

P-Ex Cloud *from* Suddensource

Take the Back Office with you...

...and manage your back office data from anywhere with an internet connection.

P-2 and P-Ex are robust and mature Windows programs which lets you deal with:

- Order processing
- Goods receiving, despatching and returning
- Stock management
- Sales invoice generation
- Purchase Invoice matching

However, they are office-based programs, so you need to be connected to your database on a local network or from elsewhere via a VPN.

P-Ex Cloud, on the other hand, is a brand new Windows application, based on a reliable transaction processing engine which lets you work anywhere with an Internet connection and still do all the things listed above. In essence it works just like a mobile phone app.

It is a scalable SME system which will work well for:

- Companies with one employee but with products to buy, manage and sell
- Companies with a small back-office function (1 to 5 people)
- Companies with dedicated office-based sales people, stock controllers or a purchasing team, which might mean there are up to 50-100 users on the system
- One order a day or 20 orders an hour
- People who work from home
- Companies who don't want the up-front cost of a trading system

Connecting is easy

Your email address will grant you access, along with a password we will issue to you.

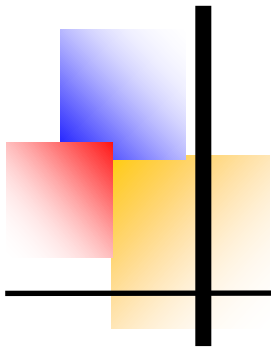
If there are any updates they will download and once that's dealt with you are into the program.

The Small Print: Formerly known as “DreamSuite”, and then Proactis II, P-2 was written by the Proactis Group. Following their move into Spend Control for larger and public organisations, the Proactis Group sold the rights to Proactis version 2 to Suddensource Ltd in January 2010 (we had been supporting it since 2003). The product was subsequently re-named and re-launched.

P-Ex Cloud is licensed on a subscription basis which includes your database hosting. Please note that hosting and system administration are provided at extra cost.

Ring now to arrange a demonstration or to receive more detailed information or one of our Case Studies showing how Suddensource software has been implemented.

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Main screen: the main icon strip is on the left because this suits wide but not tall screens.



The top icon simply shows or hides the main program menu.

The next icon talks you to the Order Management screen.

This is the Exit icon.

Order Management

Product Code	Description	Qty	Price
LIC_P2_SERVER	Proactis II Licence (System)	1	5000.00

On-screen options to create new sales order or new purchase order. If you're editing an order the top row of options will be disabled as this detail is already known.

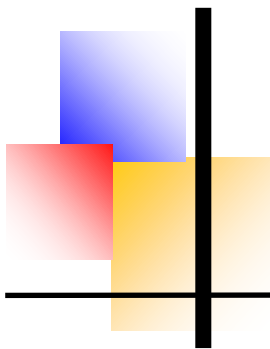
Selecting a customer or supplier will populate the address tabs. Selecting a product group will populate a list of the products in that group for you to choose from. It's done this way to make data downloads short and sharp. Comments and some basic order references can be added on the right of the screen.

Once an item is selected, set the description, quantity and price. The 'Add To Order' button will put the item in the basket of Order Items.

When you 'Save' the order is sent off to the database over the Internet and you get a set of data to prepare a PDF of the order. That's the orders placed...

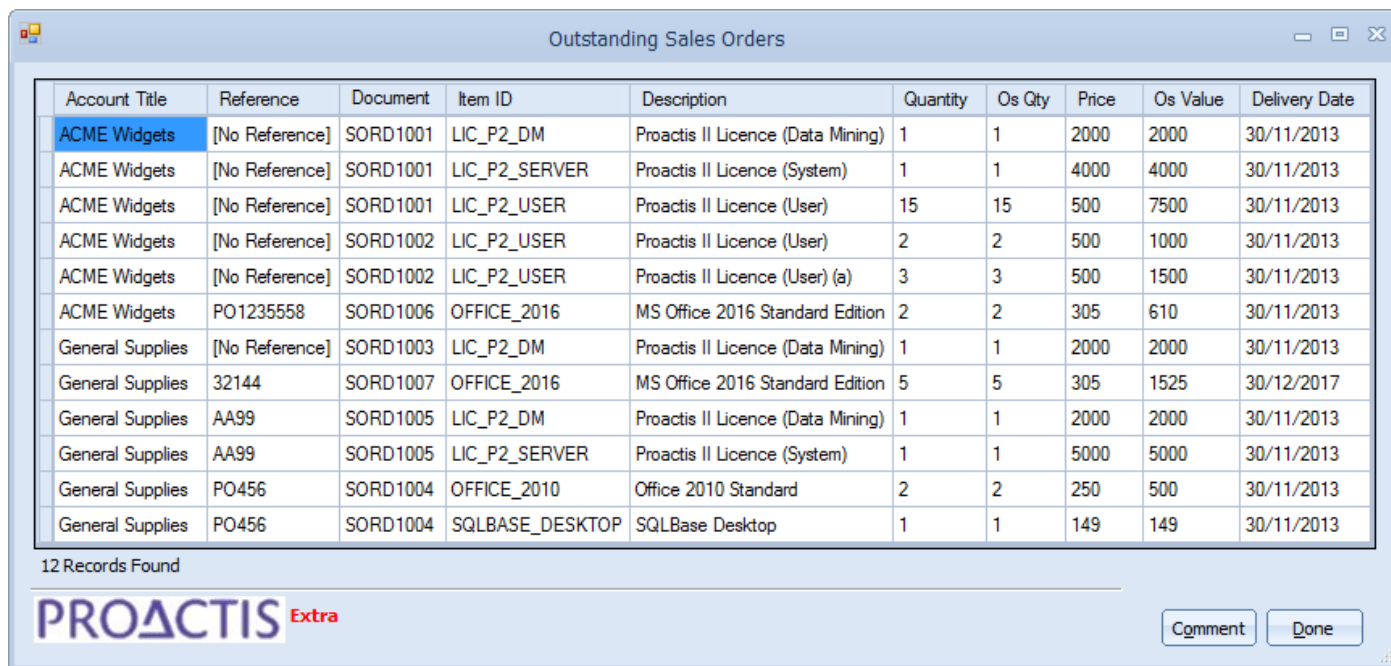
The next steps will be:

