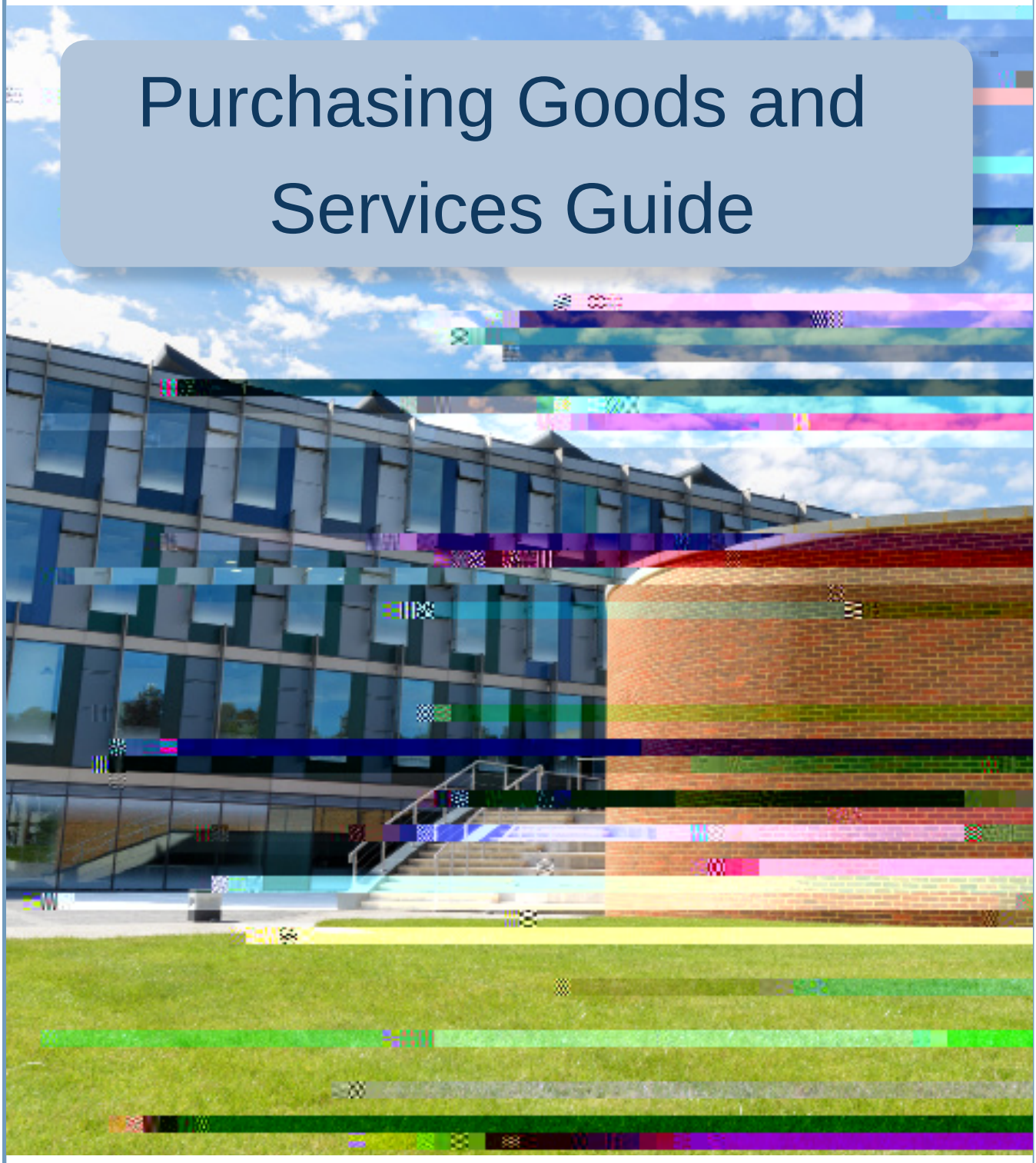
UNIVERSITY OF SUSSEX

Purchasing Goods and Services Guide



Produced by: The Finance Division, Sussex House

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1 What does this guide cover?

Part one of this guide explains what the University's rules for purchasing goods and services are, how to follow them and what di erent purchasing methods are available. **Part two** explains how to use the ýnance system in order to purchase goods and services.

1 The þnancial framework

The regulatory environment within which the University operates creates a series of requirements the University must meet. For purchasing goods and services the key requirements are:

- To ensure the University is compliant with its legal requirements
- To ensure value for money is achieved in purchases and demonstrated to students, funders, government and other stakeholders.

The University has put in place a ýnancial framework to meet these requirements. The key elements are:

The Financial Regulations

The Financial Regulations are the rules laid down by the University that you need to follow. They make up the core of the ýnancial framework. They are designed to ensure the proper and e cient use of resources within a sound system of internal control that supports the achievement of policies, aims and objectives and that fulýls any legal, ýnancial or regulatory obligations.

The Regulations set out speciýc responsibilities for individuals and categories of individuals associated with the University. The Financial Regulations can be found in full on the Finance website.

Procurement and Purchasing Policy

The Procurement and Purchasing Policy sets out the University's expectations with regard to the purchase of all goods and services in order to

2 Why is the þnancial framework important to me?

It is important that all sta making purchases understand their responsibilities within the ýnancial framework.

Value for Money

The University aims to achieve value for money in all of its activities. For purchasing, this is achieved through acquiring goods and services from the right supplier in the most cost e ective way. This applies to all methods of purchasing - such as purchase orders, purchasing cards and out of pocket expense claims.

Achieving value for money requires a judgement to be made which balances the beneýts derived from the goods and services against the total cost of buying and using them.

You will need to ensure that you can evidence that you have achieved best value for money in all purchases, particularly those where you have selected alternative suppliers or not selected the quotation with the lowest price.

Compliance

Failure to comply within the requirements of the ýnancial framework may lead to disciplinary or other appropriate action against sta . Any purchase that appears to be deliberately falsiýed, inþated or otherwise fraudulent will be investigated under the procedures outlined in the Fraud Response Plan.

Individuals need to ensure that they understand and adhere to their responsibilities. This guide will support you with this.

The Procurement and Purchasing Policy sets out the minimum controls expected. Heads of School and Directors of Professional Service are responsible for compliance within their areas of responsibility and may have additional local procedures to ensure value for money, which should be followed where applicable.

Judgement

Under the Freedom of Information Act the University is regularly asked to disclose information in relation to ýnancial transactions. There is signiýcant public interest and the importance of having clear rules correctly applied cannot be overstated.

A policy cannot cover every eventuality and some form of personal judgement will be required occasionally. If in doubt, you should apply the transparency test, i.e. would you be comfortable with

3 What should I consider before I purchase?

Before you start to purchase it is important that you know what you need, when you need it by and if it is likely to be a ordable.

It is important to understand the total value of the purchase as this will determine which route you need to follow to comply with the Procurement and Purchasing Policy.

