



## Supplier Guidance on using Procserve

Since commencement of the new Low Value Provision (LVP) process, DWP Shared Services have developed the following guidance to assist new suppliers register and transact with DWP.

If you require any further assistance please contact us on: [NORCROSS.PROCUREMENTOPERATIONS-SUPPORT@DWP.GSI.GOV.UK](mailto:NORCROSS.PROCUREMENTOPERATIONS-SUPPORT@DWP.GSI.GOV.UK)

Or call us on **01253 332970**, our helpline opening hours are Monday – Thursday 08:30 – 16:30 and Friday 08:30 – 16:00.

For any **invoice / payment related queries** please contact the Payment Services Helpline on 0845 602 8244.

The following checklist provides the pre-requisites required to become an LVP supplier to DWP.

1. [Obtaining D-U-N-S number](#)
2. [Pre-Registration with Procserve](#)
3. [Registration Completion](#)
4. [Registration Validation](#)
5. [Invoicing Set-Up](#)

### 1. Obtaining your D-U-N-S® number

Before you can register as an LVP supplier, you need to have a Dun & Bradstreet, D-U-N-S® number. If you do not know your number or your organisation does not currently have one you should contact Dun & Bradstreet directly by visiting their website at [www.dnb.co.uk](http://www.dnb.co.uk), telephoning 0870 243 2344 or emailing [customerhelp@dnb.com](mailto:customerhelp@dnb.com).

The Data Universal Numbering System (DUNS) was developed by, and is regulated by, Dun & Bradstreet (D&B) which assigns a unique numeric identifier to a single business entity. A DUNS number is a unique nine-digit number assigned to each business location in the D&B database which has a unique, separate, and distinct operation to businesses for the purpose of identifying them. This means a retail chain like Tesco or B&Q may have a unique DUNS number for each retail site as well as regional / head offices.

A DUNS number is required for both suppliers and buyers to register on Procserve. Because DUNS numbers are unique they ensure there is no duplication of any organisation during registration. As they are unique, they allow the system to identify unique delivery / order points, so if your organisation has more than one branch or site, your order can be routed appropriately.

Registration for a DUNS number is free of charge, and in many cases is done automatically, without a business entity realising it has been issued a DUNS number. Registration normally takes less than 10 business days.

## 2. Pre- Registration with Procsolve

Use the link provided, to the [Application to deliver Low Value Provision](#).

Enter relevant organisation details and select Find D-U-N-S® Number button

Find D-U-N-S® Number

Select the relevant D-U-N-S® number from the options provided. If the D-U-N-S® number you enter is not recognised please refer to [Obtaining your D-U-N-S® number](#).

If you receive an error message to say that your organisation is already registered you should contact the helpdesk at the email / phone number provided, where a new username and password will be generated and sent to the registered email account.

You will then be sent two separate emails direct to the email address you provided, one will contain a username and link to the Procsolve registration site and the other a password.

## 3. Completing the Registration Process

Once you have received your username and password you can complete the registration process.

Access the Procsolve website using the link provided in the email.

**Hint and Tip:** The emails may go into your spam so please check this if it seems you have not received your username and password.

To log in to the Procsolve system please ensure you copy and paste the username and password as sometimes the system will not recognise them.

Select all training categories that you cover and the regions you can provide training to. This will impact how many Request for Quote's (RFQ's) you receive, you should be as specific as possible about what training you can provide to prevent you receiving RFQ's that you are unable to respond to. There is an option to select "Other", if this is selected it may well mean you receive a high volume of RFQ's that are not relevant to your organisation.


Until this second part of registration is complete you will not receive any RFQ's from DWP.

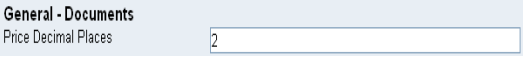
## 4. Registration Validation

The first time you log in to your Procsolve account, you will be asked to change your password. Following your password reset you will not be able to access the supplier portal until you have configured your organisation details. You will see a red warning message at the top of the screen. You should check that the information in your company details is correct including email address for the delivery of RFQ's and orders then select the save icon. This is a one off process before you begin transacting with DWP. You will not be able to access the supplier portal until this action has been taken.

