

Vendor Analysis

Proactis
2023 Update

Vendor Analysis

This Spend Matters [Vendor Analysis](#) provides an overview of Proactis and its solution for source-to-pay (S2P).

The complexity of S2P with its use of multiple systems to address each aspect it covers, manual processes, data quality issues and process variations can make managing the end-to-end process difficult. Organizations need to invest in technologies that improve visibility and control over the entire S2P process. While some businesses prefer to assemble a list of vendors to address different parts of the process, using a suite vendor that encompasses most or all needs can save time, save money and bring benefits such as standardized UI.

Proactis is one such suite vendor. It covers the S2P process, including sourcing, SxM, contract management, AP automation, payments, and spend management. It also integrates ESG into its spend and supplier management.

Here's why Proactis Matters:

- **To the market** — Over the years, Proactis has assembled a comprehensive S2P suite and considers ESG factors in its process. Its main market is Europe and middle market companies.
- **To customers** — Proactis' customers benefit from its market experience and its whole S2P functional spectrum.
- **To potential buyers** — Proactis is one of the few S2P solution providers targeting the European middle market with a solid overall set of solutions, in addition to largely positive customer perception.



Quick Facts: Proactis

Founded: 1996 as Get Real Systems Limited, name changed to Proactis in 2003

Headquarters: HQ in the UK, office in the USA, Germany, France, the Netherlands, New Zealand, and the Philippines

Ownership and funding: Private

Employees: 500

Customers:

Over 1,100, mostly in the mid-market

UK (66%), Western & Southern Europe (15%), Northern Europe (12%), North America (6%)

Examples include Sportsbet, Nijhof Wassink, Verslavingszorg Noord Nederland, AG & Co., KG, MC2I GROUPE, Quarles & Brady LLP, British Land Company PLC, Essex County Council, Travelex Ltd, University of Sussex

Industries covered: top three industries are: financial services, healthcare and the public sector. Others: Property/Real Estate/Housing, Not-for-Profit, education, Consulting, Business Services, Manufacturing, Mining, Retail, Media, Transportation

Active users: (buy-side): 3,000,000

Active users: (supply side): 2,000,000

Revenue: \$50-\$99M USD

Partners: Lake, Unit4, Fiscal Technologies, Touchstone, Commerce Decisions, Embridge Consulting, Eclipse, Social Value Portal, G7, Finexio, MRI, AnyData, Cegid

Website: www.proactis.com

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Company overview

The creation of Proactis goes back to 1996 when the company Get Real Systems was founded in the UK. The company changed its name to Proacts in 2003. Beyond that, the history of the company is also linked to some of the pioneers of eProcurement. It acquired Perfect Commerce in 2017, Perfect Commerce purchased Commerce One in 2006 and Hubwoo in 2015. In addition to these historical players, Proactis has acquired several other less-known providers: EGS (2014), Due North (2016), Millstream (2016), Intesource (2014), Intelligent Capture (2014), and eSize (2018).

In July 2021, Proactis was acquired by Pollen Street Capital and DBAY Advisors Ltd. and, consequently, delisted from the Alternative Investment Market (AIM) sub-market of the London Stock Exchange. The deal was estimated at over \$98 million.

Throughout its history, Proactis assembled an S2P suite that includes a marketplace/supplier network that covers the whole functional spectrum. In addition to buy-side capabilities and revenue, Proactis has an offering dedicated to suppliers wishing to capture new business opportunities.

Its last filing (Proactis Topco Limited, full accounts made up to 31 July 2022) at the UK Companies House shows that:

- Total Contract Value (“TCV”) of new business signed was strong at £19.0m (+20%)
- The company secured 24 new names (2021: 35) in addition to 276 upsell deals sold to existing customers (2021: 123)
- Reported revenues: £45.7m
 - Buy-side = £38.6m and supplier side = £7.1m
 - SaaS = £40.1m and professional services = £5.6m

Solution overview

Here’s how Proactis describes itself:

“Proactis is a leading Source-to-Pay software solution provider for mid-market organizations across a range of service-led industries.

Proactis Rego, our end-to-end modular platform, enables customers to control spend and manage supply-chain risk; improve compliance and governance of their purchasing activities; reduce the cost of goods and services; and deliver efficiencies, all through process digitization and automation.”

