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

<table>
<thead>
<tr>
<th>Requestor</th>
<th>Requestor</th>
<th>Requestor</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Conducts duplicate check in BW</td>
<td>• Checks with Procurement</td>
<td>• Sends New Supplier Registration Form to supplier plus requests bank details on letter-headed paper</td>
<td>• Completes and returns form plus bank details on letter-headed paper</td>
</tr>
</tbody>
</table>

New supplier available for use in BW

1 day

1 day

5 days

Procurement
• Validates and approves supplier

Supplier automatically set up overnight in Proactis

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</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>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>
</tbody>
</table>

Not all legacy Blu Qube suppliers were migrated to Business World.
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 them to complete. You should also request their bank details on letter-headed paper.

If the supplier is not going to be used more than three times, the Procurement Team may direct you down the 'Sundry Trade Supplier' route, and will advise further.

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

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<tr>
<td>1.</td>
<td>From the main menu select <strong>Procurement</strong> then <strong>Supplier information&gt;Suppliers</strong>. The <strong>Suppliers</strong> window opens.</td>
</tr>
<tr>
<td>2.</td>
<td>Click New.</td>
</tr>
</tbody>
</table>
| 3.   | Complete the **Supplier** tab:  
  a. **Supplier ID** – DO NOT overwrite. The ID is automatically assigned on saving.  
  b. **Supplier name** - enter the name, as it appears on the form.  
  c. **Supplier group** - select "Trade Suppliers" from the dropdown.  
  d. **Country** - defaults to United Kingdom, can be changed.  
  e. **Language** - defaults to English UK, can be changed.  
  f. **Head office** – defaults to the supplier name entered at step a.  
  g. **Company registration number** – enter the number. If none, leave blank.  
  h. **VAT registration number** – enter the number. If none, leave blank.  
  i. **Short name** - enter an abbreviation (sensible) for the supplier name.  
  j. **External reference** - enter '0'  
  k. **Customer ID** – leave blank.  
  l. **Notes** – leave blank. |
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** - provide at least one number.
   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

![Address details](image)

You MUST populate the following five fields for the supplier record to be successfully integrated into Proactis: **Street Address; Town/City; Post Code; Telephone; E-mail**

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.
9. 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.

The supplier has been assigned a trade supplier ID.
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<td>10.</td>
<td>Click the paperclip icon in the toolbar</td>
</tr>
<tr>
<td>11.</td>
<td>Click <strong>Add a document</strong> then locate and upload the <strong>New Supplier Registration Form</strong> and the supplier's bank details letter, to the record.</td>
</tr>
</tbody>
</table>

If you close the window **before** uploading the documents, the supplier record will no longer be visible to you as it will be in workflow awaiting approval. Please email the documents directly to the Procurement Team who will attach the supplier record on your behalf (procurement@bbk.ac.uk).

**What happens next?**
The new supplier request is routed to the Procurement Team for checking and validation. These checks can take up to 5 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.

**Where to go for help**
If you need advice or have any questions about trade suppliers contact the Procurement Team.