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NEW SUPPLIER REQUEST TRAINING

BAHAR SHAHIN – DIRECTOR OF PROCUREMENT

EAMA KHANOM – HEAD OF PROCUREMENT

TRAINING OBJECTIVES

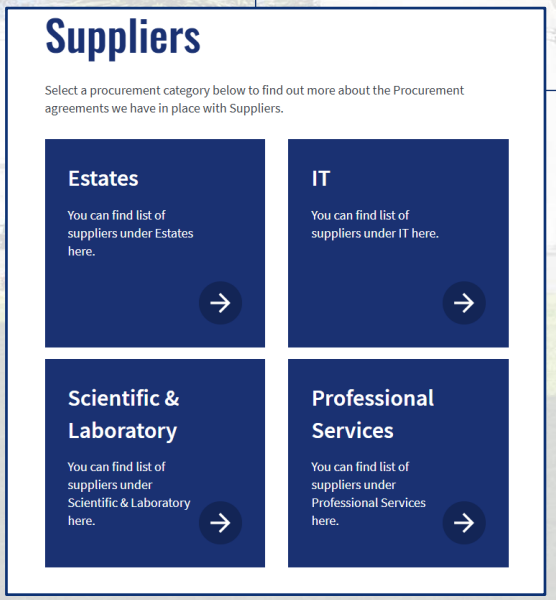
- Understand how to Set up a New Supplier on the Finance System
- Follow purchasing thresholds and documentation rules
- Always considering Total cost of ownership
- Know where to find tools, templates, and guidance
- Avoid common mistakes



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THINGS TO CONSIDER BEFORE YOU BEGIN YOUR NEW SUPPLIER REQUEST

CAN THE REQUIREMENT BE DELIVERED IN HOUSE?	DO WE HAVE AN EXISTING QMUL CONTRACT IN PLACE FOR THE GOODS/ SERVICES/ WORKS?
Contact the relevant in-house department regarding your requirement	Refer to the Procurement intranet pages for a list of Suppliers we have contracts with.



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

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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

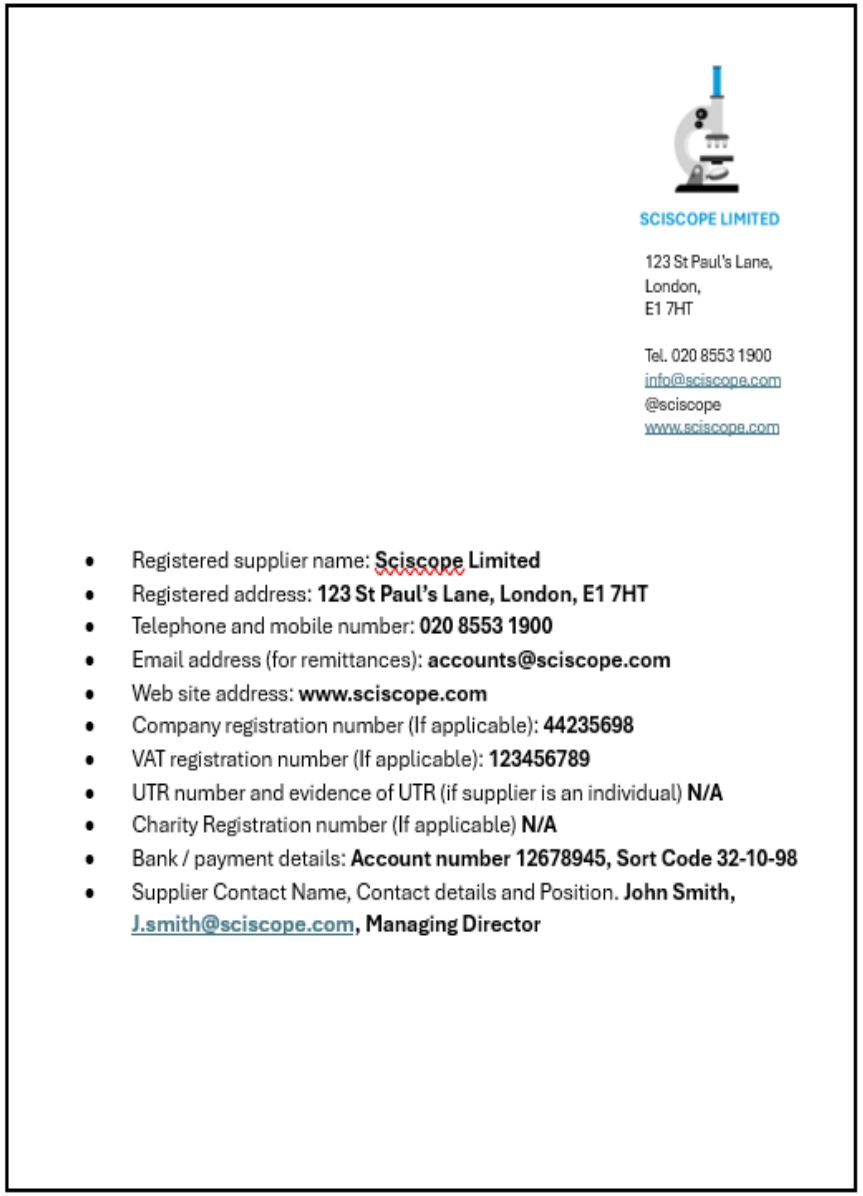
Consider: If there are any costs around importing – Tax, Duty, Shipment



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 **1 QUOTE**; however, we advise that you obtain 2 quotes to ensure you Value for Money.	You will need to obtain **3 QUOTES**; 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 **CONTACT PROCUREMENT**. 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.

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SCISCOPE LIMITED

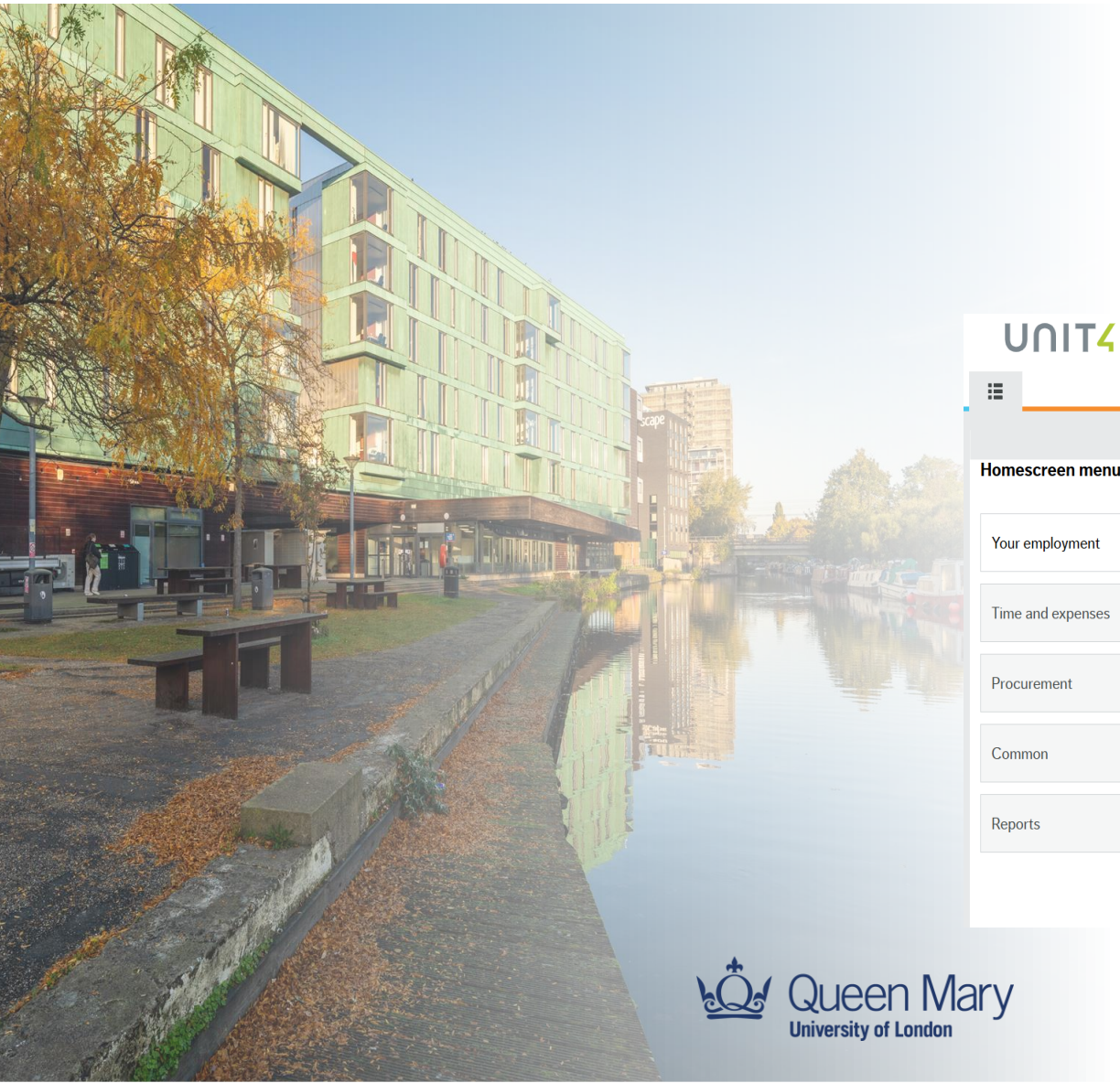
123 St Paul's Lane,
London,
E1 7HT

Tel. 020 8553 1900
info@sciscope.com
@sciscope
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, Managing Director**

