



# NEW SUPPLIER REQUEST TRAINING

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# TRAINING OBJECTIVES

- Understand how to Set up a New Supplier on the Finance System
- Follow purchasing thresholds and documentation rules
- Always considering Total cost of ownership
- Know where to find tools, templates, and guidance
- Avoid common mistakes



# THINGS TO CONSIDER BEFORE YOU BEGIN YOUR NEW SUPPLIER REQUEST

**CAN THE REQUIREMENT BE DELIVERED IN HOUSE?**

Contact the relevant in-house department regarding your requirement

**DO WE HAVE AN EXISTING QMUL CONTRACT IN PLACE FOR THE GOODS/ SERVICES/ WORKS?**

Refer to the Procurement intranet pages for a list of Suppliers we have contracts with.

<https://www.qmul.ac.uk/finance/intranet/purchasing/suppliers/>

## Suppliers

Select a procurement category below to find out more about the Procurement agreements we have in place with Suppliers.

### Estates

You can find list of suppliers under Estates here.



### IT

You can find list of suppliers under IT here.



### Scientific & Laboratory

You can find list of suppliers under Scientific & Laboratory here.



### Professional Services

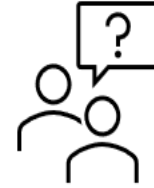
You can find list of suppliers under Professional Services here.



# PROCUREMENT THRESHOLDS AND WHAT THEY MEAN

To determine the information, you will need to attach to support your **New Supplier Request**, you will need to ascertain the **Whole Life Cost (Ex VAT)** of your requirement

**Consider:** If there are any costs around [importing – Tax, Duty, Shipment](#)



**Whole life cost** is an estimate used to help buyers determine the end-to-end cost of a service, manufacturing, or procuring a product. Also commonly referred to as total cost of ownership (TCO), or total life cycle costs (LCC). Total cost of ownership can typically be categorised into procurement costs, acquisition costs, usage costs and end of life costs.

| Below £10,000   | £10,000 - £50,000  | Over £50,000   |
|---|--|--|
| You will need to obtain <b>1 QUOTE</b> ; however, we advise that you obtain 2 quotes to ensure you Value for Money. | You will need to obtain <b>3 QUOTES</b> ; Please ensure that you send out the same requirements to all suppliers and quotes are on a like for like basis and | You will need to <b>CONTACT PROCUREMENT</b> . The team will provide you with expert advice on the sourcing approach to secure best value through competition in a compliant and commercially protected manner. |



SCISCOPE LIMITED

123 St Paul's Lane,  
London,  
E1 7HT

Tel. 020 8553 1900  
[info@sciscope.com](mailto:info@sciscope.com)  
[@sciscope](#)  
[www.sciscope.com](http://www.sciscope.com)

- Registered supplier name: **Sciscope Limited**
- Registered address: **123 St Paul's Lane, London, E1 7HT**
- Telephone and mobile number: **020 8553 1900**
- Email address (for remittances): **accounts@sciscope.com**
- Web site address: **www.sciscope.com**
- Company registration number (If applicable): **44235698**
- VAT registration number (If applicable): **123456789**
- UTR number and evidence of UTR (if supplier is an individual) **N/A**
- Charity Registration number (If applicable) **N/A**
- Bank / payment details: **Account number 12678945, Sort Code 32-10-98**
- Supplier Contact Name, Contact details and Position. **John Smith,**  
[J.smith@sciscope.com](mailto:J.smith@sciscope.com), **Managing Director**

- Once you have obtained the relevant quotes or have the contract information, you will need to ask the Supplier you want to set up to provide you with the following **Supplier Information on Letter headed paper**:
- Registered supplier name
- Registered address
- Telephone and mobile number
- Email address (for remittances)
- Web site address
- Company registration number (If applicable)
- VAT registration number (If applicable)
- UTR number and evidence of UTR (if supplier is an individual)
- Charity Registration number (If applicable)
- Bank Account Name and Bank payment details
- Supplier Contact Name, Contact details and Position.
- **Please note:** The Supplier Name and Supplier information you register on Agresso, must match the details provided on the Letter headed paper and the information the supplier provides. Any discrepancies will mean that there will be delays in getting your supplier set up whilst information is verified and set up correctly.