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Proactis is a SaaS product hosted on Amazon Web Services. Via API, it supports the exchange of information on master data and transactional data: users (to Proactis from Active Directory, LDAP or HR systems. SSO is supported using both Windows Authentication and SAML2), suppliers (from/to Proactis), orders (from/to Proactis), invoices (from Proactis), credit notes (from Proactis), accruals (from Proactis), expenses (from Proactis), payment status (to Proactis), chart of account/GL (to Proactis), currencies (to Proactis), exchange rates (to Proactis), tax codes (to Proactis), budgets (from Proactis, for budget checks). In addition, punch-out integration is available (supplier websites and multi-supplier marketplaces).

Integrations are enabled via API's that can connect via middleware with integrations undertaken either by customers, third parties or Proactis. Data can be exported from the system in Excel, Word, or PDF format.

Proactis supports English, German, French, Dutch, Hungarian, Polish and Spanish in both its online interface and its mobile application. Currently, the mobile application can be used to approve requisitions and invoices as well as answer consultation requests and submit timesheets.

Proactis has several certifications:

- ISO 27001:2013 Information Security Management System (ISMS)
- ISO 9001:2015 Quality Management System (QMS)
- Cyber Essentials and Cyber Essentials Plus.
- The Supplier Management solution (incorporated within S2C) is also annually attested against ISAE 3402 Type 1 control objectives.

The UK hosting service provider also has ISO 27001, ISO 22301, ISO 14001, ISO 9001, PCI Compliant Hosting Services.

Proactis training can be completed online or on-site (in the UK) via a training consultant. The helpdesk is available via email or online ticketing Monday-Friday, 9-5 UK time.

Proactis supports the following S2P processes:

SPEND ANALYTICS

The solution provides two spend analysis tools:

- Proactis Rego for spend management. It integrates with ERP and financial systems to pull in data and aggregate it into a holistic dashboard view.

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- Proactis Spend Intelligence for spend reporting and further dashboarding. Spend visualizations are powered by Qlik's BI tool. Reports can be canned or bespoke.

SUPPLIER MANAGEMENT

The solution enables organizations to manage the complete supplier lifecycle and orchestrate supplier data management and distribution. The main capabilities are:

- Supplier discovery and creation (in the application, by import or interface) and (self-)registration
- Supplier record with an extensible supplier profile that customer can further enhance by configuring third-party integration (Experian, D&B, CreditSafe, EcoVadis)
- Master Data Management (MDM) and integration capabilities via API to push or pull supplier records automatically
- Granular supplier classification and segmentation
- Configurable surveys to collect information (RFI) and measure risk/ESG or performance at the supplier level or supplier group level that support cross-functional collaboration and auto-scoring
- Supplier development (corrective actions, issue mgmt., innovation, etc.) to define and monitor action plans, send notifications and manage associated actions
- A unified supplier portal where suppliers can collaborate with all their customers and find new business opportunities

SOURCING

The main capabilities of the sourcing module are:

- Demand management via sourcing requests or reporting-based demand projections
- RFX management
 - Events can be created from easy-to-create templates (the solution includes a few RFQ templates out-of-the-box) or from copying past events and can include multiple steps/envelopes
 - Templates can be used to fully automate the sourcing process for single and multi-stage sourcing events
 - Users can visually compare and analyze multiple and alternative offers in different ways: side-by-side, views by lot or items or suppliers

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- Multiple people can participate in bid scoring at a granular level
- eAuctions (English dynamic) can be based on price and non-price factors
- Supplier bidding
 - Suppliers can decide which lot(s) they will answer
 - The system supports alternative (multiple) bids if configured
 - The solution provides export and reporting capacities to communicate average bid/score to suppliers
 - The system allows the import/export of full bids using templates

CONTRACT MANAGEMENT

Proactis' solution is designed to enable organizations to manage supplier contracts, ensuring compliance while also supporting authoring and negotiation. The key capabilities are:

- **Contract data modeling:** the system includes standard clause and template libraries, can model obligations, etc.
- **Contract authoring and negotiating:** Proactis supports redlining, tagging/communicating with internal and external stakeholders, view filtering, e-signature integrations, etc.
- **Post-signature support:** users have access to dashboards, KPIs, and renewal/renegotiation questionnaires

ePROCUREMENT

Proactis Rego Marketplace (eProcurement) key features include:

- Hosted catalogs and Punchout catalogs (OCI or cXML) with the ability to enable or restrict access. Catalog maintenance can be done through SFTP or portal uploads.
- Requisitions can be created from catalogs, punchouts and free-format requisition forms. The solution also can create shopping lists (private and public), kits and bundles. And create recurring requisitions from contracts.
- The solution can create multiple POs per requisition (multi-suppliers, multi-delivery addresses). Can also create automatic POs from contracts or import POs from other systems.
- The solution can configure full and partial receiving processes, including tolerance and auto-receipt rules.

