Requisition & Procurement

Automate your Requisition & Procurement process, move projects forward, enhance communications, gain real-time visibility and control, and deliver strong ROI across your entire organization.

Designated as Blackbaud Procurement Platform of Choice!

- Blackbaud Financial Edge
- Blackbaud Financial Edge NXT

1 Mobile Catalog Shopping & Approvals

Enjoy Mobile App Catalog Shopping & Approvals - browse & shop your catalogs, save items to the shopping cart to process or submit as a requisition directly from your Mobile App, anywhere, anytime!

- Available for iOS & Android
- Secure mobile access to WorkPlace via the On-The-Go (OTG) web service
- View status of open requisitions from the Mobile Requisition dashboard
- Approve & process requisitions from To-Do list, all from within the App View, enter, approve transactions on multiple companies in WorkPlace from a single interface

2 Multi-Currency & Multi-Language

Eliminate language & currency barrier, and provide system access to your global teams.

- Foreign & actual local currency options
- Currency can be selected at the transaction line level
- Manage & update exchange rates manually or automatically from ERP or online service
- Foreign & actual local language options
- Personalize interface to each user's language
- French, Spanish, Swedish, English US, UK, CAN or submit your own language template
- Switch languages on the fly with a single click

3 PunchOut Capabilities

Speed order processing, lower procurement costs by integrating real-time with suppliers' online catalogs.

- POs are created & auto sent to vendors after approval
- Real-time browsing & shopping on vendors website for easy checkout - requisitions auto populate for quick, accurate entry

4 Dynamic Rule Engine & Approval Workflow

Implement any corporate approval rule you can imagine during the entire process, even at creation!

- Mobile & e-mail approvals
- Unlimited entry rules
- Unlimited approval rules based on any field available such as vendor, amount, department, GL account, expense type, etc.
- Approval criteria can be at transaction (header) level, or item (line) level
- Position-based approvals, a rapid deployment based on organizational structure and approval limits
- Approval workflows & budgetary controls for PO & Non-PO invoices
- Approval of revisions to a transaction
- Auto detect invoice variances and route for approval
- Optional auto skip to next (but not final) approver
- Acceptance of variances (price, quantity)

5 Powerful Vendor Contract Management

Enforce vendor-negotiated terms and provide blanket PO capabilities.

- Track committed amounts & quantities against contract budgets
- Originate vendor contracts from within requisition
- Enforce vendor contract for a specified period
- Manage by $ amount, quantity, or both
- Restrict to a predefined list of items
- Auto route requisition line items for approval when amount is exceeded

6 Smart OCR Invoice Capture

Capture invoice data including line-level details, going from points A to Z accurately in seconds.

- Smart OCR capabilities with AI
- AI & machine learning features
- Automated invoice capture
- Optional 3rd party integration
- PO & non-PO invoice capture

7 Robust Check Request Features

Link paper invoices with digital data and manage non-PO invoices in seconds via document management capabilities.

- Robust check request approval
- Initiate check requests using scanned invoices
- Supports 1099 entry & payments

8 Intuitive Supplier/Vendor Invoice Portal

Empower vendors with a self-service portal for PO/non-PO invoice entry. Increase communications & collaboration with Vendor Network. Eliminate data entry for payables team and reduce internal cost. True B2B integration, powerful approvals and ERP integration.

- Secure, reliable SaaS Vendor Portal communication
- Activate existing vendors from WorkPlace Supplier Network or invite your own at no additional charge
- Vendor can access multi companies on a single dashboard and upload invoices & attachments which transfer seamlessly to transactions. Vendors are auto notified when POs are available to view & match
- Vendors are empowered to enter non-PO & service invoices, eliminating data entry for your team
- Increase collaboration with vendors
- Self-service empowers vendors to update their contact info for approval and integration to ERP as system of record

9 Enterprise Purchase Order Management

Automatically track, manage, organize, and instantly route approved request for PO creation. Control transactions, keep purchasing commitments up to date, and streamline the procurement process company-wide.

- Control who can create manual POs, initiate Change Orders, or automatically generate from approved Requisition & RFQ workflows
- Release PO via automatic email, printer/fax, and cXML
- 1-click receipt & invoice creation directly from PO screen
- Full Change Order Management document retention, revision number tracking and approval workflow
- Quantity status & detailed audit log throughout purchasing lifecycle
- Effective dashboards & analytics of PO status, detailed audit logs, inquiries, and reporting for any required compliance

Powerful Tax Engine

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Assign taxes by line level, incorporate enterprise-wide tax amount visibility, and adjust recoverable taxes within the system in no time.

