



Request New Supplier Form

How to Set Up a New Supplier or Expense Claimant

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LSE suppliers may be companies or individuals (sole traders). In order to pay any supplier, they must first exist within OneFinance. Before you can pay a supplier, they need to exist within OneFinance.

This also applies to external individuals requiring expense reimbursement, where the individual does not have a UK bank account. 'Supplier' is therefore used as shorthand for LSE creditors of all types, i.e. people and organisations to be paid.

You can check whether a supplier/payee already exists via the Creditor Accounts function (ensure the UUKAP option is selected as the Chart Name on the right hand side of the screen).

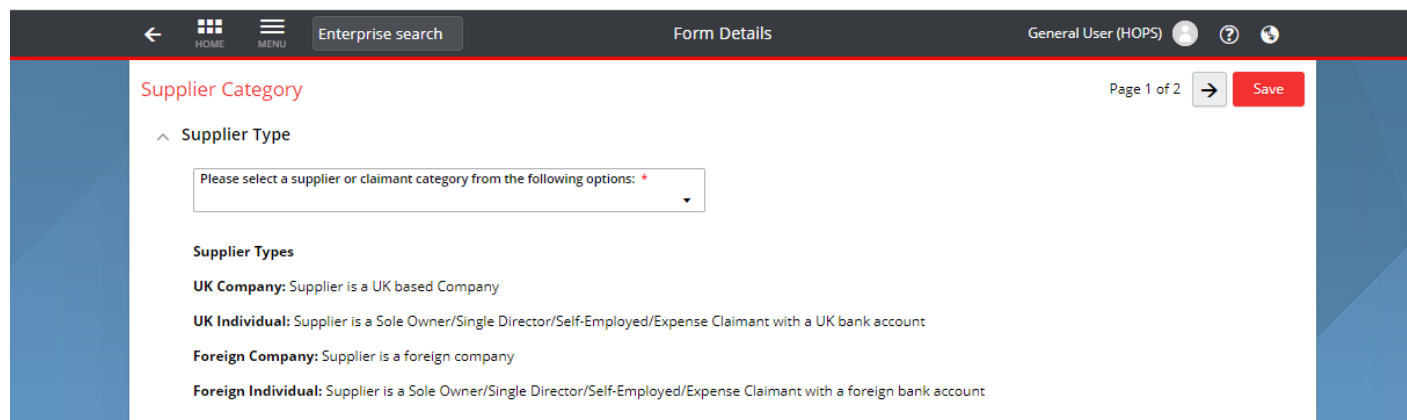
If the supplier needs to be set up, please complete the Request New Supplier Form in OneFinance by following the guidance below. New suppliers will be added to OneFinance within three working days, provided all the necessary details have been provided and there are no concerns about a company's viability.

1. Accessing the Request New Supplier Form

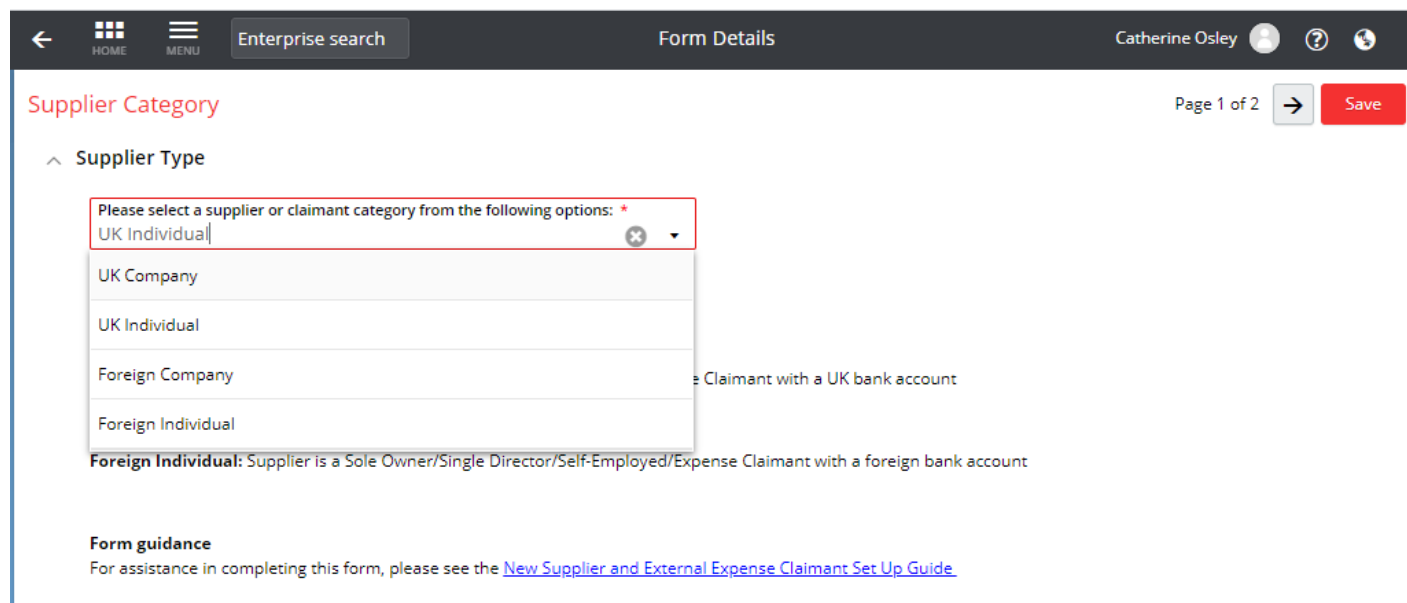
1. Login to OneFinance at <https://lse.t1cloud.com/>
2. From the Home page or by typing in the search bar, select **Forms**
3. From the form options, click the **Request New Supplier Form**, which will show a preview of the form. There is no need to select your supplier type at this stage
4. Click **Fill Out** to open the form

