

CVS 'Offline' Order Process

This is for orders for goods (and occasionally services) that you are unable to place yourself directly via the People and Money punchout sites and catalogues.

There is a separate process to follow for couriers – see 'Using Couriers – CVS' guide.

All orders for goods and services (with only a handful of exceptions, e.g. taxis) must have a purchase order (PO) raised before committing expenditure on behalf of the University.

Step 1 – Check your supplier is set up on People and Money

Use the following link to access the most up-to-date list of University suppliers available in the spreadsheet. Please always check the spreadsheet via the link, as this will be constantly updated with new supplier names.

<https://bit.ly/3BnvPud>

If your supplier is listed, move to step 2.

If your supplier is not listed, please contact CVS.Finance@ed.ac.uk to ask for help setting up a new trade supplier.

Step 2 – Obtain a quote

In order for finance staff to raise any requisition for a purchase order in PAM, we must have the details of what you need to order and the cost.

So for most purchases you will need to obtain a quote from the company as a first step. This should either be an official quote, or an email confirming net costs (i.e. without VAT) should also suffice.

Procurement Rules

- For purchases up to a value of £5,000, only 1 quotation is required and must be attached to the requisition.
- When purchasing goods/services valued between £5,000 and £49,999 you MUST obtain 3 written quotes. All must be attached to the requisition and the procurement team will place the requisition with the cheapest. If this is not your preference, please ask CVS orders to put a clear explanation within the 'justification' section of the requisition and raise the request to your chosen supplier.
- Sourcing and procuring anything with a value over £50,000 MUST be conducted in combination with Procurement.

Where it is not possible to obtain 3 written quotes, e.g. where there is no competition for the item and only 1 or 2 quotes can be obtained, you must complete the 'Quotation

Recommendation' form, which is downloadable from <https://www.ed.ac.uk/procurement/howtobuy>

Step 3 – Complete the form

Complete the 'CVS PO form' available from the CVS internal web pages for download.

Step 3 – Return the form to the correct team

Please send your form to either CVS.Order@ed.ac.uk or CVS.Finance@ed.ac.uk according to the category your PO request falls under in the table below.

CVS.Order@ed.ac.uk	CVS.Finance@ed.ac.uk
Laboratory consumables and equipment	POs for training/events
Laboratory-based services, e.g. genotyping	POs for payments to NHS and other project partners
Laboratory equipment service contracts	POs for services and activities related to research grants, with the exception of servicing/maintenance agreements

Lab Management or CVS Finance will then raise a requisition for a PO in People and Money.