# NEW SUPPLIER REQUEST DEMONSTRATION

Before we begin, you will need to ensure you have access to the finance system

# UNIT4

The screenshot displays the UNIT4 ERP interface. At the top, the logo 'UNIT4 ERP' is visible on the left, and user information 'Queen Mary University of Lond...' and 'aaw332' is on the right. A search bar is also present. The main content area is divided into several sections:

- Homescreen menu:** A vertical list of buttons for 'Your employment', 'Time and expenses', 'Procurement', 'Common', and 'Reports'.
- Start pages:** A section containing a link for 'Expenses'.
- Your employment:** A section containing a link for 'Activate your substitutes'.
- Favourites:** A section showing 'No favourites'.
- Recently used:** A section listing 'Workflow enquiry - Requisitions', 'Activate your substitutes', and 'Requisitions'.

1. From the Homescreen menu, Select “Procurement”
2. Then select “Suppliers” from the Supplier information tab

UNIT4 ERP

Queen Mary University of Lond... aaw332

### Homescreen menu

|                    | Requisitions                                 | Purchase orders                | Procurement invoices      |
|--------------------|--|--------------------------------|---------------------------|
| Your employment    | <a href="#">Requisitions</a>                 | <a href="#">Goods received</a> | <a href="#">Enquiries</a> |
| Time and expenses  | <a href="#">Requisitions - E-Marketplace</a> | <a href="#">Enquiries</a>      |                           |
| <b>Procurement</b> | <a href="#">Enquiries</a>                    |                                |                           |
| Common             | <b>Supplier information</b>                  |                                |                           |
| Reports            | <a href="#">Suppliers</a>                    |                                |                           |
|                    | <a href="#">Enquiries</a>                    |                                |                           |

**Favourites**  
No favourites

**Recently used**

- Suppliers
- Workflow enquiry
- Activate your sub
- Requisitions

3. Before setting up a supplier, it is advised to check whether the supplier is already set up on the finance system
4. Click on the 3 dots under “Lookup”

Suppliers x

Suppliers

Supplier Contact information Supplier Information Declaration

Supplier

Lookup

Supplier ID Supplier name\*

Classification Supplier identification

5. Search for the Supplier name, you can use \*, to help search for the supplier's name. If the search returns with no results, you can proceed with the supplier set up. If you find that the wildcard retrieves the supplier you want to set up, take note of the Supplier ID and verify that this supplier is the one you need and you can raise your requisition if all details match.

If the supplier does not exist, please close this window to continue to step 6.

The screenshot shows the UNIT4 ERP interface. At the top, the logo 'UNIT4 ERP' is on the left, and user information 'Queen Mary University of Lond...' and 'aaw332' is on the right. The main header shows 'Suppliers' with a close button. Below the header, there are tabs for 'Supplier', 'Contact information', 'Supplier Information', and 'Declaration'. The 'Supplier' tab is active, and a 'Value lookup' dialog box is open. The dialog box has a title bar with a close button. Inside, there is a message: 'Your search produced no results.' Below this, there is a section for 'Search criteria' with a text input field containing '\*sciscope\*'. There is also an 'Advanced' section with a dropdown arrow and a text input field. At the bottom of the dialog, there is a 'Search' button. Below the dialog, there is a table with columns: Supplier ID, Name, Supplier group (T), Bank account, Text, Currency, Address, Post code, Town, Short name, Province, Telephone, Fax no., Status, and a 'Filter' button. At the bottom left of the dialog, there is a 'Close' button.

## 6. Complete the tabs Supplier, Contact Information, Supplier Information and Declaration

**UNIT4 ERP**

Suppliers x

### Suppliers

Supplier | Contact information | Supplier Information | Declaration

#### Supplier

Lookup  
[ ] ...

Supplier ID\*  
[NEW]

Supplier name\*  
Sciscope Limited

#### Classification

Supplier group\*  
Trade Suppliers ▼  
TS

Country\*  
United Kingdom  
GB

#### Supplier identification

Company registration number  
44235698

VAT registration number  
123456789

**UNIT4 ERP**

Suppliers x

### Suppliers

Supplier | Contact information | Supplier Information | Declaration

#### Supplier

[ ]

#### Address

| Street address              | Town | Region | Post code | Contact |
|-----------------------------|------|--------|-----------|---------|
| 123 St Paul's Lane, London, |      |        | E1 7HT    |         |

Add Delete

#### Address details

| Address                               | Phone numbers               | E-mail and website           | Contact person                |
|---------------------------------------|-----------------------------|------------------------------|-------------------------------|
| Street address*<br>123 St Paul's Lane | Telephone*<br>020 8553 1900 | E-mail*<br>info@sciscope.com | Name*<br>John Smith           |
| Country*<br>United Kingdom ▼          | Mobile<br>[ ]               | URL<br>[ ]                   | Position<br>Managing Director |
| Post code<br>E1 7HT                   |                             |                              |                               |
| Town<br>London                        |                             |                              |                               |
| Region<br>[ ]                         |                             |                              |                               |

Save Clear New Export

Suppliers

Supplier Contact information Supplier Information Declaration

Supplier

Lookup  
 ...

