Table of Contents

Requesting Access .................................................................................................................. 3
Search Only.............................................................................................................................. 3
Access to request new supplier, amend or reactivate ................................................................. 3

Logging on and Searching Suppliers (Full Access only) ......................................................... 4

Amending Supplier Details....................................................................................................... 7

Adding a New Supplier Site ..................................................................................................... 10
If Supplier is ‘Inactive’ or ‘Deactivated’ ................................................................................... 10

Reactivating an Inactive Supplier ............................................................................................ 11

Adding a New Supplier .......................................................................................................... 13

Viewing Supplier Requests and Re-Submitting ...................................................................... 16
Requesting Access

There are two levels of access to the on-line supplier database.

Search Only

This level is available automatically to employees who use CUFS and have a Raven ID and password.

The purpose of the search facility is to alert staff to existing suppliers and preferred suppliers that may already exist on the system. These should be reviewed and preferably used before a request to set up a new supplier is submitted. Guidance on how to use the search only facility is covered in a separate guide.

Access to request new supplier, amend or reactivate

This level of access is available to key contacts and allocated individuals to search, request a new supplier, amend or reactivate an existing supplier.

To access the database a Raven password is required. Once the individual who requires full access has a Raven password the Departmental Administrator must e-mail UFS_Suppliers@admin.cam.ac.uk with the individuals CRSID.

It is essential that the Departmental Administrator e-mails the helpdesk with the level of authority required on the system so that they can authenticate the CRSID onto the database to enable the correct access.
Logging on and Searching Suppliers (Full Access only)

1. You will need to log on with your CRSID and Raven password. Once you have logged on the following screen will display.

   From this screen, you can amend your email address and phone number if it is incorrect, by clicking on here as these details will be used should Procurement Services need to contact you.

   ![Supplier Search and Request](image)

2. Click on Continue to display the Supplier Search Screen.

   ![Supplier Search Screen](image)
3. Search for the supplier that you wish to purchase from or use to ensure that it is not already loaded on the system. You can search for a supplier in a number of ways:

Name
No limit to the number of characters, part or full name of supplier and no need for the wildcard (%).

First line of address
First line of supplier’s address

VAT/Registration
Supplier’s VAT or company registration number if known.

Postcode
Supplier’s postcode.

Keyword
Enter an item relating to your supplier, e.g. paper and click on the Go button. All suppliers which have that keyword assigned to them will then be displayed.

Supplier number
Use this field if you want to search for an existing supplier by its number. This unique number will have been generated by CUFS when the supplier was first created.

Types of Supplier
If unsure leave the Select all box ticked.

Commodity
Using the drop down list select the commodity you wish to search for. Use the blue information icon next to this field for further information.

Commodity code
Is the first letter of the category code to indicate the category that the items falls under, for example A = Audio Visual and Multi-Media.

Once you have completed the relevant search fields, click on any of the Go buttons to see whether there is a supplier that matches your search criteria.

A further search tool is also available, which can be accessed via the Additional Search Tool button. To use this, enter a word in connection with the supplier you are searching for, e.g. paper and a list of matches will display. Click on the most appropriate match to view a list of suppliers which have been attributed to the matching word.

4. If a supplier already exists in the database that matches your search criteria a summary of the supplier will display. In this scenario I searched using the word Paper
Preferred suppliers matching your search criteria will be displayed first and are colour coded in green. Wherever possible, the University encourages you to use a Preferred Supplier.

For further information on Preferred Suppliers, access the Preferred Suppliers section on the Procurement Services website - [http://www.admin.cam.ac.uk/offices/purchasing/suppliers](http://www.admin.cam.ac.uk/offices/purchasing/suppliers)

5. If your supplier is not displayed on the Preferred Suppliers list, click on **Display all suppliers**.

6. If your supplier:
   - is on the full list and **does not** show as Inactive or Deactivated no further action is required as the supplier is already set up to use.
   - is showing as **Inactive** or **Deactivated** refer to the section ‘If a Supplier is ‘Inactive’ or ‘Deactivated’.
   - is not showing on the full list at all refer to the section ‘Adding a New Supplier’.

7. To view the full details of a supplier on the list, click on **Details**. The information will include current and deactivated site addresses. If supplier details need updating you have the option of clicking on ‘Amendment request’.
Amending Supplier Details

Company names and addresses can only be changed if you are in possession of an official document detailing the relevant change. Examples of such documents could include a letter from the company stating the change, or a copy of an invoice headed with the company’s new name or address.

The document should be forwarded to the Accounts Payable office at the Finance Division preferably by adding a scanned document as an attachment to the request online, faxing a copy or if you do not have a scanner or fax or need to send an original, via the UMS. **Note that original documents are always required for changes to bank account details.**

**Pre-Requisite:** Search for supplier, click on supplier details, Amendment request

A screen will display with important information which will help reduce the amount of time it takes to process your amendment. Please read this carefully.

