

# Procurement Newsletter

## November 2022

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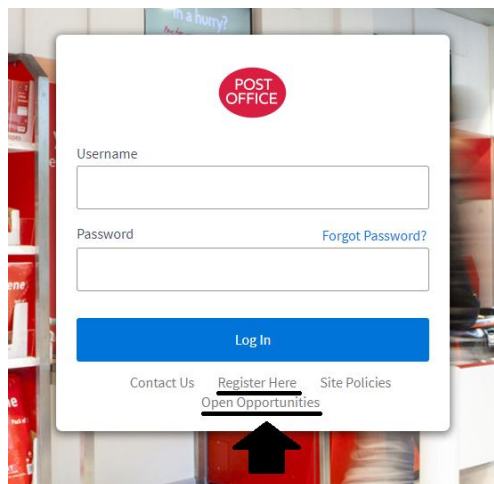
At Post Office, we're here, in person, for the people who rely on us. Our network of over 11,500 branches, which serves millions of customers every week, provides our customers with access to over 170 different products and services including travel money, banking, passports, mails and much more. As the hub of many cities, towns and villages, Post Office understands the important role the local Post Office plays within communities across the UK.

We have introduced a series of quarterly newsletters to our Supplier partners to:

- Raise awareness of our values and the subjects that matter to us.
- Provide news, information and training that will help you to do business with us.
- Help you find opportunities to work with us as we grow and change for the future.

## Registering and maintaining account details

Following on from our previous newsletter, we are providing more information on registration of Supplier accounts.



We have a Source to Settle system, where suppliers can see current open opportunities, take part in events, and see purchase orders and invoices. Suppliers can reach this using the link from our website. The website also contains training material and other important documents.

### Registering

At the login screen, suppliers can register on our system by clicking on 'Register Here' and entering the company name and a contact email address. If your company has already registered, you will be alerted and can get in touch with us by email to be added as a contact.

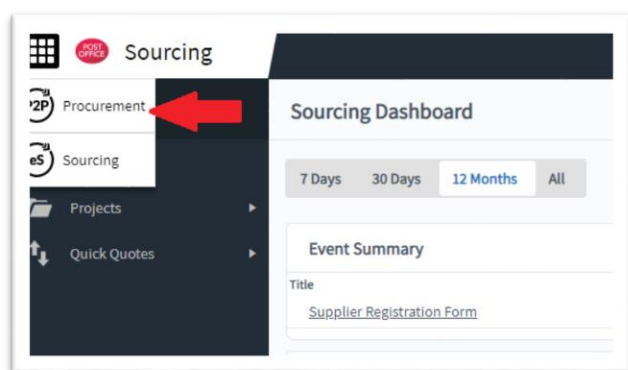
When registering your company for the first time, you may be asked to take part in the Supplier Registration Form (SRF) which enables the Post Office to gather information for due diligence purposes. The training documents on our website includes a guide and an example of the SRF, this will enable you to see the

questions in advance and help you understand what information will be required.

Although the form may seem long and complex in a full printed format; it is designed to be completed online. The online version is logic based, and therefore some of the questions will appear and disappear based on the responses provided. It is worth noting that it is likely that there may be large sections of the form which will not be relevant to you and will therefore not appear.

If a supplier is successful in a tender opportunity, we will proceed to the stage of creating a Contract and Purchase Order. For this we will require the supplier to complete an additional Financial registration.

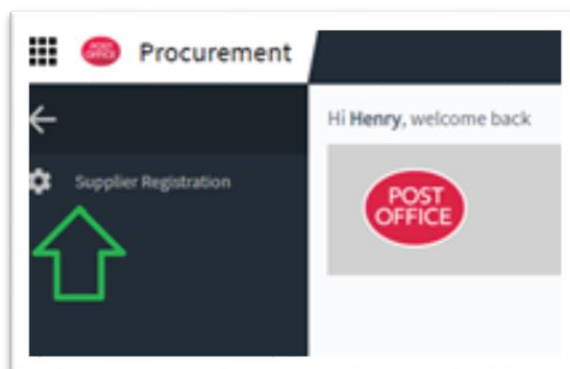
## Initial Registration



When logging in to the system you will always land in the Sourcing module, where you can find the SRF, but to complete the Financial registration you will also need to move to the Procurement module.

