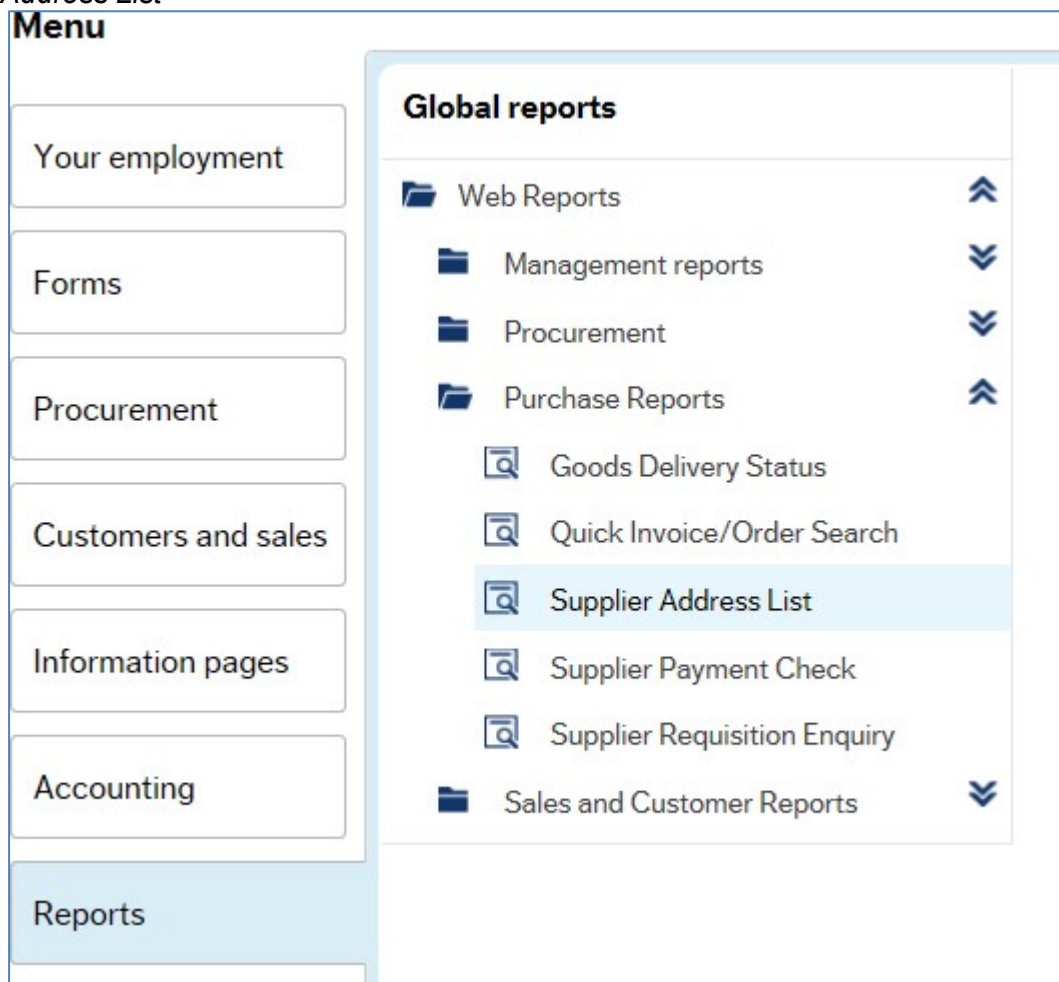


RAISING NEW SUPPLIERS ON U4ERP

1. Check if the Supplier is already set-up.

Some suppliers are already set-up on U4ERP but may be marked as [CLOSED] if they have been inactive for 3+ years. You must search for [CLOSED] suppliers before raising a new supplier request.