Consider whether the purchase is likely to be one-o or a frequent purchase. If you are purchasing items on an ongoing basis with no deýned end date, you should assume a contract duration of four years to calculate the total value of the purchase.

You should also consider:

'The 5 Rights': Is the purchase the Right Product, at the Right Price, in the Right Quantity, delivered to the Right Place at the Right Time? Often, changing one or more of these factors will a ect the others.

ôTotal Cost of Ownershipõ: Cost represents far more than just the price. Often the lowest overall cost of a solution does not come from the supplier with the lowest contract price, as there can be other additional (or varying) costs of ownership. For example, costs in relation to procurement, delivery, operating the contract or disposal of assets. Therefore all costs should be taken into consideration.

It is not appropriate to use University funds for any of the items below:

Day to day and tra c ýnes
(Living expenses e.g. toiletries, clothing, newspapers and snacks)

Usual travel
(Travel between home and usual place of work)

Gratuities
(Except where culturally paying a gratuity is seen as compulsory)

Formal attire
(Dinner jacket or ball gown costs to attend formal functions)

Care costs
(Childcare costs, kennel/cattery costs or vets fees and similar expenditure)

Alcohol
(Except for conferences, business entertaining and all welcome/leaving events within set limits)

Personal gifts
(Such as þowers and chocolates)

5 What are the preferred ways to purchase?

The preferred ways to purchase goods and services are shown below in the order that they should be considered.

1 University purchase orders

Purchase orders raised using the ýnance system are the principle mechanism for the purchase of goods and services in the University.

In order to support budgetary control and the delivery of value for money, the Universityîs Financial Regulations require all purchasing to be carried out using a purchase order. The only exceptions to this are deýned by the Director of Finance in order to meet business need and/or to support the achievement of value for money and are outlined in the next section of this guide.

Unless purchasing through an approved alternative route, any verbal or written request for the supply of goods and services may constitute a contract with the supplier and must be supported by a University purchase order.

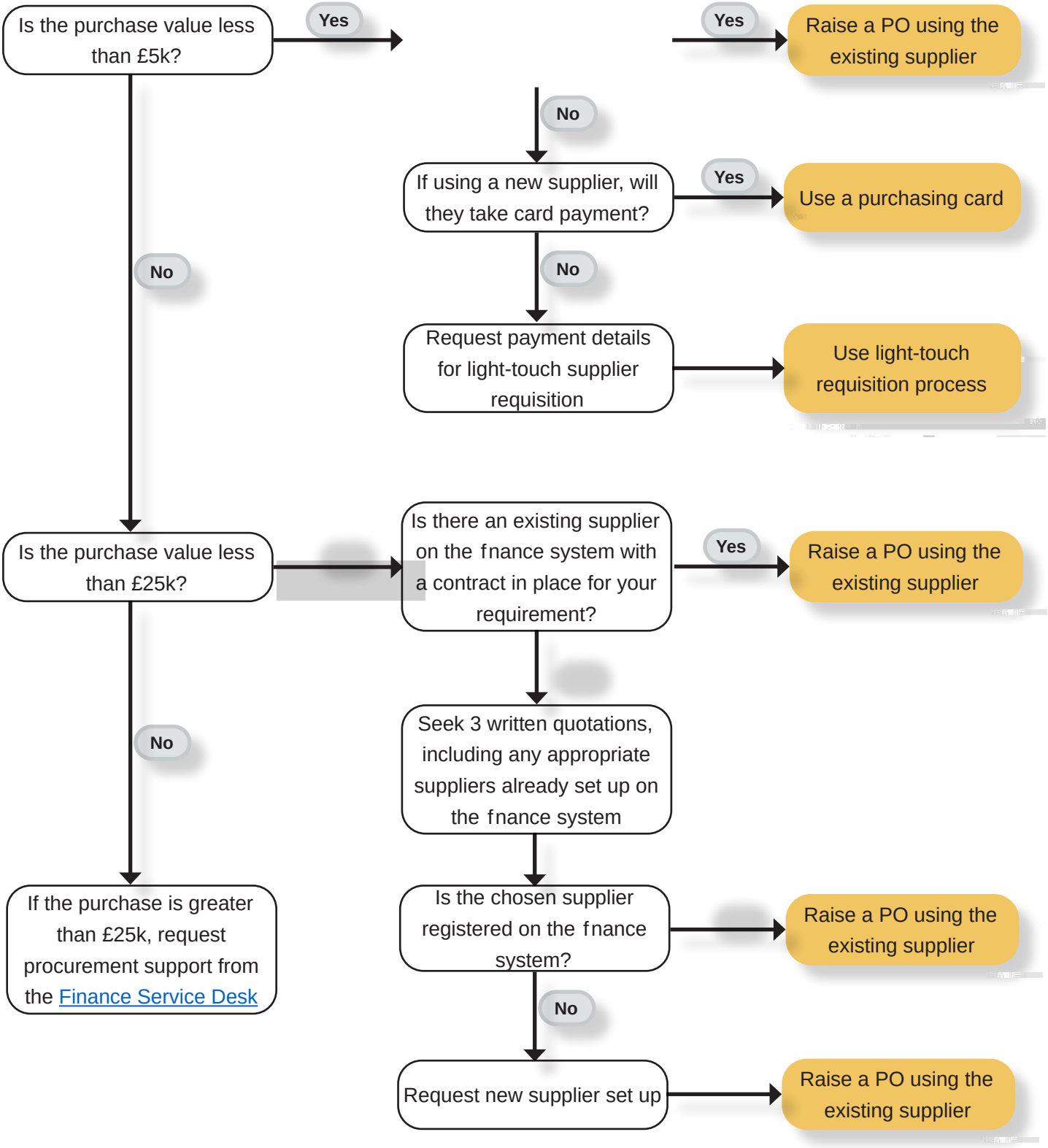
University purchasing cards

4 Advances

University funds may be advanced to sta , students and visiting researchers who do not have access to the ýnance system or a purchasing card and are unable to make purchases or cash withdrawals using a personal

6 What purchase values determine the process I need to follow?

The value of your purchase will determine what you need to do next. When making your decision, you should consider the value inclusive of VAT (except for certain purchases where VAT is recoverable - such as medical supplies).



