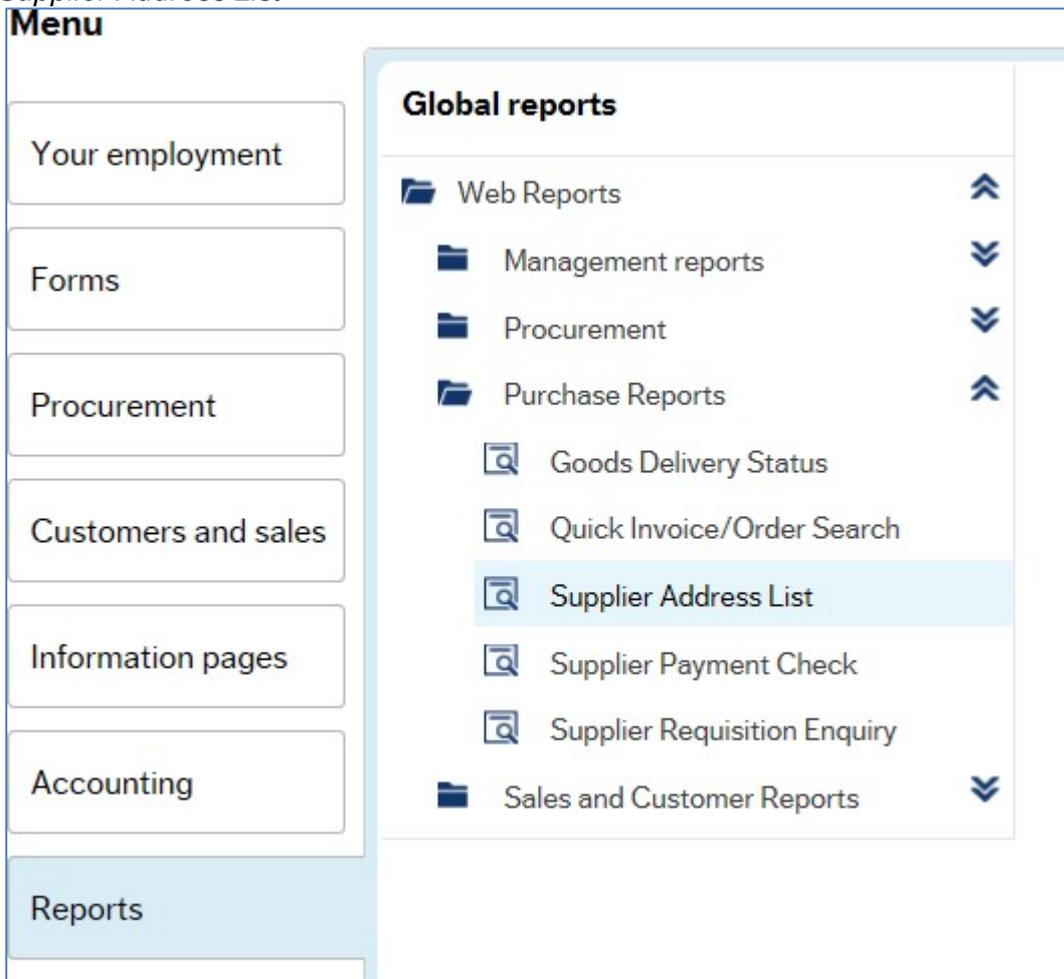


## RAISING NEW SUPPLIERS ON UNIT4

### 1. Check if the Supplier already exists

Some suppliers are already set-up on UNIT4 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 UNIT4 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
-------------	---

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

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

Results

Search  Detail level

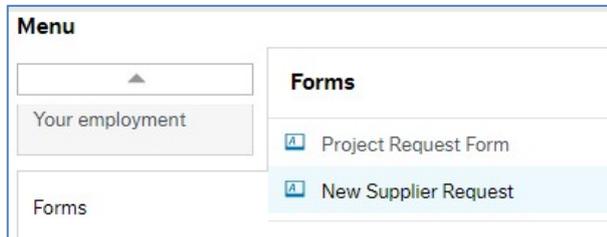
Copy to clipboard  Rows per page

#	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 [purchasledger@hope.ac.uk](mailto:purchasledger@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 UNIT4 Web
2. Navigate to *Forms > New Supplier Request*



The screenshot shows a navigation menu with a search bar and a list of items. The 'Forms' item is selected, and a sub-menu is displayed with two options: 'Project Request Form' and 'New Supplier Request', which is highlighted in blue.

3. Complete the form fields as per below:

### (i) New Supplier Request



The screenshot shows the 'New Supplier Request' form. The 'Form ID' field is pre-populated with '[NEW]' and has a small blue icon to its right. The 'Form description' field is empty.