1. Find the line that contains the information that you want to change and click on the **Amend** button.

   **Note:** If you require either the pay terms or pay group to be amended, please contact Accounts Payable.

2. The screen that follows once you click on **Amend** will vary depending on the line detail you wish to amend. Amend the information as required and click **Continue.**
3. The system will return to the amendments screen and your proposed amendment will be highlighted in yellow. This must now be authorised by clicking on the Authorise button.

<table>
<thead>
<tr>
<th>Supplier Site</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>BURY</td>
</tr>
<tr>
<td>Purchasing</td>
<td>Y</td>
</tr>
<tr>
<td>RFQ only</td>
<td>N</td>
</tr>
<tr>
<td>Payment</td>
<td>Y</td>
</tr>
<tr>
<td>Address_1</td>
<td>Po Box 444</td>
</tr>
<tr>
<td>Address_2</td>
<td></td>
</tr>
<tr>
<td>Address_3</td>
<td></td>
</tr>
<tr>
<td>Address_4</td>
<td></td>
</tr>
<tr>
<td>Town/City</td>
<td>Bury</td>
</tr>
<tr>
<td>County/State</td>
<td></td>
</tr>
<tr>
<td>Postcode/Zip</td>
<td>BL6 9AP</td>
</tr>
<tr>
<td>Province</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td>GB</td>
</tr>
<tr>
<td>Telephone area code</td>
<td></td>
</tr>
<tr>
<td>Telephone number</td>
<td></td>
</tr>
<tr>
<td>Fax area code</td>
<td></td>
</tr>
<tr>
<td>Fax number</td>
<td></td>
</tr>
<tr>
<td>Pay terms</td>
<td>Net 30</td>
</tr>
<tr>
<td>VAT number</td>
<td></td>
</tr>
<tr>
<td>Inactive date</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>Y</td>
</tr>
</tbody>
</table>

4. The next screen will ask you to enter a reason as to why you wish to make this amendment. Enter the appropriate comments such as the supplier changing address, telephone number etc.

If relevant, include any information on what you need to purchase, the value of the purchase and whether any other suppliers have been contacted for quotes etc or if not, whether a dispensation has been granted as this will help your request be processed more quickly.

Please state whether the amendment is needed to raise an invoice or purchase order, and whether it is for a one-off transaction.

5. Click on Authorise.
6. If you have any supporting documentation, you will now be able to attach it by clicking on the Add supporting document button.

7. If your request is for purchasing and invoice has not yet been raised we can accept company headed documents e.g. a quote to support the request. Please use this if you require a payment site, all supplier requests must have a relevant copy invoice attached.

If you would like to receive an email detailing your proposed amendments, click the Email me details button.

This information will now be sent electronically to Procurement Services for approval.
Adding a New Supplier Site

Use this facility to add a new address to the supplier’s record. NB - You should not amend an existing site if it is a completely new site

Pre-Requisite: Search for supplier, click on supplier details, Amendment request

1. At the bottom of the screen click on Add Site. The system will then generate a blank form for you to fill in with the new supplier address. You must click on the amend button adjacent to each line you wish to add information to. Each amendment must then be authorised.

   ![Image of supplier details form]

2. Follow the “Amending Supplier Details” instructions above.

If Supplier is ‘Inactive’ or ‘Deactivated’

If a supplier is shown as:

**Inactive**
- Supplier has not been used during the last 18 months.
- It can be reactivated. Refer to the reference guide “Reactivating an Inactive Supplier” below.

**Deactivated**
- These are either duplicate suppliers or suppliers that have ceased trading or are in administration. No further action can be taken. The supplier name is also prefixed with (**).
Reactivating an Inactive Supplier

It is possible to submit a request to reactivate an inactive supplier.

1. Find the supplier that you wish to reactivate. For further information refer to the reference guide “Searching for Suppliers”.

2. Click on the Details button adjacent to the supplier that you want to reactivate.

3. Scroll to the bottom of the page and click on the Reactivate button.

4. Complete all of the fields on this screen. An example is shown below.

Factors that you will need to consider are:

- The reason for reactivating the supplier.
- Do you require the reactivation for raising a purchase order or paying an invoice?
- Do you need the reactivation for a one-off or repeat purchase/payment?
- How much does your department expect to spend with this supplier?
- If your request relates to a purchase, whether any other suppliers (please list them) have been contacted for quotes etc or if not, whether a dispensation has been granted.

