PURCHASE TO PAY & ORDER TO CASH AUTOMATION SOLUTIONS

open**ECX**

USING THIS DOCUMENT

Quickly navigate to your desired section by clicking the links on the opposite page. Each section offers a convenient button to return to this menu.

MAKING PROCESS EASY

At Open ECX, we're leaders in SAAS-based Sales Order Processing (SOP) and Accounts Payable (AP) automation software. Recognised with multiple awards, we specialise in driving digital transformations for businesses like yours.

Our comprehensive e-commerce platform is designed to make your processes seamless. By automating the Purchase to Payment (P2P) process for buyers and streamlining the Order to Cash process for sellers, we help lower costs and reduced risks for your organisation.

What sets us apart is our Next Generation EDI solution, a versatile system that works seamlessly with various file types, including PDF to XML conversion. This adaptability ensures it meets your needs, whatever they may be.

We know that implementing an eTrading solution can seem daunting, but our streamlined onboarding process will help you clear those hurdles with ease. From day one, we'll establish a clear project plan to keep your business running smoothly. Our commitment to prompt onboarding means you will start reaping the benefits far quicker than with our competitors.

You'll have a dedicated onboarding manager and a comprehensive support team at your service. Plus, you'll gain immediate access to our ever-expanding global community of live trading partners, accelerating the process even further.

At Open ECX, we're not just about providing software – we're about building lasting relationships. We're here to support your success every step of the way.

OUR CUSTOMERS

arco Experts in Safety

bam Ireland

Becketts Bacon at its Best

berry

Bradfords BUILDING SUPPLIES

CALA

CARTER

Direct Heating

Donaldson Group

EH Smith Builders Merchants

E.T UPLING THE LEADING DISTRIBUTOR TO INDEPENDENT MERCHANTS

FARRANS A CRH COMPANY

grs We go beyond

GRUNDFOS

HALDANE FISHER TIMBER & BUILDING SUPPLIES

HG CONSTRUCTION

JT ATKINSON BUILDERS MERCHANT

kirby engineering & construction

McL&H

MEYER

NG Bailey

NMBS

octavius

PHOENIX Healthcare Distribution Limited

Portsmouth Aviation

PRECON PRODUCTS

Proagrica

Scott Parnell

SEALEY

Seddon

SIG

Solenis

TGLynes

Tobermore

UNIPART RAIL

Vernacare

WOLSELEY

WSH we love this business

SUPPORTING YOUR SUCCESS

OUR PURPOSE

Our purpose is to empower businesses through innovative technology solutions. We are committed to delivering solutions that drive success, transform business processes and enhance customer experiences. We work collaboratively with our community and partners to create an ecosystem of growth and innovation.

INVOICING

Fully automate the processing of invoices and credit notes from your suppliers as part of your Purchase to Pay process. Open ECX's AP Automation Invoicing solution reduces time-consuming manual processing tasks for Accounts Payable teams, such as scanning or re-keying invoices, reducing business costs and introducing a standardised format to enhance accuracy and efficiency. Seamless integration into your ERP system ensures smooth operations across the entire process.

Our unique conversion technology extracts the underlying physical text from the source document with 100% accuracy. This enables data enrichment and the application of business rules to update the handling of incoming documents and their associated data. Invoices are transmitted directly into your ERP, creating an efficient digital end-to-end process that is aligned with net-zero goals and supports Fair Payment practices.

STREAMLINE INTEGRATE AUTOMATE

TRANSFORM YOUR INVOICE PROCESSING

Open ECX automates supplier invoice processing across multiple formats – including .pdf, CSV, XML and EDI, without requiring your suppliers to change the way they send invoices and credit notes.

Advanced business rules prevent potentially problematic transactions from reaching your finance system by automatically returning errored invoices to the sender. These rules can also be defined to enrich inbound data, ensuring compatibility with ERP requirements or supporting line-level matching.

Invoices are validated using 2-way or 3-way matching against related POs and Goods Received Notes, ensuring discrepancies are identified early and only accurate invoices are processed. Customisable workflows, multi-level approval hierarchies, and business rules allow approvals directly from the portal.

Seamless ERP integration ensures an efficient end-to-end invoicing process with accurate data and full transparency for finance teams and suppliers.

