



Index

Pre-registration Stage

What categories can I become a supplier of?

What do I need to do to become a Supplier on PW Evo?

I have been instructed to register on PW Evo. How do I do that?

What else do I need to do after I register?

Will I need specialist IT system?

Will I need special Training?

Will I get ongoing Training and Support?

Does my delivery process change?

Does my invoicing process change?

Do I need to keep my prices up to date on PW Evo?

Who needs access to PW Evo?

How many user accounts can I have?

How will I get paid?

Will I be charged for using PW Evo?

What features does PW Evo have?

Is there an ongoing Support?

Is there an ongoing Support?

Post-registration Stage

What happens after I complete my online registration?

What is the Supplier Survey?

What happens after I completed Supplier Survey?

How can I keep on top of things?

Can I only have access to the customer I look after?

Will my delivery schedule change?

What if I don't have any delivery rules?

What is the 'Product Allergens' form?

What format should I send my price list in?

How does splittable products work on PW Evo?

How do I set up my weighted products on PW Evo?

What is a SKU?

Why do I need product codes?

What if I use one product code for more products?

What are my Invoice options?

How do I change a price?

What if my customer orders products I don't currently stock?

Pre-registration Stage

What categories can I become a supplier of?

Typical supplier categories that customers use Procure Wizard Evo to interact with:

- Food and Beverage purchases
- Stationery and Office supplies
- Cleaning and Chemical supplies
- Uniforms and Workwear
- Crockery, Cutlery and Glassware
- Service providers and ad hoc suppliers
- Medical and Consumable supplies
- Maintenance and Electrical supplies
- Capital equipment

What do I need to do to become a Supplier on PW Evo?

Procure Wizard Evo is an invite-only platform where your customers will initiate the onboarding process by sending you their PW Evo Supplier Setup Forms directly.

Please reach out to your purchaser and request that they provide their PW Evo Supplier Setup Forms.

I have been instructed to register on PW Evo. How do I do that?

Once the completed PW Evo Supplier Setup Forms have been returned to the Procure Wizard Evo Onboarding Team, please register for an online account here.

Please note that you only need to register once on the system; multiple registrations may cause confusion on the portal and lead to delays with your setup.

What else do I need to do after I register?

Once you have returned your completed PW EVO Supplier Setup Forms to PWonboarding@theaccessgroup.com, our Onboarding Team will advise on the next steps and confirm once your account has been fully set up.

Will I need specialist IT system?

No, there's no need to purchase or download any software. The PW Evo Supplier Portal enables you to trade electronically with your clients regardless of your IT capability as it is an online platform that can be accessed anytime using a computer/smart device with Internet access.

Will I need special Training?

Once your online account is fully set up, we will provide training through our in-product Digital Assistant. This will guide you around the system, show you how to confirm your invoices, and help you manage your price list on an ongoing basis. You can either read through our available guides on these topics or watch our training videos to gain a better understanding of the PW Evo system.

Will I get ongoing Training and Support?

Yes, PW Evo Support Team provides ongoing support and training and users can choose how they wish to access this support. This can be by telephone or by using the PW Evo online Digital Assist feature. Online library of guides and videos are also available to you. How will I receive my orders?

From your go-live date on PW Evo you will receive orders by Email or EDI option is also available depending on your preference and level of capability. The original purchase order includes all the key data required for you to accurately fulfil the order.

Does my delivery process change?

No, you will process PW Evo orders and send delivery to your client as usual.

Does my invoicing process change?

Yes, from your go-live date on PW Evo all invoices will need to be processed online. There are three options to process invoices; Portal, CSV, or EDI. Details for particular types of invoicing will be provided during the setup process, you can also contact our Support Team if you need to go through the first couple of invoices to make sure you're using the correct process.

Do I need to keep my prices up to date on PW Evo?

Yes, it is the supplier's responsibility to keep pricing updated. You can update each individual customer's price file at the click of a button by following simple steps covered in the Product Management guides and videos.

Suppliers are requested at the point of enrolment to confirm that the price on PW Evo is the maximum price the customer is willing to pay. Invoices received with a greater value are likely to be held until a credit is received.

All price changes made and subsequently accepted or rejected by your customer will be notified back to you by e-mail alert.

Who needs access to PW Evo?