**Form ID** = Pre-populated

**Form description** = "New supplier request"

### (ii) Your Details



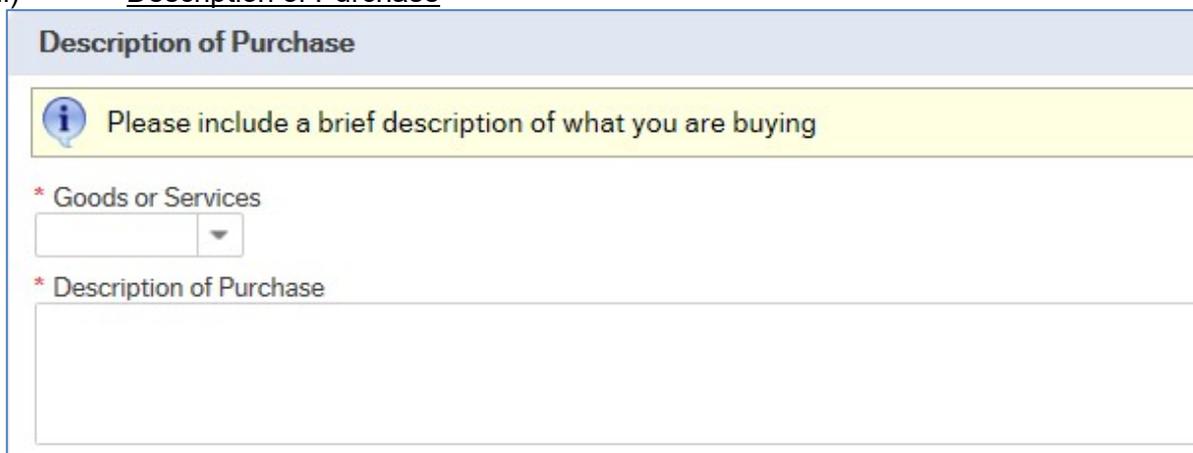
The screenshot shows the 'Your Details' form. The 'Your Name' field is pre-populated with 'MHAYES'. The 'Department' field is empty. The 'Date of Request' field is pre-populated with '22/02/2019' and has a small blue icon to its right.

**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 features a yellow information banner that reads: 'Please include a brief description of what you are buying'. Below this, there is a dropdown menu for 'Goods or Services' and a large text area for 'Description of Purchase'.

**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

**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 UNIT4.*

**1<sup>st</sup> 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

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

**Process Undertaken:** Pick from drop-down box

**Note:** If you select *Other-Details* below then please provide details in the box.

For 'Single Justification' complete and attach the [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  
 ▼

If No, enter details here

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

**Complete the fields as required (see below)**

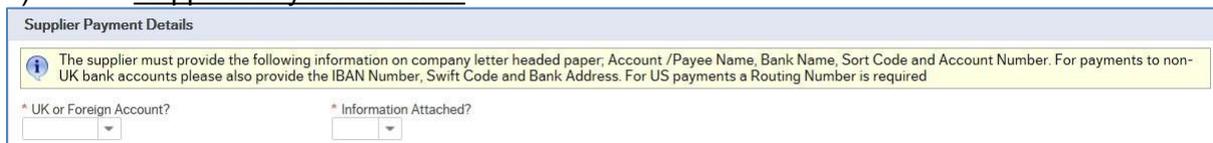
**Country:** For Scotland, Wales and Ireland, select "UK".

**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

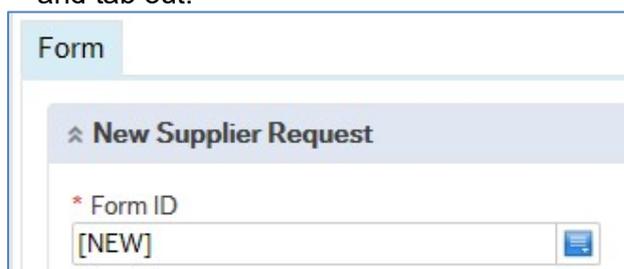
**Information Attached:** Yes or No

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

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



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



7. 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)

8. 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	<a href="#">New Supplier Application Form</a>
Bank details (either on supplier's letter headed paper or an invoice)	
IR35 Legislation Guidance – ( <b>off-payroll/individuals only</b> )	<a href="#">Employment Relationship Guidelines and Approval Process for Engagement</a>
Check employment status for tax – ( <b>off-payroll/individuals only</b> )	<a href="#">Check employment status for tax</a>
Signed Self-Employed Declaration – ( <b>off-payroll/individuals only</b> )	<a href="#">Self-Employed Declaration</a>

Documents should be attached in pdf or word format.

9. Click *Submit form*

Print preview	<b>Submit form</b>	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.*