Our fully managed onboarding service ensures suppliers are ready in a matter of weeks, enabling your business to quickly realise the benefits of automation. With no charge to suppliers or changes to their processes, supplier adoption rates are exceptionally high.

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The support we've received from both the technical and onboarding teams at Open ECX has consistently exceeded our high expectations. Their collaborative approach, including regular weekly calls, ensures everything runs seamlessly, giving us confidence in the system's performance.

**Nikolaos Sapounas
Supply Chain Manager
Octavious**

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KEY BENEFITS OF OPEN ECX INVOICING

Efficiency and Accuracy

Achieve 100% data accuracy with metadata extraction, automated workflows, and line-level data capture for error-free and efficient accounts payable processing.

Timely Supplier Payments

Accelerated processing supports prompt payments with no system changes required for your suppliers.

Seamless ERP Integration

Flexible AP automation software integrates seamlessly with your existing systems, providing comprehensive visibility and immediate efficiency gains.

Customisable Approval Workflows

Tailor approval processes with multi-level hierarchies and rules to suit your business needs, enabling efficient document handling.

Quick and Easy Onboarding

Our dedicated team ensures quick supplier setup, maximising your ROI while improving supplier relationships.

Sustainability and Efficiency

Embrace eco-friendly digital invoicing to streamline your procure-to-pay operations while supporting sustainability goals.

Built in Fraud Protection

Automated matching and secure data handling safeguard your finances against fraud.

Scalable Cloud Technology

Cloud-hosted for stability and high availability, delivering reliable performance and future scalability.

Expert Support

Our dedicated support team is always ready to assist you, ensuring a smooth and successful experience.

> **IF SIMILAR TO US, YOU'RE A BUSINESS PROCESSING A HUGE AMOUNT OF INVOICES, LOOKING TO REDUCE THE COST AND INEFFICIENCIES ASSOCIATED, I WOULD HIGHLY RECOMMEND EXPLORING OPEN ECX'S INVOICING SOLUTION.**
>
> SCOTT MCLENNAN,
> HEAD OF FINANCIAL ACOUNTING, CALA HOMES

REAL RESULTS IN ACTION

CALA

CALA Homes, a leading UK homebuilder with a £1 billion turnover and over 100,000 annual invoices, sought to reduce invoice processing time and costs while integrating seamlessly with their finance system, EVision from Eque2. Manual processes caused errors and delayed payments, and they were also concerned about ensuring a smooth transition for suppliers to a digital invoicing platform.

The Solution

Open ECX Invoicing provided an ideal solution, seamlessly integrating with CALA's finance system and automating invoice processing. The cloud-based platform extracts data directly from PDFs, saving time, reducing costs, and eliminating paper-based processes. This transformation also helped CALA and their suppliers reduce their carbon footprint.

The Results

Faster invoice processing improved supplier relationships and cash flow. The new, streamlined process operates with 100% accuracy, eliminating manual effort and saving significant time across the business.

> **SINCE PARTNERING WITH OPEN ECX WE'VE SEEN EFFICIENCY SAVINGS, SPEEDING UP OF PROCESSES AND IMPROVED ACCURACY, WHILST BUILDING GREAT RELATIONSHIPS WITH OUR SUPPLIERS. LONG TERM IT'S ABOUT THE FULL P2P PROCESS, ENSURING ALL PARTS OF THE P2P CHAIN ARE EASIER AND SLICKER AS WE CONTINUE TO GROW THE BUSINESS.**

RHIANNON LUCAS, PROJECT TRANSACTION MANAGER

NG Bailey

NG Bailey, a leading UK engineering and services business, specialises in integrated solutions across sectors like engineering, construction, and IT. Known for its commitment to innovation and sustainability, the company sought a solution to streamline its invoice processing, which was hindered by multiple ERP systems and manual input errors. The complexity of splitting invoices across systems added further inefficiencies, creating a need for a streamlined and accurate solution.

The Solution

Open ECX automated NG Bailey's invoice processing across multiple ERPs, including COINS and IFS. By taking ownership of supplier onboarding, Open ECX simplified the integration process and reduced manual input errors. Automation resolved issues earlier in the process, delivering accurate data, faster processing, and a seamless experience for NG Bailey's internal teams.

