

ProcuraCloud Overview

The Secure, Canadian-Hosted Procurement Platform for SMEs

ProcuraCloud is a multi-tenant procurement SaaS platform designed for small and medium-sized enterprises. It automates purchase orders, approvals, RFP/RFQ bid management, invoicing, and finance integration — all while keeping data secure, compliant, and hosted in Canada.

As a beta partner, you'll receive:

- ✓ **3 months free access**
- ✓ **30% lifetime discount** (50% for nonprofits)
- ✓ Early access to new features
- ✓ Dedicated onboarding support



Sign up for our Beta Program here:

<https://www.smartsolutionsco.ca/procura-beta>

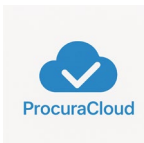
Key Features

1. Procurement Core

- **Purchase Orders (POs):** Create, approve, and issue POs with configurable workflows.
- **Requisitions:** Simple request and routing based on spend thresholds.
- **Three-Way Matching:** Automated validation between PO, receipts, and invoices.
- **Smart Notifications:** Highlight mismatches (price, quantity, tax) before approvals.

2. RFQ / RFP Management

- **RFQ/RFP Creation:** Issue requests to multiple vendors directly through the portal.
- **Bid Tabulations:** Automated comparison of vendor responses.
- **AI-Powered Selection:** System recommends best vendor based on configurable criteria; can be turned off for manual decisions.



- **Approval Workflows:** Approvals required for PO creation, RFQ/RFP submissions, award decisions, and invoice postings.

3. Vendor Management

- **Supplier Portal:** Vendors can acknowledge POs, submit bids, and upload invoices.
- **Vendor Performance Tracking (Next Phase):** Score vendors on delivery, quality, responsiveness.
- **Vendor Reviews (Planned):** Internal evaluations for better sourcing decisions.
- **Marketplace Expansion (Planned):** Broaden vendor pool by accessing ProcuraCloud's shared marketplace.

4. Finance Automation

- **ERP Integrations:** QuickBooks, Xero, NetSuite, SAP.
- **Automatic Posting:** Approved invoices posted directly to finance systems.
- **Payment Sync:** Payment status automatically updated.
- **Vendor Master Sync:** Supplier records aligned across systems.
- **Invoice Approvals:** Multi-step workflows before posting.
- **Bulk Invoice Download & Merge:** Export multiple invoices into single PDF packages for easier client billing.

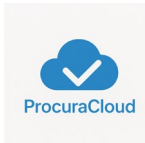
5. Security & Compliance

- **RBAC & RLS:** Tenant, group, and user-level isolation with PostgreSQL row-level security.
- **Audit Logging:** Immutable before/after diffs for every approval and change.
- **SOC 2 & ISO 27001:** Controls and readiness built-in.
- **Canadian Hosting:** Data residency for compliance with PIPEDA.

6. Reporting & Intelligence

- **Dashboards:** Spend visibility, budget tracking, supplier performance (phase 2).
- **AI Reporting Assistant:** Natural language queries for reports.
- **Export Options:** CSV, XLSX, PDF templates.

7. Next Phase Modules



- **CRM (Customer Relationship Management):** Manage client contacts, opportunities, and sales pipelines; fully integrated with procurement and billing for client billable projects.
 - **Project Management:** Track client/internal projects with tasks, budgets, and timelines; seamlessly connected to procurement and billing.
 - **Unified Billing:** Merge procurement, CRM, and PM data to generate accurate invoices. Bulk invoice exports and document merge features simplify billable packages.
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Why ProcuraCloud is Better

Compared to Procurify & Precoro

- **Multitenant Architecture:** Lower costs per tenant with project/client isolation.
- **Canadian Hosting:** PIPEDA-compliant with strict data residency.
- **Transparent Pricing:** Per-user subscription, no hidden fees.
- **Billback Support:** Reimbursable PO flags and client billing features.

Compared to Enterprise Suites (Coupa/Ariba)

- **Affordable for SMEs:** Start small, scale as you grow.
- **Out-of-the-Box Workflows:** Ready to use without costly consultants.
- **Lightweight Onboarding:** SSO with Google/Microsoft for quick adoption.