- Receiving purchase orders or despatching sales orders
- Dealing with any returns
- Matching purchase invoices or creating sales invoices
- Raising any credits
- Sending out purchase orders, sales invoices or credits



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Once your documents are safely stored in the database you may want to report on them. The screenshot below shows an on-screen report of outstanding sales orders:



The screenshot shows a Windows application window titled "Outstanding Sales Orders". It contains a table with 12 records. The table has columns for Account Title, Reference, Document, Item ID, Description, Quantity, Os Qty, Price, Os Value, and Delivery Date. The data is as follows:

Account Title	Reference	Document	Item ID	Description	Quantity	Os Qty	Price	Os Value	Delivery Date
ACME Widgets	[No Reference]	SORD1001	LIC_P2_DM	Proactis II Licence (Data Mining)	1	1	2000	2000	30/11/2013
ACME Widgets	[No Reference]	SORD1001	LIC_P2_SERVER	Proactis II Licence (System)	1	1	4000	4000	30/11/2013
ACME Widgets	[No Reference]	SORD1001	LIC_P2_USER	Proactis II Licence (User)	15	15	500	7500	30/11/2013
ACME Widgets	[No Reference]	SORD1002	LIC_P2_USER	Proactis II Licence (User)	2	2	500	1000	30/11/2013
ACME Widgets	[No Reference]	SORD1002	LIC_P2_USER	Proactis II Licence (User) (a)	3	3	500	1500	30/11/2013
ACME Widgets	PO1235558	SORD1006	OFFICE_2016	MS Office 2016 Standard Edition	2	2	305	610	30/11/2013
General Supplies	[No Reference]	SORD1003	LIC_P2_DM	Proactis II Licence (Data Mining)	1	1	2000	2000	30/11/2013
General Supplies	32144	SORD1007	OFFICE_2016	MS Office 2016 Standard Edition	5	5	305	1525	30/12/2017
General Supplies	AA99	SORD1005	LIC_P2_DM	Proactis II Licence (Data Mining)	1	1	2000	2000	30/11/2013
General Supplies	AA99	SORD1005	LIC_P2_SERVER	Proactis II Licence (System)	1	1	5000	5000	30/11/2013
General Supplies	PO456	SORD1004	OFFICE_2010	Office 2010 Standard	2	2	250	500	30/11/2013
General Supplies	PO456	SORD1004	SQLBASE_DESKTOP	SQLBase Desktop	1	1	149	149	30/11/2013

Below the table, it says "12 Records Found". At the bottom left is the "PROACTIS Extra" logo. At the bottom right are "Comment" and "Done" buttons.

How it works

Your data is set up and stays in the cloud. Each user has a unique login, which is mapped to your exclusive database, and no one else will have access to your data, except our own administrative users. Your data will be backed up nightly to another server on our network and from there to a further location of your choice.

The program asks you to enter your email address and a password, and this is used to validate your use of the system and establish which database you log on to and with what rights and credentials.

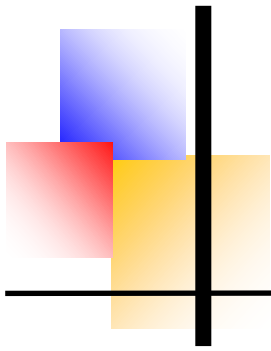
You download and start a small Windows program. The program is not installed on your PC in the normal way, but it remains cached until there is a newer version available, so you don't have to download it every time you use it.

The system downloads all the data it needs from our web servers, and saves orders, stock transactions and invoices back to the web servers.