The Results

With Open ECX, NG Bailey achieved improved efficiency and accuracy across departments. The streamlined system eliminated manual complexities, reduced errors, and allowed the business to focus on delivering value to clients without disruption to suppliers.

NMBS

NMBS, the UK's most successful Buying Society for independent builders, plumbers, hardware, and timber merchants, processes over 280,000 invoices monthly from more than 600 suppliers. The company needed an automated solution to streamline complex, time-consuming processes and reduce manual efforts, while also enhancing supplier relationships.

The Solution

NMBS selected Open ECX for its proven expertise and credibility. The Invoicing solution automated their invoicing process, enabling faster payments, reducing paper waste, and minimising manual input. Open ECX's Ordering solution was also implemented, allowing NMBS to broaden its supplier network and improve service offerings.

The Results

With Open ECX, NMBS reduced invoice processing time from two weeks to a single day, freeing staff to focus on strategic tasks. The cost-efficient solution expedited payments and supported a seamless supplier onboarding process, further strengthening relationships across the supply chain.
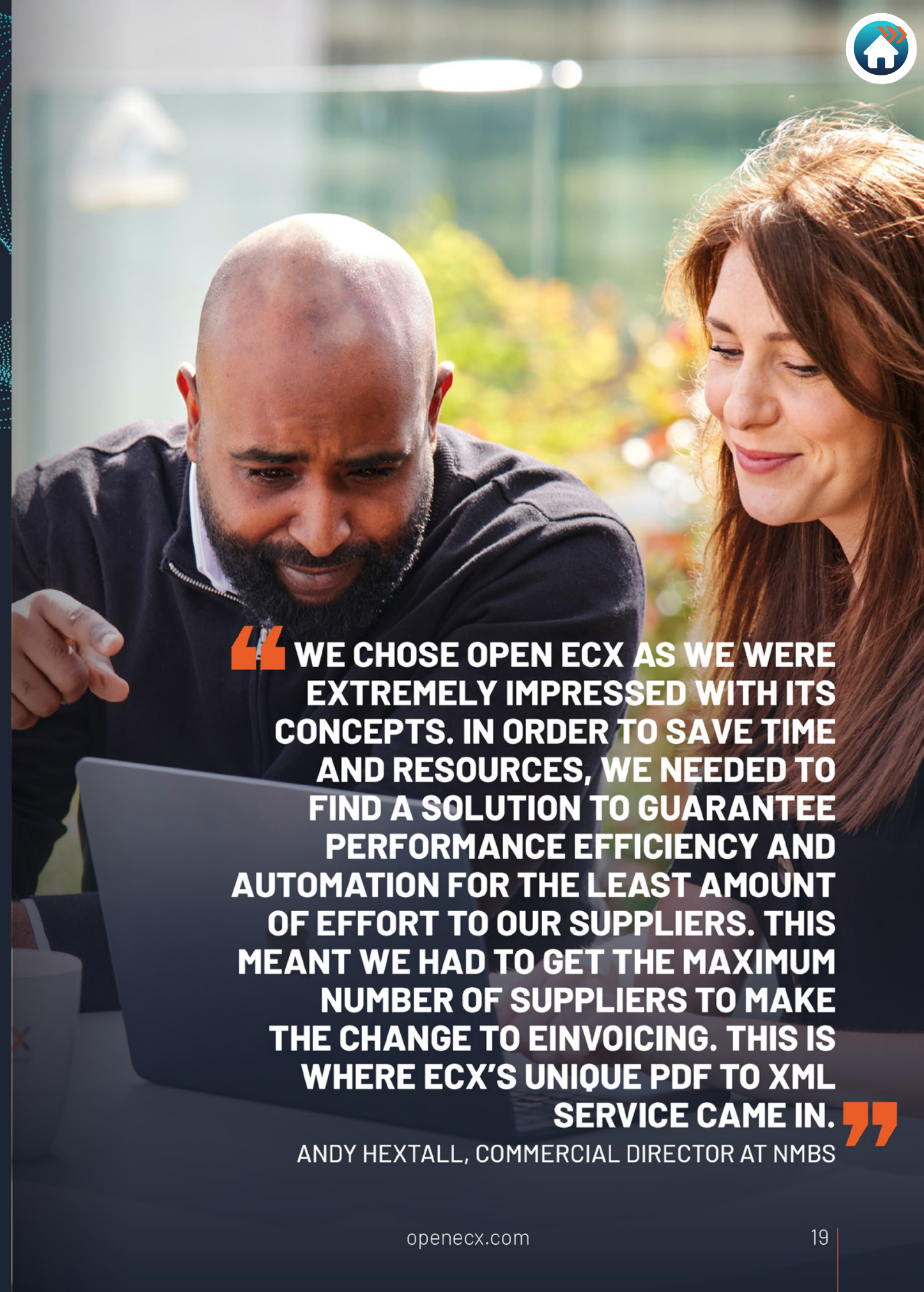
> "WE CHOSE OPEN ECX AS WE WERE EXTREMELY IMPRESSED WITH ITS CONCEPTS. IN ORDER TO SAVE TIME AND RESOURCES, WE NEEDED TO FIND A SOLUTION TO GUARANTEE PERFORMANCE EFFICIENCY AND AUTOMATION FOR THE LEAST AMOUNT OF EFFORT TO OUR SUPPLIERS. THIS MEANT WE HAD TO GET THE MAXIMUM NUMBER OF SUPPLIERS TO MAKE THE CHANGE TO EINVOICING. THIS IS WHERE ECX'S UNIQUE PDF TO XML SERVICE CAME IN."