Supplier Information

Goods / Services Supplied\*  
 The supplier provides Scientific equipment for Laboratories.

Supplier Justification\*  
 This supplier provides specialist scientific equipment required by our labs. This supplier has been sourced by obtaining 3 quotes. Sciscope Ltd met our requirements and provides value for money.

Value of Initial Purchase\*

One-off or Recurrent?\*

Estimated Annual Spend\*

Estimate Whole Life Spend\*

Suppliers

Supplier Contact information Supplier Information Declaration

Supplier

Lookup  
 ...  
 Awaiting approval

Declaration

Declaration  
 I declare that neither I nor colleagues involved in sourcing this supplier / colleagues involved in subsequent transactions have family, financial / other connection that may affect or be perceived to affect impartiality in placing business with supplier.

I Agree\*

# 7. Click “Save” once all tabs are complete

The screenshot displays the UNIT4 ERP interface for the 'Suppliers' module. The page title is 'Suppliers' and it features four tabs: 'Supplier', 'Contact information', 'Supplier Information', and 'Declaration'. The 'Declaration' tab is currently active. Within this tab, there is a 'Declaration' section containing a text area with the following text: 'I declare that neither I nor colleagues involved in sourcing this supplier / colleagues involved in subsequent transactions have family, financial / other connection that may affect or be perceived to affect impartiality in placing business with supplier.' Below this text area is a dropdown menu labeled 'I Agree' with 'YES' selected. At the bottom of the page, there is a row of buttons: 'Save', 'Clear', 'New', and 'Export'. The 'Save' button is highlighted with a blue border.

UNIT4 ERP

Suppliers x

**Suppliers**

Supplier Contact information Supplier Information Declaration

**Supplier**

Lookup

...

**Declaration**

Declaration

I declare that neither I nor colleagues involved in sourcing this supplier / colleagues involved in subsequent transactions have family, financial / other connection that may affect or be perceived to affect impartiality in placing business with supplier.

