

EUNAVERSE

# Maximizing Time and Savings Through Smarter Purchasing and Sourcing

Euna Procurement

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# Agenda

09-09-2025

## **01. Purchasing and Invoicing**

Maximizing Savings

## **02. Sourcing and Contracting**

Maximizing Your Time

## **03. Purchasing and Invoicing**

Maximizing Your Time

A stylized illustration of a satellite in orbit around a planet. The satellite is positioned on the left side of the frame, with its solar panels and various instruments visible. The planet it orbits is shown in shades of orange and pink, with a white horizon line. The background is a deep blue space filled with numerous small white stars.

# Purchasing and Invoicing

Maximizing Savings

# Common Sources of Overspending

## Purchasing

### Off-Contract Spending

- Purchasing from a supplier without an approved contract.
- Purchasing from an approved supplier, but at off-contract pricing.
  - Public eCommerce stores
  - Outdated catalog files

### Best Price Not Chosen

- Buyer only had 1 option to choose from.
- Buyer had options but didn't select the best price.
  - Habit of preferred suppliers or repeat orders.
  - Convenience of first option

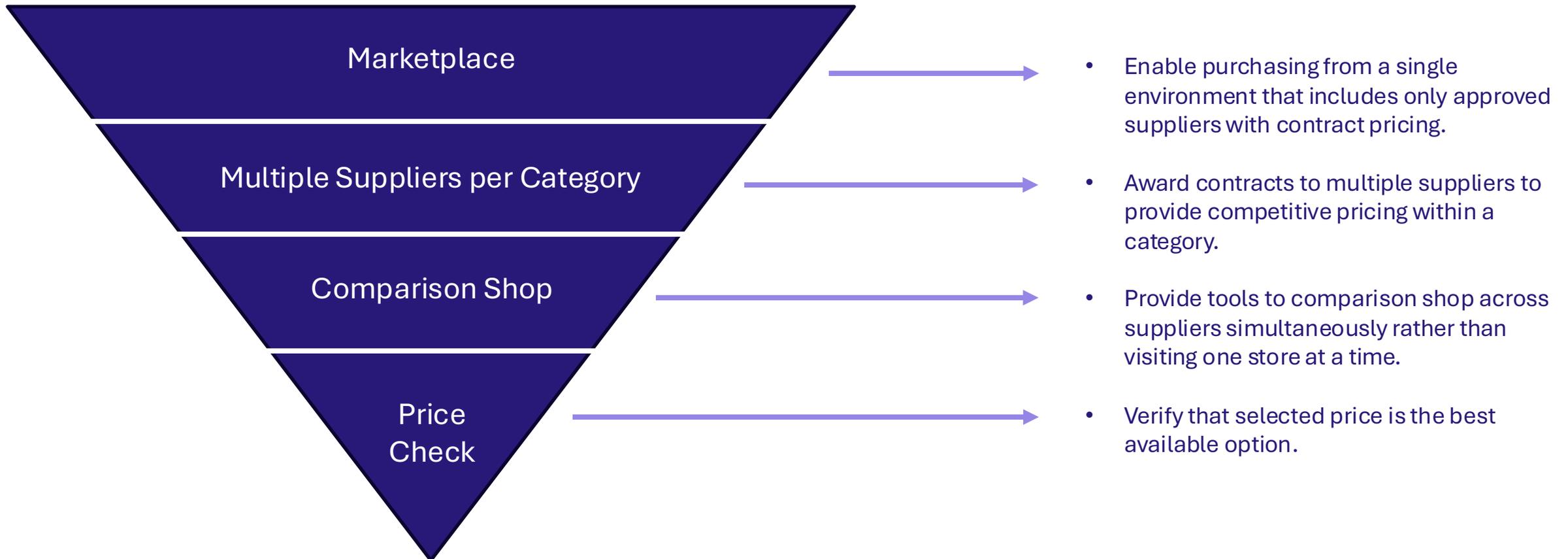
## Invoicing

### Overpayment

- Invoiced items not received
- Invoice discrepancies
  - Supplier data errors
  - Data entry errors

