**August 2020**

** New Vendors, Re-activating Vendors and Contract for Service Vendor Application Form**

*Form and procedure are intended for internal use*

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 **Background**

Since installing the PeopleSoft financial management system in 1999, Unitec have created over 40000 supplier records, many of whom are only used once. Currently, up to 3500 suppliers are active in the system at any one time.

The vast number and disparate nature of the supplier’s make it difficult to analyse expenditure and obtain best value for money from our suppliers. The Procurement Service aims to limit the amount of suppliers in the system to make it more manageable and to be better able to leverage Unitec’s buying power.

To achieve this, the addition of new suppliers and reactivation of old suppliers requires the approval of the Procurement Service.

**Procedure**

A request to set up and use a new supplier is sent to the Unitec Procurement team. **Usually this request will have been preceded by a supplier selection and evaluation process**, the requirements and nature of this process are dependent on the value that will be spent with the supplier. Where Procurement have not been involved with the supplier selection process they may request relevant information and documentation before approving the supplier for use by Unitec departments.

This process may take some time and require a certain amount of forward planning before new suppliers are brought on board and goods or services ordered.

**Please remember** that you must have an approved PeopleSoft Purchase Order to order any goods or services. This means that no order or transaction may be initiated without the supplier being approved and active in the PeopleSoft System. We certainly should not initiate the vendor set up after the invoice has been issued.

Please note that committing Unitec to a purchase from a supplier without a valid approved Purchase Order contravenes Unitec’s financial delegation policy and procurement policy and is not permitted. Refer to the relevant policies on the Nest.

**Process**

**New Suppliers / Vendors**

If there is no suitable supplier in the Unitec system for the goods or services you require, or you completed a formal selection process that awarded business to a new supplier, you complete the attached form to request the approval and set up of the supplier prior to ordering.

To do this the buyer needs to:

* Print out and complete the following form, sign it and forward it to procurement@unitec.ac.nz together with a bank account document (see1) to obtain approval and have the vendor set up, **or**
* Send a completed scanned form and supporting documents to procurement@unitec.ac.nz requesting the vendor be approved and set up. The form needs to be signed by the requesting staff member.
1. Remember to attach documentation confirming bank account details. It is a requirement for financial security and for the auditing process that we hold a document showing bank name, account holder name and bank account number before we set up a vendor. It should be issued by the bank and show the letterhead or website headers of the bank. It must be something that is not easily altered. A scan sent as an email attachment is acceptable, however it must be the scan of an original document and clearly legible after printing. The following documentation is acceptable provided it is of good quality and either original, or clearly a scan of the original:
* Deposit slip
* Top part of a bank statement with the transactions left off or covered
* A scan of a cheque
* A screenshot from internet banking provided it shows the website address of the bank and the logo’s etc are clearly visible
1. Remember to provide a reason why the new vendor is required. This may include the provision of pricing comparisons with existing vendors.

 Attach a copy of the Quote / Proposal / email whenever possible.

The Procurement Service will evaluate your request. This might take some time, particularly if there are any questions requiring follow up such as the rationale to add similar vendors, a vendor where alternative suppliers already exist in the system, possible conflict with a preferred supplier agreement, or missing information. There may also be the need for legal input.

When a request is declined or further information is needed, the buyer / requester will be notified.

If your request is approved, the vendor will be set up in the PeopleSoft financial management system, you will be notified via email and you can then raise the Purchase Order.

**Inactive Suppliers / Vendors**

For the re-activation of inactive suppliers, the completion of the New Supplier Form is also required to confirm if there have been any changes.

Reactivation needs to be approved by the Procurement Service and may be declined depending on the reasons the supplier has been closed. You will be notified if reactivation is declined or further information is required. Please provide supporting documentation where a change of bank account needs to be processed.

If your request is approved, the vendor will be reactivated in the PeopleSoft financial management system, you will be notified accordingly and you can then raise the Purchase Order.

**Contacts in Procurement are:**

Dagmar Osborne, Purchasing Officer, dosborne@unitec.ac.nz

procurement@unitec.ac.nz



**NEW SUPPLIER REQUEST FOR APPROVAL AND SET UP *or* SUPPLIER REACTIVATION REQUEST**

***Supplier Details:***

|  |  |  |
| --- | --- | --- |
| **Supplier’s Full Business Name:** |  | **P/Soft Supplier ID #:** |
| **Trading As:** |  | **Short Vendor Name:** |
| **Supplier’s Postal Address:** PO Box or Private Bag No: |
| Suburb |  | Country |  |
| City |  | Post Code |  |
| **Supplier’s Physical Address if different:** Number / Street : |
| Suburb: |  | City: |  | Post Code |  |
| **Supplier’s Contact Details :** |
| **Phone**  |  | Fax |  | **Mobile** |  |
| **E mail for Purchase Orders** |  |
| **GST Registered in NZ?** | Yes / No | **NZ GST Number:** |  |
| **NZ Withholding tax?**  | Yes / No | **NZ IRD Number if applicable** |  |

|  |  |
| --- | --- |
| **BANKING INSTRUCTIONS** | Payment Method: EFT(preferred) / Other(specify) |
| **Currency** | NZ Dollar / Other :  | **Bank A/C Number** | **Please supply support document**  |
| **Bank** |  |  |  |
| **Email for Remittance** |  |
| **Unitec Payment Terms** | All Payments are made 20th of the month following the date in the invoice |

***Requesting Unitec Staff to provide all information in this section:***

|  |  |  |  |
| --- | --- | --- | --- |
| **New Supplier?** | Yes / No | **Contract for Service**  | Yes / No |
| **Please explain what goods or services this supplier will provide** |  |
| **Anticipated Annual Spend** | **$** |
| **Please explain what process was used to select this new supplier** | Attach supporting information such as quotes, offer evaluation or emails |
| **Please advise the people who were involved in the selection process** |  |
| **Please advise if there is any written arrangement**  | Yes / No **If yes** advise signatory on behalf of Unitec and attach scan of document **or** provide contract number from Unitec’s Contracts Register |
| **COMMENTS** Include justification if requesting different payment terms  |
| **Requesting Unitec Staff** | **Print Name** | **Signature** | **Date** |
| Requested by: |  |  |  |
| Requester Email |  | Requesting Department |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Procurement Department Action** | **Print Name** | **Signature** | **Date** |  |
| Approved / Rejected |  |  |  | **Supplier Type:** |
| PeopleSoft set up completed: |  |  |  |  |
| Buyer Notified |  |  |  |  |

**The new supplier must be approved and authorised by the Procurement Department before anything can be ordered from them**. **Missing information will delay processing.**