When creating a new user account it's important to think about who will need access to your PW Evo system. This will be important especially for telesales (to acknowledge orders), accounts (to confirm invoices) and to account managers to manage your products, allergens details and price lists.

You can have as many logins as needed for your company, one access for all can also be set up if preferred.

How many user accounts can I have?

As many as you need. You can set up separate logins for each user or one login for all if you prefer more employees accessing the PW Evo online account from one login. New users can be always added in few quick steps and any old users can be taken off the system easily.

How will I get paid?

Payment for orders received via PW Evo customers will follow your current payment collection procedures. PW Evo does not make payments on behalf of customers.

Will I be charged for using PW Evo?

No — suppliers are not charged for using the Procure Wizard Evo Portal. All standard portal functionality is provided free of charge, including:

Receiving and managing orders

Confirming invoices

Maintaining and updating price lists

Accessing standard training guides and videos

However, there are some scenarios where fees may apply:

Optional EDI Integration

If you choose to integrate via EDI (Electronic Data Interchange), additional fees will apply. These are outlined in the Procure Wizard Evo EDI Agreement and include charges related to establishing and maintaining the EDI connection.

OneOff New Customer Connection Fees

For some new customer connections, oneoff connection fees may be applicable. Full details of these charges can be found in the PW Evo Supplier Setup Forms.

How do I access PW Evo?

After your user account has been created, you will shortly receive your login details by email with further instructions. This also includes a link to the login page on our portal.

What features does PW Evo have?

Delivery rules

Default rules can be set up to inform your customer of next available delivery day.

Minimum order value

This feature allows the assignment of minimum order value and delivery cost (if the minimum is not met). Setting can be assigned to a single venue or the purchaser group as a whole.

Split charges

Splitting rule can be defined, modified and applied to purchasers as Fixed Cost or Percentage Cost.

Adding new products

This functionality allows you to add new products into the Procure Wizard Evo catalogue so customers can purchase your product.

Amending prices

Prices can be easily added, changed and deleted online using our Product Search feature. Changes for multiple products or across more clients can be done in one file ready to be imported. Your pricing can also be uploaded with a future date as well as immediate effect as needed.

View outstanding invoices in one place

Orders overview located on your home screen takes you straight to Awaiting invoice status to process any outstanding invoices for all your customers.

View outstanding credit requests in one place

Credits overview located on your home screen takes you straight to Credits status to process any outstanding credits for all your customers.

Reporting functionality including statements

Provides clear and comprehensive management reports.

Will my prices be confidential?

Contract price lists created on PW Evo are not visible to other suppliers or customers and are fully confidential. You can create separate price lists with different pricing structures for each of your customers.

Is there an ongoing Support?

Yes. The PW Evo Support Team provides ongoing support, and users can choose how they prefer to access it.

Support is available by phone or through the PW Evo in-product Digital Assist feature.

Post-registration Stage

What happens after I complete my online registration?

Once you have returned your completed PW Evo Supplier Setup Forms to PWonboarding@theaccessgroup.com, our Onboarding Team will advise on the next steps and confirm once your account has been fully set up.

What is the Supplier Survey?

Supplier Survey is a document that gathers ordering details from suppliers and is used by the PW Evo Onboarding Team to set up your online account. The following is covered: price list, account codes, minimum order value, delivery rules, order/credit requests emails, online user accounts and type of invoicing.

What happens after I completed Supplier Survey?

The completed Supplier Survey, including your price list, should be returned to the PW Evo Onboarding team. Once received, the team will update your online account with all the information provided for the customer. Your ordering settings will be configured, and your price list will be uploaded on your behalf.

Once everything has been completed, a confirmation email will be sent to you.

How can I keep on top of things?

There are several types of email alerts available to you to help you monitor events on PW Evo, these can be turned on any time.

For Example:

- New Order Placed – to keep on top of all your orders, if you'd like to be notified about new order but don't need to see all details etc.
- Purchaser Accepted / Rejected Your Prices – to stay on top of your price changes
- Overdue Pending Price Changes – informing you that your newly added prices were not yet accepted by your customer so you can follow up immediately with the customer
- New Purchaser Unit Created – so you can gain more business when your customer adds more venues to PW Evo

There are also Overview types of Alerts that can be sent to you daily/weekly at certain time of a day to inform you about Outstanding Invoices, Awaiting Deliveries, Awaiting Acknowledgement of an Order received, Rejected Credits and others.