To move between the modules, you can use the 9 dots in the top left corner (also known as the "waffle"). You can then select the Procurement module where the financial information is stored.

You will need to click on the Supplier Registration link to enter your account information. We recommend that you have all the information prepared in advance – Company Registration Number, VAT number, Bank Account details, and the contact details you need for orders, remittances and other account correspondence.



Enter your company information including address, bank account, and contact numbers. When entering the VAT number (please include the prefix, i.e. GB172670502

Before you submit you will be asked to accept the terms and conditions. Some suppliers have been unable to download them from the system due their security settings. You can also find them from our website (see link below).

When you have submitted your information, and it has been validated, you will receive notification from the system confirming completion and advising you that your account is open for use. There are guides on our website on how to view invoices, purchase orders and other information.

### Maintaining Information

Once your account is created you will be able to see the full range of options in Procurement. To prevent attempted fraud by email (especially with the rise of phishing attempts) we do prefer suppliers to maintain their own account information whenever possible



You can maintain and amend company details by clicking on My Account to change your information or add additional users to your account. There are guides on our website which take you through this in more detail.

It is important to note, the system permits only one bank account per currency (i.e. one in GBP, one in EUR is valid, but not two GBP accounts).

A common error occurs when suppliers who are updating information attempt to add an additional bank account instead of amending the bank account details that are already in the system. This may result in an error message.

If you are amending information, it is important to select the account that is in the system. Only select Add New if you are adding an additional account.

Show Changes Save Changes Cancel Edit

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Company Details Additional Setup **Accounting Details** Tax Registration Trading Info Users Audit Log

Profile Key	Bank Name	Bank Country	Account Number	Sort Code	Payee Name	Swift / BIC Code	Is New	Is Modified
Select	BankAccount3672 Halifax	United Kingdom (GB)	77667766	110394	Chicken		<input type="checkbox"/>	<input type="checkbox"/>

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Here you can see that changes have been made and submitted for approval.

Status: InApproval Viewing Pending Changes

Approval Notes: (No Approval Notes)

Show Changes Toggle Cancel

Company Details Additional Setup Accounting Details Tax Registration Trading Info Users Audit Log

Profile Key	Bank Name	Bank Country	Account Number	Sort Code	Payee Name	Swift / IBAN BIC Code	Is New	Is Modified
Select	BankAccount3672	United Kingdom (GB)	77777777	110394	Chicken		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Country: United Kingdom  
Region: -- Please Select One --  
Postcode: PO Box  
PO Box Postcode: 01134764837  
ContactPhoneNumber: 01134764837  
BankName: Halifax  
BankCountry: United Kingdom  
AccountNumber: 77777777  
Sort Code: 110394  
IBAN  
PayeeName: Chicken  
ExternalID  
IsActive: Yes  
CurrencyCodeList: Pound sterling (GBP)

When changes are made to your account, and those changes are saved, they go for validation and approval. This is required for fraud prevention and in the case of amendments to bank accounts, this could involve additional steps to verify that the change is intended.

Changes are only accepted into the system when they have been approved. Notifications are sent from the system when changes have been made and accepted into the system.

You can contact us via the help within the system or by email if you have questions or concerns.

You will receive notifications from the system when orders are raised, goods and services are receipted, and invoices processed. You may also receive reminders from the system when key documents that you have uploaded to the SRF, such as insurance certificates, are due to expire. It is therefore important to keep the contact information on your account up to date.

We would recommend that suppliers try to use a shared email box as one of their account users (e.g. sales@ or finance@) so that you can retain consistent access to your account even when individual staff move positions within in your business or are away from work.

We would also recommend that suppliers do a regular check of who has access to your account and that their access is appropriate for their role in your business.

### Useful Resources

Guides on how to use the system, our standard Terms & Conditions, and other useful information are available from our website (link below).

The website also contains our previous newsletters which we encourage you to read, especially:

August 2022 – Finding opportunities to supply to Post Office

February 2022 - How to Invoice us

### Who do I contact for help?

Please read the guidance on our website

<https://corporate.postoffice.co.uk/en/governance/our-suppliers/working-with-us/>

If you require any further advice, please contact [procurement@postoffice.co.uk](mailto:procurement@postoffice.co.uk)