# How to Purchase Smarter

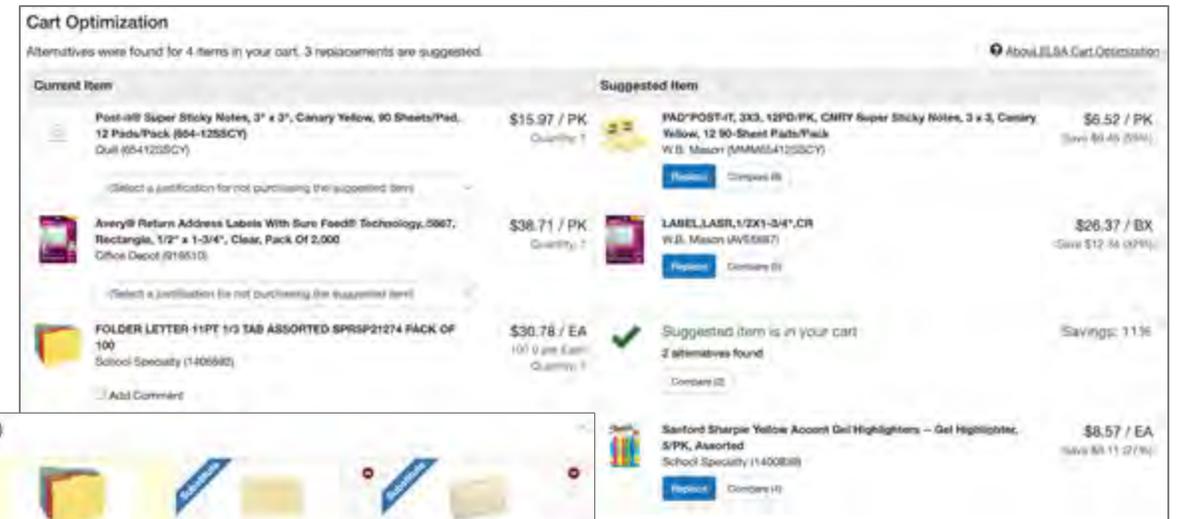
4 levels to reduce overspending and maximize savings



# Price Check with Euna's AI Savings Advisor

How it works

- Analyze** - Savings Advisor analyzes the shopper's cart and looks for alternatives from approved supplier contracts in the marketplace.
  - Exact matches
  - Substitute items
- Optimize** – Item replacements are suggested that will optimize the total purchase, accounting for item price, shipping charges, and minimizing order count.
- Replace** - Shopper chooses to make replacements, can view savings achieved, and enter comments/justification.



**Cart Optimization**  
 Alternatives were found for 4 items in your cart. 3 replacements are suggested.

Current Item	Price	Suggested Item	Price	Savings
Post-it® Super Sticky Notes, 3" x 3", Canary Yellow, 90 Sheets/Pad, 12 Pads/Pack (854-1258CY) Dell (854-1258CY)	\$15.97 / PK	Post-it® Super Sticky Notes, 3 x 3, Canary Yellow, 12 90-Sheet Pads/Pack W.D. Mason (MMMS41258CY)	\$6.52 / PK	Save \$9.45 (59%)
Avery® Return Address Labels With Sure Feed® Technology, 9967, Rectangle, 1/2" x 1-3/4", Clear, Pack Of 2,000 Office Depot (916510)	\$38.71 / PK	LABELASR, 1/2X1-3/4", CR W.D. Mason (WV55887)	\$26.37 / BX	Save \$12.34 (32%)
FOLDER LETTER 11PT 1/2 TAB ASSORTED SPRSP21274 PACK OF 100 School Specialty (1406682)	\$30.78 / EA	Suggested item is in your cart 2 alternatives found		Savings: 111%
		Sanford Sharpie Yellow Accent Gel Highlighters - Gel Highlighter, 5/PK, Assorted School Specialty (1400838)	\$8.57 / EA	Save \$3.11 (37%)



**Product Comparison (2)**

Item	Price	Savings	Action
FOLDER LETTER 11PT 1/2 TAB ASSORTED SPRSP21274 PACK OF 100	\$30.78 / EA		✓ Suggested item
File Folders: Letter, 1/3, 9 1/2 in Ht, 11 3/4 in Wd, 3/4 in Expanded Wd, Manila, 100 PK	\$22.16 / PK	Save \$8.62 (28%)	Replace
File Folders: Letter, 1/3, 9 1/2 in Ht, 11 3/4 in Wd, 3/4 in Expanded Wd, Manila, 100 PK	\$34.02 / PK	+ \$3.74	Replace

Supplier: School Specialty, GRAINGER, GRAINGER

Cooperative: AEPA

Supplier Part #: 1406682, 8XWFG, 31UE86

Manufacturer: SP RICHARDS CO, UNIVERSAL, ABILITY ONE

Manufacturer Part #: SPRSP21274, UNW12113, 7530-01-583-0558

# Euna's AI Savings Advisor

Results from 2024, across all Euna Marketplaces.

## 2M items checked out

- 17% of items had an alternative available.
- 31% of the time, the shopper had not chosen the suggested item.

## 31K Replacements

- 460 item replacements per agency.
- 32% of suggested replacements made.