I Agree \*

YES

Save Clear New Export

8. An “Auto-numbering” pop up box will appear, click “Ok”

UNIT4 ERP

Suppliers x

Suppliers

Supplier Contact information Supplier Information Declaration

Supplier

Auto-numbering x

Auto-numbering series\*  
Supplier master file

AP1

Manual number

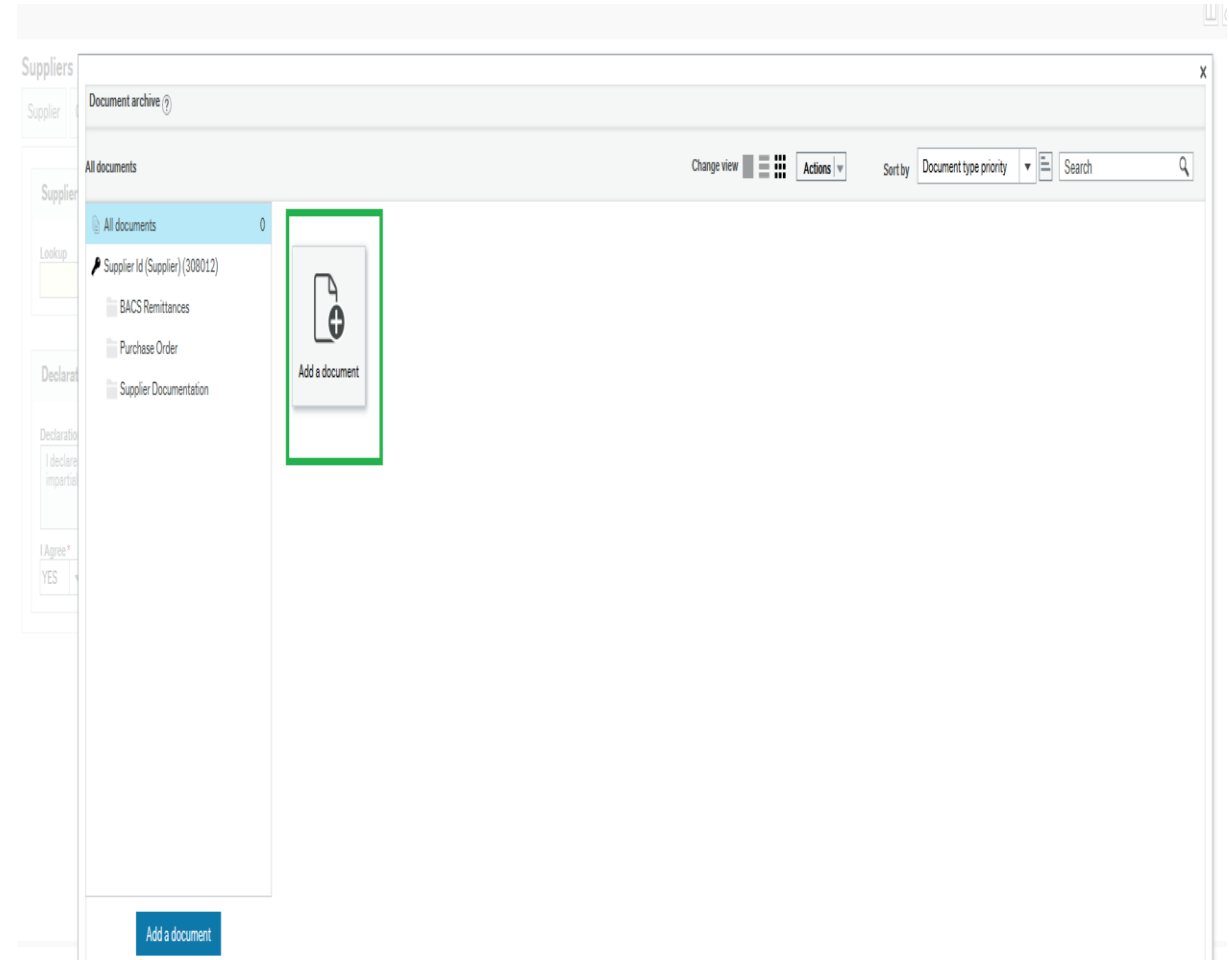
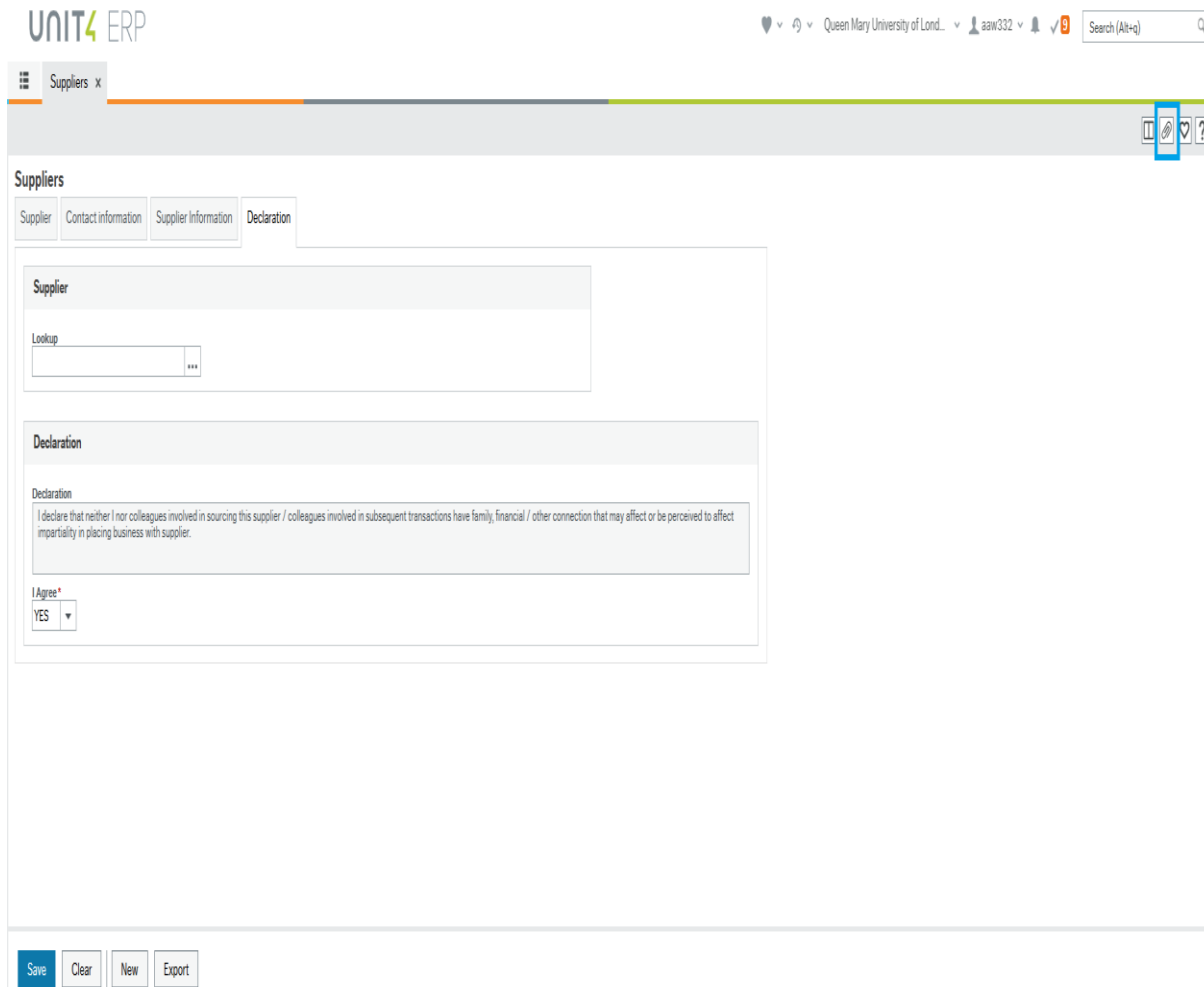
OK Cancel