These are not set up as default but can be quickly added to your account.

There's also an Online Alerts inbox where you can see all your alerts in one place after accessing your PW Evo account.

Can I only have access to the customer I look after?

Yes, if there are more account managers with different customers their access can be limited by these customers so they can only manage their part of the account.

Will my delivery schedule change?

No, we can pre-set the delivery rules ensuring that purchasers can be confident that orders placed will be fulfilled in line with the supplier agreements.

You can set up different delivery rules for different venues and customers. However, only one rule can be created for each venue (hotel, restaurant etc.). Any exceptions need to be communicated to your client and their end users who are placing orders.

What if I don't have any delivery rules?

PW Evo default delivery rules are set to next day delivery, 7 days a week with a cut off time at midnight the previous day. If you don't advise your delivery rules, default will be used and any time an order is placed next day will be shown as next available delivery date.

Setting up correct delivery rules is an important task especially for customer's stock take.

Will my minimum order policy change?

No, you can mirror your minimum order policy ensuring that orders created within PW Evo fully mirror your supply agreements.

What is the 'Product Allergens' form?

This form is used to ensure you have a clear understanding of your responsibilities regarding the procedures relating to Product Allergens upload onto PW Evo.

What format should I send my price list in?

Please provide your price list in Excel format only.

For a successful upload, make sure the file includes the following information:

- Full product description
- Product categories
- Pack sizes
- Product codes
- VAT rates
- Prices
- Any other relevant specifications (e.g., brand, fresh/chilled/frozen, dried, canned, etc.)

Providing complete and accurate details will help us set up your price file correctly.

How does splittable products work on PW Evo?

Always advise pack size and price for this size. If a product can be bought as split, please clearly mark this next to this product. (If a split price is not an even split of a case size, this would have to be entered as separate product with split price and different product code.)

How do I set up my weighted products on PW Evo?

There is quite a difference in 'priced per Kg' and '1 x 1 Kg pack' products. If a product is entered as 1 Kg pack this can't be priced as weighted product, only as multiples of 1 Kg.

Only product entered as 'price per Kg' can be weighted and price is then automatically recalculated accordingly when completing your invoice.

This is very important when uploading any new products.

What is a SKU?

SKU (Stock Keeping Unit) is a unique identifier used to track products. It should match your internal product codes to ensure accurate mapping and processing on PW Evo.

Why do I need product codes?

PW Evo system requires product codes to be uploaded in your product list to give each product their unique indicator. This is then used for quick and efficient management of your product list and pricing.

If you are not using product codes we can assign our own codes to your products. Any changes to your products would then need to be done by your product description only and can't be carried out by PW Evo Products Team.

What if I use one product code for more products?

PW Evo system requires unique product codes as default.

What are my Invoice options?

PW Evo supports supplier invoices in three ways:

1. Portal Invoices

You can log in to your PW Evo account and amend the order to ensure it matches the values on your backoffice invoice. The electronic invoice is then emailed to the purchaser, and the online version can be used by them to upload into their accounts system for payment.

This option is free and ideal for suppliers who receive only a few orders per week.

2. CSV Import

You can compile multiple invoice records within an Excel file (saved in CSV format) and import the file directly into the PW Evo system.

This option is free and suitable for suppliers who receive several orders but do not have the technical capability to move to EDI.

3. EDI (Electronic Data Interchange)

For suppliers who can send EDI files, this option removes the need to manually upload portal invoices.

Fees apply. This option is ideal for suppliers who receive high volumes of orders and want to streamline processes by reducing telesales activity and automating invoice handling.

How do I add a new product?

For additional products upload you can use our Product Management option online. You can add single products using our 'Single Product Creation' option as well as batching multiple products using the 'Batch Product Creation'.

Product Management guides and videos are available in your Support Help Centre located within your online account.

How do I change a price?

For amending your prices you can use our Product Search option online. This allows you to change prices of your product across all your clients.

Amendments for multiple products or across more clients can be done in one file ready to be imported. Price List Amendments guides and videos are available in your Support Help Centre located within your online account.

What if my customer orders products I don't currently stock?

You can manage product availability by marking items in your catalogue as out of stock. This ensures Purchaser Users can clearly see which products are unavailable before placing an order, helping to prevent issues and maintain accurate expectations.