## 5. Invoicing Set-Up

To enable the correct invoices to be sent you also need to amend a field within your company information. **Again this is a one off process that should be completed prior to sending any invoices.**

Select Admin > Company Admin from the supplier portal 

Scroll down the page to the heading **General – Documents** and in the Quantity Decimal Places field, enter 2 (normally defaults to 0) 

Select Save icon 

After completing the registration process you will be eligible to receive and respond to RFQ's for Low Value Provision.

The following guidance has been created to assist you when transacting with DWP for low value provision following successful registration:

6. [Receiving RFQ's](#)
7. [Viewing RFQ's](#)
8. [Responding to RFQ's](#)
9. [Winning the Quote](#)
10. [Submitting an Invoice](#)
11. [Submitting a Partial Invoice](#)
12. [Re-submitting a Rejected Invoice](#)

## 6. Receiving RFQ's


DWP sends RFQ's to all suppliers that have selected the relevant category / training course within the registration process. **If you begin receiving RFQ's for training you cannot provide you may wish to review the training categories you selected during registration. You can do this within your account by selecting Edit Organisation > DWP Settings > Edit Details.**

When an RFQ is sent, you will receive an email notification which includes a PDF copy of the RFQ. This is **not** the RFQ and you will be unable to open the attachment or respond to this. You must respond via the supplier portal.

## 7. Viewing RFQ's

Access the RFQ by selecting the Documents tab  in the supplier portal.

Using the Document List on the left hand side of the screen navigate to Requests For Quote, you can filter these further by selecting a relevant Document Status, i.e. Not Yet Viewed, All, or by Time Period, i.e. Today, This Week.

Select the relevant RFQ from the list and open the document using the document icon  from the Document Summary.

Once the document has been opened, you will see an attachment on each RFQ, which **must** be completed and returned along with your quotation. The link to open the attachment will appear at the line level, it will always begin with Annex 3.


**Hint and Tip:** You may receive a Procsolve standard message alert when you open the attachment, if you do, click OK to proceed.


You will then be given the option to open or save the attached document. You should complete the Annex 3 with your quote details and save locally, e.g. desktop, My Documents, and then close the attachment, prior to responding to the quote within the portal. Do not amend or add any further information to the specification details.


## 8. Responding to RFQ's

From the Document Summary screen select the  arrow next to Create Quote.

The RFQ > Quote screen will be displayed.


Before you can complete the quote information you must save the details to generate a quote number. Select the  save icon. A warning will appear in red across the middle of the screen stating "Warning. No quote lines"

Enter quote lines by selecting the  add lines button. **You should choose this button each time you create a quote to ensure the relevant information is transferred from the RFQ into the quote lines.**


Select the edit icon  to add the extra information to your quote. You need to ensure you include the following:


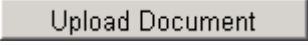
- The price of the training (the pound sign is not required)
- Amend the VAT code if necessary
- Ensure both the Item ID and Description fields are populated with information from the original RFQ



**To Note:** You will see a field populated with Social Care. (the field next to the Item ID field). The information in this field must be deleted as it has been populated from the DWP system but the Procsolve system does not recognise the details. If this is not deleted you will not be able to save the changes and proceed.

You can also add extra lines if required, for example, a non VAT line. To add a second line, select the  add line button and copy the Item ID, descriptions etc from the first line and enter price, quantity and VAT code as required. Amend the Item ID to ensure it is not identical to the first line e.g. copy the information from the first line then add **non VAT**.

**IMPORTANT:** Once you are happy with the quote details you **must** add the Annex 3 as an attachment.

To attach the document to your quote you should select the  upload document button.

Using the  Browse button search for the document you wish to attach and then select  Upload Document button. You will see a URL in the Attachment URL field.

Once all the information has been populated select the  save icon again and then  submit quote. You will receive a warning screen prior to the quote being submitted to say that once it is sent it cannot be undone. Select Submit again to confirm.

**Do not send the Quote unless a URL is populated in the attachment field. Failure to do so will mean that your Quote is rejected.**

**It is DWP policy to pay on completion of training. If you require payment at any other interval, you will need to highlight this in your quote details on the Annex 3.**

**You must only use the standard character set available on your computer keyboard. If there is a need to include information on Quotes or Invoices that uses non standard characters, you must include them in the Annex 3. If you do not take this action, any Quotes or Invoices submitted with special characters will fail to be passed to DWP.**

## 9. Winning the Quote

If you do not hear from DWP within 5 working days of the closing date, you should presume you have been unsuccessful on this occasion.