7 When is a purchase order not required?

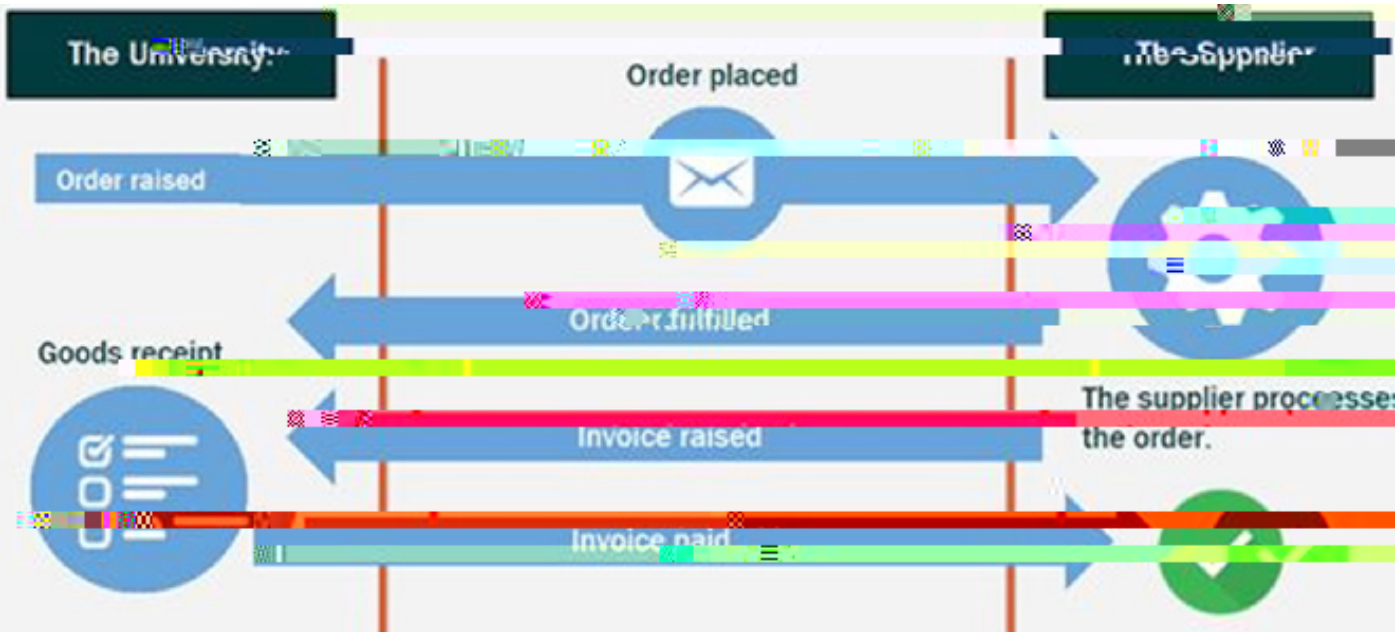
The majority of your purchases will follow the purchase order route, but there are some exceptions where a purchase order is not required. These are:

Business entertainment and hospitality
All purchases relating to business entertainment and hospitality must be from the University's provider via the SussexFood website. An alternative provider can be considered only if this does not meet business need.

Purchasing cards:

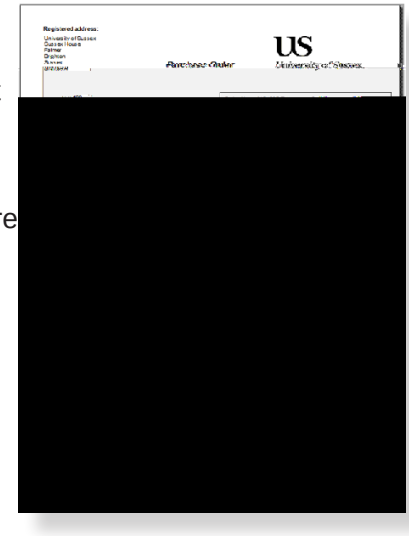
9 What is the purchase order process?

The remainder of this guide explains the purchase order process which can be summarised as:



PO created

The o cial University purchase order sets out the University's standard terms and conditions of purchasing goods and services, guaranteeing the most advantageous value for money terms for the University. It must be recorded and approved on the University's ýnance system to ensure:



- Up front budget holder authorisation before a commitment is made.
- A clear segregation of duties and audit trail.
- Immediate and accurate recording of a commitment and the type of expenditure.
- A conýrmation to the supplier of the University's commitment to purchase.

An o cial University purchase order must be raised and authorised before a contract is signed. Authority to sign a contract on behalf of the University is set out in the scheme of delegated ýnancial authorities maintained by the Director of Finance.

PO sent to supplier

A contract can be created without a signed written document. The purchase order creates a contract on the University's terms and conditions in the absence of any other agreement.

The purchase order is sent to the supplier who then fulýls the order.

Goods or services receipted

The Financial Regulations state that all goods should be received and checked against the supplier's delivery note and purchase order to ensure they match the description of what was ordered and are of the appropriate quality. If quality or quantity is unsatisfactory, the supplier should be immediately notiýed and action taken.

When you receive goods, or services have been delivered, you must promptly conýrm this within the ýnance system. This acts as the authority to pay the supplier and will enable the invoice, when received, to be matched to the purchase order and paid without further intervention.

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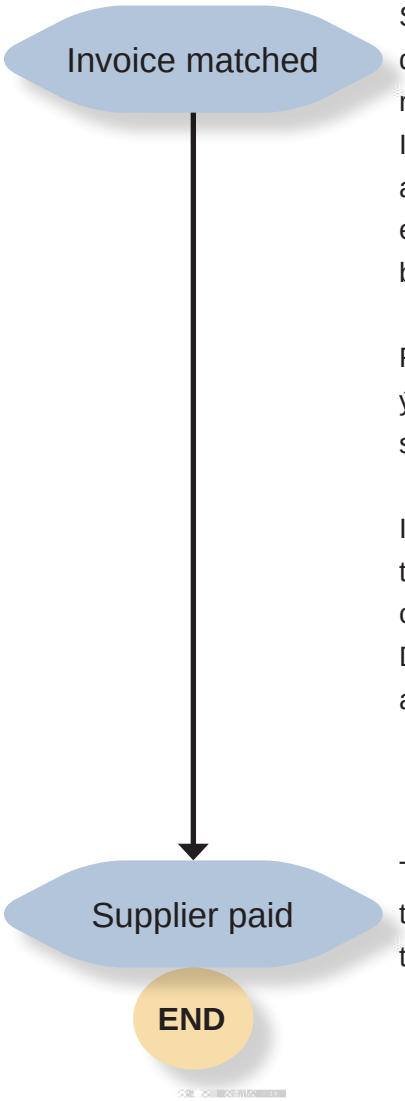


Suppliers must send invoices, with a valid purchase order number included, directly to invoices@sussex.ac.uk as stated on the purchase order. If you receive an invoice, please forward it to invoices@sussex.ac.uk immediately. If you receive a query from a supplier, for example regarding payment, please ask them to email suppliers@sussex.ac.uk. Prompt receipt of invoices helps to ensure that suppliers are paid within the payment terms and conditions set out by suppliers and the University.

Received invoices can be automatically matched to your goods receipt in the ýnance system and will then be paid without further intervention, ensuring a segregation of duties between receipt and payment.

Invoices will only be paid where they can be matched to purchase orders and the goods or services have been received on the ýnance system. In exceptional circumstances, where an invoice cannot be matched, the Head of School, Director of Professional Service or authorised delegate will be required to authorise the invoice.

The purchasing procedure ensures that invoices are paid in accordance with the standard terms of 28 days from the invoice date by BACS transfer, or other terms where agreed by the Director of Finance.