The information will help Procurement Services to confirm that you have followed the University’s Financial Regulations in the tendering and selection of your supplier. **Failure to provide adequate information may result in your request being rejected.**

5. Click on the Reactivate button.
Note that you may be contacted by the Finance Division if there are any queries surrounding your reactivation request. Finance must be satisfied that there is a valid reason for the reactivation before the request is actioned.

After clicking on the Reactivate button, you will have the opportunity to amend the supplier details and attach any supporting documentation. For further information refer to the guidance notes “Amending Supplier Details” at: 
http://ufs.admin.cam.ac.uk/reference/upgrade/purchasing/amending_supplier.pdf

If you do not wish to amend the supplier details, at this point you can close your web browser or select another task from the bottom of the page.
Adding a New Supplier

If the supplier is not listed at all in your search results, you will need to request a new addition to the supplier database.

1. Scroll to the bottom of your search results and click on the **Add New Supplier** button.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Supplier number</th>
<th>Note</th>
<th>Keywords</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIOPTICA</td>
<td>Supplier</td>
<td>8800887</td>
<td>New record uploaded into LPS 10-Oct-2017</td>
<td>Training Courses</td>
</tr>
<tr>
<td>BIOPTICA</td>
<td>Supplier</td>
<td>231146</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DOUGLAS CONNECT</td>
<td>Supplier</td>
<td>980298</td>
<td>New record uploaded into LPS 26-Sep-2007</td>
<td>Training Courses</td>
</tr>
<tr>
<td>DOUGLAS CONNECT</td>
<td>Supplier</td>
<td>229363</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSA INTERACTIVE LTD TIA CAMBRIDGE HM SUMMIT</td>
<td>Supplier</td>
<td>9800330</td>
<td>New record uploaded into LPS 26-Sep-2007</td>
<td>Training Courses</td>
</tr>
<tr>
<td>MSA INTERACTIVE LTD TIA CAMBRIDGE HM SUMMIT</td>
<td>Supplier</td>
<td>9800164</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Istrum Training Solutions Limited</td>
<td>Supplier</td>
<td>9800920</td>
<td>New record uploaded into LPS 05-Oct-2017</td>
<td>Training Courses</td>
</tr>
<tr>
<td>ROSTRUM TRAINING SOLUTIONS LIMITED</td>
<td>Supplier</td>
<td>231035</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BUE TRINDER LTD</td>
<td>Supplier</td>
<td>232687</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Select the type of supplier on the next screen and click **Continue**. Move your cursor over the blue information icon for further information on each of the supplier types available.
3. Complete all of the fields on this screen. If you do not enter any information in a required field, the system will advise you and you will need to go back and correct this. Type in capitals.

4. Click Continue.
5. The next screen will summarise the information that you entered on the previous page. If you notice any errors such as a spelling mistake, click on **Back to edit**, correct the error and re-submit the form. Once you are happy with your selections, click **Check for Duplicates before Save**. The system will cross reference the new information with all existing suppliers to double check that it does not already exist:

The system will not only cross reference the supplier name at this point, but also other fields such as the address and VAT number. If possible matches are found, they will be displayed on the above screen. If you recognise any of these to be your supplier, abandon the process at this stage by closing your web browser.

If you have any supporting documentation, you will now be able to attach it by clicking on the “Add supporting document” button.

6. Click **Save** to finish your request. Scroll to the bottom of the next screen and click on **Email me details** if you would like to receive an email detailing your new request. Alternatively, read the section “Viewing Supplier Requests” to view your request online.

Your request will now be sent electronically to the appropriate office at the Finance Division, who will make the necessary checks on the supplier. Once these checks have been made, one of two things will happen:

- The request will be approved and the supplier will be added into CUFS.
- The request will be rejected. If this happens, you will receive an email detailing the reason for this and if applicable it will also ask you for further information and you will need to resubmit your request.

Information will also be sent to the Tax office if you are creating an individual. It is possible to view the status of your requests for new suppliers and amendments. The next section looks at this process.
Viewing Supplier Requests and Re-Submitting

After logging on using your Raven ID and password, the Welcome screen displays.

1. To view your current requests and their status, click on manage your new suppliers or manage your amendment and reactivation requests.

2. The screen below will then be displayed.

Re-submitting a rejected request

In the above example, the request to add Cambridge Training Company plc to the database has been rejected. This is detailed in the State column.

Rejected requests require you to either correct a mistake or provide further information.
Follow these steps to do this:

1. Click on the supplier name to view the request details.

The note states that the VAT number is incorrect, therefore it must be changed and the request must be re-submitted.

2. Scroll down the page to find the field that you need to change. Additional documentation can also be attached if relevant.

3. Amend the information and click **Save**.

4. Click **Authorise** and enter a comment to reflect what you have changed. In this example, a suitable comment would be “VAT number now corrected”.

5. Click **Authorise** to finish the process.