If you are successful in the tender process you will receive a Purchase Order from DWP. You will be notified in the same way you are informed about an RFQ, you will receive an email notification including pdf.


You will also receive an SL2 form from Jobcentre Plus with trainee details and start and end dates. You will need to return it to the named Jobcentre Plus contact once training has taken place to allow for payment. You may need to return the form several times to ensure Jobcentre Plus is updated on customer progress and ensure payments are made at the agreed stages.


**Note: If your quote is accepted by DWP, your organisation may also be awarded any duplicate requirements arising in the same geographical area within the subsequent 6 months and to a maximum value of £50,000. There is, however, no guarantee of any additional requirements.**

## 10. Submitting an Invoice



**An invoice should only be sent once the training has taken place and a completed SL2 has been returned to Jobcentre Plus.**

To submit an invoice you must first select the Purchase Order by highlighting the relevant Order from the Document List and selecting the  arrow next to Create Invoice.

The Purchase Order > Invoice screen will be displayed. Before you can complete the invoice information you must save the details to generate an invoice number, select the  save icon. A warning will appear in red across the middle of the screen stating **“Warning. No invoice lines”**.

Enter invoice lines by selecting the add lines button . You should choose this button each time you create an invoice to ensure the relevant information is transferred from the PO into the invoice lines.


The price and quantity will appear to be the wrong way around but **DO NOT** amend this. The quantity field should contain the price and the price field should equal 1.


Once all the information has been populated select the  save icon again and then  submit the invoice.

You will receive a warning screen prior to the quote being submitted to say that once it is sent it cannot be undone.

Select Submit again to confirm.

## 11. Submitting a Partial Invoice

**If DWP has agreed to staged payments and you want to send an invoice for the agreed amount you need to follow the information above to create the invoice but prior to saving the information and submitting you must select the  edit icon.**

Enter the amount you wish to invoice in the quantity field then select the  save icon and send as you normally would.

**Hint and Tip:** For each staged payment a new SL2 is required in order for payment to be released.

## 12. Re-submitting a Rejected Invoice


In some circumstances the invoice you submit may be rejected. This usually happens if the information provided does not identically match the information held in the DWP system. In this instance you will receive a call from DWP asking you to resubmit the invoice and will be advised of the process required.

## 13. Re-registration

When you first register to become a LVP supplier, you answer the accreditation questions to allow you to trade with DWP. The accreditation expires after 12 months, so dependent on when you register, you will need to re-register **on or** before the anniversary of the initial registration.

**If you do not complete your renewal you will no longer receive Request for Quotations or Purchase Orders from DWP. However, as soon as the accreditation is completed, you will be able to continue as normal.**

Log into your Procsolve account and select 'Edit Organisation'.

Once in the 'Organisation Management – View Organisation' page, select the DWP LVP Settings tab .

You will see at this point whether your organisation is currently certified. If your certification has expired you will see the following message:

Your organisation's LVP self certification status is currently: **Not Certified. Take the self certification questionnaire.**

Selecting the hyperlink within the Procserve screen will take you to the certification questions.

You should answer all questions and select the 'Submit' button.



Once submitted, you will be taken back to the 'Organisation Management – View Organisation' page. However, the message should have changed to the following:

Your organisation's LVP self certification status is currently: **Certified.** It will expire on [Date/Month/Year]. **Take the self certification questionnaire again.**

You will now be certified to continue trading with DWP.

## 14. Help and Support

If you require any further assistance please contact us on:

[NORCROSS.PROCUREMENTOPERATIONS-SUPPORT@DWP.GSI.GOV.UK](mailto:NORCROSS.PROCUREMENTOPERATIONS-SUPPORT@DWP.GSI.GOV.UK)

Or call us on **01253 332970**, our helpline opening hours are Monday – Thursday 08:30 – 16:30 and Friday 08:30 – 16:00.

For any **invoice / payment related queries** please contact the Payment Services Helpline on 0845 602 8244.

## Annex 1 – Frequently Asked Questions

### Will I as a small company be able to use the service?

As the service is an Internet-based solution, you only need a PC and Internet connection to use the service. The service offers benefit to any supplier, regardless of their size, technical capability or location.

### How much does it cost to join and trade with the service?

There are no registrations or transaction based fees of any kind for suppliers using the system. If you wish to integrate the system with your back office systems or to enable buyers to punch-out to your existing eCommerce website, then you will need to set up these interfaces and bear this cost. More information about these options is available from [www.procserve.com](http://www.procserve.com) within the downloads section.