## \$1.25M Saved

- \$40 saved per item replacement.
- \$18k saved per agency.
  - Some saved over \$100k.

# Euna's AI Savings Advisor

Best practices to maximize savings

- **Supplier Setup**
  - Include multiple supplier options in each product category.
  - Require suppliers to provide a catalog if search API is not available.
  - Encourage suppliers to address poor data quality
- **Shopper Behavior**
  - Communicate to users that all purchases should be made through Marketplace. Higher transaction volume leads to more savings.
  - Educate users on the Savings Advisor and how to review suggestions and make replacements.
- **Monitoring**
  - Assist users with questions or issues. Escalate problems to Euna support as needed.
  - Review savings reports and provide feedback to users and suppliers to improve results.

# Euna's AI Savings Advisor

## Tips & Tricks

- **Set the "Added Supplier Penalty"**
  - Set the savings required to justify adding a supplier PO. In other words, the extra cost that is acceptable to eliminate a supplier PO.
  - Found in the General Settings
  
- **Require Justification**
  - If the suggested item is not selected, require the shopper to select/enter a reason why.
  - Contact Euna support to enable this setting.

**ELSA Shipping Estimate\***

 ⓘ

**ELSA Free-Shipping Threshold\***

 ⓘ

**ELSA Added Supplier Penalty**

 ⓘ

**Cart Optimization**

Alternatives were found for 3 items in your cart. 3 replacements are suggested.

Current Item	Suggested Item
 <p><b>HIGHLIGHTER, SHARPIE, GEL</b> El Paso Office Products (SAN1803277)</p> <p style="text-align: right;">\$11.68 / ST Quantity: 1</p> <div style="border: 1px solid gray; padding: 2px;">           (Select a justification for not purchasing the suggested item)         </div>	 <p><b>Sharpie Gel Stick Highlighter</b> Staples (343884)</p> <p style="text-align: right;">Replace Compare (5)</p>
 <p><b>DURACELL BATTERY</b></p> <div style="border: 1px solid gray; padding: 2px;">           (Select a justification for not purchasing the suggested item)         </div>	 <p><b>DURACELL BATTERY</b></p> <p style="text-align: right;">Replace Compare (7)</p>
 <p><b>COPY PAPER</b></p> <div style="border: 1px solid gray; padding: 2px;">           (Select a justification for not purchasing the suggested item)         </div>	 <p><b>8.5" x 11" Copy Paper, 20</b> (324791/200230) Staples (324791)</p> <p style="text-align: right;">Replace Compare (7)</p>

# Additional tips to maximize savings

## Purchasing

### Shopping Lists

- Create shared lists of preferred items to ensure best price.

### Quoting

- Requests quotes for items being bought in large quantities for additional savings.
- Requests quotes for items from other suppliers for items not found in their catalog/store.

### Set Purchase Limits

- Set limits for single purchases per supplier.
- Set approval rules to require approval based on purchase amount.

## Invoicing

### Confirm receipt

- Require buyers to create an electronic receipt of shipment.
- Perform 3-way match to ensure invoice matches the receipt.

### Evaluate exceptions

- Perform 3-way match to identify discrepancies with the order.