1 An overview of requisitioning

Error Messages

If any mandatory ýelds are left blank you will receive a validation error message when saving the requisition, like the example on the right.

1. **Log on** to the ýnance system.
2. **Click** on ółPurchasingô, then ółRequisition Inputô.

You will now see 3 tabs:

- Requisition entry
- Requisition details•

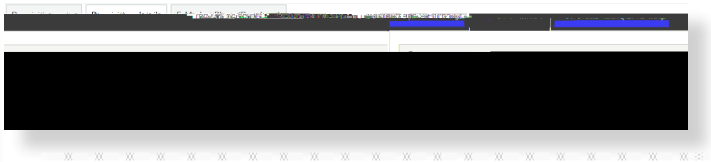
reminder email.

13. **Delivery address:** This will pre-populate with your campus address. You can use the ‘Delivery contact’ drop-down box to select another location or building.
14. **For Attention of:** This is where you can add specific delivery instructions for your purchase order.

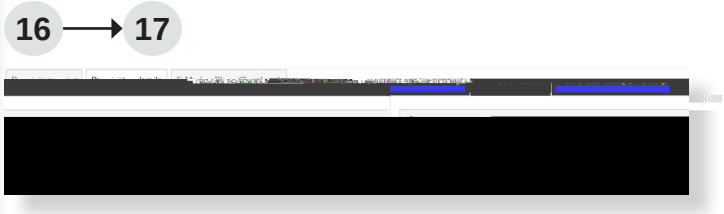
How to Complete the Requisition Details Tab:

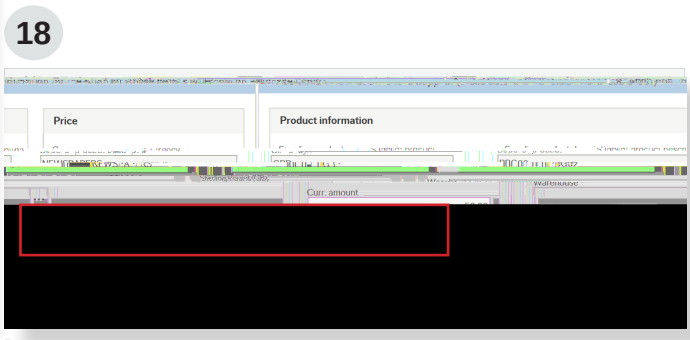
What is this?

This tab is where the line-by-line detail for the requisition is entered. The detail added in this tab will show on the purchase order, and will be used by Finance to match against the invoice received from the supplier. Accurate data entry on this screen will maximise the efficiency of the purchasing process.



15. **Click ‘**Add’ or click on a line to start entering the first line of your requisition.
16. **Product:** Use ‘Type Ahead’ to enter a product code by typing a description of what you want to order. E.g. Consultancy fees. A product code with a description will appear for you to select. You can also use the ‘Field Help’ box to help you search for the correct product code.
17. **Description:** You must overwrite the ‘Description’ field with a detailed description of the product or service you wish to buy. This field has a 250 character limit. If the description is not overwritten, the requisition will be sent back to you automatically. The information input in this field is used by Finance to match against invoices, therefore it is important not to use generic descriptions such as “Computer Equipment’ or ‘General Stationery’.
18. **You can add additional product information** to appear on the purchase order by using the ‘Product text’ field within the ‘Additional Information for the supplier’ section pictured right.





19. Supplier: If you entered the Supplier ID in the ‘Requisition entry’ tab then the Supplier ID will

What is funds checking?

When the requisition is submitted for authorisation, the ýnance system will automatically check against the subproject(s) entered to see if there are su cient funds to cover the expense of the proposed purchase. You can check available funds prior to saving and submitting your requisition by following the guidelines below.

28. Once you have completed the 'Requisition details' tab press ◊Funds check◊.

There are 3 possible icons that will appear against each line of the ◊Requisition details◊ tab in the ◊Funds check◊ column. **These are:**

- Funds overspent (over budget)
- Funds available (within budget)
- Funds available, but remaining funds less than 10%

29. To view the detail click on 'Funds check results◊. This will show you the detail per subproject budget.

30. Click on each subproject line to view the available budget results.

These results include the cost of the requisition you are raising and VAT.

31. If your requisition is over budget but you have a justiýed reason to request the spend, add a comment explaining this to your authoriser in the ◊Internal Message◊ ýeld in the ◊Requisition Entry◊ tab. You will also receive a pop up message advising you are over budget when you save the requisition.

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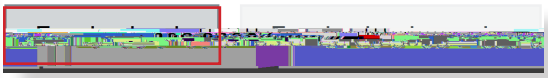

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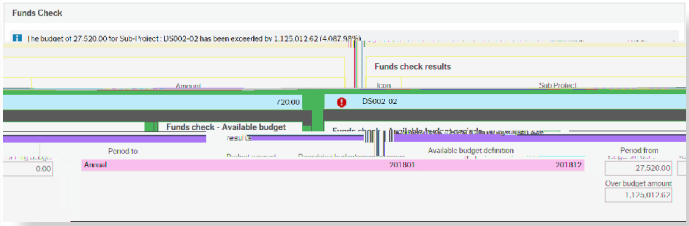

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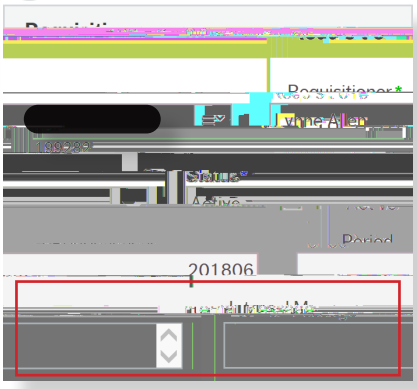

If you amend any subprojects during the requisition raising process you will need to repeat the funds check process to get the new result.

How To Attach a Document:

Why do I need to do this?

In order to allow for seamless authorisation, documents need to be attached to a requisition where necessary. This forms part of the audit trail and demonstrates that the appropriate process has been followed and value for money has been evidenced. If appropriate documents are not attached, the requisition may be rejected with a request for them to be attached.

You need to attach documents:

- For purchases up to Ã25,000. In this case attach all quotations received, including those from unsuccessful suppliers.
- For purchases above Ã5,000 which are subject to VAT relief. In this case you would need to attach a VAT Exemption Form issued by Finance.
- For purchases above Ã25,000. In this case attach a Tender Audit Report or a Tender Waiver Form (fully

32. **Click on** the paper-clip in the top right hand corner.
33. **The ‘Documents’ pop up box will appear.** Click on ◊Add a Document◊.
34. **Upload your chosen document,** complete the document title ýeld and click ◊Save◊.
35. **Add further documents** by repeating process above.
36. **Once all documents have been attached,** and all details have been completed in the ◊Requisition entry◊ and ◊Requisition details◊ tabs, click on ◊Save◊.

