Introduction
This guide explains how to:
A. Duplicate check if a trade supplier already exists in Business World
B. Submit a request for a new trade supplier

Audience
All staff responsible for raising requisitions, and who have been nominated for the “new supplier” role.

Process

A. Conduct duplicate check to find out if trade supplier already exists in BW

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the main menu select Procurement then Supplier information&gt;Suppliers. The Suppliers window opens.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Supplier information" /></td>
</tr>
<tr>
<td>2.</td>
<td>On the Supplier tab, enter the supplier name in the Lookup. If no matching values are found then the supplier does not exist. Note: if you don’t find your supplier try searching alternative names e.g. edulab or edu lab</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Suppliers" /></td>
</tr>
</tbody>
</table>
What happens next?
Contact the Procurement Team to let them know you want to set up a new trade supplier. Once you have their confirmation to proceed you can send the New Supplier Registration Form to the supplier, for the supplier to complete.

B. Submit a request for a new trade supplier
Follow these steps, using the information provided in the New Supplier Registration Form:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the main menu select <strong>Procurement</strong> then <strong>Supplier information&gt;Suppliers</strong>. The Suppliers window opens.</td>
</tr>
<tr>
<td>2.</td>
<td>Click <strong>New</strong>.</td>
</tr>
</tbody>
</table>
| 3.   | Complete the **Supplier** tab:  
| a.   | Enter the supplier name, as it appears on the form.  
| b.   | Select “Trade Suppliers” from the dropdown.  
| c.   | Country - defaults to United Kingdom can be changed.  
| d.   | Language - defaults to English UK, can be changed.  
| e.   | Head office – defaults to the supplier name entered at step a.  
| f.   | Company registration number.  
| g.   | VAT registration number.  
| h.   | Enter an abbreviation (sensible) for the supplier name.  
| i.   | For legacy suppliers migrated at go-live, enter the BluQube ID. Otherwise enter ‘0’  
| j.   | Customer ID field – leave blank.  
| k.   | Notes field for additional relevant information. |
4. Complete the **Contact information** tab. Click **Add** to add the address.

5. Complete the **Address details**
   a. Address type. You can have multiple addresses (e.g. different area offices), but you must have at minimum a **General** address.
   b. Address details
   c. Telephone number - provide at least one.
   d. E-mail – email address to which purchase orders will be sent
   e. E-mail cc – email address to which payment remittances will be sent
   f. Contact person – typically sales rep or account manager

6. Click **Add** to add additional addresses (e.g. if invoice address is different)
7. Click **Save**.
8. Click **OK** at the **Update relations** window.

Click **OK** at the **Auto-numbering** window. A warning about missing bank details is displayed. You can ignore this as bank details will be obtained from the supplier by the Procurement Team as part of their validation checks.

**Warning**

IBAN and Bank account are empty. One of these is usually required for electronic payment transfers. Successfully saved. Supplier ID TS10542 is now created and is sent for approval.

9. Click the paperclip icon in the toolbar
### Business World Quick Reference P2P05
#### Request a new trade supplier

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click <strong>Add a document</strong> then locate and upload the New Supplier Registration Form to the record.</td>
</tr>
<tr>
<td>11.</td>
<td>Click <strong>Save</strong> to save the changes</td>
</tr>
<tr>
<td>12.</td>
<td>Click <strong>OK</strong> at the warning</td>
</tr>
</tbody>
</table>

**What happens next?**

The new supplier request is routed to the Procurement Team for checking and validation. These checks can take up to 3 days as the Procurement Team need to liaise with the supplier. In some cases this could be longer if there are further queries, but the Procurement Team will aim to keep you informed.

Once the supplier has been approved in Business World a job runs overnight to export the supplier record to Proactis, and add the category coding. The supplier is then available for use. You will receive an email notification outside of Business World when this is done.

**Where to go for help**

If you need advice or have any questions about trade suppliers contact the Procurement Team.