Save Clear New Export

9. The system will generate a Supplier ID for your New Supplier Request. Keep a note of it as it is useful when enquiring where the supplier request is in the workflow process. (Please do not close this page until you have completed step 10).

The screenshot displays the UNIT4 ERP interface for the 'Suppliers' section. The page title is 'Suppliers' and it includes a breadcrumb trail: 'Suppliers > Contact information > Supplier Information > Declaration'. The main content area is divided into several sections: 'Supplier', 'Classification', and 'Supplier identification'. The 'Supplier' section contains a 'Lookup' field, a 'Supplier ID' field with the value '308012', and a 'Supplier name\*' field with the value 'Sciscope Limited'. The 'Classification' section includes a 'Supplier group\*' dropdown menu set to 'Trade Suppliers' (with 'TS' below it) and a 'Country\*' dropdown menu set to 'United Kingdom' (with 'GB' below it). The 'Supplier identification' section contains a 'Company registration number' field with the value '44235698' and a 'VAT registration number' field with the value '123456789'. A green success message dialog box is overlaid on the page, stating: 'Success Successfully saved. Supplier ID 308012 is now created and is sent for approval.' with an 'OK' button. The top right of the page shows the user 'aaw332' and a search bar. The bottom right corner of the page has the text 'Updated by PPT'.

10. Now that the Supplier ID is created, you can attach your supporting information. To do this you need to click on the Paperclip icon. Click on the “Add document” button.