    If there are enough funds available in the subproject, the system will generate a requisition number. If not, you will receive a warning message.
37. **If any of the requisition lines result in an overspend** you will receive a pop up ‘Funds Check◊ warning message.

    If you want to check the result again, click on ◊Funds check results◊.
38. **If you receive the warning message and have not yet added comments for the authoriser**,

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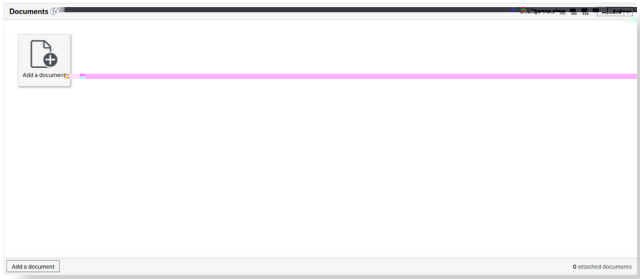

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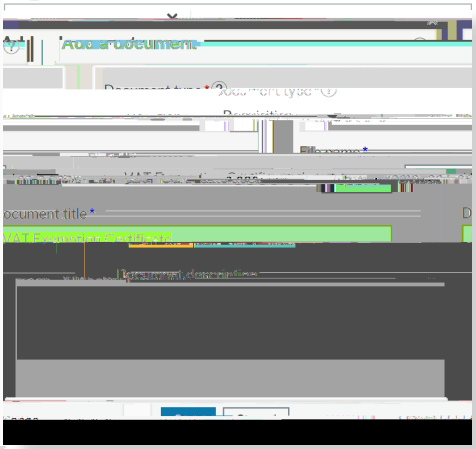
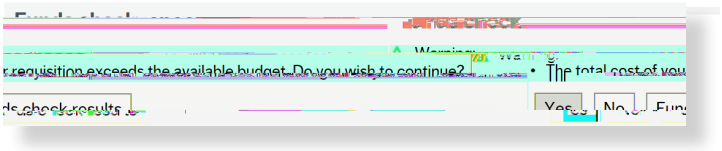
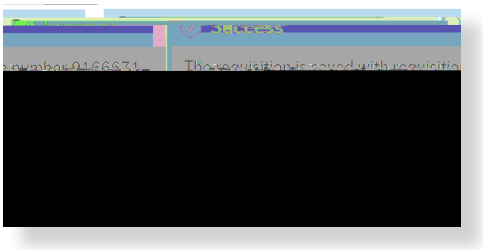






What now?

Once the system has generated a requisition number, your requisition will enter workþow for authorisation and will create a commitment on the ýnance system against the budget code entered in the ◊Requisition Entry◊ screen. Section 8 of this guide explains how to track the progress of your requisition.

If the requisition is not authorised it will be rejected back to you with comments. Please see Section 9 to learn how to amend or close a requisition.

An o cial purchase order will be created once your requisition has been authorised.

Fields required for each currency							
GBP	Yes	Yes	--	Yes	Yes	Yes	Yes
EURO	Yes	IBAN	Yes	--	Yes	Yes	Yes
USD	Yes	Yes	Yes	Routing number	Yes	Yes	Yes

Additionally, there is also a ǿrest of the world paymentsǿ account, where we can make a GBP payment to an international bank account.

4. GBP International - I11111

Fields required							
	Name (payee)	**Bank account**	**SWIFT**	**Sort code**	**Address**	**Town**	**Postcode**
GBP Intl	Yes	Yes	Yes	--	Yes	Yes	Yes
	Supplier must complete local currency conversion to allow a GBP requisition to be raised in the ýnance system and for invoice payment						

We require you to liaise with your supplier and request the local currency conversion to GBP, which you will use to raise the requisition, and which they will then use when submitting their invoice for payment.

Invoices received must be in GBP for payment, and contain the required supplier detail (PO number, supplier email address and bank details).

Where the currency conversion has not taken place the ýnance system will restrict processing and the account cg ! e я ethe

- For GBP Supplier Payment ï P11111. Enter the mandatory ýelds of supplierîs name, bank

it should contain one or more of the e =

6 pyom

Payment

The use of the sundry requisition process can result in a prompt 7-day payment. Supplier invoices should be sent to invoices@sussex.ac.uk and will only be paid where the invoice can be matched to a purchase order and conýrmed as received through a completed ǿgoods receiptǿ.

This can be particularly advantageous to our local businesses, small or medium-sized enterprises (SMEs). You can ýnd further detail on this in our Faster Payments Guide.

Reporting

To see any Light Touch Supplier Requisitions you have raised, from the home screen navigate to Reports>Purchasing Reports>My Single Use Supplier Requisitions.

To see if any invoices have been paid, navigate to Reports>Purchasing> Invoice Enquiry - Single Use Suppliers

What is the e-marketplace?

The e-marketplace contains hosted catalogues in an online marketplace, which can be accessed directly through the ýnance system. Once you have selected the items you want to purchase and checked out, your basket is automatically imported into the ‘Requisition details’ screen, with a majority of the data ýelds populated from the basket.

There are two elements to the e-marketplace:

1. Punchout ï This is where you are transported to a speciýc supplier’s website and can then import your shopping basket back into the ýnance system.
2. Hosted Catalogues ï This is a single marketplace interface, which allows you to search for products over

1. **Log on** to the ýnance system
2. **Click** on ‘Purchasing’ and ‘Requisition Input’

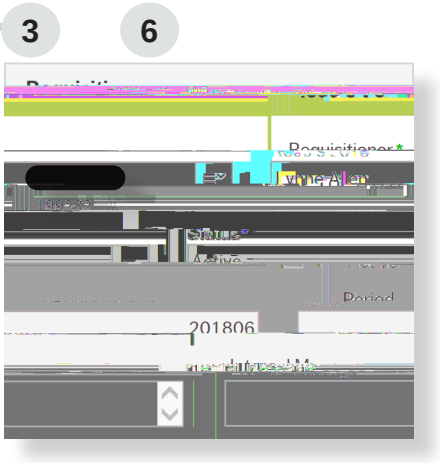
You will now see 3 tabs:

- Requisition entry
- Requisition details
- E-Marketplace (Punchout)

You will need to complete the ‘Requisition entry’ and ‘E-Marketplace’ tabs for an e-marketplace requisition. The ‘Requisition details’ are automatically populated for you and should not be changed.

Requisition

3. **Requisitioner:** This line automatically populates with your name.
4. **Status:** This line defaults to ‘Active’.
5. **Period:** This line defaults to the current ýnancial period.
6. **Internal Message:** This is where you can enter an optional message to your authoriser and provide information to facilitate the authorisation of your purchasing request. This message does not appear on the purchase order and is not visible to the supplier.