### What benefits will my business gain in trading online through the service?

Suppliers can achieve savings as a result of online trading, by reducing administration procedures and removing the cost of printing and posting invoices and statements. Furthermore the service as the UK Public Sector's preferred choice will potentially allow you to market your services to new customers.

**We already have an eCommerce/trading website and want to use this to trade with our customers. Can we do this?**

If you have an existing trading website with “shopping cart” functionality and wish to link this to the service to sell to your customers, you may be able to do this. Customers may be able to use the service to visit your site and place orders. However, some other forms of integration may be required. There may be a cost associated with integrating your site to the new marketplace depending upon the degree of integration required or the level of functionality your existing website provides. More information about these options is available from [www.procsolve.com](http://www.procsolve.com) within the downloads section.

**I supply more than one Public Sector organisation. Will I need to go through this all over again for those organisations?**

No, if your other government customers also join, you will be ready to trade with them and will not need to repeat your registration. You will only have to load or provide additional specific catalogues on the system. The system will help you ensure that only the right customers see the right catalogues.

**So does this mean I will need to operate both traditional and e-enabled systems to trade with all the government departments?**

Yes, you will need to operate both traditional and electronic processes until all your other government or Public Sector customers join. When they join, you will already be set-up to trade with them.

**If my organisation objects to using the Internet for religious reasons, will my customers stop trading with me?**

The Public Sector will not discriminate against those organisations whose employees do not use the Internet for religious reasons. Please speak to your customer to determine what arrangements they have made to be able to trade with you.

## **We have pricing structures for various areas. Can we show this on the system?**

You can create individual catalogues for each pricing structure and upload them. The system can hold an unlimited amount of catalogues and they are maintained by the supplier. You can then define what buying organisation you want to be able to view them.

## **How can we add delivery charges?**

Delivery charges can be handled by either adding into the line item or attaching an associated line item.

## **What are the recommended technical IT requirements for suppliers to connect to the service?**

Suppliers only need access to the internet via a PC to use the service.

The minimum hardware requirements are:

- Pentium III with 128 MB RAM (minimum recommended specification)
- Display – 800 x 600 pixels / small fonts; 256 or greater colours (minimum)
- 1024 x 768 pixels / small fonts; 256 or greater colours and 32 bit colour quality (recommended)

The operating system requirements are:

- MS Windows 98, NT, 2000, ME or XP with TCP/IP configured

The Internet Browser requirements are:

- Microsoft Internet Explorer version 5.5 (minimum)
- Microsoft Internet Explorer version 6.x (recommended)

## **What support is there to help suppliers trade on the system?**

If you have received an invitation to a supplier adoption forum then we would strongly recommend you attend as these are proven to answer a number of common questions from suppliers.

Further to the forums, Procserve run regular internet based online training sessions “webinars.” You will be able to register for these on the Supplier Portal once you have been invited to become a supplier.

Further information and help is also available at <http://www.procserve.com/> or by email to [supplierssupport@procserve.com](mailto:supplierssupport@procserve.com).

## **I have tried logging into the system and I am getting an error message saying “Please contact your system administrator”. What do I do?**

If you have attempted to get in the system several times without success, you may have locked yourself out of your account. You need to contact DWP Shared Services First Line Support via email at [norcross.procurementoperations-support@dwp.gsi.gov.uk](mailto:norcross.procurementoperations-support@dwp.gsi.gov.uk) with your company name, your Procserve user name and contact details. DWP Shared Services will arrange for your account to be unlocked.

Once this action has been confirmed, the system will take approximately 10 minutes to upload the change. Input your user name and click forgotten password. You will receive your new password via email, which will enable you to access the system.

### **I have received a Purchase Order from DWP, when can I submit my invoice?**

DWP standard payment terms are pay on completion. Therefore, an invoice should not be submitted until training has taken place. If you have any queries around this, please contact DWP Shared Services First Line Support on 01253 332 970 or [norcross.procurementoperations-support@dpw.gsi.gov.uk](mailto:norcross.procurementoperations-support@dpw.gsi.gov.uk).

### **How do I view RFQ attachments in the Procserve Supplier Portal?**

If an RFQ has an attachment, a hyperlink will display in the line details of the RFQ. Click on the hyperlink to view the attachment. You may receive a Procserve standard message alert. If you do, click 'OK' to proceed. You will then be given the option to open or save the attached document.