ANDY HEXTALL, COMMERCIAL DIRECTOR AT NMBS

> ## IT NOW TAKES A SINGLE DAY TO PROCESS TRANSACTIONS, WHICH IS REALLY INCREDIBLE FOR US CONSIDERING WE WERE PREVIOUSLY WAITING TWO WEEKS.

KELLY FLETCHER, ACCOUNTS PAYABLE MANAGER, SIG

SiG

SIG is an international industry-leading supplier of specialist insulation and building products. With over 75,000 customers, 440 branches, and an annual turnover of £2.7bn, the business is a central and valued distributor across the construction supply chain in the UK and across Europe. The business processes around 300,000 transactions annually, and improvements in this area would pass considerable benefits onto their customers.

The Solution

The decision was made to implement Open ECX's electronic invoicing. What impressed SIG so much about the solution was the fact it didn't impact their suppliers. Open ECX's technology is open to all suppliers, regardless or size or technical capability, and doesn't require them to change their current processes or technology.

The Results

Through Open ECX, supplier invoices are processed within a day, a vast improvement on the two weeks they originally faced using traditional EDI. However, the most important aspect of the new solution for SIG is the benefits they're able to pass onto their suppliers. SIG now has high levels of control and visibility over their invoicing process, improving communication and ways of working with their supply chain.

STATEMENT RECONCILIATION

Automate the reconciliation of invoices and credit notes against supplier statements as part of your Purchase to Pay process.

A key component of Open ECX's AP Automation capability, the Statement Reconciliation solution eliminates time-consuming, manual tasks, enabling Accounts Payable teams to focus on resolving unmatched records, locating missing documents and handling supplier queries.

Through one intuitive workbench, AP teams gain real-time visibility into the matched status of each statement via a clear dashboard and complete digital records. This transparency simplifies audits and improves efficiency.

CAPTURE QUERY RECONCILE

REVOLUTIONISE STATEMENT RECONCILIATION

Open ECX's statement reconciliation solution fully automates the receipt and processing of supplier statements, matching invoices and credit notes while highlighting discrepancies for supplier queries.

Using feeds of document data and Open ECX's intelligent capture capability, Statement Reconciliation brings each document into a single view, regardless of its origin, eliminating manual processes for handling paper, spreadsheets and varied formats. This automation removes time-consuming manual tasks, supporting your business to grow while reducing administrative overheads.

Finance teams can easily view and report on statements reconciled, providing clear insights for analysis and focusing only on exceptions requiring intervention. Dashboards provide visibility into statement health, supplier performance, and full document history to support external audit requirements.