The program uses your PC to generate prints or PDFs and then to print or send them using MS Office. You can report direct to Excel on your PC.

The program will appear very much like a regular Windows application (and you will be able to 'skin' it in a style of your choice). The menus will be reasonably simple and the program will be as intuitive to use as we can make it.

Online help will be available once development is complete.



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Setup and Licensing

We will provide you with a database for your exclusive use containing:

- two user groups (admins and regular users)
- an admin login for us (or you ***) to administer your database
- a single trading company with:
 - one main stock location
 - one sales ledger and one purchase ledger
 - a single template for each transaction type you require (sales orders, GRNs, etc)
 - a single currency (GBP)
 - a basic list of cost codes, for reporting purposes
 - a single-level product group structure

(***) an additional fee gets your system administrator a desktop on our cloud servers from where your admin user can administer your database using P-Ex (or the original version, P-2).

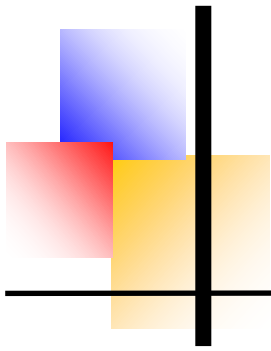
Once we have received your setup fee and your completed data import sheets, we will then set up:

- your regular users
- your financial period definitions
- your VAT quarters
- your 'home' addresses
- your stock sub-locations (up to 1000)
- your product groups and products
- your customers and suppliers

To use the system, you will need to pay a basic monthly charge for the hosting of the database and the first five named users, and another small fee per additional named user. Users who leave your company can be deactivated and removed from your billing. Fees are payable by standing order at the start of the month.

You can pay additional setup fees and a bit more per user per month and benefit from:

- multiple templates for any transaction types (e.g. 2 types of purchase order)
- customisation of the six 'reference' field names
- multiple companies
- multiple locations
- multiple currencies
- a chart of accounts linked to product codes
- multiple level product groups
- multiple sales or purchase ledgers
- more than two user groups so that your users can have different rights within the system
- links to a back-end finance system (Unit 4's Dream or PS Financials preferred)
- a local database for saving data when offline



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Installation

You need broadband internet access to use the program. The program is installed from the Internet by your end users using Microsoft ClickOnce technology.

Your users' PCs need to have Microsoft Office 2010 or later installed (Word, Excel and Outlook are required). You need to have the Standard or Professional edition.

Support

The monthly licence fee includes the necessary base-line support:

- creating and deactivating logins
- security changes
- online help
- bug fixes
- addition of new customers, suppliers and products (until such time as the software allows you to do this)
- database maintenance and backup

An enhanced support package will get you:

- telephone or email support (for an agreed named user)
- bespoke report design
- bespoke functionality (within existing program screens)
- database automation (to enforce business rules)

Additional fees are chargeable for enhancements and services such as:

- new functionality requiring both new database tables and program screens
- automated integration (e.g. dumping data files to your specification)

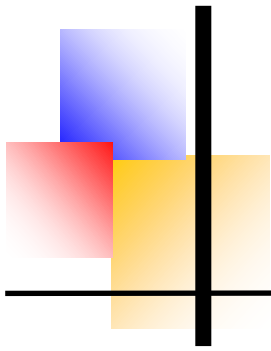
Training

We can do training for groups of users or a dedicated training package for a super-user. This will be charged at our normal consultancy rates.

Beta Testers

A company who would like to help us by beta-testing will benefit from:

- a reduced setup fee for the basic system described above
- a discount of monthly fees of 50% for the first year for up to 10 users (after the first year, normal fees will apply)
- enhanced support at no extra cost



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Options

Reporting can be arranged via:

- on-screen reports with option to copy to Excel
- our own web portal
- in-built reporting direct to Excel
- P-Ex DataMining (requires a hosted desktop)

Development

The system will not initially allow much end-user configuration, but plans are in hand to allow admin users to carry out various tasks including:

- create product groups
- import new products
- add customers and suppliers
- import bulk 'requirements' (e.g. requisitions)
- save data locally if connectivity is lost
- access for your clients to place orders

The program's roll-out programme is:

2024 Q1/2

1. Receive stock against purchase orders
2. Despatch stock against sales orders
3. Check stock levels
4. Quick-entry stock-checking and inter-location transfers

2024 Q3/4

1. Create sales invoices and credit notes for your client
2. Match purchase invoices and credit notes from your supplier
3. Outstanding orders reports
4. Stock reports

After that, the development of the program will be demand-driven, but will probably include:

- Issuing stock to a job number (with no sales order)
- Issuing stock for your own use
- Receiving stock back from a job number
- Receive back unused own-use stock

For information about P-2 or the standard version or P-Ex, please download one of our other brochures:

- Overview (P-2)
- Order Processing (P-2)
- Stock Control (P-2)
- Invoicing (P-2)
- Features (P-2)
- P-Ex



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