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- The solution offers the ability to configure specific workflows/ approval rules for different scenarios depending on the purchasing category, the location, the cost center, or any other dimension. The approval process can also be adapted by adding new approvers and allowing delegation support.

AP Automation (includes payments and accelerated payments)

Proactis Rego AP Automation key features include:

- Ability to capture multiple formats of invoices including Word, PDF (Image and Vector), Paper, API upload. As well as the receipt of UBL via PEPPOL Access Point.
- E-invoicing post-audit and clearance model support.
- Core functionality for three-way matching with discrepancy workflow on failure.
- Approval business rules with automatic invoice processing, rounding and tolerances.
- Ability to create an OK to Pay file which can be processed by a payment system.
- Ability to provide dynamic discounting and SCF through an accelerated payment facility. Deployed in the UK and France.
- Ability to automate the disbursement and settlement of payments to suppliers, through its Finexio partnership in the US.

Roadmap and vision

Proactis plans to improve requisition routing for purchasing approval, improve support for subcontractors in contract management and introduce new REST APIs.

Specifically, four areas where the Proactis team are investing focus are:

- Integration: Data simplification, reusable connectors, broad availability of APIs
- Applied Intelligence: Invoice coding and spend analytics across the suite
- UX: Streamlined design, supply chain risk data within processes
- Compliance and Regulation: Tender support, European invoice regulation
- Productive Users: Supplier chain risk management to enhance informed decision-making toolset

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Strengths

- The company focuses on serving the mid-market and tailors its products, pricing models and support to meet the specific needs of this segment.
- The breadth of the solution covers all building blocks of S2P
- A modular approach means organizations can begin with Sourcing, Procure-to-Pay, Accounts Payable Automation or anywhere in between, and evolve at their own pace.
- Ease of use of the solution, as noted by several customers
- Footprint and Capabilities for the public sector
- An advanced catalog management function allows users to search for items through different hosted and external catalog sources

OPPORTUNITIES

- Improve its support to handle MRO and Direct Materials through advanced PO collaboration features
- Incorporate Cash Management capabilities to enhance payments and early payments capabilities
- Incorporate a Supplier Network approach to competing against strong AP Automation solution (and P2P) providers in Europe
- Improve clause library to support alternate and fallback clauses in addition to standard clauses
- Extend its footprint to North America mid-market for further opportunities

SUPPLIER MANAGEMENT

One of the strengths of the supplier management module is its ability to provide some level of supplier intelligence and community insights. This feature allows users to gather valuable information about suppliers and gain insights into the supplier community. Proactis also offers supplier discovery based on advanced queries and network connections. Users can utilize these functionalities to efficiently search for and connect with potential suppliers.

Proactis has configurable risk and performance management capabilities. When evaluating suppliers, it enables users to consider customer-specific requirements to build the needed KPIs. This feature helps ensure that suppliers meet each customer's specific needs and standards.

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In addition, Proactis provides supplier-facing capabilities through a unified portal and network. The portal allows suppliers to manage all customers in one place and discover business opportunities. It offers a convenient and centralized platform for suppliers to interact with multiple customers and explore potential collaborations.

SOURCING

One of the strengths of the solution's sourcing engine is its support for multi-round RFXs. This feature enables users to conduct comprehensive evaluations by gathering multiple rounds of supplier responses (or alternative bids). Such capabilities are especially useful and needed in the public sector to comply with rules and regulations that drive how public bodies buy.

The sourcing process also fosters cross-functional collaboration for evaluations, including consensus management. This means that different stakeholders can collaborate and share their insights and perspectives during the evaluation process. It helps in making informed decisions and reaching a consensus on supplier selection and awards.