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# Sourcing and Contracting

Maximizing Your Time

# Time Saving Tips & Tricks for Projects

Little Ways to Improve your Projects

## Templates

63% of customers have >1 project template

**Tip:** Project Templates can include Criteria, Files, Tasks & Approvals

## Task Lists

3% of customers have >1 task list

**Tip:** Project Task Lists can be created in the Library, and imported to any Project Template or Project

## Invite Suppliers

29% of projects that have invited suppliers since launching Vendor Search

**Tip:** ~3 months ago, the Vendor Search feature was launched, allowing you to search our entire vendor network (700k+)

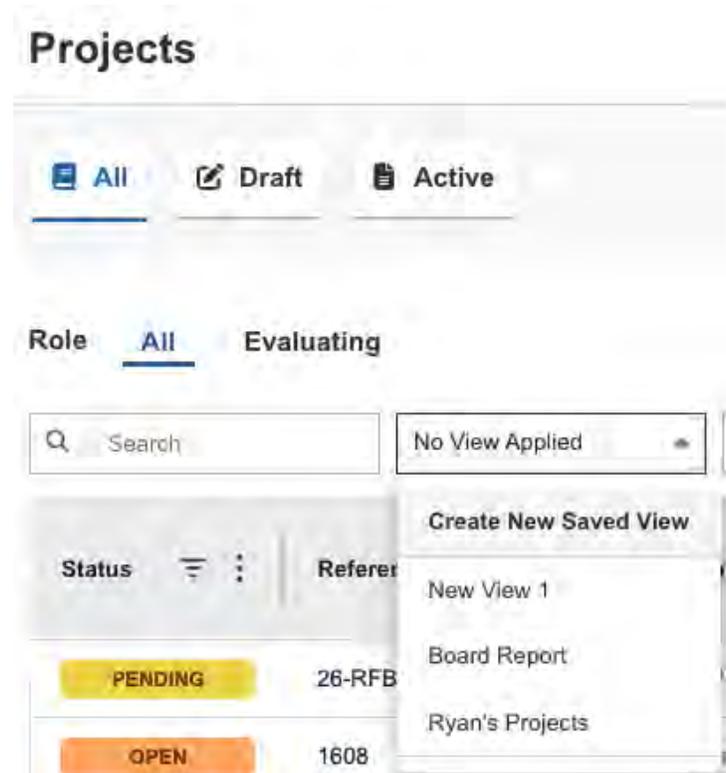
## Public Q&A

12% of public projects that have at 1 or more Public Q&A threads

**Tip:** Public Q&A helps with one-to-many communications, allowing you to aggregate vendor questions and answer them in bulk

## Projects Table

**Tip:** The new table on the Projects home page allows you to save "views"



The screenshot shows the 'Projects' table interface. At the top, there are filter tabs for 'All', 'Draft', and 'Active'. Below that, there are filter tabs for 'Role' with 'All' and 'Evaluating' selected. A search bar is present with the text 'Search'. To the right of the search bar is a dropdown menu showing 'No View Applied'. Below the search bar, there are columns for 'Status' and 'Referer'. The 'Status' column has two rows: 'PENDING' (highlighted in yellow) and 'OPEN' (highlighted in orange). The 'Referer' column has two rows: '26-RFB' and '1608'. On the right side of the table, there is a 'Create New Saved View' dropdown menu with options: 'New View 1', 'Board Report', and 'Ryan's Projects'.

# Vendor Search in Projects

## Apply Commodity Codes

Search Commodity codes by keyword or code number and select the codes to filter by. You can also scroll the list and click to expand the codes.

Search Keyword  Search Code Number

3 currently selected

[View Selected Commodity Codes](#)

- Decorative Household or Office Items, (Not Otherwise Classified) (03735)
- OFFICE START-UP KITS, SERVICE AWARD (0806553)
- Partitions, Office, Metal and Glass, Custom-Made (Inactive, please see commodity code 425-56 effective January 1, 2016) (15056)
- Partitions, Office, Wood and Glass, Custom-Made (Inactive, please see commodity code 425-56 effective January 1, 2016) (15058)

Invite Vendors -

**Search for Vendors**

Invite via Email or Vendor List.



Cancel

Apply



# Time Saving Tips & Tricks for Contracts

Little Ways to Improve your Contracts

## Templates

- 13% of customers have >1 contract template
- **Tip:** Contract Templates can include Files, Approvals, and Commodity Codes

## Internal Tasks

17% of contracts have 1+ Internal Task

**Tip:** Internal Tasks are the best way to manage stakeholders for each contract. And, with the new **End Department Owner** user role, your end users can collaborate with you directly from within the contract

## Task Lists

3% of customers have >1 task list

**Tip:** Contract Task Lists – for Internal and Vendor Tasks - can be created in the Library, and imported to any Contract

## Vendor Tasks

14% of contracts have 1+ Vendor Task

**Tip:** Vendor Tasks enable all workflows, allowing you to assign tasks directly to the vendor linked to the contract, for onboarding, document collection, renewal or performance management

## Coming Soon! Approvals Workflow

Create approval workflows tailored to your processes with a configurable workflow builder

Set up sequential approvals or reroute automatically

Set system triggers to automatically start your workflow or act when workflow is complete.

Generate custom email alerts when workflows start and end

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# Purchasing and Invoicing

Maximizing Your Time

# Common Inefficiencies in Procurement Processes

Where your time is not best spent

## Purchasing

- Paper/email purchase requests
- Shopping one supplier at a time
- Manual review and approval

## Invoicing

- Confirming order receipt
- Manual data entry
- Manual review and approval

## Suppliers

- ERP Integration
- Catalog maintenance
- Troubleshooting

# Euna Marketplace and Streamlining Procurement

How to maximize your time

## Purchasing

- Enable all employees to shop and submit requests
- Cross-search suppliers and comparison shop
- Automate approval rules and notifications

## Invoicing

- Enable electronic receipt of order
- Integrate suppliers for e-invoicing
- Automate invoice matching, exception rules, and notifications

## Suppliers

- Integration through Euna Marketplace
- Supplier-managed stores/catalogs
- Euna support

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**Thank you!**

Let's reach for the stars!