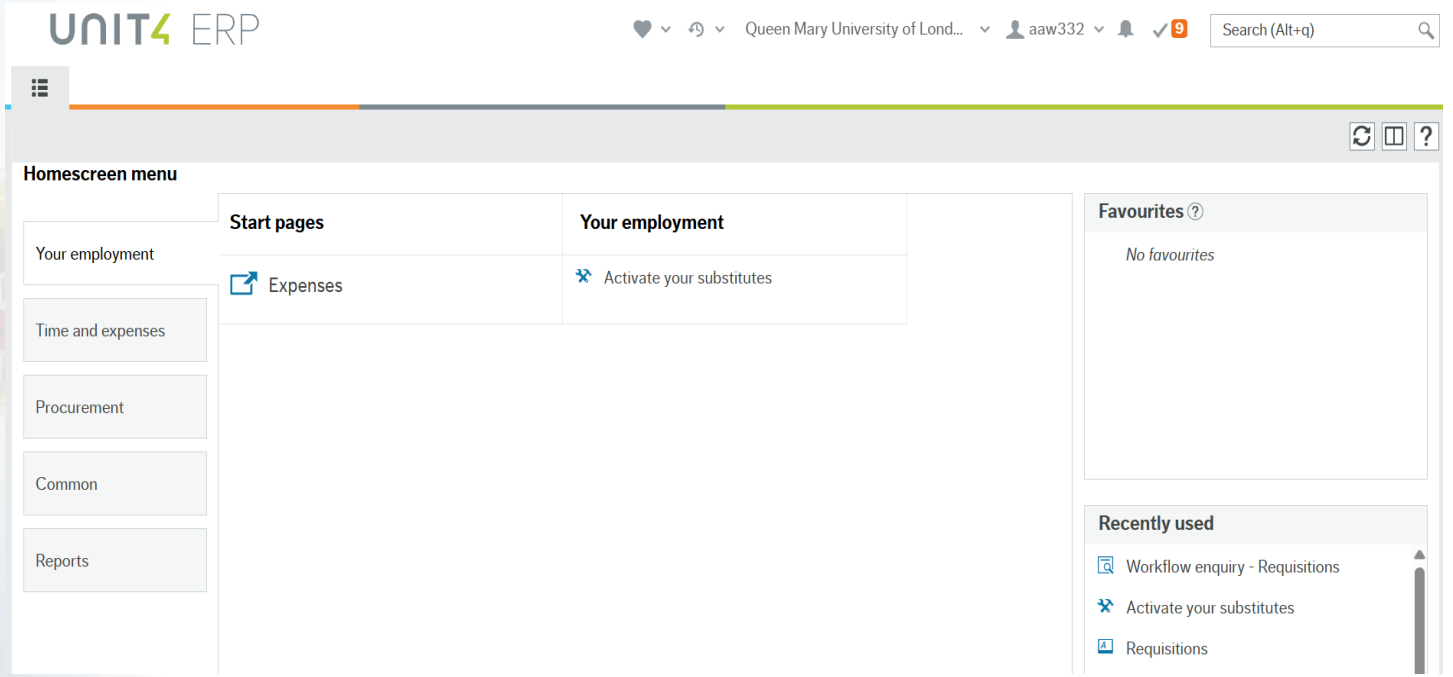
- Once you have obtained the relevant quotes or have the contract information, you will need to ask the Supplier you want to set up to provide you with the following **Supplier Information on Letter headed paper**:
- Registered supplier name
- Registered address
- Telephone and mobile number
- Email 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



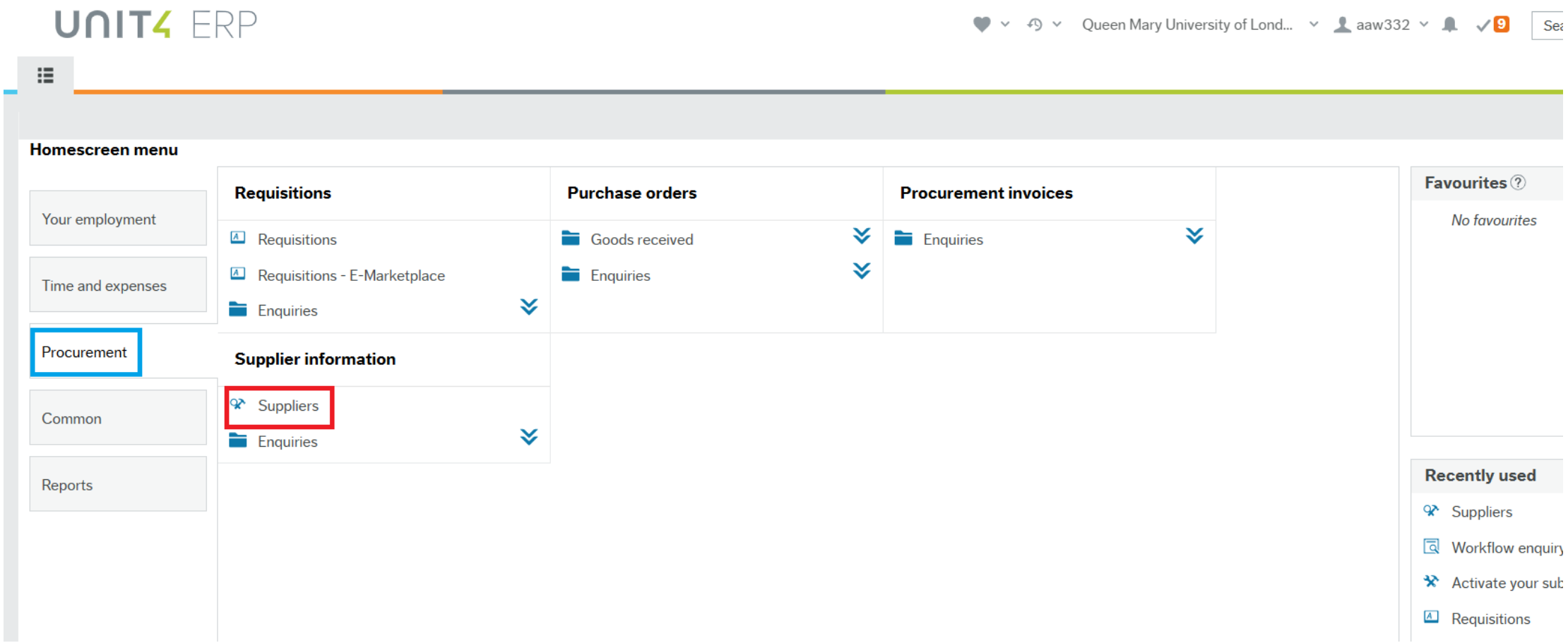
Before we begin, you will need to ensure you have access to the finance system