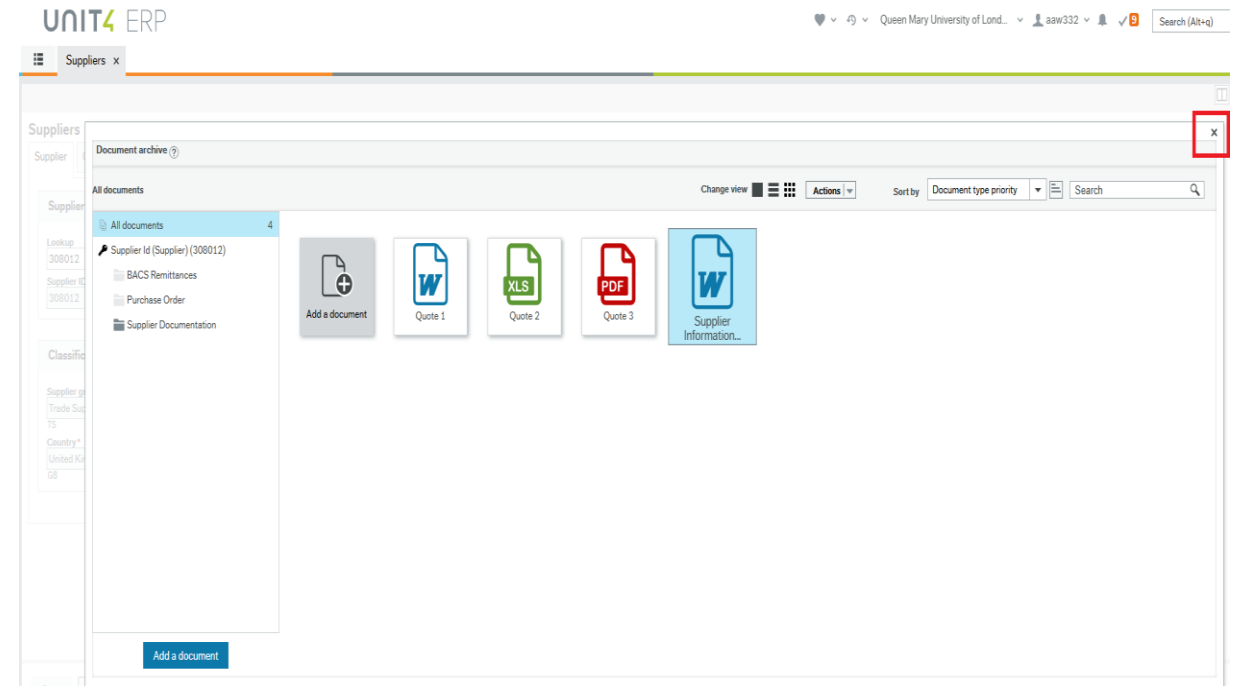
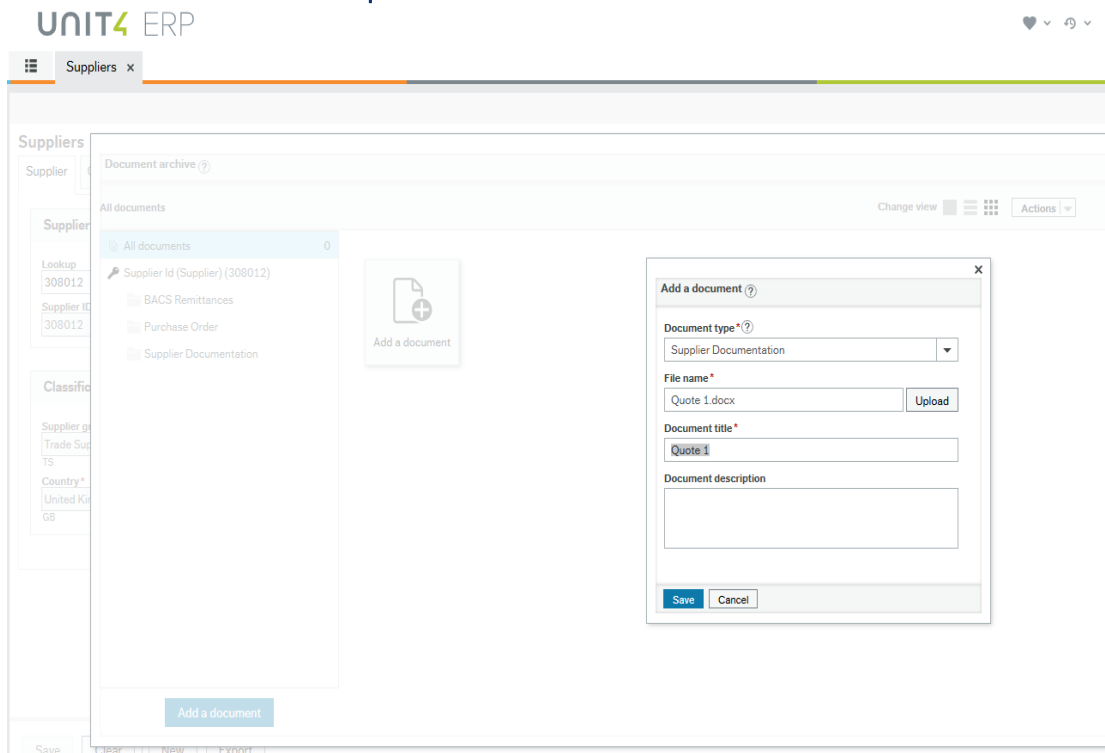
11. In this example, as the Total Spend is £30,000, 3 quotes, and the Supplier Information on Letterheaded paper will need to be attached.

Select **Supplier Documentation**, upload file, File name will pre-populate once you upload then click on Save.

*Repeat the process until you have uploaded all relevant documentation. Click on the X button once complete.*

12. You do not need to save. The system will automatically save to the supplier request.


13. The Request will now workflow to the Procurement Team for review.





# WHAT HAPPENS NOW TO MY SUPPLIER REQUEST?

The Supplier request will now workflow to the Procurement Team for approval.  
The team will either Approve, Reject or Re-work the supplier request.

| APPROVE   | REJECT  | REWORK  |
|---|---|---|
| <p>The supplier will be added to the finance system and an email alert will be sent to the requestor to confirm that set up has been completed and requisition can be raised.</p>  | <p>An email alert will be sent to the requestor to confirm the Supplier Request has been rejected with the reasons why.</p> | <p>An email will be sent back to the requester with actions required to progress.</p> <p>The requester will need to update / add the information required and Click 'Task Complete' (which will be at the bottom of the screen).</p> <p>DO NOT CLICK 'REJECT' unless you wish to cancel the request and no longer need the supplier set up.</p> |