CATALOG MANAGEMENT

Proactis has, since its Hubwoo acquisition in 2015, a robust catalog management function such as advanced features for cleansing, enriching, controlling and monitoring data during the onboarding process, assuring data quality and mapping support. Ability to compare or filter items through different dynamic criteria, to add different icons related to each item to specify visually some characteristics or level (low carbon print, toxic, dangerous...), ability to define items as part of bundles, lists and kits. Ability to configure items by adding free format or predefined information lists when buying. Purchasing and catalog permissions based on user profiles/ roles.

Tech selection tips

Use Proactis when:

- You are an organization based in Europe looking for a P2P or S2P solution.
- You want to increase your technology reach toward an S2P suite that includes sourcing, contracts and supplier management solutions (SXM).
- You are looking for an easy-to-use, configurable P2P/S2P solution at a reasonable price with a highly customer-focused team.
- You are looking for an S2P solution that can handle multi-company, multi-currency, multilingual and multi-tax elements.

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Detailed solution overview

INTEGRATIONS

The integration framework is well-structured and flexible. With it, customers can integrate the solution with popular ERPs and financial management systems by using a combination of flat file import/export methods and real-time web services. Customers can also use the solution's punch-out capabilities for supplier websites and multi-supplier marketplaces.

Integrations include master data and transactional data:

- Users (to Proactis from Active Directory, LDAP or HR systems. SSO is supported using both Windows Authentication and SAML2)
- Suppliers (from/to Proactis)
- Orders (from/to Proactis)
- Invoices (from Proactis)
- Credit notes (from Proactis)
- Accruals (from Proactis)
- Expenses (from Proactis)
- Payment status (to Proactis)
- Chart of account/GL (to Proactis)
- Currencies (to Proactis)
- Exchange rates (to Proactis)
- Tax codes (to Proactis)
- Budgets (from Proactis, for budget checks)

The solution also supports various methods and formats for integration:

- Full files, incremental files, single entry files
- Flat files (CSV, Excel, XML or fixed-width) and database tables for high-volume imports
- Files located in a local folder, a shared folder/file on a local network or an FTP/SFTP server
- Web services for import of master data and import/export of transactional data
- Frequency: real-time, scheduled

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Spend analytics

Proactis offers both a spend management solution called Proactis Rego and spend analytics and reporting one called Spend Intelligence. Both solutions are powered by Qlik's BI tool. Simple SQL queries are used to classify data.

SPEND MANAGEMENT

Proactis Rego is designed specifically for mid-market organizations that track all spend in one place (from payments, sourcing, AP and P2P costs, marketplace and contracts). It can integrate with both ERP and financial systems to ingest spend data.

SPEND INTELLIGENCE AND REPORTING

Spend Intelligence is for spend performance management and reporting, i.e., to explicitly inform business decisions rather than just tracking and compliance. Customers can either use canned reports or custom-build their own. However, they can only subscribe to canned, static reports.

It is worth noting that neither solution is built for master data management (MDM). Clients cannot upload and maintain data sets themselves. Nor is the data load automated; it is refreshed once a day, not live. It also lacks associated capabilities, such as outlier detection.

Spend dashboards are semi-dynamic. Users can select from pre-built widgets and utilize custom filters. Filters can be applied to individual views or entire dashboards. Any hierarchy or dimension can be mapped, although this is not done automatically, i.e., not done through AI.

The platform allows for multiple workspaces, so teams do not have to share dashboards. New workspaces have to be created by the Proactis team on the backend.

Supplier management

The solution is designed to enable organizations to manage the complete supplier lifecycle, ensuring seamless supplier data management and distribution.

SUPPLIER CREATION AND REGISTRATION

The solution provides a user-friendly interface for organizations to create and register suppliers. Whether it's done within the application itself, through import from external sources or via interface integration, the process is streamlined to simplify supplier onboarding.

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SUPPLIER DISCOVERY

Customers can use the solution's search functionalities that can combine multiple criteria to conduct comprehensive searches to find new potential suppliers. Additionally, community feedback, including KPIs and questionnaires, enhances the supplier discovery process.

SUPPLIER RECORD AND PROFILE MANAGEMENT

Organizations have a centralized hub to manage supplier records and profiles. The supplier record contains different tabs, providing comprehensive information on company identification, addresses, contacts, order and invoice settings, payment details (with fraud prevention measures), supplier type, supplier status and essential documents, such as terms and conditions, certifications and insurance documentation. Furthermore, organizations can define and use custom fields to capture additional information or track performance/ risk KPIs.