UNIT4

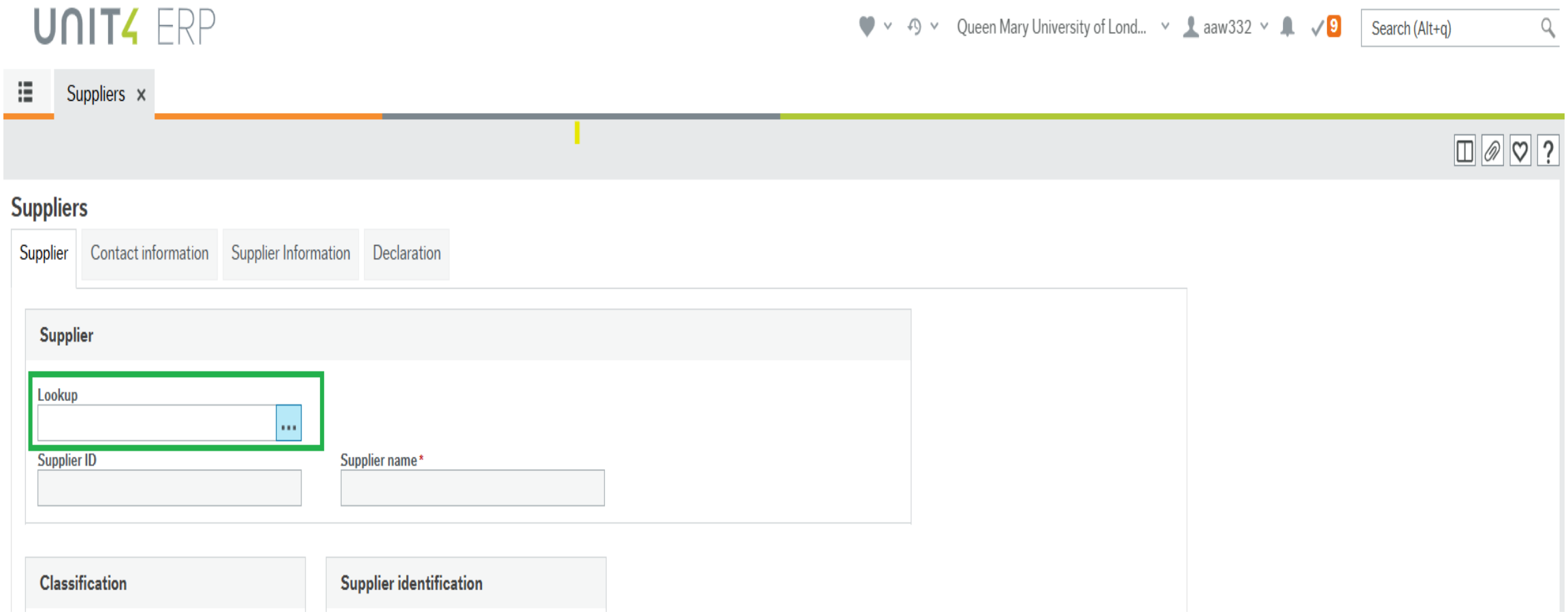


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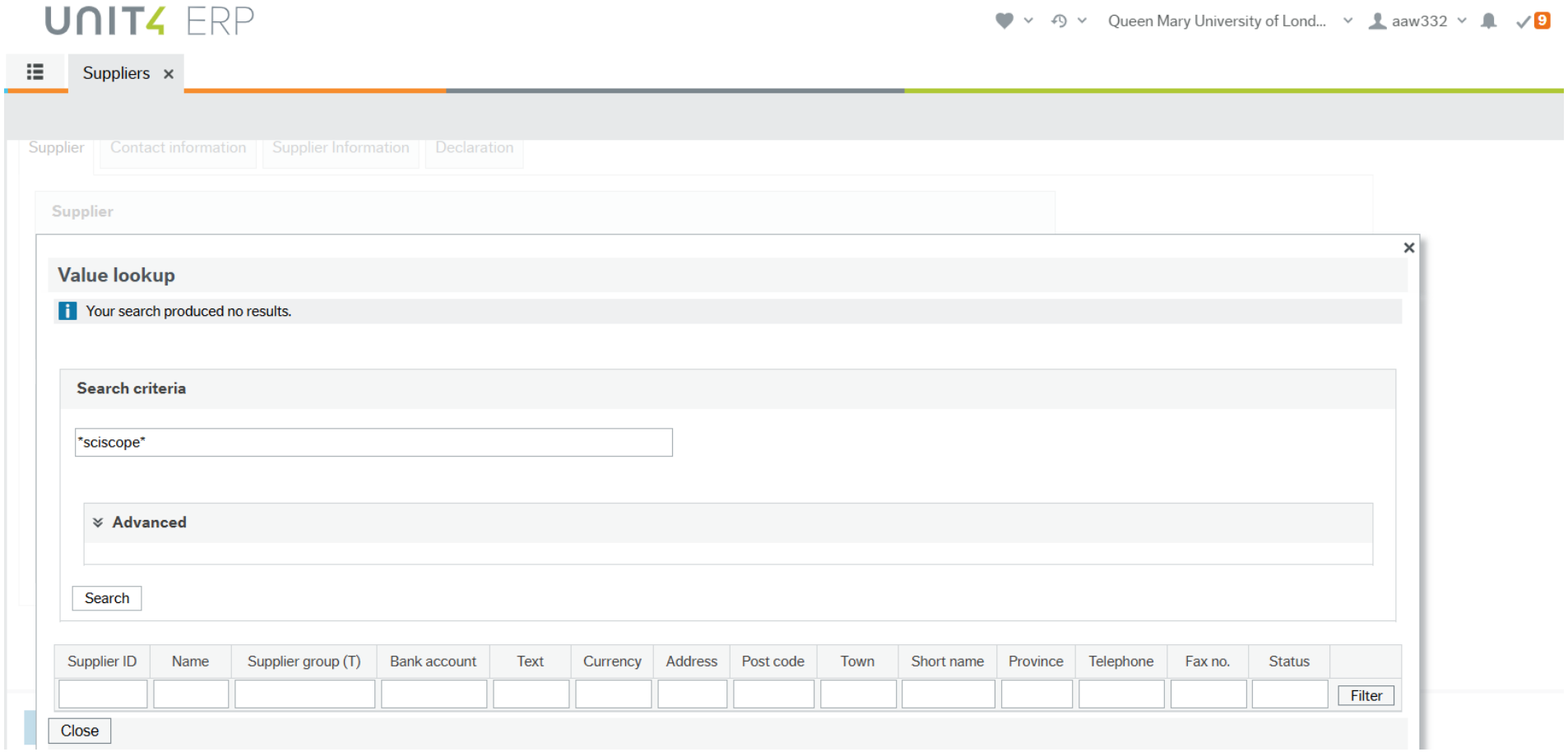
1. From the Homescreen menu, Select **“Procurement”**
2. Then select **“Suppliers”** from the Supplier information tab



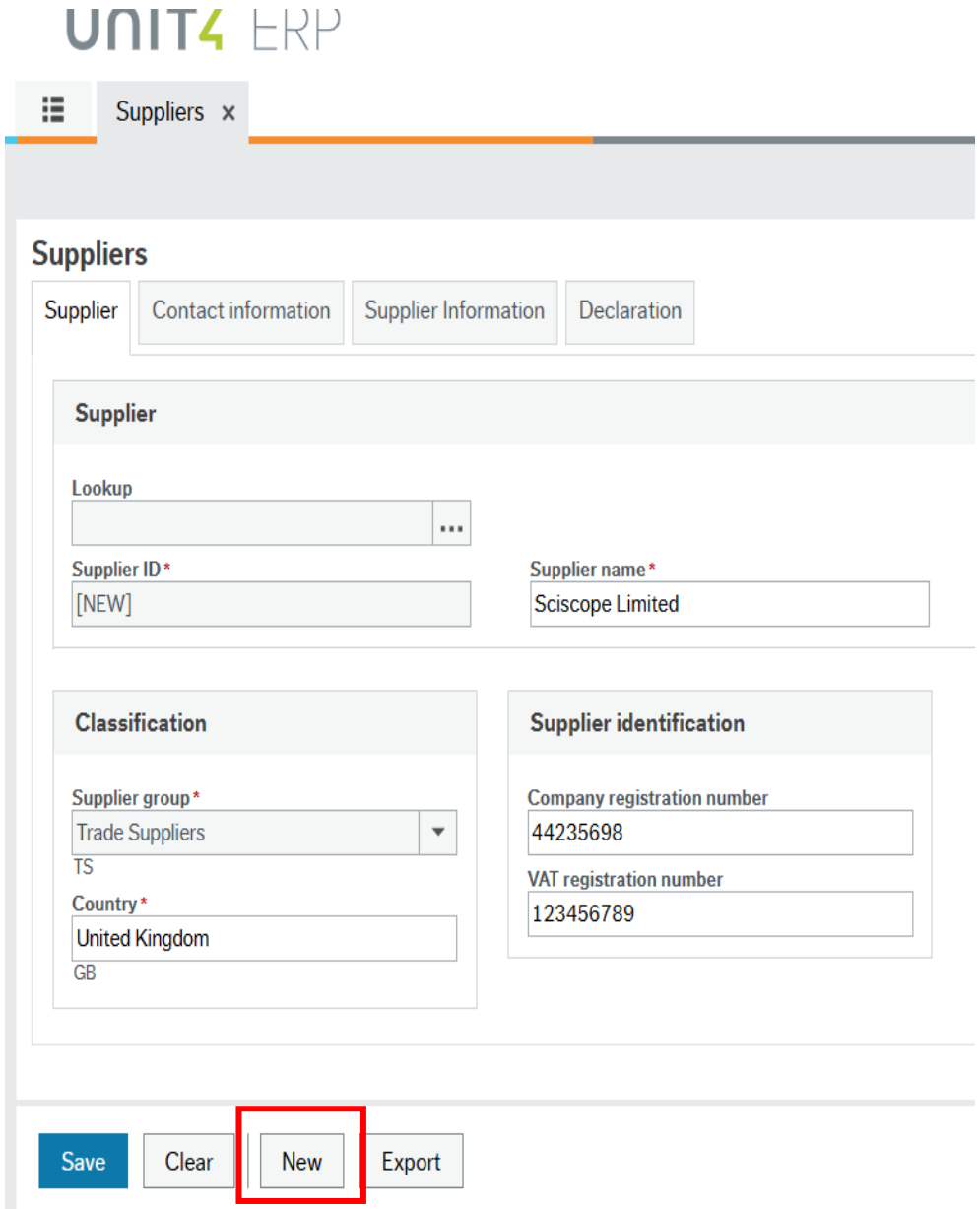
3. Before setting up a supplier, it is advised to check whether the supplier is already set up on the finance system
4. Click on the 3 dots under “Lookup”