Our dedicated onboarding team provides a fully managed service to minimise the time to value for your business. They handle the supplier onboarding, ensuring statements are captured and loaded into the dashboard with 100% accuracy as they are received.

"

Open ECX's Statement Reconciliation automates the receipt and processing of supplier statements, streamlining the entire process and highlighting any discrepancies. This solution has been highly beneficial - we anticipate a 50% reduction in processing time, enhancing supplier relationships, and supporting Fair Payment.

Rex Nye
Digital Director
NMBS

"

KEY BENEFITS OF OPEN ECX STATEMENT RECONCILIATION

Enhanced AP team productivity

Eliminate tedious manual tasks, freeing your team to focus on higher-value activities such as resolving exceptions and driving improvements.

Unparalleled visibility

Gain real-time insights into statement reconciliation progress, supplier performance, and overall financial health through intuitive dashboards.

Improved accuracy

Automated matching ensures data integrity by eliminating human error from the reconciliation process, providing reliable reporting.

Faster query resolution

Identify and resolve discrepancies quickly with integrated query management, reducing delays and strengthening supplier relationships.

Simplified audits

Maintain a complete digital record of transactions for easy internal reporting and external audits, including SOX compliance.

Data-driven decision-making

Gain real-time insights into statement health and supplier accuracy to optimise your P2P process and enable data-driven decision-making.

> **"PREVIOUSLY, WE WERE MANUALLY TICKING OFF EACH STATEMENT OR PERFORMING VLOOKUPS IN A SPREADSHEET TO RECONCILE LARGER SUPPLIERS. NOW, OPEN ECX AUTOMATICALLY RECONCILES ANY MATCHING ITEMS TO OUR LEDGER, AND WE ONLY NEED TO FOCUS ON ANY DISCREPANCIES. PROVIDING RECONCILIATIONS TO OUR TOP FIVE SUPPLIERS HAS BECOME A SIMPLE TASK, SAVING US A SIGNIFICANT AMOUNT OF TIME. THE EFFICIENCY GAINS HAVE BEEN FANTASTIC."**
>
> RYAN DAVIES, FINANCE MANAGER AT DIRECT HEATING AND PLUMBING

ORDER TO CASH AUTOMATION

Streamline the order-to-cash (O2C) process by automating the receipt and processing of electronic customer orders in real-time. Open ECX's Ordering Solution eliminates manual tasks, reducing business costs and introduces a standardised format to drive accuracy and efficiency.

Seamlessly integrating into your existing systems, our unique conversion technology extracts the underlying physical data from the source document with 100% accuracy, automatically processing orders and transmitting them to your sales order processing or ERP system.

Comprehensive insights ensure complete transparency and control over your procurement process, improving performance and strengthening customer relationships – all without imposing any costs or disruptions on your customers.

AUTOMATE INTEGRATE TRANSFORM

openecx.com

REVOLUTIONISE YOUR ORDER PROCESSING

Open ECX automates customer order processing, capturing essential data from various formats, including structured XML, CSV, PDF, or EDI documents. The extracted data is verified against multiple reference points to flag issues such as missing data, quantity discrepancies and incorrect product codes, ensuring orders are processed quickly and accurately.

Real-time tracking and reporting features provide end-to-end visibility throughout the order cycle. These features enable your sales and customer service teams to proactively identify opportunities, resolve challenges, and optimise operations with data-driven insights.

Seamless integration with existing sales order processing and ERP systems ensures rapid deployment and facilitates a smooth transition for both you and your customers, driving high adoption rates.

Improve your Sales and Accounts Receivable processes by leveraging order intelligence and analytics, reducing cost per order and error rates while optimising cash recovery and revenue recognition for increased profitability.

"The project management at Open ECX was spot on, and their communication with our third-party ERP provider made the entire process straightforward. We're thrilled with how quickly we were able to go live with several suppliers, and we're looking forward to seeing even more efficiency gains as we continue to onboard additional partners.

Matthew Jarvis
IT Co-ordinator
Precon Products

KEY BENEFITS OF OPEN ECX ORDERING

Enhanced efficiency

Automate manual tasks, reduce errors, and speed up order processing times.

Reduced costs

Streamline operations, minimise errors, and optimise resources for significant cost savings while reducing per-order costs.