DATA ENRICHMENT AND VALIDATION

To ensure the accuracy and reliability of supplier data, Proactis offers integration with third-party services through APIs. While there are no default third parties or networks, organizations have the flexibility to integrate with trusted providers such as Experian, D&B, CreditSafe and EcoVadis. This enriches the supplier data and validates its authenticity.

The solution also provides capabilities for suppliers to upload and manage documents. They can categorize documents using predefined labels and control which documents are shared with specific customers, ensuring privacy and confidentiality.

MDM AND INTEGRATION

The solution has MDM capabilities and can serve as either the master or slave system, allowing for smooth synchronization of supplier data between various systems. Third-party applications (ERPs or other procurement tools) can use the API to automatically push or pull supplier records.

SUPPLIER CLASSIFICATION AND SEGMENTATION

Organizations can classify and segment suppliers based on various criteria, such as spending pools and commodity codes. This segmentation allows for better categorization and management of suppliers based on specific characteristics. Buyers can configure data elements based on geographical region, status, supplier type or entity, enabling tailored supplier management approaches and the use of the most relevant suppliers in other processes, e.g. sourcing, contracting or ordering.

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SURVEYING CAPABILITIES

Proactis offers surveying capabilities to gather information (RFI), measure risk/ESG and evaluate performance. Users can create customized survey templates, defining relevant questions and evaluation criteria (including auto-scoring). Surveys can be sent on an ad-hoc basis or as part of targeted campaigns, allowing organizations to obtain inputs and feedback from suppliers. Additionally, organizations can design cross-functional surveys to ensure inputs are collected from stakeholders across the organization.

SUPPLIER PERFORMANCE AND RISK MANAGEMENT

Survey responses can be used to calculate KPIs (including custom ones) and provide insights into supplier performance or risk. Additionally, Proactis can use predefined criteria to automatically rate suppliers, such as 'Low, Medium or High' or 'Green, Amber or Red.' These scores can be aggregated across the supplier hierarchy to generate group-level scoring.

SUPPLIER DEVELOPMENT

Organizations can define and monitor action plans and send notifications to foster supplier development. Proactis provides a survey- and workflow-based approach to address issue management and innovation. While it lacks out-of-the-box templates, organizations can create their own.

SUPPLIER PORTAL

The supplier portal serves as a centralized platform for suppliers to manage their customer interactions. Suppliers can maintain their profiles and access contracts, orders, invoices and credit notes through a single login. They can collaborate and communicate with buyers and add users (predefined access rights). Suppliers can ensure data accuracy by updating their data, which will be automatically reflected in the system. In cases concerning safeguarding compliance and mitigating risk, the system will not automatically update the data. For example, bank account details only changed after an approval/review process.

Sourcing

DEMAND MANAGEMENT

Users can create structured requests that effectively capture the value and qualitative data associated with the demands. They can then assign these sourcing requests to the appropriate buyer or category manager for further action.

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In addition, the reporting module can use order history and contracts to conduct trend analyses. This helps generate demand projections categorized by either specific categories or individual items, facilitating efficient re-sourcing.

RFX MANAGEMENT - CREATION

In terms of RFX, the platform provides RFI and RFQ management. Predefined templates can guide users through a workflow designed to capture the information needed for an RFI. The platform also offers a library of questions that users can access when creating templates or RFIs. Users can group these questions into sections.

Similarly, RFQs can be created from different predefined templates or by duplicating past events. The platform streamlines the process by providing default templates, such as standard RFQ, two-stage tender and dynamic open framework. Users can group items into different categories or lots and define simple cost breakdowns to enhance accuracy and transparency.

Users can manually bulk upload documents for each RFX or include documents in templates to ensure automatic attachment to RFX events created from those templates.

RFX MANAGEMENT - SUPPLIER BIDDING AND FEEDBACK

Suppliers can participate in bidding and choose the lots they want to answer. They can indicate their preferred or alternative products and attach relevant documents if needed. Export and reporting capabilities communicate the average bid/score information to suppliers.