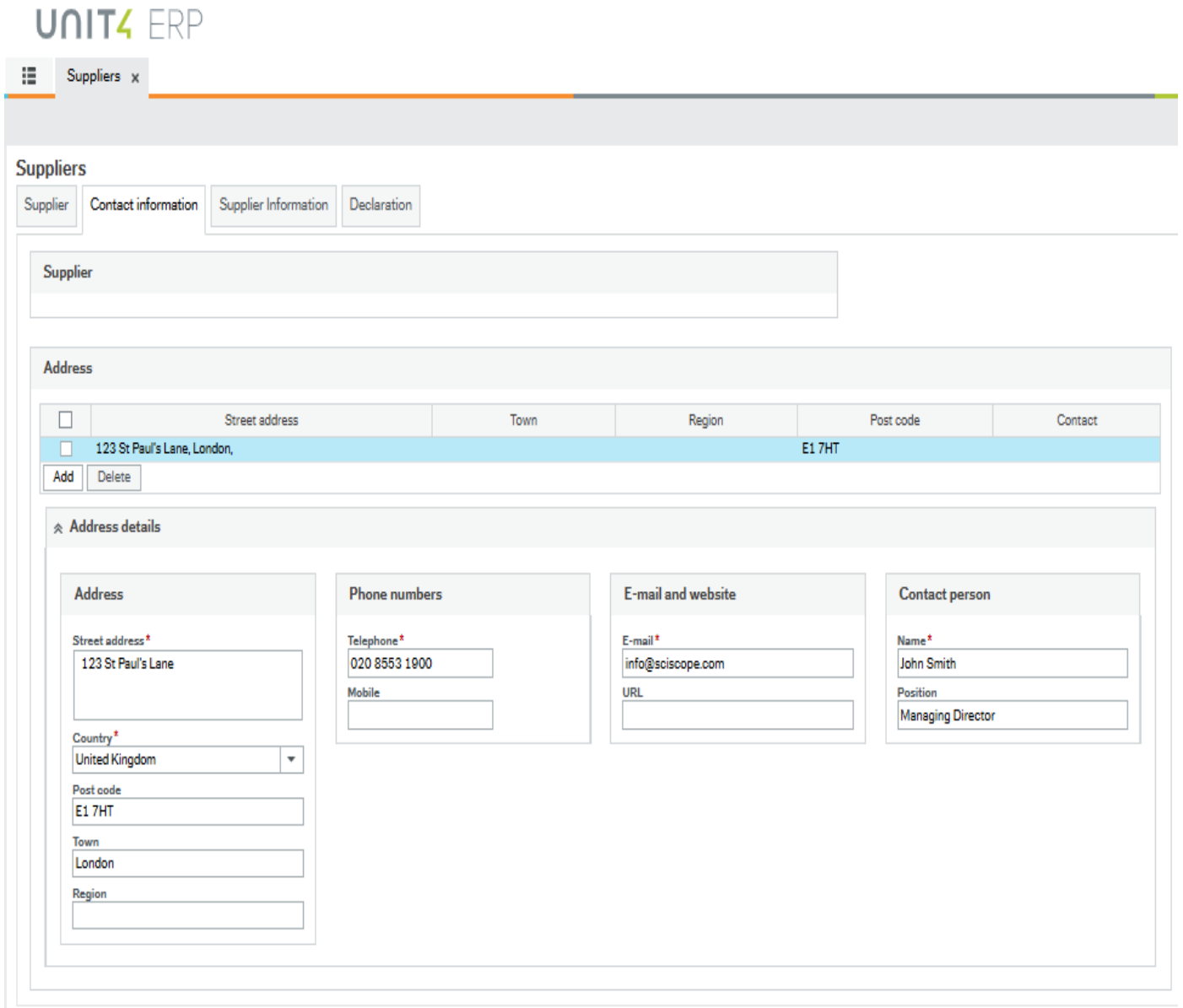


5. Search for the Supplier name, you can use *, to help search for the supplier's name. If the search returns with no results, you can proceed with the supplier set up. If you find that the wildcard retrieves the supplier you want to set up, take note of the Supplier ID and verify that this supplier 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.



6. Click on New and then complete the tabs Supplier, Contact Information, Supplier Information and Declaration





UNIT4 ERP

Suppliers x

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 *

30,000.00

One-off or Recurrent? *

One-off

Estimated Annual Spend *

30,000.00

Estimate Whole Life Spend *

30,000.00

Save | Clear | New | Export

UNIT4 ERP

Suppliers x

Suppliers

Supplier | Contact information | Supplier Information | Declaration

Supplier

Lookup

308012

Awaiting approval

Declaration

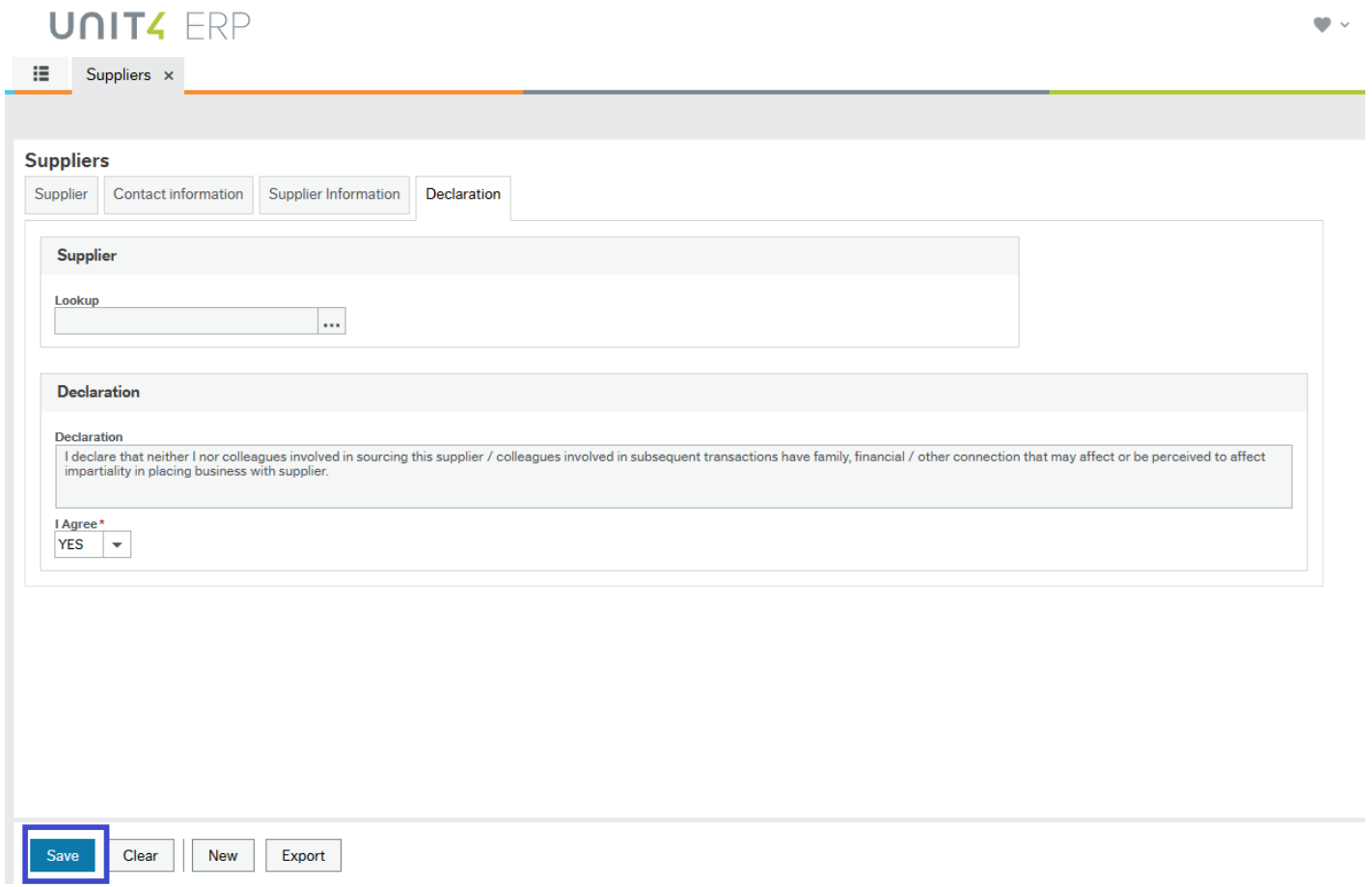
Declaration

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.