Improved accuracy

Achieve 100% data accuracy through automated processing, eliminating manual data entry errors and ensuring accurate order fulfilment.

Optimised inventory management

Gain real-time visibility into inventory levels and track order status for better demand forecasting and efficient supply chain management.

Increased customer satisfaction

Deliver faster, more reliable order processing without disruptions and meet SLAs, improving service levels and trust with your customers.

Data-driven insights

Leverage comprehensive analytics and reporting to make informed decisions, address challenges proactively, and drive continuous improvement.

Scalable and Integrated Solution

Adapt to changing business needs with a scalable solution that seamlessly integrates into your ERP and sales order processing systems.

Sustainability

Support your Net Zero goals by transitioning to a fully digital process that reduces waste and improves resource efficiency.

> **WE'VE SAVED SIX HOURS OF STAFF TIME A DAY USING OPEN ECX. THE ASSOCIATED COST-SAVINGS COVER THE SOLUTION, AND WE'RE ABLE TO REDEPLOY STAFF INTO MORE VALUABLE TASKS, SUCH AS ACTIVE-SELLING WITH OUR CUSTOMERS.**
>
> RYAN DAVIES, FINANCE MANAGER AT DIRECT HEATING AND PLUMBING

> **" TRANSACTION VOLUMES ARE NOW AVERAGING 12,000 PER MONTH. IN A PEAK MONTH, OUR LARGEST CUSTOMER UTILISING THE SOLUTION SUCCESSFULLY TRANSACTED OVER 4,000 ORDERS, WHICH IS REALLY REMARKABLE. "**
>
> MIA VAN BILJON
> ECOMMERCE MANAGER, WOLSELEY

WOLSELEY

Wolseley, the UK's largest plumbing, heating, and cooling specialist, managed over 12,000 monthly orders manually – a time-consuming and error-prone process that strained resources and affected customer satisfaction. With significant growth increasing order volumes, Wolseley needed an automated solution to improve efficiency and customer experience.

The Solution

Open ECX Ordering automated Wolseley's order processing, integrating seamlessly with their bespoke ERP system. Customers could continue submitting orders in their usual formats without disruption. Open ECX's fast onboarding enabled customers to go live within a week, minimising delays and ensuring a smooth transition.

The Results

With 97% of orders now processed in 90 seconds with 100% accuracy, Wolseley has reclaimed time previously spent on manual tasks. The streamlined process has improved customer experiences by enabling faster order fulfilment and reduced delays, empowering Wolseley to focus on delivering value to its customers.

WE GET RESULTS FAST...

GRUNDFOS

Grundfos, the world's largest water pump supplier, identified a gap in its electronic ordering system. While 70% of their orders were received electronically, many customers still sent PDF orders by email, requiring manual entry into their SAP system. This process was slow, error-prone, and inefficient, especially for large orders with up to 150 lines.

The Solution

Open ECX Ordering has automated the process, allowing PDF orders to be directly processed into SAP without manual entry. Seamlessly integrated into their existing system, the solution required no changes to customer ordering habits and provided order confirmations within minutes.

The Results

With Open ECX, Grundfos improved efficiency and customer experience while reducing errors. The solution has expanded its eBusiness capabilities across 20 countries, processing orders in various formats and languages, including traditional Chinese characters.

"DO WE CONSIDER OPEN ECX AS A TRUSTED PARTNER? OBVIOUSLY. NOT ONLY FOR OURSELVES, BUT FOR OUR CUSTOMERS THAT ARE IMMEDIATELY GETTING THEIR ORDER CONFIRMATION BACK – EVERYTHING JUST GOES A BIT FASTER."

LEO LUI, ECOMMERCE CONSULTANT AT GRUNDFOS

> " WE'VE HAD TO WORK AT PACE ONBOARDING OUR CUSTOMERS WITH OPEN ECX. THROUGHOUT THE PROJECT, THE OPEN ECX ONBOARDING TEAM HAVE RESPONDED BRILLIANTLY, CREATING CUSTOMERS' CONNECTIONS AT SUCH A SPEED THAT OUR PROJECT WILL FINISH EARLIER THAN THE ANTICIPATED DEADLINE. "

PAUL BURTON,
DIGITAL ADOPTION MANAGER AT ARCO

arco®
Experts in Safety

With a turnover of over £300 million in 2023, Arco recognised that adopting a digital approach to order processing would help streamline their operations, allowing their teams to manage orders more efficiently, reduce processing time, and create stronger relationships with customers.