1. Log-in to U4ERP Web
2. Navigate to *Reports > Global Reports > Web Reports > Purchase Reports >> Supplier Address List*



3. Delete the letter 'N' from *Status like*:

Status like	N
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4. Enter a wildcard (* *) search on the supplier name or post code. Click *Search*

Selection criteria

Supplier group like

Name like

Post Code like

Status like

Results

Search
Detail level
All levels

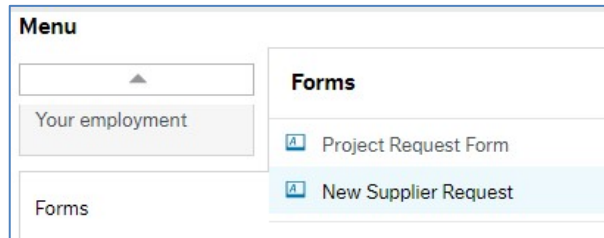
- The search will return all suppliers matching part of your wildcard.

Results			
<div> Search Detail level All levels </div>			
<div> Copy to clipboard Rows per page 50 </div>			
#	SupplID	Name	Text
1	10003693	LYRECO - [CLOSED]	Inactive for 3+ years

- If the supplier exists on the system DO NOT raise a new supplier, but DO check that the bank details are correct.
- If the supplier is shown as [CLOSED] send an email to purchaseledger@hope.ac.uk to request the supplier be opened (set to 'Active'), and confirm correct bank details.
- If no records are returned try searching with different words within the supplier name.
- If the supplier does not exist on the system a 'New Supplier Request form' will need to be completed (see Part B below)

2. How to raise a new Supplier request.

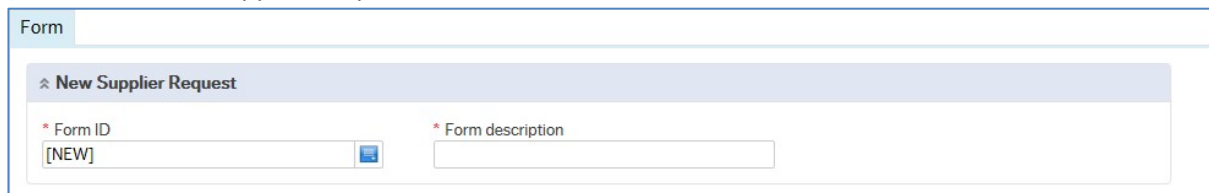
1. Log-in to U4ERP Web
2. Navigate to *Forms > New Supplier Request*



The screenshot shows a 'Menu' on the left with 'Your employment' and 'Forms'. The 'Forms' section is expanded, showing a list of forms: 'Project Request Form' and 'New Supplier Request'.

3. Complete the form fields as per below:

(i) New Supplier Request



The screenshot shows the 'New Supplier Request' form. It has two fields: 'Form ID' with a pre-populated value '[NEW]' and 'Form description'.

Form ID = Pre-populated

Form description = "New supplier request"

(ii) Your Details



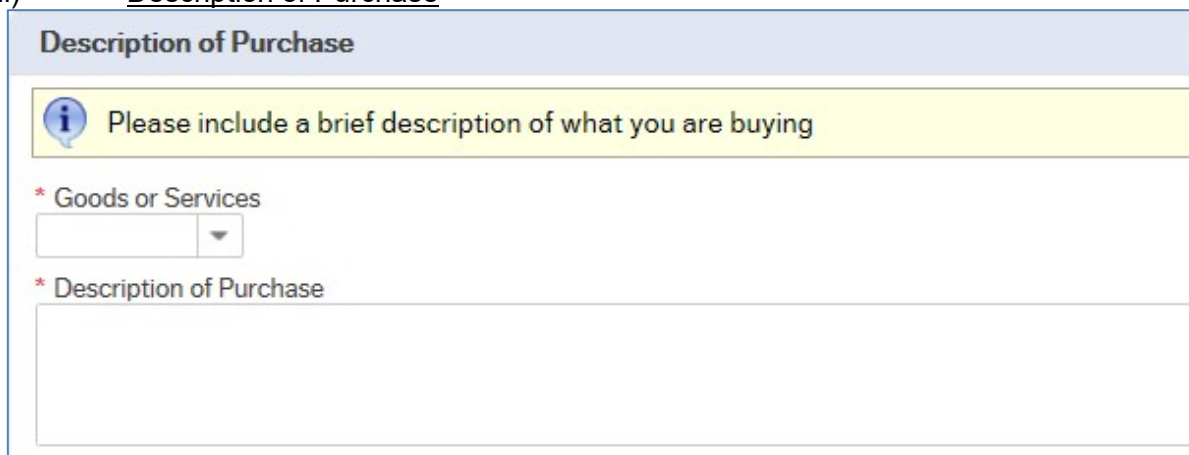
The screenshot shows the 'Your Details' form. It has three fields: 'Your Name' with a pre-populated value 'MHAYES', 'Department', and 'Date of Request' with a pre-populated value '22/02/2019'.