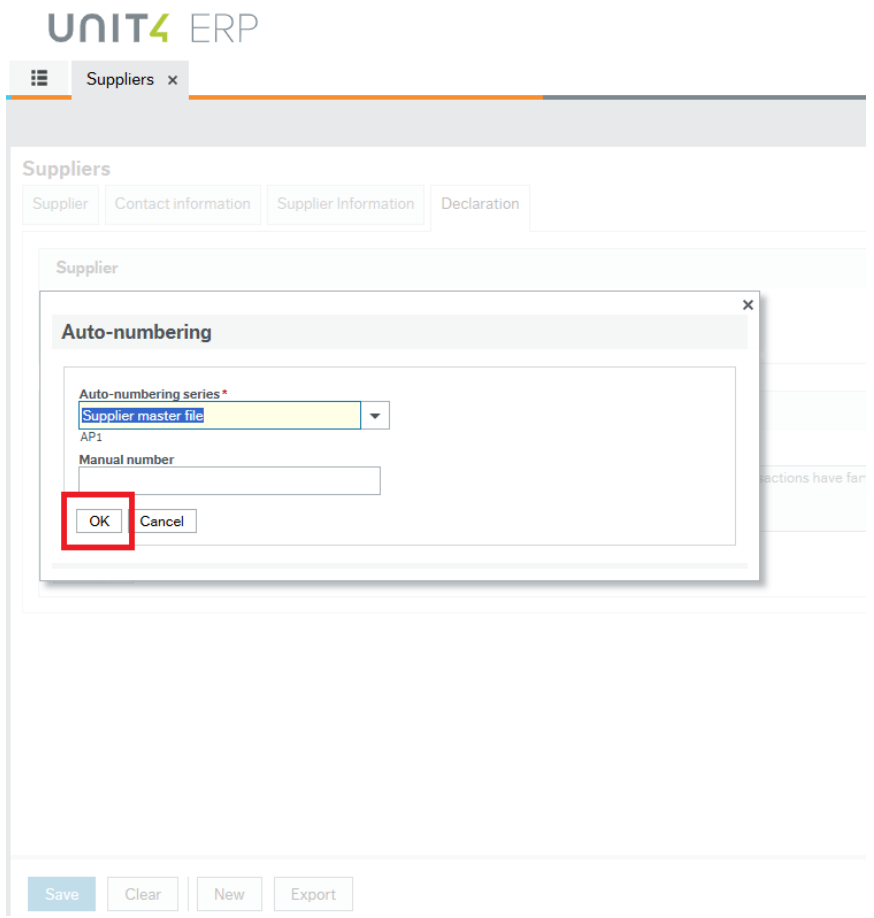
I Agree *

YES

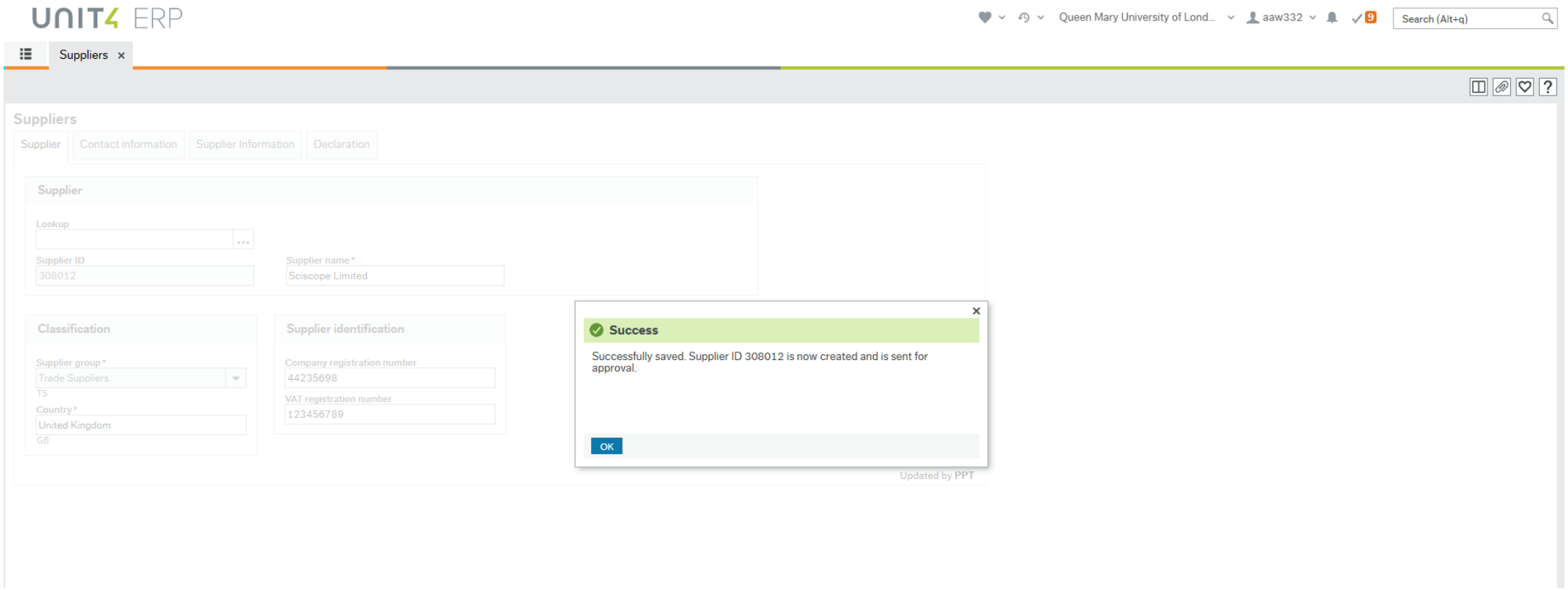
7. Click “Save” once all tabs are complete



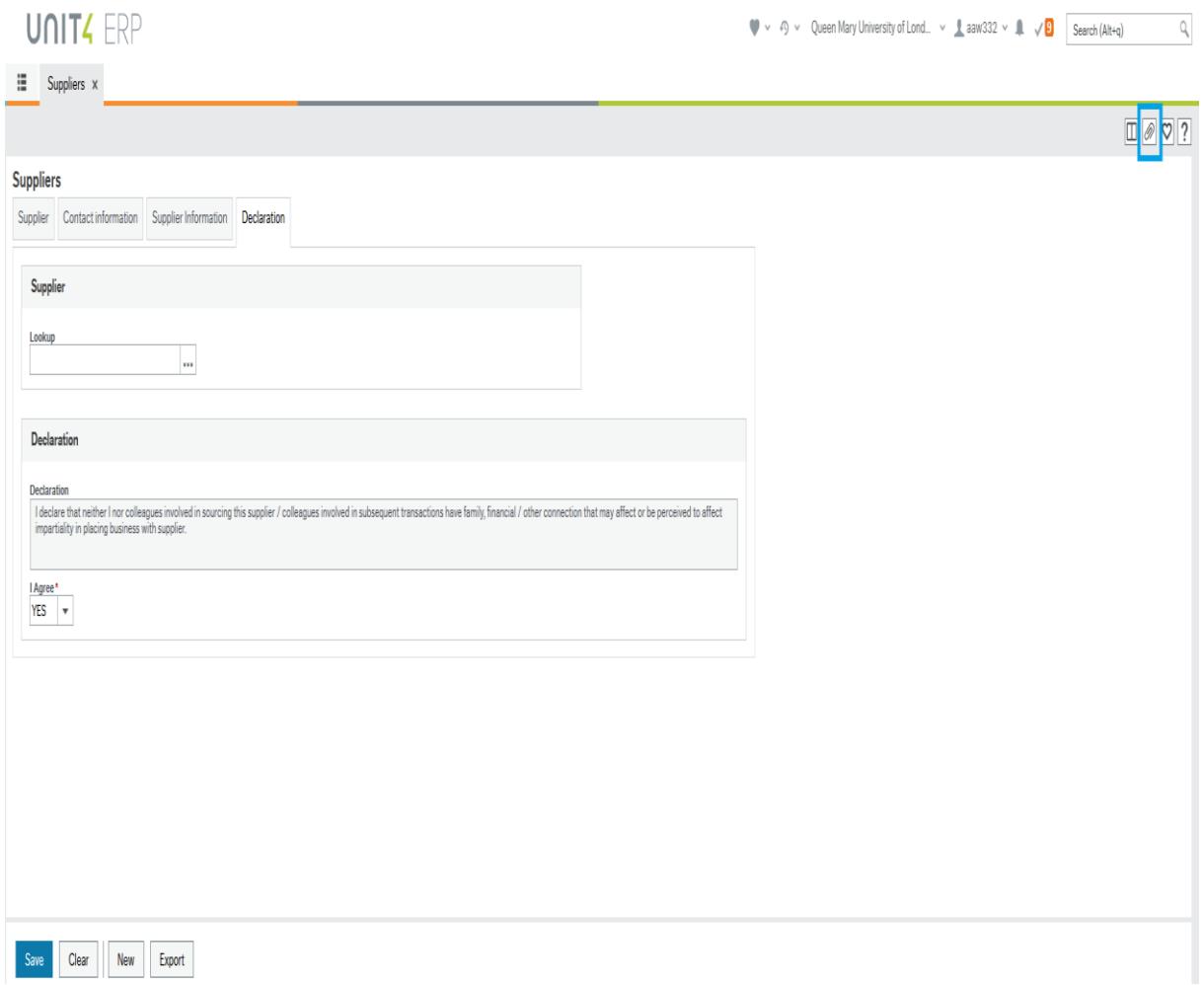
8. An “Auto-numbering” pop up box will appear, click “Ok”