# EXAMPLE OF SUPPLIER REQUEST REWORKED TO REQUISITIONER FOR ACTION

The screenshot displays the UNIT4 ERP interface. On the left is a 'Homescreen menu' with categories like 'Your employment', 'Time and expenses', 'Procurement', 'Common', and 'Reports'. The main area shows a 'Supplier Request - Rework' task. A 'Your tasks' pop-up window is visible, listing 'Missing Goods Receipt (9)' and 'Supplier Request - Rework' (highlighted). The main view includes a 'Master file approval' section with an 'Information' table and a 'Workflow log (row 0)' section. The workflow log contains a note from Procurement: '19/08/2025 16:06 Shamiso Munzara (QP24660) - Supplier Requires Rework - "Please check the company registration number is correct with the supplier"'. Below this is a 'Details' table for contact information.

**Information**

| SupplID | Supplier name    |
|---------|------------------|
| 308012  | Sciscope Limited |

**Workflow log (row 0)**

19/08/2025 16:06 Shamiso Munzara (QP24660) - Supplier Requires Rework - "Please check the company registration number is correct with the supplier"

19/08/2025 13:10 Pinal Patel (PPT) - Distributed

Enter a comment

Copy

**Details**

| Map | Status | Field        | Field associated with | New value          |
|-----|--------|--------------|-----------------------|--------------------|
|     |        | Address type | Contact information   | General            |
|     |        | Address      | Contact information   | 123 St Paul's Lane |
|     |        | Code         | Contact information   | United Kingdom     |
|     |        | Description  | Contact information   | John Smith         |
|     |        | E-mail       | Contact information   | info@sciscope.com  |
|     |        | Town         | Contact information   | London             |
|     |        | Position     | Contact information   | Managing Director  |
|     |        | Region       | Contact information   |                    |
|     |        | Telephone    | Contact information   | 020 8553 1900      |

Task complete | Reject | Advanced mode | Clear | Export

In the Workflow log, you will see a note from Procurement on the action that is required to progress the Supplier Request.

# HOW TO CHECK THE WORKFLOW STATUS OF A SUPPLIER

1. Click on Procurement from the Home screen menu
2. Under Supplier information, click on Enquiries, then Workflow enquiry - Supplier

**UNIT4 ERP**

The screenshot displays the UNIT4 ERP Home screen menu. On the left, a vertical sidebar contains a 'Homescreen menu' with options: 'Your employment', 'Time and expenses', 'Procurement' (highlighted with a red box), 'Common', and 'Reports'. The main content area is divided into three columns: 'Requisitions', 'Purchase orders', and 'Procurement invoices'. Under 'Requisitions', there are links for 'Requisitions', 'Requisitions - E-Marketplace', and 'Enquiries'. Under 'Purchase orders', there are links for 'Goods received' and 'Enquiries'. Under 'Procurement invoices', there is a link for 'Enquiries'. Below these columns is a 'Supplier information' section with links for 'Suppliers', 'Enquiries' (highlighted with a yellow box), and 'Workflow enquiry - Supplier' (highlighted with a green box). The 'Workflow enquiry - Supplier' link is the final step in the navigation path described in the instructions.

| Homescreen menu    |                              |                        |                             |
|--------------------|------------------------------|------------------------|-----------------------------|
| Your employment    | <b>Requisitions</b>          | <b>Purchase orders</b> | <b>Procurement invoices</b> |
| Time and expenses  | Requisitions                 | Goods received         | Enquiries                   |
| <b>Procurement</b> | Requisitions - E-Marketplace | Enquiries              |                             |
| Common             | Enquiries                    |                        |                             |
| Reports            | <b>Supplier information</b>  |                        |                             |
|                    | Suppliers                    |                        |                             |
|                    | Enquiries                    |                        |                             |
|                    | Workflow enquiry - Supplier  |                        |                             |