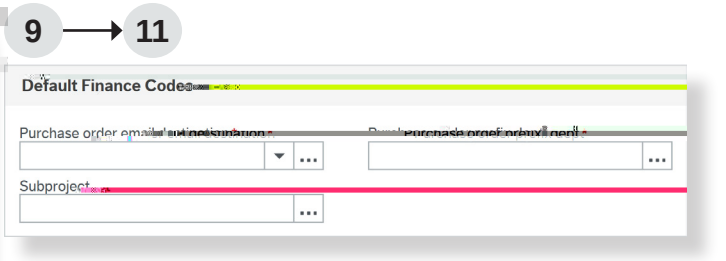
Default Supplier Details

7. **Supplier:** This ýeld is not required when raising an e-marketplace requisition as it will automatically populate when you checkout from the supplier’s web page.
8. **Contact:** This ýeld is not required when raising an e-marketplace requisition.

Default Finance Codes

9. **Purchase order email Destination:** This ýeld instructs the ýnance system where to email the o cial purchase order once the requisition has been authorised.

   You must Type ‘P’ into this ýeld, as these orders are sent electronically to the supplier’s ordering system rather than via an emailed purchase order. A copy will also be emailed to you for your reference.
10. **Purchase order preýx dept:** Input your departmental preýx into this ýeld. E.g. FIN for Finance. If you need help ýnding your department preýx use the ‘Field Help’ button.
11. **Subproject:** Insert your subproject code into this ýeld. If you do not know your subproject code the ‘Type Ahead’ function can help you. If you need a more detailed search use the ‘Field Help’ button or contact the Finance Service Desk.



Delivery Contact

12. **Delivery date:** Set the delivery date to the date you expect to receive the goods or services. This will trigger an automated goods receipt reminder email.
13. **Delivery address:** This will pre-populate with your campus address. You can use the ‘Delivery contact’ drop-down box to select another location or building.
14. **For Attention of:** Do not use this ýeld for e-marketplace orders as it may delay your order.

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How to Complete the E-Marketplace (Punchout) Tab:

15. **From the ‘Requisition Entry’ tab,** click straight on to the E-Marketplace (Punchout) tab.
16. **Click on** ‘Go shopping’.
17. **You will be redirected to a website where you can either:**

- Select a Punch-out supplier
- Or select ‘Catalogue’ for a list of hosted catalogues (to search for products across multiple suppliers).

18. **Select the items to purchase** from the supplier’s website or hosted catalogue(s).
19. **Once you have completed your shopping,** the supplier website will provide you with a summary of your purchases. If you are happy with your order, click on ‘checkout’.
20. **You will see a summary of your order** in the University e-marketplace. You can add to this order from as many Punch-out suppliers or catalogues as you wish. Clicking on ‘Checkout’ will take you back to the ýnance system, where you will complete your requisition.
21. **Click on ‘Retrieve shopping’**. This will load all of your shopping baskets. Tick the appropriate line to load and click ‘Generate to

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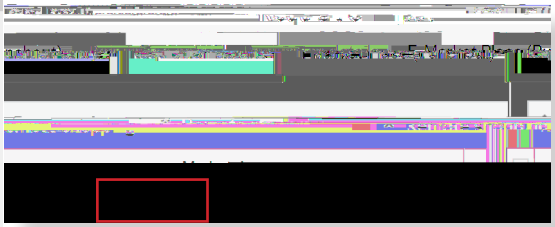

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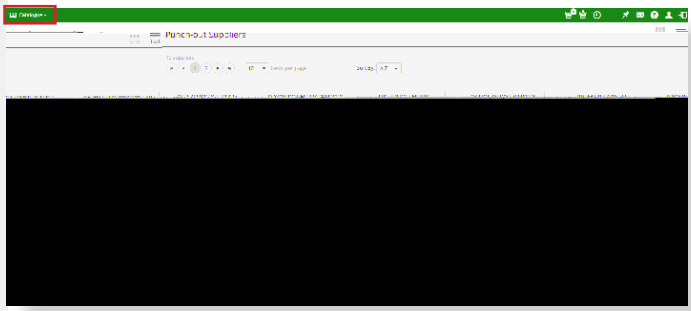

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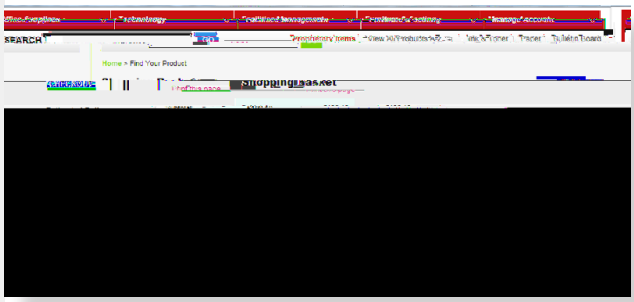


How to Complete the Requisition Details Tab:

What is this?

This tab is usually where the line-by-line detail for the purchase order is entered. The detail in this tab will be shown on the purchase order, and will be used by Finance to match against the invoice received from the supplier.

With e-marketplace orders, the shopping you have just completed online will automatically populate in the ◊Requisition details◊ ýelds.

It is important **NOT** to change any of the order details

28. Once you have completed the ‘Requisition details’ tab press ‹Funds check›.

There are 3 possible icons that will appear

If you amend any subprojects during the requisition raising process you will need to repeat the funds check process to get the new result.

1. **Log on** to the ýnance system
2. **Click**

How to Complete the Requisition Details Tab:

this purpose on all SEF requisitions.

Note: You do not need to complete the 'Currency' ýeld as this is automatically defaulted by the supplier set-up data on the system.

What if I want to create one open purchase order for multiple invoices?

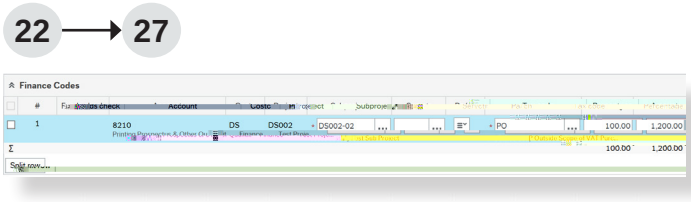
To create an open purchase order you need to swap the ◊quantity◊ and ◊price◊ ýelds, as you can only goods receipt using the ◊quantity◊ ýeld and not the ◊price◊.

For example (see right), if you are going to be billed monthly and you have been given a quote of Ã1,200 (excluding VAT) for the year, you will want to match the goods received to the invoice value.

Therefore, use the 'Quantity' as the total price £1,200 and the ◊Price◊ as Ã1.00.

If you want to use the same product information for subsequent rows, you can use the Copy button to save time. Just tick the line you want to copy and click Copy. You can amend the quantity, price and subproject as required.

22. **Account:** This is automatically populated from the product code and can◊t be amended.
23. **Costc:** This is automatically populated from the subproject code and can◊t be amended.
24. **Project:** This is automatically populated from the subproject code and can◊t be amended.
25. **Subproject:** If you entered the subproject in the ◊Requisition entry◊ tab then the subproject will be automatically populated for all lines. You can amend the subproject per line if the purchase is to be charged to di erent subprojects.
26. **Servctr:** When ordering certain goods or services from SEF, a ◊Servctr◊ ýeld will be shown. If you have been given an order number by SEF, you must enter it in this ýeld.