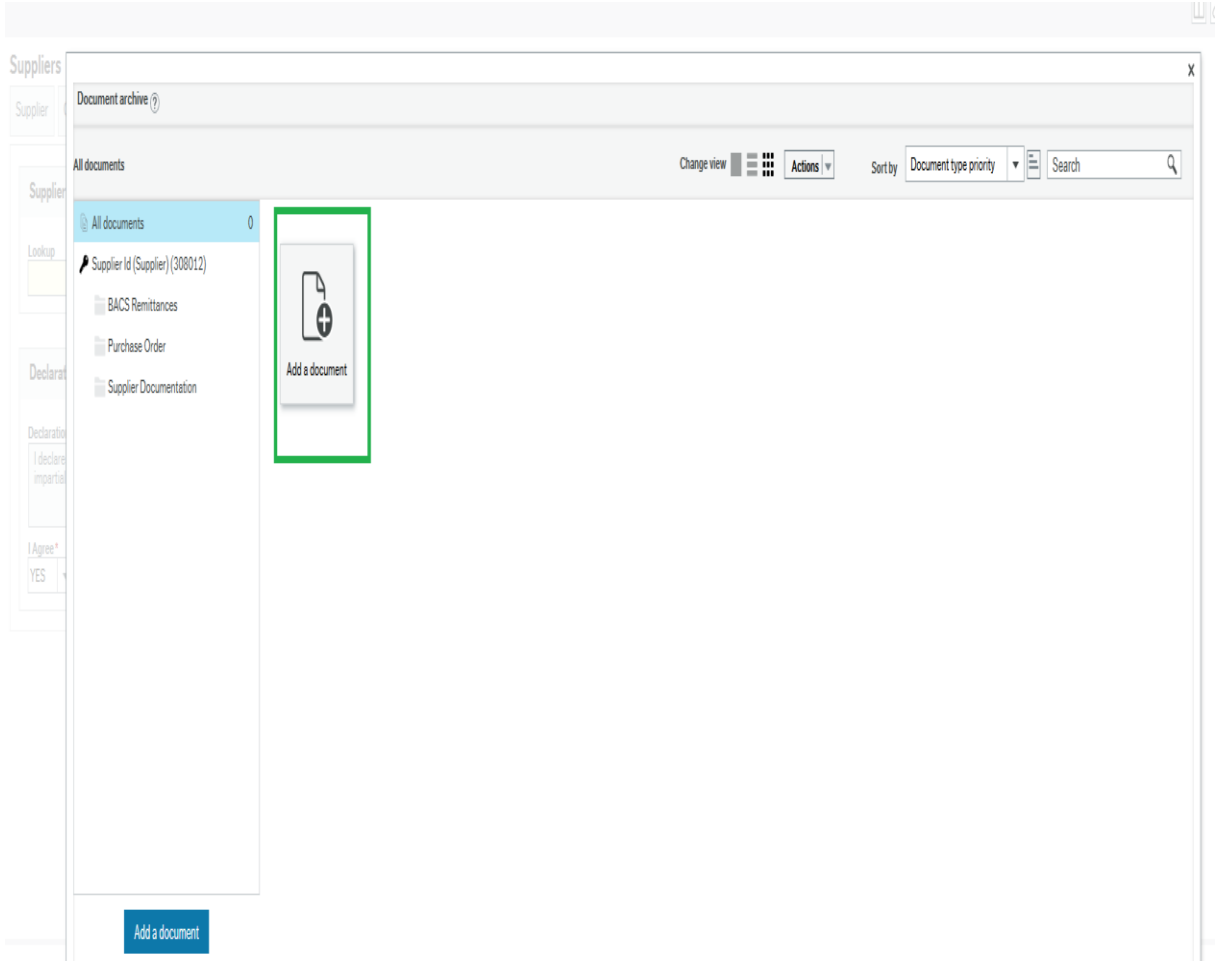


9. The system will generate a Supplier ID for your New Supplier Request. Keep a note of it as it is useful when enquiring where the supplier request is in the workflow process. (Please do not close this page until you have completed step 10).



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.

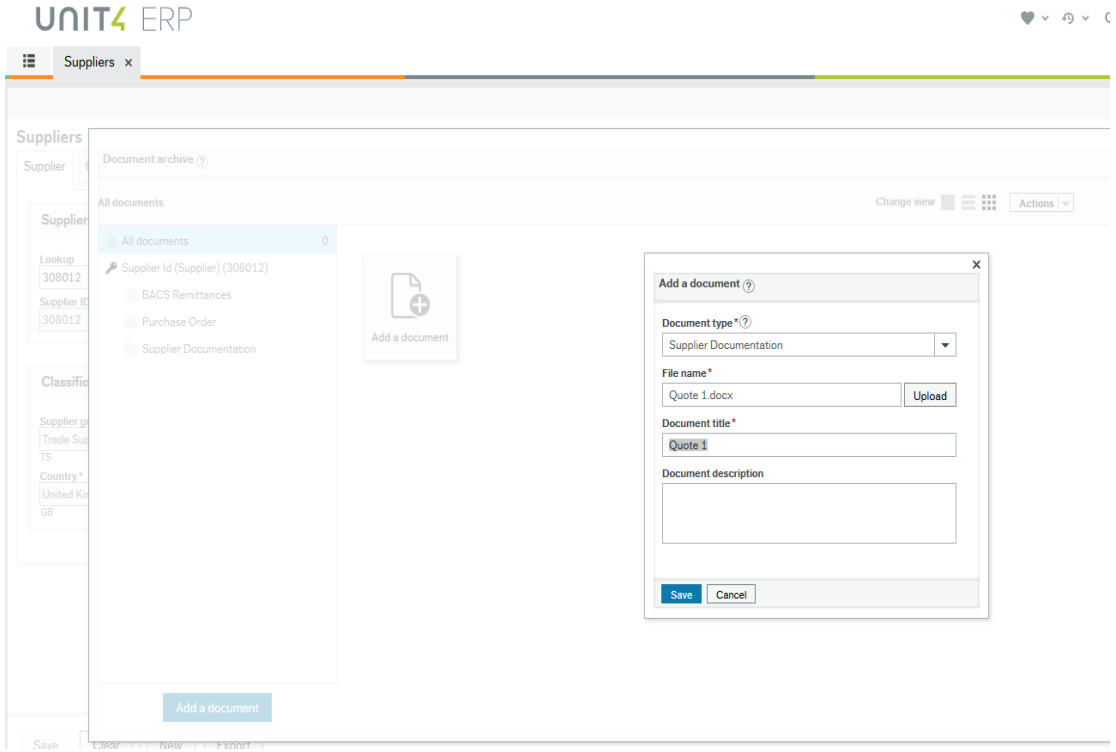


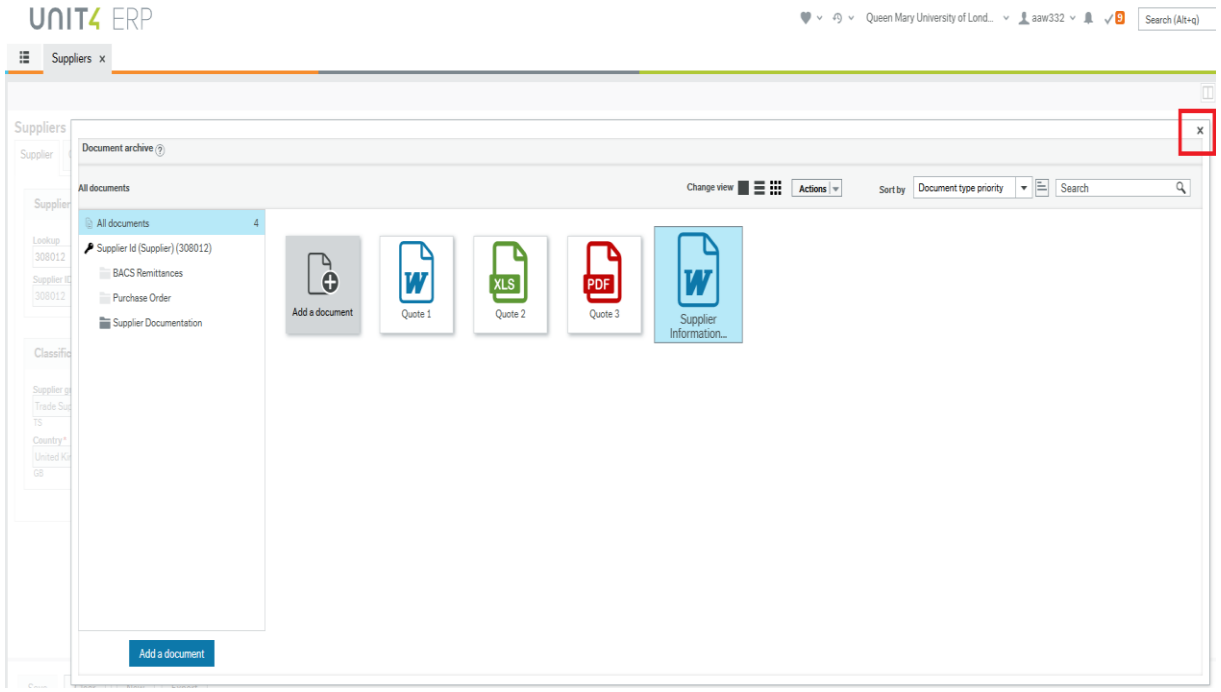


11. In this example, as the Total Spend is £30,000, 3 quotes, and the Supplier Information on Letterheaded paper will need to be attached.

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. **DO NOT CLICK SAVE**. The system will automatically save to the supplier request.
13. The Request will now workflow to the Procurement Team for review.





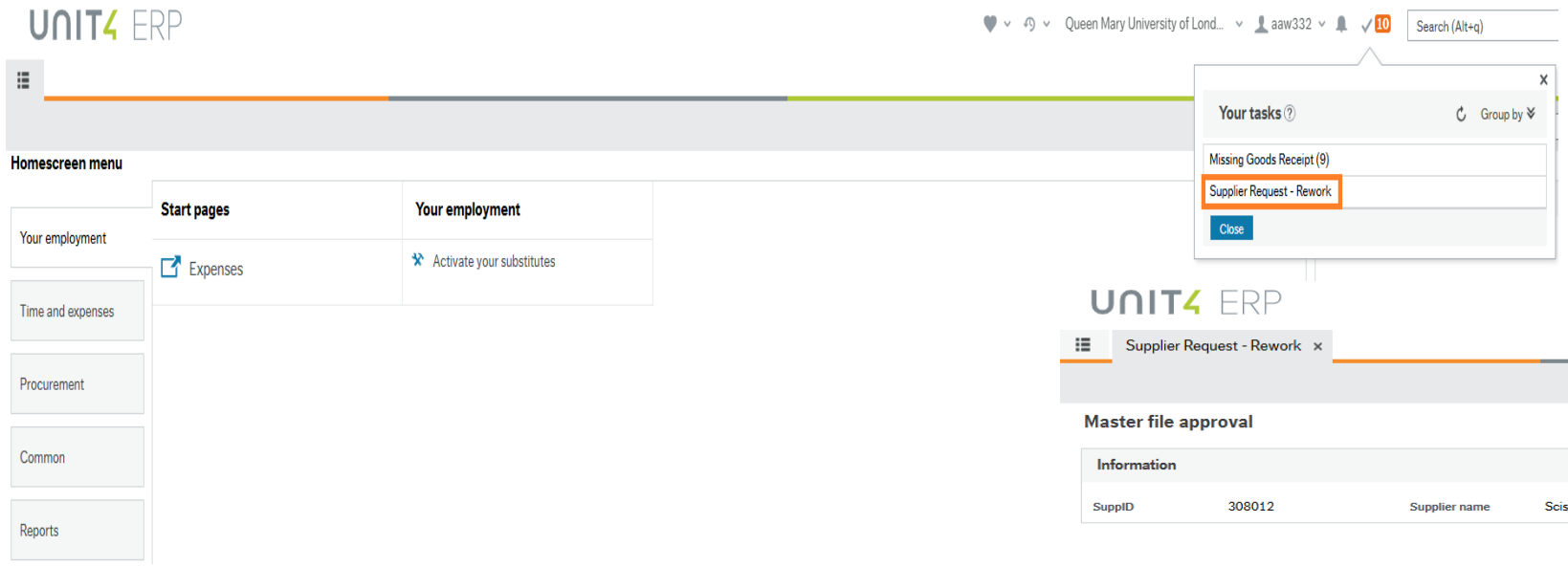
WHAT HAPPENS NOW TO MY SUPPLIER REQUEST?