RFX MANAGEMENT - OFFER ANALYSIS AND EVALUATION

Users can perform side-by-side comparisons and export bids for further analysis in tools like Excel. If configured so, the system supports multiple bids. An analysis tab provides detailed information in graphs with which users can view all offers from different suppliers or selectively focus on specific items or lots. The scoring process supports multi-party evaluations and can flexibly restrict to individuals or groups based on specific questionnaire sections. The platform also supports moderation and consensus for assessments involving multiple users with a mechanism for score adjustments.

E-AUCTIONS

Proactis supports English dynamic auctions. These auctions can be price-based or based on both price and non-price factors. Users can create auctions from scratch, use templates or launch them from RFX events. They can configure parameters, such as start and end times,

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auto extensions, ceiling prices and minimum bid decrements, at the item or lot level. Additionally, auctions can be manually paused to address clarifications or concerns raised by suppliers. The platform also allows buyers to define proxies on behalf of the suppliers.

SOURCING AUTOMATION

Customers can leverage templates to automate single and multi-stage sourcing events while ensuring compliance with regulations. These templates can encompass all necessary steps, tasks and approval workflows. For example, the 'Auto-Select' option simplifies supplier selection by automatically identifying and including suppliers that meet classification, category or geography codes specified in the sourcing event or request.

Contract management

Proactis' solution enables organizations to manage supplier contracts, ensuring compliance while also supporting authoring and negotiation.

CONTRACT DATA MODELING

Proactis supports standard clause libraries, template libraries, keyword-based search and basic obligation tracking. Contract data is present throughout the system through configurable dashboards and KPIs. Additionally, Proactis supports the use of risk scores, which are gleaned from scorecards, on a contract-by-contract basis.

CONTRACT AUTHORIZING AND NEGOTIATING:

Users can create a contract from Microsoft Word templates. Both internal and external stakeholders can access contracts and comment in Word. For users to whom an administrator granted permission, Proactis supports redlining between parties with an audit trail at the document level.

From an approval standpoint, Proactis supports multi-criteria approval chains with configurable notifications to ensure the necessary parties efficiently approve contracts. Once both parties are ready to sign, Proactis can punch out to systems such as DocuSign.

POST-SIGNATURE SUPPORT:

Post-signature, users can gain insights into contracts on an ongoing basis through the solution's configurable dashboards and KPIs. Users can also send configurable questionnaires for third parties to review as critical dates are near. Responses can then inform contract renewal or renegotiation.

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E-Procurement (marketplace)

CATALOG MANAGEMENT

The solution offers the following options to onboard catalogs:

- Hosted catalogs can be loaded using content templates (CSV, XLS, XML), online or via FTP, through a standard process including validation steps.
- Punchout catalogs through OCI or cXML protocols.

Standard and advanced features can manage extended item information, e.g., short and long descriptions, price, UOM, quantity price break, attachments, UNSPSC codes or manufacturing numbers. Additional specific attributes can be added if needed.

Various reports and features highlight field inconsistencies, price variances, etc. If needed, users can restore previous versions of the catalog. There are also workflow-based approvals, price impact analysis and history audits.

The solution provides advanced features for cleansing, enriching, controlling and monitoring data during the onboarding process, thus assuring data quality and mapping support. Enrichments and data checks can be defined/flexible upon request to meet business needs.

A dedicated supplier support team helps the supplier through the entire catalog creation and delivery process. Error reporting is also present and can be accessed either online or via download.

REQUISITIONING

The solution offers fully integrated background search calls, including calls regarding delivery, stock quantity and lead time. It also offers a global search against hosted catalogs and external web shops. Users can compare all types of external content sources and internal catalogs.

The solution offers private and public shopping lists, kits and bundles. Shopping lists can be saved for recurring purchases.

The solution offers item ranking and recommendations, such as best-price items. The guided buying experience drives users to select suppliers, items and services based on configuration.

The users can comment on a product or supplier to share their experience with the community.

Requisitions can be created from catalogs and punchouts. The solution offers a dedicated tool that uses the quick quote functionality

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to create guided buying requisitions. There is also a freeform text area that can be configured to meet customer requirements. Once the form has been created and populated, the system will process the form via the purchasing system. The forms can be customized depending on the purchase category.

Users can share requisitions, override what has been put in the shopping cart and save a draft for later. They can implement a soft or hard stop based on budget availability. A workflow can be set up based on the requisition information to control the spend. The solution also supports multiple suppliers and multiple delivery addresses per requisition.