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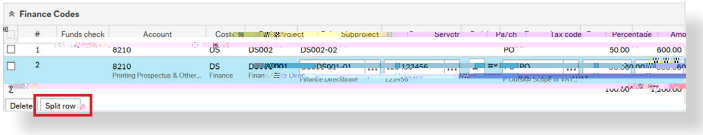

What is funds checking?

When the requisition is submitted for authorisation, the ýnance system will automatically check against the subproject(s) entered to see if there are su cient funds to cover the expense of the proposed purchase. You can check available funds prior to saving and submitting your requisition by following the guidelines below.

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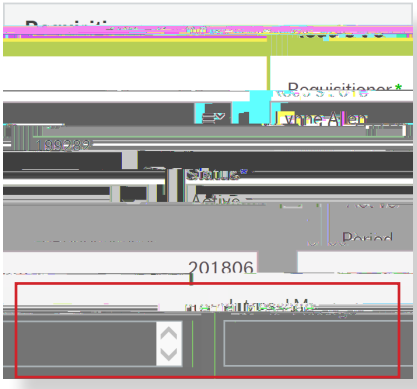
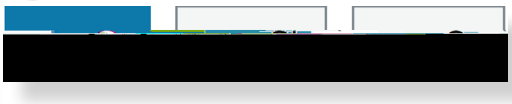


40. **If you have provided comments to the authoriser** and have viewed the funds check results, click on ‘Yes’ to accept the warning. The system will now generate a requisition number (starting with a 9).

37



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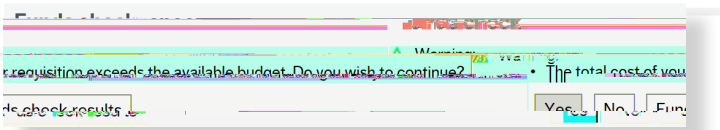

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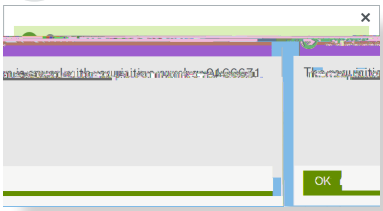


Next Steps After Submitting a Requisition:

What now?

Once the system has generated a requisition number, your requisition will enter workflow for authorisation and will create a commitment in the finance system against the budget code entered in the ‘Requisition Entry’ screen. Section 8 of this guide explains how to track the progress of your requisition.

If the requisition is not authorised it will be rejected back to you with comments. Please see Section 9 to learn how to amend or close a requisition.

An official purchase order will be created once your requisition has been authorised. At this stage please note:

- If you selected R in the ‘Purchase order email destination’ field when raising the requisition, you will receive an email with a PDF of your order. You must ensure this is forwarded to SEF.
- If you selected S in the ‘Purchase order email destination’ field when raising the requisition, your purchase order will have been automatically sent to SEF. You will also receive an email with a PDF copy of your order, for your records.

Once the goods or services are received you must remember to enter these details in the finance system via a goods receipt. For guidance on how to goods receipt, please see Section 10 of this guide.

Once the supplier sends an invoice to Finance, it will be matched in the finance system against the goods receipted on the purchase order.

1.

1. **You can run a workþow enquiry** to ýnd out where your requisition has gone for authorisation. Log on to the ýnance system and navigate to ‘Purchasing’, ‘Enquiries’ and select ◊Workþow enquiry - Requisitions◊.
2. **Enter your requisition number and click ‘Search’.** If you do not know the requisition number, un-tick ◊Historical◊, leave the ◊Requisition like◊ ýeld blank and click ◊Search.◊ This will show all of your requisitions in

10 How to close or amend rejected requisitions

Why has my requisition been rejected?

There are two reasons why a requisition could be rejected back to you:

1. The system has automatically rejected the requisition back to you due to a data error. This would be due to one of the following scenarios.

- Rejected REQ: PO Destination error: This means that you have chosen the wrong option in the ‘Purchase order email destination’ field within the ‘Requisition entry’ tab. I.e. For e-marketplace/Punch-out orders this must be input as P. For non e-marketplace/Punch-out orders you must chose R or S. See the ‘Requisition Entry’ guidelines in Section 3 for further details.
- Rejected REQ: Description error: This means that you have not over-typed the generic product description. You must over-type the default product description with full details of the goods or services you wish to purchase.
- Rejected REQ: SEF Supplier/Product error: This means that you have chosen the wrong product or supplier for a SEF requisition. You must choose a SEF product when ordering from SEF, and you must use Supplier S17277 if you have chosen a SEF product. For further details please see Section 5.

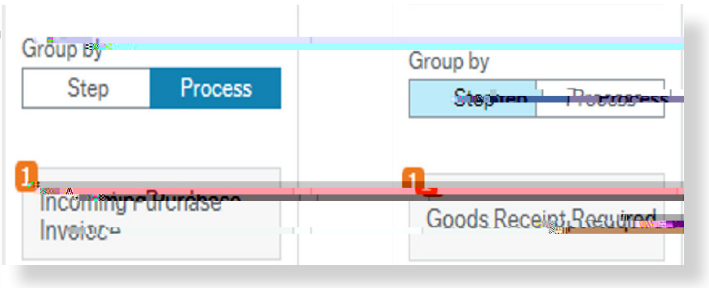
2. The authoriser has rejected the task back to you with a comment as to why they have rejected it. E.g. This means tha7 ! ɔ ξ l

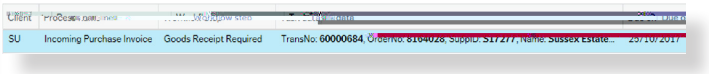
1. **Log on** to the ýnance system.
2. **Click on** ǐPurchasingǐ and ǐGoods Receiptǐ.
3.

12 How to receipt goods and services when an invoice has been registered

ôMissing Goods Receiptõ tasks will appear for the requisitioner to complete when an invoice has been registered against an order but has not been goods receipted on the system, or a goods receipt has been completed but it does not equal the quantity on the invoice registered.

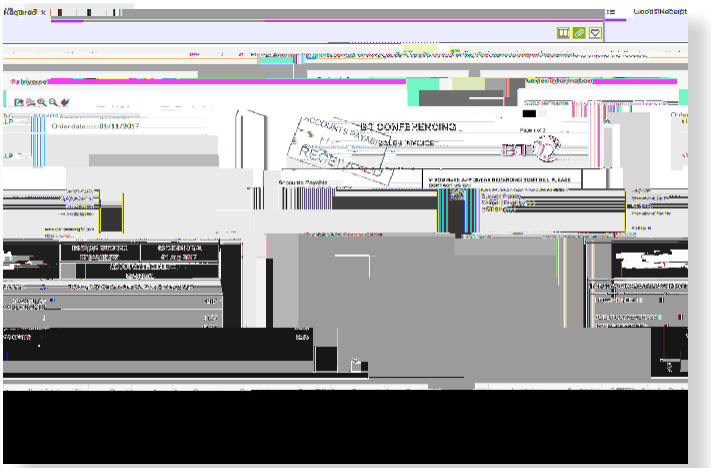
They will appear in the task manager under ôProcessõ as ‘Incoming Purchase Invoice’ or under ‘Step’ as ‘Goods Receipt Required’, depending on how you have chosen to view your tasks.