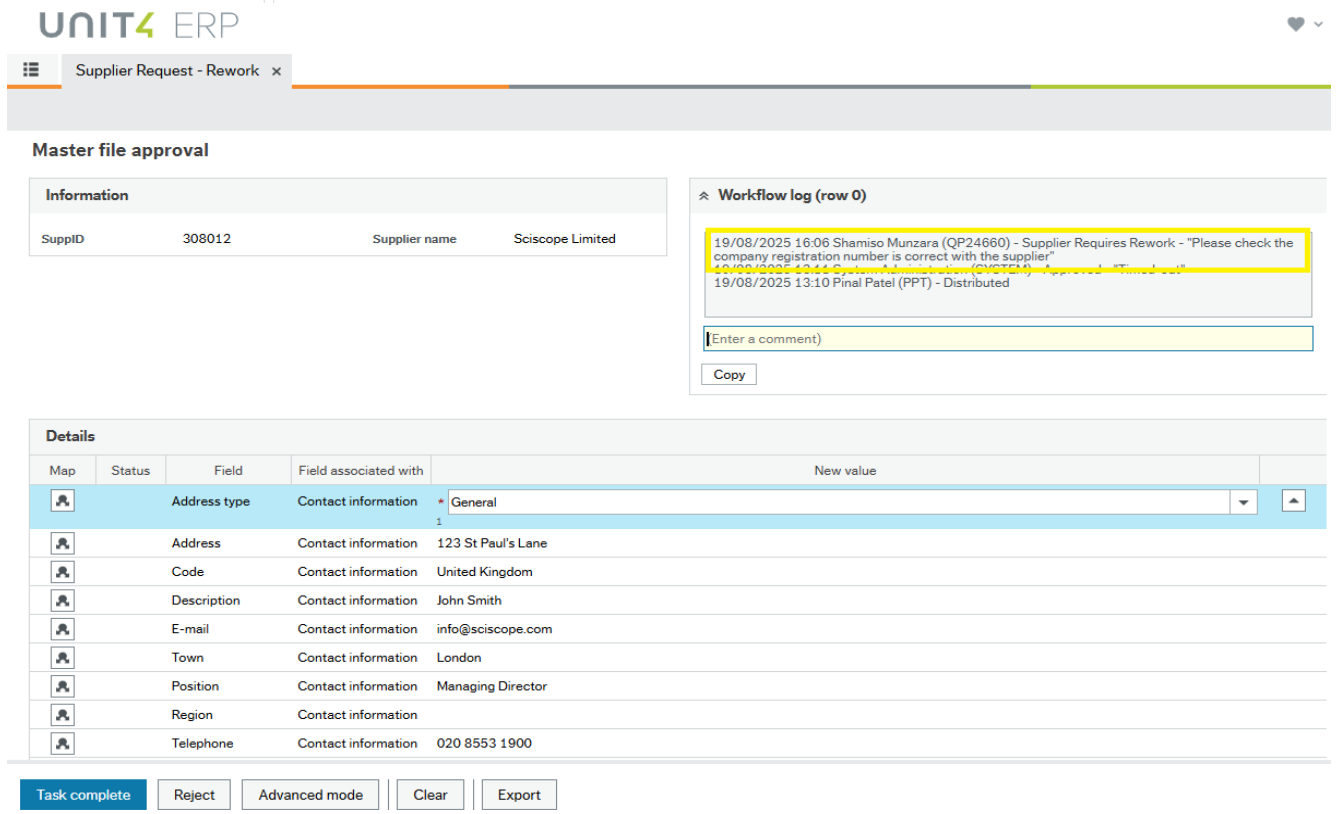
The Supplier request will now workflow to the Procurement Team for approval.
The team will either Approve, Reject or Re-work the supplier request.