The screenshot shows the OneFinance Forms interface. The top navigation bar includes 'HOME', 'MENU', 'Enterprise search', and 'Forms'. The user is logged in as 'AP Officer Test'. A search bar is visible. Below the search bar, there are tabs for 'Forms' and 'Responses'. A message states '6 forms. Select a form to fillout.' The 'Request New Supplier Form' is highlighted in red. To the right, a preview of the form is shown, including a 'Supplier Category' dropdown, 'Supplier Types' (UK Company, UK Individual, Foreign Company, Foreign Individual), 'Form Guidelines' (Workflow, Amendments, Rejection, Blank Forms), and a 'Fill out' button.

5. The landing page of the form will open:



6. Select the type of supplier you require from the dropdown list, using the descriptions provided if necessary. This will take you to the relevant sub section for that type of supplier



- [\(To set up a UK Company\)](#)
- [\(To set up a UK Individual\)](#)
- [\(To set up a Foreign Company\)](#)
- [\(To set up a Foreign Individual\)](#)

2. Setting up a UK Company

1. Before completing this form, you should ask your supplier to provide their details directly. External parties cannot access OneFinance and should provide their details to you. It is highly recommended that you send your supplier the [Onboarding guide for LSE suppliers](#). This includes the New Supplier Set up [pro-forma](#).
Please note: if you already have all of the mandatory information requested on the form, and supporting document(s), such as an old invoice or other communication, which verifies the company and provides the relevant bank details, then you do not have to send the pro-forma to your supplier. However, please be aware that if any information is missing, this will delay the set up of your supplier
2. You will need the contact and UK bank details of the company, the VAT registration number and the size of the business. These are required either for compliance reasons or to ensure payment(s) can be smoothly made.
3. Fields marked with a red * are mandatory in order to be able to submit the form
4. Once you have all the details, you can complete the basic details in OneFinance and then attach the form or other documentation received from the supplier. It is mandatory to supply something directly from the company. This is to ensure the details can be independently verified during the set up process
5. If you expect to spend more than £7999.99 (excluding VAT), you must ensure you have followed LSE procurement rules, and attach evidence as stated

TH
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^ Procurement

If you intend to spend more than £7999.99 (excl. VAT) with this supplier, please ensure you have followed the correct Procurement procedure, attaching ONE of the following

- Three quotes
- Single source approval
- Contract document

Please refer to the [LSE Procurement Policy and Procedures](#) for more information.

^ Procurement Attachments

Attachments

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Once complete, click **Submit for approval** to send the form to Accounts Payable for processing

3. Setting up a UK Individual

This option covers both self-employed individuals/sole traders and external expense claimants.

3.1 Your supplier is a sole trader providing goods or services to LSE

- 1 Before completing this form, you should ask your supplier to provide their details directly. External parties cannot access OneFinance and should provide their details to you. It is highly recommended that you send your supplier the [Onboarding guide for LSE suppliers](#). This includes the New Supplier Set up [pro-forma](#).
Please note: if you already have all of the mandatory information requested on the form, and supporting document(s), such as an old invoice or other communication, which verifies the company and provides the relevant bank details, then you do not have to send the pro-forma to your supplier. However, please be aware that if any information is missing, this will delay the set up of your supplier
2. You will need the contact and UK bank details of the individual
It is mandatory to supply something directly from the individual, such as an email chain. This is to ensure the details can be independently verified during the set up process
3. Fields marked with a red * are mandatory in order to be able to submit the form
4. Once you have all the details, you can complete the basic details in OneFinance and then attach the form received from the supplier.
5. You will need to select whether the individual is providing Goods or Services. Where the individual is providing Services, the form will route to payroll for approval
6. If the individual is providing goods or services, and you expect to spend more than £7999.99 (excluding VAT), you must ensure you have followed LSE procurement rules, and attach evidence as stated

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3.2 You wish to set up an external individual for expense reimbursement

7. Complete the details as requested for the individual and attach bank details in the format they provided them, normally an email chain.
8. Fields marked with a red * are mandatory in order to be able to submit the form
9. You do not need to set up external individuals with a UK bank account as a supplier, payment can be requested via the External Expense Claim (UK only) form, for more information, please see here. Set up is recommended where you anticipate making regular payments to the individual