- Foreign recoverable taxes & tax guidelines capabilities
- Advanced tax capabilities

Flexible Vendor Approval

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Control vendor creation within the ERP by keeping vendor approvals with A/P while providing requisition & procurement users an easy way to request a new vendor.

- Fully configurable approval process within WorkPlace
- Detailed audit log of who requested & approved the vendor
- Attachment capabilities, and 1099 vendor support

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Flexible GL Distributions

Distribute requisition line items into hundreds of GL accounts in seconds.

- Total control & flexibility in expense & ERP
- Distribute unlimited line items into unlimited GL accounts
- Distribution Groups for auto or manual GL distribution

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Comprehensive Status Monitoring

Solve common problems of delays from paper-based, Excel, e-mail requisition and approval process.

- Intuitive user dashboard shows employees To-Do's at a glance
- View status of a transaction in real-time
- Alternate approvers can be assigned during absences
- Administrators can add custom reports & enable access by user
- E-mail alerts & reminders to users & approvers

Sophisticated Audit Capabilities

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Experience full visibility of what was changed, who made it, and when it was made.

- Detailed transaction line & field level audit trail capabilities
- Audit detail reporting to track critical user, security, configuration changes
- Detailed log of date, time, user actions during entire transaction lifecycle

Effective Request for Quote

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Obtain the best deal & turnaround time. Submit and manage RFQs to multiple vendors. Compare quotes based on delivery date & price. Manually or auto award POs in seconds.

- RFQ Module & securely hosted RFQ Portal options
- Real-time vendor notification when items are available for quote
- Automate vendor selection based on rank & commodity codes
- Auto or manual vendor awarding based on price or fastest delivery
- Online vendor response via vendor portal

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Advanced Budgeting Engine

Establish & enforce any corporate budget during entire requisition & procurement process.

- Real-time GL budget validation
- Define approval routing rules to specific budget or when exceeded
- Visibility to budget detail during the entire procurement process
- Configure budgets to be strictly enforced

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Multi-Company & Inter-Company

Consolidate purchasing across your organization, eliminate duplicate purchases, and capitalize on your buying power & volume discounts.

- Ability to transfer inventory among companies
- Central repository for multiple AP ledgers
- Single session invoice processing capability regardless of payment location
- Enterprise-wide centralized data for detailed analytics, dashboards and performance metrics

Inventory & Materials Management

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Gain full visibility & control costs with a tightly integrated inventory-to-requisition system. Order, fulfill, or transfer stock held at any inventory location with confidence and ease.

- Real-time updates & visibility of item stock levels
- Hand-held scanner interface, serial, lot items support
- Materials management workflow
- Inventory replenishment check stock levels to auto generate requisitions

Centralized Invoice Matching

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Ensure correct receipt & billing of items ordered with true centralized AP Invoice Processing across your entire organization.

- Easy 3-way matching process to avoid paying for items billed, paid for, but not yet received
- Separate user & role level security for Receiving, 3-way & 2-way matched invoices to enforce segregation of duties
- Auto unmatched invoice processing workflow & notifications to eliminate processing delays
- Exception based invoice variance approvals based on quantity or amount thresholds to enhance purchasing controls
- Line level audit log for instant access to each item's purchasing history - from requisition, approvals, receipts, invoice match

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Guided Buying Catalogs

Enhance user shopping experience & control costs, using your own catalog, pictures, descriptions, and company selected items.

- Customized catalogs by vendor, location, type of item, etc.
- Auto generate requisitions & route for approval before PO is created

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Powerful Receiving Capabilities

Recognize receipt of goods & services easily from any location with multiple receiving options to compliment user needs.

- Auto alert to requester when request is fulfilled or not received by due date
- Single wizard-driven session to streamline receiving process for multiple vendor shipment transactions
- Filters to restrict items available to receive based on user's responsibility
- Multiple user-tailored receiving include auto-receiving, Receive Load Wizard, Load by PO Number, detailed transaction entry, and more
- Auto GL journal based accrual accounting for items received not invoiced
- Receivers can cancel or reject item quantities upon receiving and update PO status in real-time

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Questionnaire Capabilities

Enhance communications, streamline entry, and prompt users to provide key information for specific charges, as a requirement or as an option.

- Unlimited number of questions
- Multi data types to tailor responses to your business needs
- Configurable questionnaires, anytime, anywhere