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

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EXAMPLE OF SUPPLIER REQUEST REWORKED TO REQUISITIONER FOR ACTION

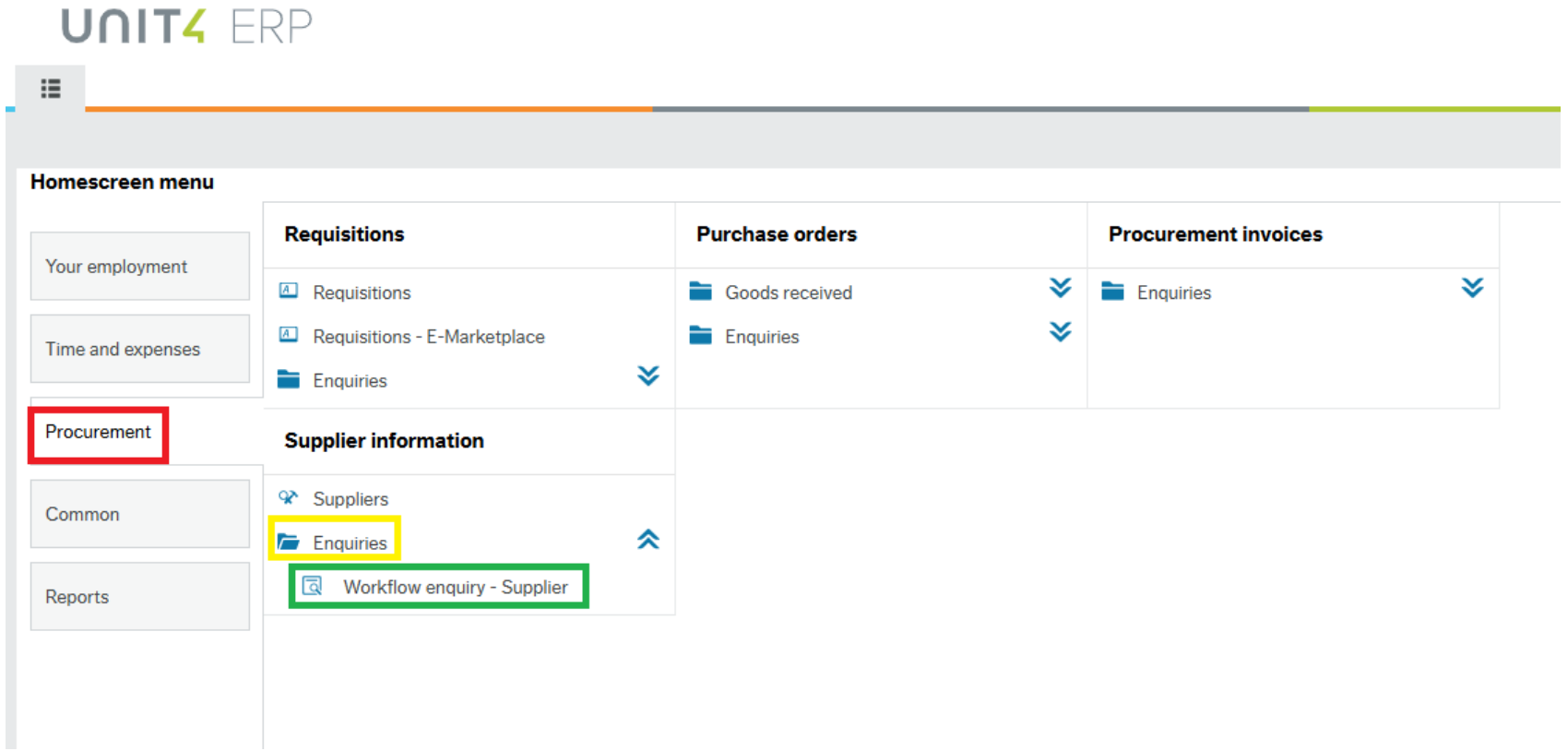




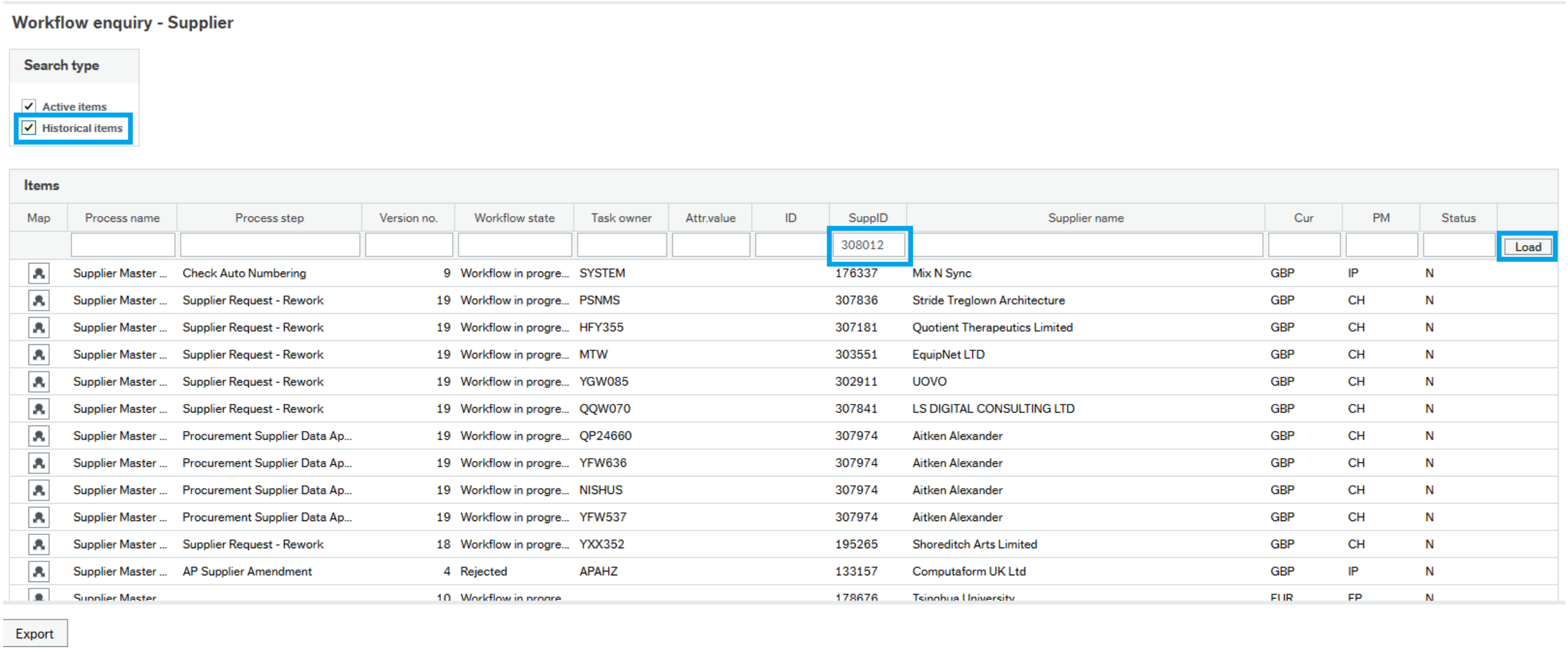
In the Workflow log, you will see a note from Procurement on the action that is required to progress the Supplier Request.

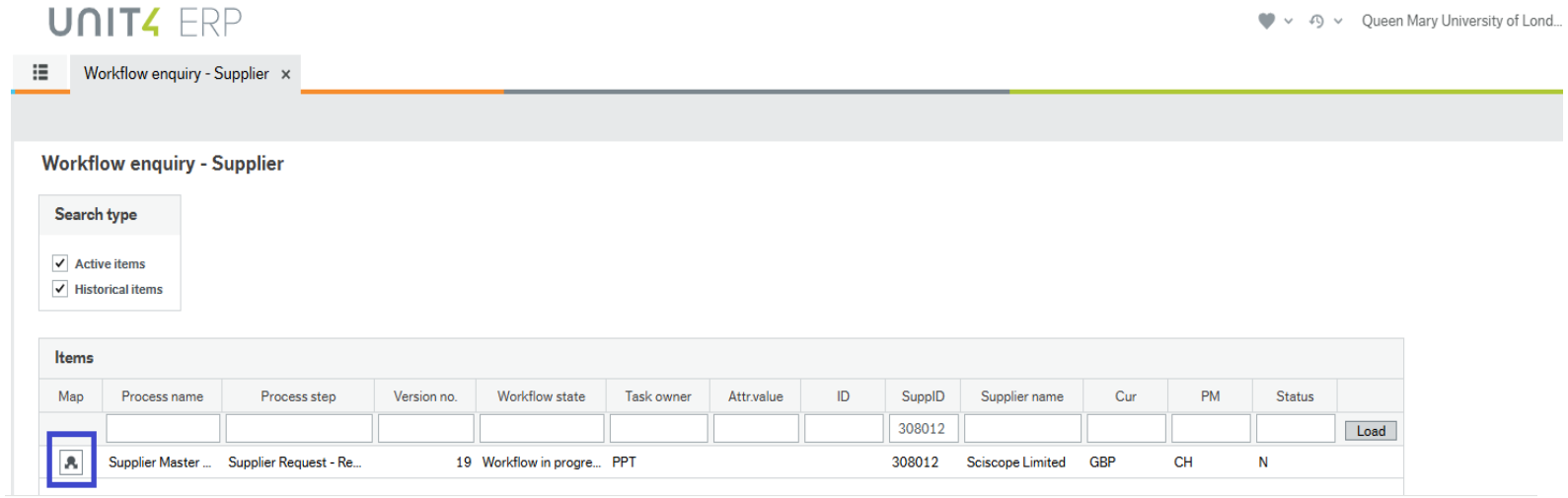
HOW TO CHECK THE WORKFLOW STATUS OF A SUPPLIER

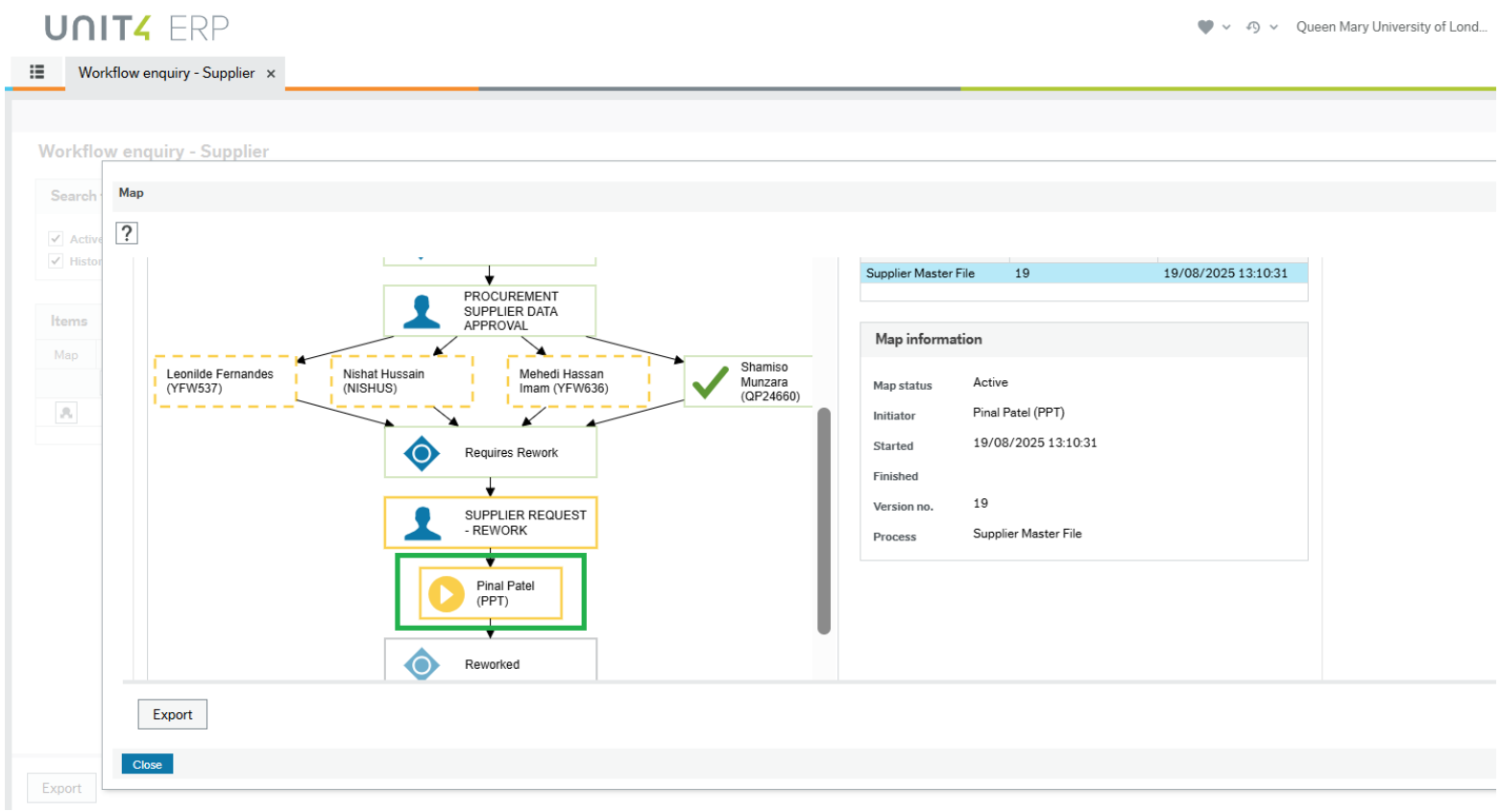
1. Click on Procurement from the Home screen menu
2. Under Supplier information, click on Enquiries, then Workflow enquiry - Supplier



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







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

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.

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Thank You & Queries

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

Finance-procurement@qmul.ac.uk