

Key information you will need before you start:

- Application Code- you would have received this in the email from the University of Exeter.
- Company Information- examples include Company Status, VAT Registration Number, Charity Number, Company Registration Number.

- Bank Detail Confirmation Letter- The information on this document **must** match what you have entered into the New Supplier form. Information that needs to be included is:

- Letterheaded PDF document.
- Registered Business Address- if business is not registered main contact address. For example address registered with Companies House
- Signed by Director, CFO or Owner.
- Name of who signed the form.
- Bank Details
- Contact Information
- VAT Number (if applicable)
- Company Number (if applicable)

1. Open the Form.

Select the link in the email you received from the University of Exeter.

2. Complete the form fields- Name and Address Information.

Supplier Information

Application Code (From invitation email): *

Included in your invitation email.

Supplier Name *

This information must match your PDF document that is to be attached. Please ensure that name includes correct capitalisation.



If you are a company trading under another name, please use the format Company Name T/A Trading Name

Address Line 1 *

Address Line 2

This information must match the registered address as per your PDF document that is to be attached. Requirements for the attached are found at the top of this crib sheet.

Address Line 3

Town *

County

Country *

Select from the drop down list. This information must match your PDF document that is to be attached. Double check you have selected the correct country.

Post Code





New Supplier Form

3. Complete the form fields- Contact information

Mobile Phone Number (Including Country Code)

Contact number including country code. Do not include spaces

Landline Phone Number (Including Country Code) *

Email Address *

Email address must not contain any spaces. This is the primary email that will be on the account in our system.

Remittance Details:

If you tick this box, complete the relevant field that appear. Any fields with a red * are mandatory.

Are Remittance Address details different from the business, provided above?

Remittance Email Address *

Email address must not contain any spaces. This is the email that will be on the account in our system to receive remittance once we have processed payments.

PO Details:

If you tick this box, complete the relevant field that appear. Any fields with a red * are mandatory.

Are Purchase Order Address details different from the business, provided above?

PO Email Address *

Email address must not contain any spaces. This is the email that will be on the account in our system to receive remittance once we have processed payments.

Supplier Contact Details:

Contact Person First Name *

Contact Person Last Name *

The primary contact that will be listed on the account in our system

3. Complete the Form Fields- Company Information.

Company Details

• Select from the drop down list that appears.

Company Status *

VAT numbers must include country codes. VAT numbers must not include spaces or dashes.

Is your company VAT Registered?

Is your company VAT Registered?

Selecting this box will unhide a field to enter your VAT number in.

VAT Registration Number (Including Country Code)

Complete as appropriate.

Is company a small or medium-sized enterprise (SME)?*
 Yes
 No

Factor creditor *

A factor company is an intermediary agent that provides cash or financing to companies by purchasing their accounts receivables.

New Supplier Form

4. Complete the form fields- Bank Details

Select this option if you have a UK bank account and are expecting to be paid in pounds sterling.

Bank Type*

UK Bank

Non-UK Bank

Select this option

- If you have a non UK bank account and are expecting to be paid in a currency that is not pounds sterling. OR
- You have a UK bank account and are to be paid in a currency that is not pounds sterling.

UK Bank details

- *Sort Code*- UK sort code must contain 6 numerical characters and must not include any special characters or spaces.
- *Account Number*- a UK account number must contain 8 numerical characters and must not include any special characters or spaces.

Non-UK Bank details

A guide on what details are required can be found [here](#).

- *IBAN/ Account Number*- Include your IBAN or Account number in the IBAN field. Do not include any special characters or spaces. Do not include the word IBAN. If an IBAN is available this is the preferred information.
- *SWIFT*- If a SWIFT is available this is the preferred information.
- If any of the bank details sections do not apply, leave those fields blank.

Do you have an Intermediary Bank Account?

Tick this option if an intermediary bank is required when receiving payments into your account.



Intermediary banks are normally needed when the final bank being paid does not accept the currency being paid.

Currency *

This is the currency that you will be raising your invoices in.

Please attach a copy of the above banking information on company letter headed paper, signed by a Company Director/Finance Director/Financial Controller/CFO and in PDF format.

Bank Information

Attachments *

Drag new attachments here

+ Add

This attachment must be in a PDF format. Refer to details at the beginning of this Crib Sheet for information on requirements

5. Invoice Information

Information on invoicing requirements and supplying the University can be found on our [webpage](#).

6. Complete the Declarations, and Submit your form.

Declarations

Supplier Declaration

REQ NEW SUPPLIER EXTERNAL

Page

Submit

More

- The form will go to the University of Exeter for approval, you will be notified of the outcome within 5 working days.
- If approved, you will be contacted with details of how access to the Supplier Portal
- For help or further information about this form, please contact procurement-operations@exeter.ac.uk