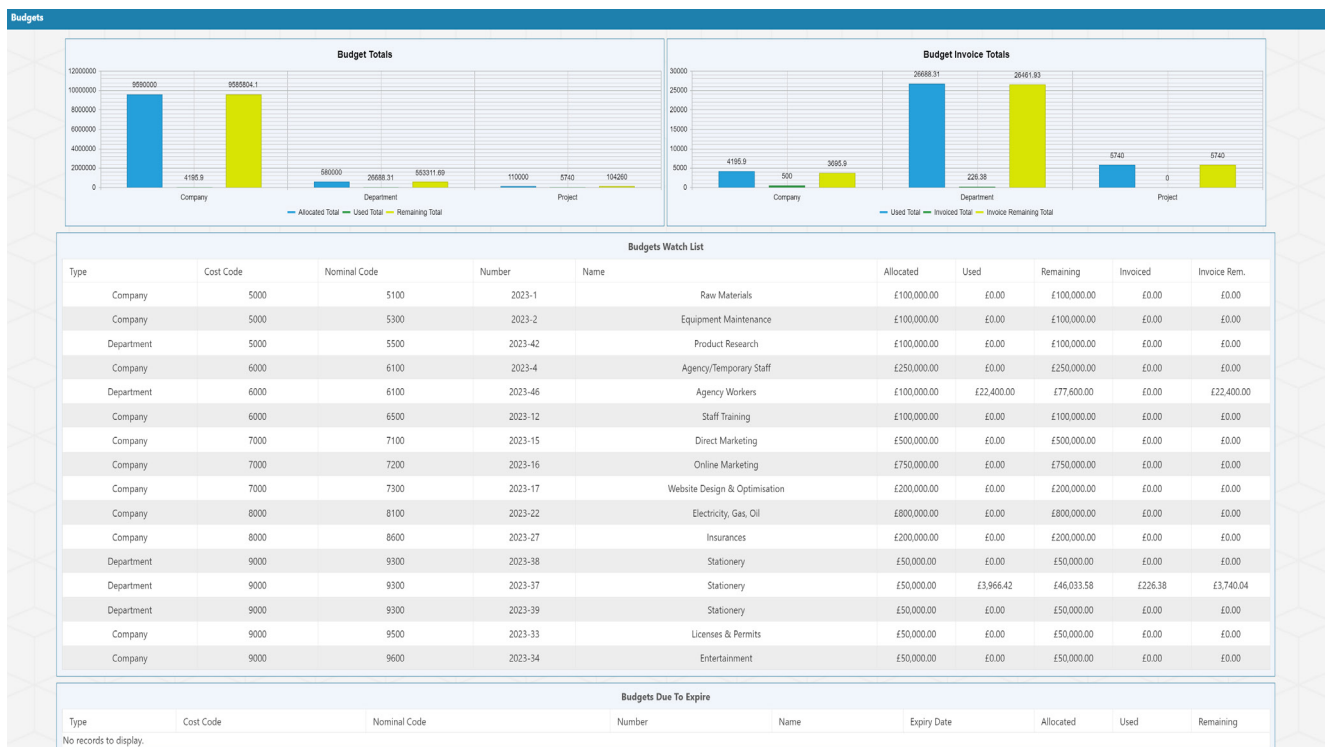


Case History

R&S Building Services Engineers (client since 2016)

Back in early 2016, Alex Norton (R&S Director) contacted Cloud B2B, with regard to introducing an on screen Purchase Order and Supplier invoice system, to replace a paper based system. After a number of discussions and demos, Alex opted for the full Purchase Order and Supplier Invoice system, using the concurrent user licence model, to ensure all relevant staff had access to the system.



Sample screen shot from the POPIA system opening dashboard showing budget status.

The customised workflows for approval of PO's is based on value, so smaller PO's are not delayed internally. Orders over £1000 need Finance or Director approval, but at all stages of approval PO's can be rejected or cancelled. Rejected PO's are returned to the PO creator for action or alteration if required, ensuring everyone internally is happy before a PO is placed with a supplier via email.

One of the challenges for R&S was to cater for staff engineers working away, who need to raise PO's so it was decided that the Project Managers based at the head office would be the ones raising all purchase orders. The system also caters for both standard and sub-contractor suppliers, with options to raise orders for each category.

Post the initial system go live, there have been 2 rounds of change management to the system including the reconfiguration of the Budget Control module. Budgets are now set for each R&S client, that also relate to a Location, an R&S Job number, and Project name. Each budget also has a Budget owner, for project monitoring, ensuring cost over runs are avoided.

A revoke PO tool was also developed to cater for circumstances when suppliers couldn't fulfil orders sent – the system allows the closure of a PO internally (with an audit trail reason) and also automatically send the supplier an email advising no further supplier invoices will be accepted against that PO.

Other changes to the system were implemented that take account of the industry CIS reverse charge (retained VAT) by adding new tax codes to invoice handling , and an additional optional field added at project level to advise suppliers of individual site contacts selected from an approved list e.g site foreman, site surveyor. This tool also allows copies of all approved PO's related to that site to be forwarded to the relevant site contact to assist with delivery scheduling.

We were then approached to see if a Compliance function could be added to the system. In their industry R&S require contractors to have relevant accreditations for them to carry out work on behalf of the Company. So a new module was introduced to the POPIA system that meant moving from a paper based system, to include a designation when raising a PO, that the selected contractor has relevant and up to date accreditations. When raising a PO the system would show that the relevant accreditations are available by highlighting in green; a contractor who had not got the right level, would or had accreditations that are due for review would appear in red, to flag the person raising a PO. To back this up relevant documentation can be added to the supplier account for on going review and action.

About R&S



R&S, founded in 1986 provides a wide range of engineering services for commerce and industry from their headquarters in Staverton, Gloucestershire. The company primarily serves commercial and industrial clients around the South West and South Wales but have travelled the world for clients, many of which are 'blue chip' organisations. The Company currently employs some 36 staff, including senior engineers, who have a wide range of expertise in building services, petrochemical, process, mechanical and electrical engineering.

Project work varies in size and nature, ranging from the installation of one-off air conditioning units to designing and installing complete factory facilities infrastructures. The largest project to date had a value of c. £2.5m.



Client Comments

Alex from R&S commented *"The system has added a new level of control into our business, and has moved us away from a laborious paper based system, that was fraught with issues such as delays in approval, and budgets being exceeded. Being on screen means we also have full visibility of all orders and supplier invoices as to their status, and also means our communication with our suppliers has improved, as has the delivery of items often required urgently. I would say that overall adoption of the Purchase Order and Supplier Invoice system has saved us time, money and improved the delivery of our services to our clients, which is core to our business philosophy. We have also found that dealing with Cloud B2B has been always positive and their speed of response to any system issues, or new requirements has been excellent"*