Once complete, click **Submit for approval** to send the form to Accounts Payable for processing

4. Setting Up a Foreign Company

1. Before completing this form, you should ask your supplier to provide their details directly. External parties cannot access OneFinance and should provide their details to you. It is highly recommended that you send your supplier the [Onboarding guide for LSE suppliers](#). This includes the New Supplier Set up [pro-forma](#).
Please note: if you already have all of the mandatory information requested on the form, and supporting document(s), such as an old invoice or other communication, which verifies the company and provides the relevant bank details, then you do not have to send the pro-forma to your supplier. However, please be aware that if any information is missing, this will delay the set up of your supplier
2. You will need the contact and bank details of the individual. For foreign suppliers, you do not need to enter bank account information directly into OneFinance. This is because the requirements vary by country and it is better for the supplier to provide the information they consider will be required to successfully complete an international payment
3. Fields marked with a red * are mandatory in order to be able to submit the form
4. Once you have all the details, you can complete the basic details in OneFinance and then attach the form or other documentation received from the supplier. It is mandatory to supply something directly from the company. This is to ensure the details can be independently verified during the set up process
5. If you expect to spend more than £7999.99 (excluding VAT), you must ensure you have followed LSE procurement rules, and attach evidence as stated

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Once complete, click **Submit for approval** to send the form to Accounts Payable for processing

5. Setting Up a Foreign Individual

This option covers both self-employed individuals/sole traders and external expense claimants. For foreign individuals, you do not need to enter bank account information directly into OneFinance. This is because the requirements vary by country and it is better for the supplier to provide the information they consider will be required to successfully complete an international payment.

5.1 Your supplier is a sole trader providing goods or services to LSE

1. Before completing this form, you should ask your supplier to provide their details directly. External parties cannot access OneFinance and should provide their details to you. It is highly recommended that you send your supplier the [Onboarding guide for LSE suppliers](#). This includes the New Supplier Set up [pro-forma](#).
2. Fields marked with a red * are mandatory in order to be able to submit the form
3. Once you have all the details, you can complete the basic details in OneFinance and then attach the form or other documentation received from the individual. It is mandatory to supply something directly from the company. This is to ensure the details can be independently verified during the set up process
4. You will need to select whether the individual is providing Goods or Services. Where the individual is providing Services, the form will route to payroll for approval
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5.2 You wish to set up an external individual for expense reimbursement

6. Complete the details as requested for the individual and attach bank details in the format they provided them, normally an email chain.
7. Fields marked with a red * are mandatory in order to be able to submit the form

Once complete, click **Submit for approval** to send the form to Accounts Payable for processing

6. Reviewing the Status of Your Form Submissions

When your New Supplier Set Up form has been assessed, it will be either Approved or Rejected. You should receive an email notification to confirm the outcome of your form submission. If your supplier has been approved, you will be able to proceed to select them within AP Payment Requests and Purchase Order requisitions.

Please note, if your form does not contain all the required information, it will be rejected. It is then not possible for Finance staff to make amendments to a form once it has been rejected.

If you are unsure of the status of a particular request, you can view your submissions within Forms.

1. In the **Forms** function, switch tabs to **Responses** (rather than Forms)

The screenshot displays the 'Forms' interface with the 'Responses' tab selected. On the left, a list of 7 responses is shown, each with a checkbox, a version indicator (Version 3), and a status label (REJECTED or SUBMITTED). The first response is highlighted in red. On the right, a detailed view of the selected 'Request New Supplier Form - 10-Feb-2020 13:25:46' is shown. This view includes a 'Supplier Category' section with a dropdown menu set to 'Foreign Individual', 'Supplier Types' with explanatory text for UK, Foreign Company, and Foreign Individual suppliers, and 'New Supplier Details' with input fields for 'Chart Name' (UUKAP), 'Account Mask' (NNNNN), and 'Account Number' (17665).

- To access a particular form, click on the red **View** button on the right-hand side. This will display the Form Details. Click on the **Auditing** tab on the left hand side of the screen to see the workflow/status associated to the form view the reason for rejection

The screenshot displays the 'Request New Supplier Form' interface. At the top, it shows 'Request New Supplier Form - 04/02/2020 15:58:26' and 'Rejected'. A red 'Copy' button and a 'Workflow complete' indicator are visible. A notification at the top right states 'Changed by Melanie D'Arcy at 05-Feb-2020 12:36:43 View audit details'. The left sidebar contains navigation options: 'Supplier Category', 'New Supplier Details', and 'Auditing' (which is highlighted in yellow). The main content area is titled 'Auditing' and shows a workflow table with the following steps:

Step	Action	By	Department	Date
1	Create	Melanie D'Arcy		
2	AP Approval		Accounts Payable Department	
3	Reject	Melanie D'Arcy		05-Feb-2020 12:36:44
4	AP Notify Rejected	Melanie D'Arcy		
5	AP Reject End Task	Melanie D'Arcy		