In the marketplace, the stock level of each item can be checked during the requisition process. This information must be updated and loaded regularly for each catalog.

ORDERING

The solution can import POs from other systems, create multiple POs per requisition with multiple suppliers and multiple delivery addresses and create automatic POs from a contract.

The solution offers a multi-channel portal supporting a large volume of transactions between buyers and suppliers, allowing the exchange of different document types and formats during a PO process.

Suppliers to override PO information via Proactis' portal at the header and line levels (delivery dates, quantities, status, prices) and collaboratively validate through a workflow.

RECEIVING

The solution enables delivery visibility through ASN allowing the buyers to anticipate delivery.

The solution can create GRs that reflect quantity and quality through the end user's receiving. GRs can also be imported in the system through an API. The solution can configure full and partial receiving processes, including tolerance and auto-receipt rules.

AP automation (includes payments and early payments)

CAPTURE INVOICES

The solution can capture multiple formats of invoices including Word, PDF (Image and Vector), paper, API upload and the receipt of UBL via PEPPOL Access Point

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A managed service exists for the receipt and processing of invoices e.g., paper, PDF and XML. It also supports multiple languages and translations, with SLA and response times under 12 hours.

MATCHING, VALIDATION AND CODING

The solution supports core functionality for three-way matching with discrepancy workflow on failure. Multiple POs are supported, but this is manual. Budgets and contracts are updated following matching.

The Invoice Management portal hosts the validation of invoices and the resolution of exceptions to support onward processing. The Query Desk functionality uses a unique one-time link to send invoices to the buyer or supplier. Proactis balances business rules and human intervention to support standard invoice coding.

COMPLIANCE

The solution connects directly to government platforms or via certified partners for e-invoicing compliance.

The solution is tax-aware, meaning it can associate applicable tax codes, values to goods and services dependent on rules and countries with deployments in North America and EU.

APPROVALS AND DISPUTES (INCLUDING CREDIT NOTES)

Invoice approvals can be built on business rules with automatic invoice processing, rounding and tolerances. Users can set approval limits based on cost centers.

The solution's native mobile application can approve and authorize invoices.

The accelerated payment facility can send SMS notifications and mobile approval apps to trigger early payments.

The solution can create credit notes irrespective of the channel — whether it be XML, paper, PDF or a manual input credit note applied based upon previously received or processed invoice. Budgets are updated to reflect the credit.

PAYMENTS AND ACCELERATED PAYMENTS

The solution can create an OK-to-Pay file, which a payment system can process. For more advanced payment scenarios the solution has partnerships with Finexio and Corpay (primarily focused on our US customer base)

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The accelerated payment facility for dynamic discounting and SCF programs, which has been deployed in the UK and France, enables different early payment discount levels based upon different parameters. It can offer opt-in and OnDemand finance program options, such as pre-arranged funding between Proactis and a third-party funding provider with the ability for the buyer to determine which suppliers access the SCF.

Voice of the customer

Proactis provided five customer references — a state-owned manufacturing business in Europe, a county council in Europe, a UK-based law firm, a UK-based real estate agency and a UK-based charity.

The customer's overall perception of Proactis is largely positive. On a scale of 0-10, the likelihood the references would recommend Proactis all answered with either a 7/10 or an 8/10.

When asked to score return on investment, the respondents gave Proactis between a 5/10 and a 7/10. Ease of use was the most varied; one respondent gave Proactis a 4/10 and another a 10/10.

Key customer quotes:

- "P2P system and interfacing with our suppliers."
- "Very customer orientated and approachable."
- "Easy to use; regular software updates; cost-effective vs other systems."
- "Support teams are quick to respond. The data is stable. Cloud deployment of updates is efficient."
- "I would say ease of use and the fact this system is accessible to WCAG 2.0 standards so can be used by blind users with Access Technology."

Analyst summary

Overall, Proactis delivers an above-average S2P product relative to those offered by other vendors in the European middle market. Its capabilities cover standard and, in many cases, complex business scenarios.

The recognition of Proactis in Europe is undeniable. It continues to grow its footprint in different territories with different types of partnerships, including BPO partners, reseller partners, go-to-market partners and more strategic and value-add partners. We will closely follow the evolution of both its solutions and its market growth both in Europe and in other territories (e.g., North America). We hope that it will continue to raise the level of competition for suites focused on the mid-market.

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