

CAPITA

Integrated business solutions

Integra Purchase-to-Pay

for Charities





Integra Purchase-to-Pay (P2P) empowers charities to streamline accounting practices, introduce efficiencies and maintain public trust.

The charity sector is facing huge challenges. Government funding reforms combined with the growing economic uncertainty have resulted in charity resources becoming increasingly stretched. Today's charities are looking for new and more efficient ways to control their finances and streamline their business operations in order to survive and thrive.

Increased confidence and assurance through transparent financial management

Public trust and confidence in the financial management of charities has declined rapidly over the last few years. The media are only too ready to promote stories of poor financial control, high administrative costs and questionable spending practices amongst charities of all sizes. Now more than ever, charities need transparent, accurate, auditable and highly visible processes and ways of working to regain the trust and confidence of the public, donors and beneficiaries. Not only will this enable them to exercise the highest levels of financial control to avoid unauthorised spending or fraud, but it will also assure the public that all funds are accounted for and spent wisely in line with charitable aims and not simply on internal costs, salaries and expenses.

What's more, the removal of resource-hungry manual functions to enable the adoption of more efficient and digital ways of working is a key objective for many charities, so they can save money and resources and do 'more with less'.

Public trust and confidence has fallen from 6.7 out of 10 in 2014 to 5.7 in 2016*



67% of people feel that charities spend too much of their funds on salaries and administration*



56% of people know very little about how charities are run and managed*



How Integra can help your organisation

End-to-end procurement

The Purchase-to-Pay (P2P) cycle is a key area in which manual processes, paper documents and slow distribution methods hamper efficiency and cost money. Lost invoices, manual data entry, error-resolution and time spent chasing paper internally, all contribute to high costs.

The Integra P2P solution provides a comprehensive purchasing and invoice management function for the diverse needs of requisitioners, buyers and finance users, removing paper-based processes and supporting mobile ways of working.

It offers complete purchasing control, from catalogue and contract management through to spend analysis per category, supplier or department. Incorporating Optical Character Recognition (OCR) technology saves valuable input time and speeds up the authorisation processes through automatic invoice matching.

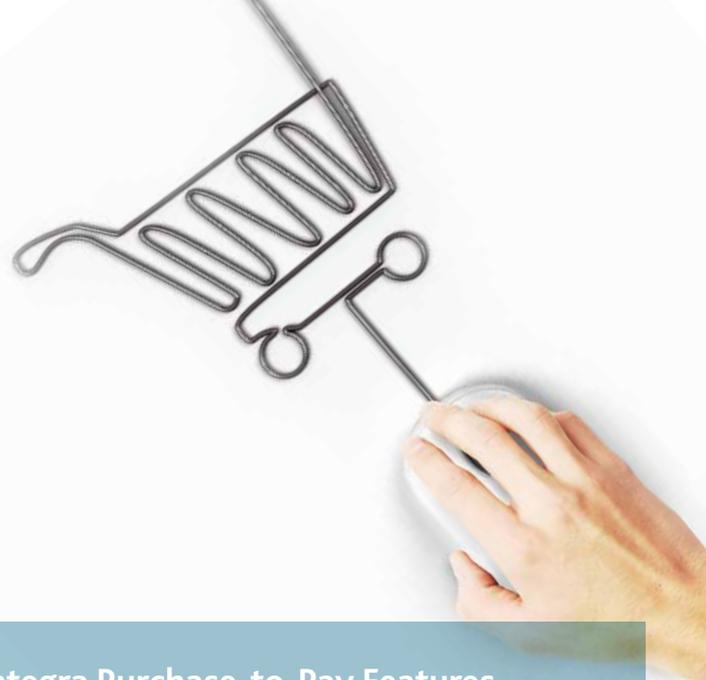
Requisitioning and ordering

Integra includes multiple data entry options to create the initial request for goods or services, dependant on the user's requirement.

Easy-to-use "Shopping Basket" requisitioning enables users to simply search for and select the goods that they wish to buy from a defined list of products or categories, without the need to identify any other information, such as general ledger code or supplier.

This is a very straightforward concept similar to standard internet shopping style web sites, and most importantly, easily understood by even the most occasional of computer users.

Online authorisation hierarchies ensure all orders outside of predefined tolerances are subject to control checks to ensure budgetary and technical sign-off.



Integra Purchase-to-Pay Features

- Supports the full Purchase-to-Pay cycle
- Fully integrated into existing finance system
- Mobile data access and approvals
- Detailed analytics
- Ability to punch out to third party sites



Approvals on the go

The Integra Mobile interface allows users to access their financial data anytime, anywhere thus keeping up with the fast-paced business world around them. With 'Approvals on the go' requisitions, orders and invoices can be reviewed and approved on a mobile device.

All access and security is controlled via the core application and any actions are immediately synchronised with the full Integra installation.

Advanced analytics

The Purchase-to-Pay Analytics Pack empowers users to manage and monitor their entire procurement operation. Advanced analytics tools help to track exceptions to the process and highlight potential efficiency savings. Highly visual dashboards not only ensure management teams will get an instant view of all purchasing activity but also allow them to pro-actively manage their organisation's procurement savings plan.

Full integration

Disparate systems can often cause a break down in processes, reduced business insight and unnecessary administration time. This is why the Integra P2P solution includes a purpose built integration engine that provides full, two-way communication with your existing finance system.

This can be used to simply validate general ledger codes during data entry, check against budget and commitment postings, or to maintain reference data.

The full integration ensures that finance and procurement teams can rely on an accurate data flow between all systems involved.



Integra Purchase-to-Pay Benefits

- Monitors performance and identifies exceptions
- Supports flexible, mobile working
- Elimination of costly, time-consuming manual tasks
- Improved financial visibility
- Pre-built dashboards to support procurement savings plan
- Secure audit trail

Want to learn more about how Integra Purchase-to-Pay can help your charity?

[Learn more](#)



About Capita Integrated business solutions

Capita Integrated business solutions (part of Capita plc) provides world-class financial management software, e-procurement and bespoke solutions helping clients to realize strategic cost savings and modernisation objectives.

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