

FAQ

Most common questions about our solutions

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Pre-registration Stage

What categories can I become a supplier of?

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

- Food and beverage purchases
- Stationery and office supplies
- Cleaning and chemical supplies
- Maintenance and electrical supplies
- Uniforms and workware
- Crockery, cutlery and glassware
- Service providers and ad hoc suppliers
- Medical and consumable supplies
- Capital equipment
- Butcher, bakers and candle stickmakers

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

You can become a supplier once you are asked to do so by your customer.

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

Your customer will have issued an official letter with all necessary information for your registration and set up on PW. Simply register for an online account [Here](#).

What else do I need to do after I register?

You are required to complete Supplier Survey which should have been sent to you by your customer together with a request for your current price list. Please return completed Survey to pwonboarding@theaccessgroup.com; our Administration team will advise next step 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 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.

What else do I need to do to have my Supplier account set up on Procure Wizard?

Once you register for an online account you will be accepted to your client's market on PW. After the PW Administration team receives your completed Supplier Survey and price list all the data will be set up online on your behalf. You will then receive export of your price list for review and a test order to make sure this is

emailed to you correctly.

Will I need special Training

Once your online account is fully set up we will offer you training to show you around our system, teach you how to confirm your invoices and also manage your price list on an ongoing basis. You can either read through our many guides on these topics or watch some of our videos to gain a better understanding of the PW system. If further training is needed there are online training sessions scheduled each week; these take about 30 minutes.

Will I get ongoing Training and Support?

Yes, PWizard Support Team provides ongoing support and training and users can choose how they wish to access this support. This can be by telephone, e-mail or by using the PW online Live Support 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 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 orders and send delivery to your client as usual.

Does my invoicing process change?

Yes, from your go-live date on PW all invoices will need to be processed online. There are four options to process invoices; Portal, CSV, PDF or EDI. Details for particular types of invoicing will be provided in the training session, 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?

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. There is also a training provided if further guidance is needed.

Suppliers are requested at the point of enrolment to confirm that the price on PW 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.

PW will provide the necessary training to enable you to maintain your catalogue, add, change and remove products and prices as required. You can also appoint the Products team at PW to undertake this task on your behalf if you prefer.

Who needs access to PW?

When creating a new user account it's important to think about who will need access to PW system. This will be important especially for telesales (to acknowledge orders), accounts (to confirm invoices) and to account managers to manage your products 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 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 customers will follow your current payment collection procedures. PW does not make payments on behalf of customers.

Will I be charged for using PW?

Any charges need to be discussed with your customer. Please contact your customer directly.

How do I access PW?

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 website.

What features does PW 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 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 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.

Post-registration Stage

What happens after I complete my online registration?

You will receive an e-mail alert confirming your registration. In a separate e-mail you will also receive your login details.

What is the Supplier Survey?

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

What's the difference between 'Order E-mail', 'Secondary Order E-mail' and 'Order has been placed Alert'?

There are three ways of being informed about a new order placed on PW system.

Order Email (compulsory) is used to send your customer's orders to you. This e-mail includes all order details directly in the e-mail body. Quick access to your order is ensured by 'View Order' button that takes you directly to your online account (login is required). Any email address can be used to receive orders even if this particular email is not attached to a user within the PW system, you can have multiple order email addresses set up if needed.

Secondary Order Email (with attachment) is used to send you customer order details as an Excel attachment (CSV file). There is again a 'View Order' button in the email body and all details are attached. This type is optional and can be useful for keeping records of your invoices in CSV format. Any email address can be used to receive orders even if this particular email is not attached to a user within the PW system, you can have multiple order email addresses set up if needed.

Alert sent to your Inbox – 'Order has been placed' Alert – this is an Alert sent to your Inbox informing you about order being placed. No details are given except order number that can be used to quickly locate your order online. This type is optional and can be turned on for any supplier user set up on PW.

This alert can only be set up for actual PW account user.

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, 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

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 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 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 fully mirror your supply agreements.

How do I know my order settings online are correct?

We send you a test order after your account set-up has been fully completed. You will receive this order by email to ensure that your setting is correct and to also give you a peek of what the real orders will look like.

This test order only lists one product – Children Smoothie drink; on your real order your own products and codes will be listed.

Please confirm when this order has been received so we know your settings are correct.

What happens after I completed Supplier Survey?

Completed Supplier Survey and price list need to be returned to PW Administration team who will update your online account with all data provided. All your ordering settings will be updated and your price list uploaded on your behalf. Once this is done a test order and your product and price list export will be sent to you for review.

What is the 'Price Maintenance' form?

This form is used to ensure you have a clear understanding of your responsibilities regarding the procedures relating to maintaining pricing online.

What is the 'Invoice Management' form?

This form is used to advise your customer of your preferred type of invoicing, choosing from four available options.

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.

What format should I send my price list in?

The best type of format is Excel. For successful upload of your price file you will need to give us following info: full product description, categories, pack sizes, product codes, VAT, prices, any other specification (e.g. certain brand, fresh, chilled, frozen, dried, canned etc.).

Alternatively you can use one of the templates provided in Supplier Survey and simply populate your data in.

This list then needs to be sent to PW Administration team for upload. More details are available directly in the Supplier Survey file in 'Information' tab, alternatively you can call the Admin team on 0844 801 2009 for further guidance.

How does splittable products work on PW?

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?

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 stands for Stock Keeping Unit and is used on PW for product codes.

Why do I need product codes?

PW 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 Products Team.

What if I use one product code for more products?

PW system requires unique product codes as default. This can be discussed with PW Products Team directly before you complete your price list to find a solution.

Will my prices be confidential?

You can create separate price lists with different pricing for each of your clients. These can't be accessed/viewed by other clients or suppliers.

There is a list price set up for Full price list pricing, should you wish to offer a discount off list price.

What are my Invoice options?

PW accepts supplier invoices in 3 ways:

- **Portal invoices**, you can login to your PW account and simply amend the order to ensure it matches the actual values of your back of house invoices. The electronic invoice is emailed to the purchaser and the online version can be used by the purchaser to upload into their accounts package for payment. (FREE and ideal for suppliers who only get a few orders per week)
- **CSV Import**, you can compile multiple invoices data within an Excel file (in CSV format) and import directly into PW system. (FREE and ideal for suppliers who receive several orders but do not have the technical ability to move on to PDF or EDI or simply do not want to pay any fee).
- **EDI Option**, for suppliers with the ability to send us EDI files (Electronic Data Interchange) to remove the need to manually upload portal invoices. Full EDI integration is available; however we are happy to start with Limited or Partial integration and build up as the business case dictates. (Fees apply, this option is ideal for suppliers who receive several orders and want to drive out the telesales function and automate invoice processing, in our experience national suppliers).

Pre-live Stage

Where can I login to PW?

You can login at PW website, your login details had been provided in registration email sent to your inbox. If you have any trouble logging in please contact PW Support Team on **0844 801 2008** or **pwsupport@theaccessgroup.com**

When and how can I book my training?

We will provide you with LMS guides one month prior to your customer going live. If you are looking for bespoke training, please discuss with the on-boarding team.

Is there an on-going Support?

Yes, PW Support Team provides ongoing support and training and users can choose how they wish to access this support. This can be by telephone or e-mail or by using the PW online live support feature.

Post-live Stage

How do I add a new product

For additional products upload you can use our improved 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 Online Training Centre located within your online account.

How do I change a price

For amending your prices you can use our improved 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 Online Training Centre located within your online account.

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

You can control product availability by simply marking items within your catalogue as out of stock, helping to ensure that Purchase Users are aware of stock availability prior to committing the order.