Your Name: Pre-populated

Department: Your Department

Date of Request: Pre-populated

(iii) Description of Purchase




The screenshot shows the 'Description of Purchase' form. It has a message box saying 'Please include a brief description of what you are buying'. Below it are two fields: 'Goods or Services' with a drop-down menu and 'Description of Purchase' with a text area.

Goods or Services: Select from drop-down box

Description of Purchase: Provide a brief description of what you are buying. This should be sufficiently clear as to enable staff to understand the nature of the purchase. Please avoid using single word or vague descriptions, e.g. 'conference', 'goods', 'repair works'. The more information you provide at this stage, the quicker the supplier will be approved.

(iv) Value of Spend – ex VAT

Value of Spend – ex VAT			
 For low value one-off purchases, a University purchasing card should be used wherever possible. If you can pay by card, the supplier does not need set up on Agresso.			
* One-off Purchase?	* Accepts P-card?	* 1st Order Value?	* Est Spend per Annum
<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

One-off purchase: Select from drop-down box.


Accepts P-card: Select from drop-down box.

Note: If it is a low value (under £500) one-off purchase and the supplier accepts purchasing cards then these can be used instead of setting up a new supplier on U4ERP.

1st Order Value: Value of the first order.

Est Spend per Annum: This should be a genuine estimate of the value to be spent with the Supplier per annum. Please note if the estimate exceeds the current Procurement Threshold you may be required to carry out a formal procurement activity.

(v) Employment Status

Employment Status	
 In accordance with employment legislation and HMRC rules (updated 6 April 2017) the University is responsible for determining the correct Employment Status and the correct payment route for individuals and intermediaries. You will need to complete this section if you believe an individual or an intermediary is self-employed for tax purposes Employment Relationship Guidelines Check employment status for tax	
* Completed Assessment?	If Yes, Outcome Attached?
<input type="text"/>	<input type="text"/>


If the supplier is providing a service and is either an individual or a Personal Service Company, you will need to attach evidence of checking their employment status. This can be accessed with this link: [Check employment status for tax](#)

Completed Assessment: Yes or No

If Yes, Outcome Attached: Yes or No

Note: If an assessment should have been carried out or you have carried out the assessment but not attached the outcome to the form, then your new supplier request **will be REJECTED**. Therefore, please ensure you attach the document to save any delays.


(vi) Procurement Policy

Procurement Policy
 The procurement of goods, works or services on behalf of the University must comply with the University's Financial Regulations, which includes the Procurement Policy. Please select the procurement process undertaken. Procurement Policy
* Process Undertaken
<input type="text"/>
Details
<input type="text"/>

Process Undertaken: Pick from drop-down box

Note: If you select *Other-Details* below then please provide details in the box. If you select 'Single Justification' then please attach the form. The form is available here: [Single Supplier Justification form](#)

(vii) Terms and Conditions

Terms and Conditions	
	Will the order(s) be formed on the University's terms and conditions?
* University T&C's	
<input type="text"/>	<input type="button" value="v"/>
If No, enter details here	
<input type="text"/>	

University T&C's: Pick from drop down box

If No, enter details here: Complete the box

Note: This is a declaration that the order will be formed on the University's standard terms of business. You should be certain of this before completing this section.