The Solution

Open ECX's Ordering solution provided a seamless transition by integrating with Arco's customer base, replacing manual order entries with an automated process that transmits data directly to sales and finance teams in real-time.

The Results

By adopting Open ECX, Arco has reduced the risk of human error, achieved 100% data accuracy, and accelerated order processing to meet customer demand. This has empowered Arco to manage orders more efficiently and accurately while enhancing customer and supplier relationships.

EMPOWERING YOUR BUSINESS

E.TUPLING
THE LEADING DISTRIBUTOR TO INDEPENDENT MERCHANTS

E Tupling, a leading distributor to independent merchants with over 57 years of experience, handled over 4,000 monthly orders and hundreds of invoices manually – a process that strained resources and slowed efficiency. To support their growth, they sought an automated solution to improve accuracy, streamline processes, and scale operations without adding staff.

The Solution

Open ECX automated E Tupling's order and invoice processing, integrating seamlessly with their K8 ERP system. The solution eliminated manual tasks, ensured 100% data accuracy, and provided one source of truth for all transactions. Open ECX's dedicated onboarding team enabled a smooth transition, achieving high supplier adoption rates and rapid deployment with minimal disruption.

The Results

E Tupling has significantly reduced manual workloads, allowing employees to focus on strategic growth and customer relationships. The automation has improved processing speed and accuracy, strengthened supplier relationships, and prepared E Tupling to handle increasing transaction volumes as their business expands.

> **AS OUR BUSINESS CONTINUES TO GROW, OPEN ECX'S SOLUTIONS CAN SCALE TO SUPPORT OUR INCREASING ORDER AND INVOICING VOLUMES TO ENSURE CONSISTENTLY HIGH LEVELS OF OPERATIONAL EFFICIENCY. THE SOLUTION HAS SIMPLIFIED BUSINESS PROCESSES, ALLOWING OUR FINANCE TEAM TO MANAGE HIGH TRANSACTION VOLUMES EFFECTIVELY AND EFFICIENTLY, WITHOUT THE NEED TO EXPAND OUR WORKFORCE.**

CHARLES PEARCE, STRATEGIC FINANCE DIRECTOR AT E TUPLING

ERP INTEGRATION

Open ECX integrates seamlessly with leading ERP systems, enabling organisations to automate critical business transactions with 100% accuracy and real-time data visibility.

Our powerful and fully configurable Business Rules engine enriches and validates transactional data, tailoring it to your specific business requirements. With proven integration into systems such as Microsoft, Oracle, SAP, Kerridge Commercial Systems (K8) and more, Open ECX ensures a smooth transition that enhances efficiency and scalability without disrupting your existing workflows.

By connecting to your core systems, Open ECX streamlines operations, reduces errors, and delivers the transparency needed to support informed decision-making and sustainable growth.

POWERING SEAMLESS AUTOMATION

A PROVEN TRACK RECORD...

We have a proven track record of delivering substantial ROI for clients. Recognised with multiple industry awards for innovation and excellence, our solutions streamline operations, guarantee significant cost savings, and foster collaboration through leading-edge technology.

OUR INFRASTRUCTURE

We've built our solution with your needs in mind, leveraging the best technology to provide a reliable, high-performing service.

Our application is hosted on Azure (Platform as a Service - PaaS), offering a strong foundation that scales seamlessly with your requirements. Even during your busiest times, everything runs smoothly.

Our systems are resilient, distributing workloads to eliminate single points of failure. This ensures a faster, more reliable experience for you. Dashboards and alerts allow us to detect and resolve issues quickly, ensuring uninterrupted service for our customers.

Behind the scenes, we've implemented robust measures to deliver a service you can rely on, day in and day out. This guarantees a smooth, dependable experience, no matter what.

FIND OUT MORE

Let's discuss how we can support your business. Call us on **0161 543 5300** or email us at **enquiries@openecx.com** to get started.

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