3. Active List will be ticked; you can also tick Historical items. Then complete the Supplier ID and click on Load.

Workflow enquiry - Supplier

Search type

Active items

Historical items

Items

| Map | Process name        | Process step                    | Version no. | Workflow state        | Task owner | Attr.value | ID | SupplID | Supplier name                 | Cur | PM | Status |      |
|-----|---------------------|---------------------------------|-------------|-----------------------|------------|------------|----|---------|-------------------------------|-----|----|--------|------|
|     |                     |                                 |             |                       |            |            |    | 308012  |                               |     |    |        | Load |
|     | Supplier Master ... | Check Auto Numbering            | 9           | Workflow in progre... | SYSTEM     |            |    | 176337  | Mix N Sync                    | GBP | IP | N      |      |
|     | Supplier Master ... | Supplier Request - Rework       | 19          | Workflow in progre... | PSNMS      |            |    | 307836  | Stride Treglown Architecture  | GBP | CH | N      |      |
|     | Supplier Master ... | Supplier Request - Rework       | 19          | Workflow in progre... | HFY355     |            |    | 307181  | Quotient Therapeutics Limited | GBP | CH | N      |      |
|     | Supplier Master ... | Supplier Request - Rework       | 19          | Workflow in progre... | MTW        |            |    | 303551  | EquipNet LTD                  | GBP | CH | N      |      |
|     | Supplier Master ... | Supplier Request - Rework       | 19          | Workflow in progre... | YGW085     |            |    | 302911  | UOVO                          | GBP | CH | N      |      |
|     | Supplier Master ... | Supplier Request - Rework       | 19          | Workflow in progre... | QQW070     |            |    | 307841  | LS DIGITAL CONSULTING LTD     | GBP | CH | N      |      |
|     | Supplier Master ... | Procurement Supplier Data Ap... | 19          | Workflow in progre... | QP24660    |            |    | 307974  | Aitken Alexander              | GBP | CH | N      |      |
|     | Supplier Master ... | Procurement Supplier Data Ap... | 19          | Workflow in progre... | YFW636     |            |    | 307974  | Aitken Alexander              | GBP | CH | N      |      |
|     | Supplier Master ... | Procurement Supplier Data Ap... | 19          | Workflow in progre... | NISHUS     |            |    | 307974  | Aitken Alexander              | GBP | CH | N      |      |
|     | Supplier Master ... | Procurement Supplier Data Ap... | 19          | Workflow in progre... | YFW537     |            |    | 307974  | Aitken Alexander              | GBP | CH | N      |      |
|     | Supplier Master ... | Supplier Request - Rework       | 18          | Workflow in progre... | YXX352     |            |    | 195265  | Shoreditch Arts Limited       | GBP | CH | N      |      |
|     | Supplier Master ... | AP Supplier Amendment           | 4           | Rejected              | APAHZ      |            |    | 133157  | Computaform UK Ltd            | GBP | IP | N      |      |
|     | Supplier Master ... |                                 | 10          | Workflow in progre... |            |            |    | 178676  | Tsinghua University           | EUR | FP | N      |      |

Export

Workflow enquiry - Supplier

Search type

Active items

Historical items

Items

| Map | Process name        | Process step             | Version no. | Workflow state       | Task owner | Attr.value | ID | SupplID | Supplier name    | Cur | PM | Status |      |
|-----|---------------------|--------------------------|-------------|----------------------|------------|------------|----|---------|------------------|-----|----|--------|------|
|     | Supplier Master ... | Supplier Request - Re... | 19          | Workflow in progr... | PPT        |            |    | 308012  | Sciscope Limited | GBP | CH | N      | Load |

Workflow enquiry - Supplier

Map

Map information

|                      |    |                     |
|----------------------|----|---------------------|
| Supplier Master File | 19 | 19/08/2025 13:10:31 |
|----------------------|----|---------------------|

Map status: Active

Initiator: Pinal Patel (PPT)

Started: 19/08/2025 13:10:31

Finished:

Version no.: 19

Process: Supplier Master File

Export

Close

4. Click on the Workflow Icon, this will bring up the map, which will show you where the request is sitting.

If you hover, over the task owner, you can see additional comments, if they have added any.

# OTHER CONSIDERATIONS

If you know that you are engaging an individual or an intermediary, please also complete QM Flowchart and Check Employment Status for Tax (CEST) assessment.

If you are engaging an individual or intermediary, you are responsible for determining the correct payment route, which in turn dictates the Tax and National Insurance payments made. Refer to guidance on [payment of external workers](#).

Please read the guidance in full - if you still have specific questions then contact Eva Kurekova at [finance-tax-manager@qmul.ac.uk](mailto:finance-tax-manager@qmul.ac.uk)

For Individuals/ Sole traders you will need to ask the supplier to provide a copy of their business insurance policy and evidence of Unique Tax Reference (UTR).

**Note:** When you raise requisition, please attach all supporting information (e.g. Quotations/ contracts / other documents) to ensure all approvers have transparency and will enable quick approval.



Thank You  
& Queries

Should you have a query around supplier  
set up or general Procurement queries  
please contact:

[Finance-procurement@qmul.ac.uk](mailto:Finance-procurement@qmul.ac.uk)