(viii) Supplier Details

Supplier Details	
* Full Trading Name	* Street Address
<input type="text"/>	<input type="text"/>
Town	County
<input type="text"/>	<input type="text"/>
* Postcode	* Country
<input type="text"/>	<input type="text"/>
Company Registration No	Registered VAT Number
<input type="text"/>	<input type="text"/>
Tel No	Web Address
<input type="text"/>	<input type="text"/>
E-mail Address - Orders	* E-mail Address - BACS
<input type="text"/>	<input type="text"/>
Payment Terms	* Currency
<input type="text"/>	GBP <input type="button" value="v"/>
	Sterling Po...

Complete the fields as required (see below)

Country: For Scotland, Wales and Ireland, select "UK".

Payment Terms: 30 days. Shorter terms require prior approval from the University's Procurement Manager.

Email Address - BACS: Enter the email address to send remittance advice(s) to.

Currency: If the supplier is paid by BACS the currency must stay as GBP – Sterling Pound. If supplier is foreign and the payment method is International Transfer, enter the currency in which the supplier will send their invoices and require payment in.

(ix) Supplier Payment Details

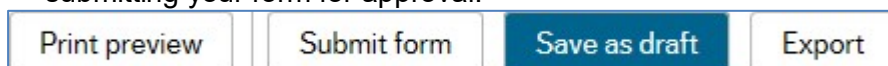


UK or Foreign Account: Pick from drop-down box

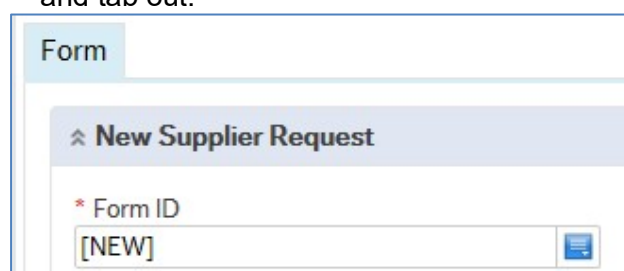
Information Attached: Yes or No

Note: If you **do not** attach bank details the request **will be REJECTED**. Please ensure you attach the document to save any delays.

- Click **Save as draft**. This is **mandatory** to enable documents to be attached, before submitting your form for approval.



- A new Supp.ID will be generated, e.g. 50000000. Make note of this number.
- The Supp.ID can then be used to retrieve the form details. Enter the number in **Form ID** and tab out.



- Click the **paperclip** in the top right corner to attach your documents, e.g. bank details.



Note: The form **MUST** be **SAVED** as a **DRAFT** before documents can be attached. (See 4 above)

- When all documents are uploaded the form is complete.

Documents required for new supplier request

Document required	Link to guidance or form
Signed New Supplier Application Form	New Supplier Application Form
Bank details (either on supplier's letter headed paper or an invoice)	
IR35 Legislation Guidance – (off-payroll/individuals only)	Employment Relationship Guidelines and Approval Process for Engagement
Check employment status for tax – (off-payroll/individuals only)	Check employment status for tax
Signed Self-Employed Declaration – (off-payroll/individuals only)	Self-Employed Declaration

Documents should be attached in pdf or word format.

9. Click *Submit form*

Print preview	Submit form	Save as draft
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10. When the form has been submitted for approval, it will be sent to the Univeristy's Procurement Manager for approval. If the form is approved, the supplier record will be created and you will be informed so you can then raise requisitions against it.

Note: If the form is **REJECTED**, you will receive an email informing you of the rejection. You will need to retrieve the form, make the necessary changes, and resubmit.