Invoice tasks will always appear with a due date; this is when an invoice is due for payment.

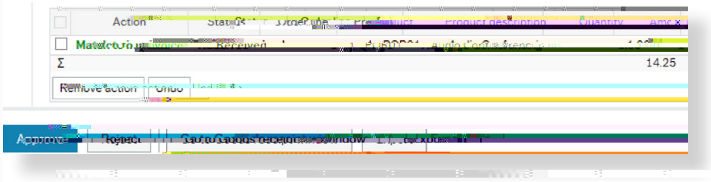
When you click on the task it will load an authorisation screen. There are two di erent types of goods receipt authorisation:



1. Receive Goods - This is where a goods receipt has not been completed prior to the invoice being entered onto the system by Finance.
2. Match to invoice - This is where a goods receipt has been completed after the invoice has been entered by Finance.

For both types, you need to conýrm that you have received these goods/services and authorise the invoice to be processed against your order line/s.

If the ôApproveõ button does not complete the task, this means that there are multiple invoices on the system where the total quantity invoiced exceeds the order quantity. To complete the task, click ôGo to Goods Receipt Windowõ, fully action the goods receipt and click ôSaveõ. You should then be able to return to the task and it will allow you to authorise. The action will change to ôMatch to invoiceõ.



If the goods receipt is actioned before the invoice is received, then no task will be sent.

13 What are requisitioner Invoice Approval Tasks?

14 How to cancel purchase orders and/or return goods

Cancelling a Purchase Order:

If you wish to cancel a purchase order, or cancel the rest of a purchase order, you must:

1. Contact the supplier in writing to tell them that the order is cancelled. This is to ensure you don't receive the goods or services which are no longer required.
2. Cancel the order in the finance system. This is to ensure that the supplier is not paid for goods and services that have not been received. This will also ensure that the funds are made available again in your budget.

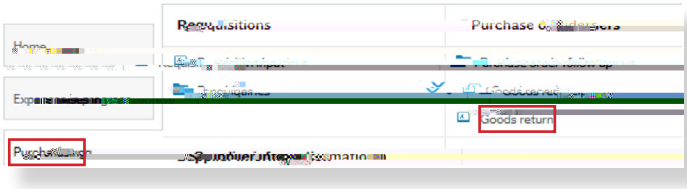
How to Return Goods:

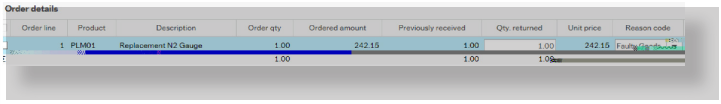
ĳGoods Returnĳ is used to update the ýnance system when you have returned goods to a supplier for which you have already registered a goods receipt. If you have received goods or services that subsequently prove to be sub-standard, the process below shows how the goods can be returned in the ýnance system. You will still need to advise the supplier separately.

1. **Navigate to 'Goods return'** via the 'Purchasing' tab.
2. **Recall** the purchase order number
3. **Under the order details section** enter the quantity being returned. If you are not expecting a replacement you need to tick the box and provide the reason code.

   This will reduce the order quantity of the purchase order so that the order quantity is equal to the delivered quantity.
4. **If you wish to cancel the rest of the order** then you will need to go back to the ĳGoods Receipt' screen and perform the actions as per Section 8.

1

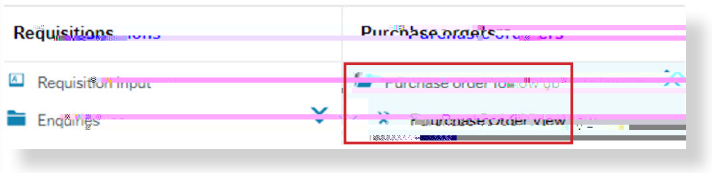




16 How to view a previous purchase order

1. **Your purchase orders will be emailed to you as an original or a copy. If you need to view or print one again,** navigate to the ‘Purchasing’ tab in the main menu and click ‘Purchase Orders’, ‘Purchase order follow up’ and ‘Purchase Order view’**.**
2. **Enter the purchase order number** and tab out of the ýeld to enable the purchase order details to load onto the screen. Click the highlighted paper-clip icon in top right corner.
3. **A new screen will open with the PDF copy.** Double click on it to view the purchase order.
4. **You can then download or print as needed.**

1



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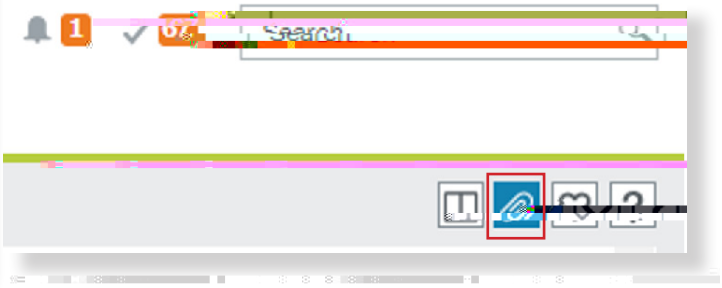

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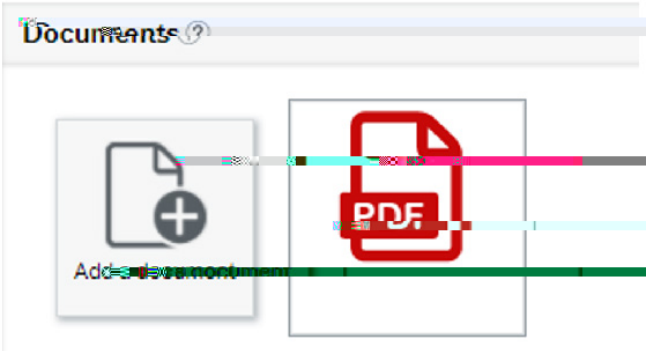

17 How to process a credit note

All credit notes should be automatically sent to invoices@sussex.ac.uk by the supplier. Should you receive any credit notes directly, you should forward these immediately to the email above, including your name and subproject code in case there are any queries.

Any action that you will be required to take will come to you via task w ! ⅄ ᴷ a nance s ā ste

Appendix One

How to set up a new supplier

1: Request login details to the supplier set-up system from the Finance Service Desk.

2: Enter the system and propose a new supplier. Watch the video for guidance.

3: Finance will review the proposal and approve it if appropriate. You will get a system notiýcation.

4: