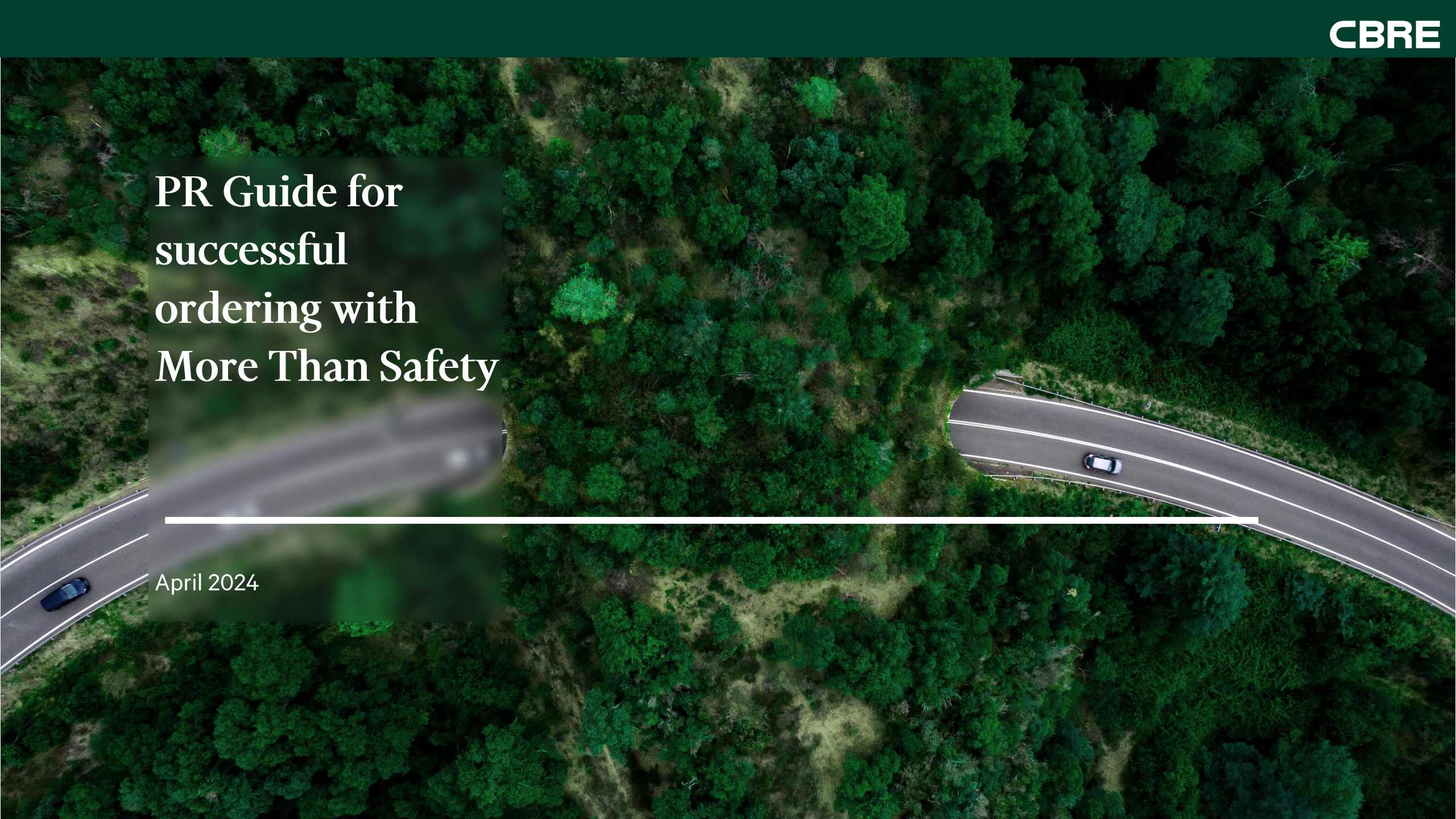

PR Guide for successful ordering with More Than Safety

April 2024

Imagine getting your orders within 3-5 days, you can and here's how...

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Purchase Requisition's require vital information, this is to:

To reduce time wasted in corrective actions

Ensures orders and invoices are fulfilled promptly

Increase speed of delivery to correct site address

Enable communication/SMS alerts updating users on orders

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Punch Out

Why are End User/Requester details so important?

Technical Changes to

Usually this is a conversation needed with the person who originally requested the item and rarely the PO raiser.

By including a telephone number, we can get in contact straight away to advise of these changes and offer alternatives if necessary.

Back Orders

Sometimes items go out of stock and can have extended lead times.

If we have the Requester details, we can call up/email and suggest alternatives or work through the issue. Enabling goods to be received quickly..

Dispatch Notification

Our automated systems send out a notification to the Requester and PO raiser, alerting the user that their goods have been dispatched.

The email also details the returns process and has a copy of the delivery note attached along with any backorder notifications. Ensure the end user e-mail address is included to receive order information.

Delivery Tracking

All our couriers use automated SMS delivery tracking, with the ability to delay or redirect orders.

In some cases, this is crucial in order to book the delivery into site in advance. In order to do this, we need the end user email/telephone number as this is a mandatory requirement of most couriers nowadays. If we have no details this holds up orders being dispatched.

Product Recall

We have always stored the end users details against order lines and this has been crucial in the past when dealing with product recalls.

Test equipment, LOTO locks and Tools have all been subjected manufacturers product recalls throughout the past few years and end user details have been crucial to this process.

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Punch Out

Why are PO raisers details so important?

Issues with PO received

We experience a number of issues with Purchase Orders, from wrong line type, incomplete or wrong delivery address details. These need to be corrected early on to stop soft closing of the PO.

PO's being closed early

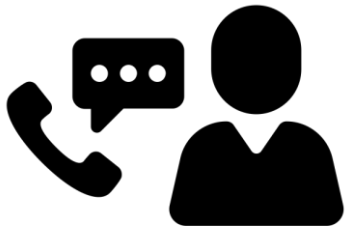
When a PO is closed on the system and we receive a notification this will cancel our backorders and leaves us needing to contact the PO raiser to inform them that they will need to reopen or raise a new PO in order for us to deliver back orders

Back order notification

If a back order persists for a long period we will likely contact the PO raiser and end user to check that an alternative is not the best course of action, or whether we should cancel. We ideally need both sets of details for this

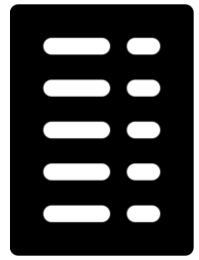
Invoicing issues

When we come to invoice if there are any issues, our first port of call is with the PO raiser. They will likely be the person we need to contact to resolve these issues.



Manual PO's being Raised

Manual PO's should be by exception. All orders should be placed through the punch out catelog. The MTS quote converter function has been developed to improve your user experience through making it quicker and easier to process ordering.



Comprehensive video guides available at
https://cbre.morethansafety.com/video-homepage

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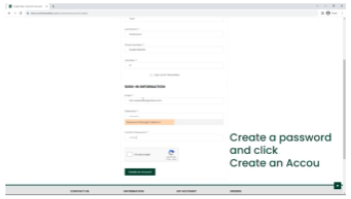
Helpful steps in Using Punchout

1

HOW DO I LOG IN?



How to register for the CBRE Procurement Portal when you don't have access to myBuy and the punchout catalogues.

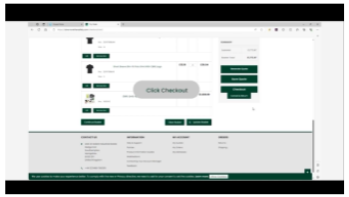
2

HOW DO I CHANGE MY CONTRACT?

How to set up your account to see your contract specific branded items and PPE.

3

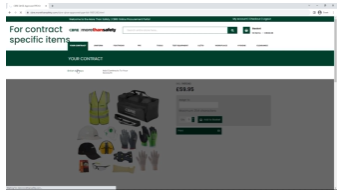
HOW DO I CREATE A QUOTE?



How to add items to your basket and subsequently raise a quote to give to your contract support to order.

4

HOW DO I TURN A QUOTE TO AN ORDER THROUGH MYBUY?



How to process an engineers quote through the online catalogue to correctly raise a purchase order using the punch out.

MTS receive orders via the catalog punch out, data points are collated and transferred via a feed. Please note, not all fields are included and they do not receive separate individual PO's.

Receive:

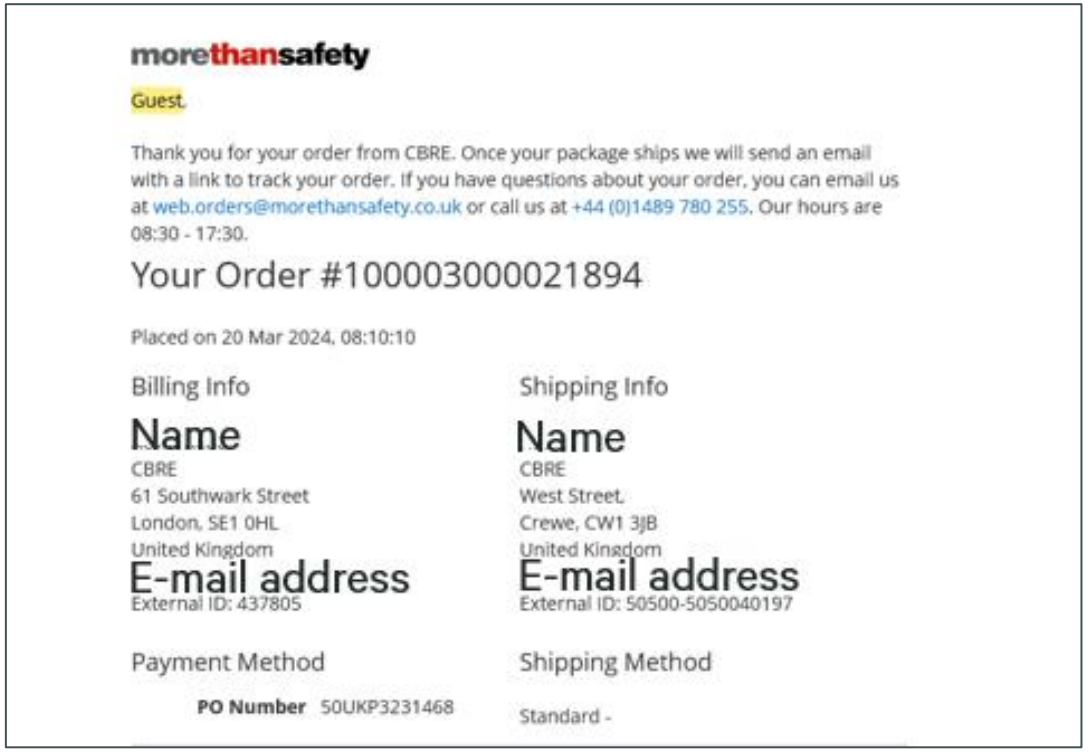
PO Coupa header information:

- Shipping Info (Address)
- Name
- E-mail address
- phone number

Catalogue information:

- Line quantity
- Delivery date
- Part ID
- Price
- Line Item

PO description in header view is NOT visible to the supplier



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Guest,

Thank you for your order from CBRE. Once your package ships we will send an email with a link to track your order. If you have questions about your order, you can email us at web.orders@morethansafety.co.uk or call us at +44 (0)1489 780 255. Our hours are 08:30 - 17:30.

Your Order #100003000021894

Placed on 20 Mar 2024, 08:10:10

Billing Info

Name
CBRE
61 Southwark Street
London, SE1 0HL
United Kingdom
E-mail address
External ID: 437805

Shipping Info

Name
CBRE
West Street,
Crewe, CW1 3JB
United Kingdom
E-mail address
External ID: 50500-5050040197

Payment Method

PO Number 50UKP3231468

Shipping Method

Standard -

Before you place your order ensure:

- ✓ Correct delivery address is selected from the dropdown and contains the client name, building floor/ building
- ✓ Requesters telephone number has been set up
- ✓ Correct On Behalf Of / Requester
- ✓ Quantity PR
- ✓ Transmission method must remain as 'Supplier Default'.

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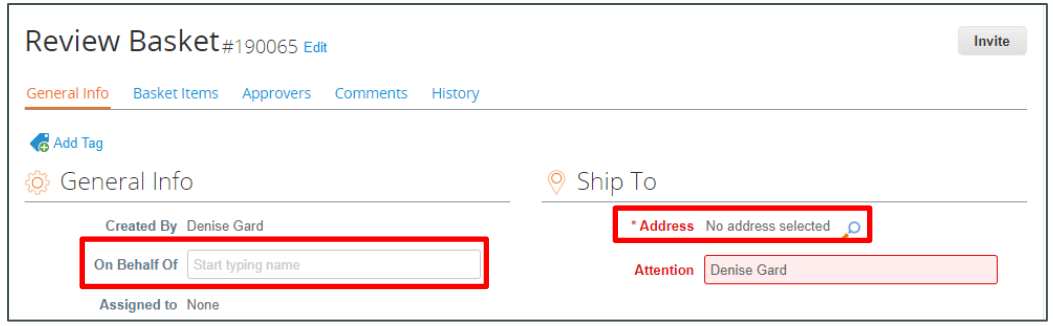
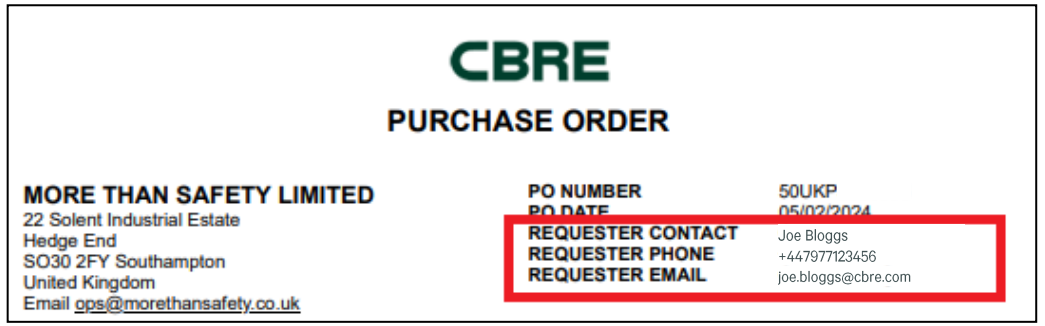
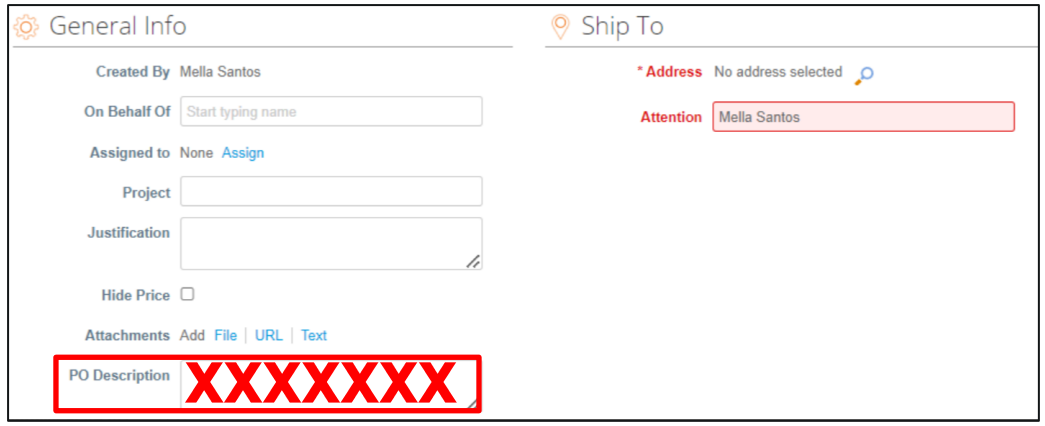
CBRE View in myBuy





- The Requesters Phone number will not be visible within myBuy but will be shown on the Purchase Order and contained within the CXML feed to the supplier



- Do not add comments to your PO Description as this cannot be seen by MTS

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1 How to:

Add a ‘Ship To Address’ for it to be available in the dropdown. Raise a SNOW ticket (TIGER Project/Contract Request | ServiceNow (service-now.com)

- Line 1 to **include the Client name and floor of the building or building name,** (column N)
- Line 2 should include the number and Street name (column O)
- City (column R)
- Postal code (column U)

2 Add requesters **telephone number,** via onetime set via **peopleservicesemea@cbre.com** to add to their profile

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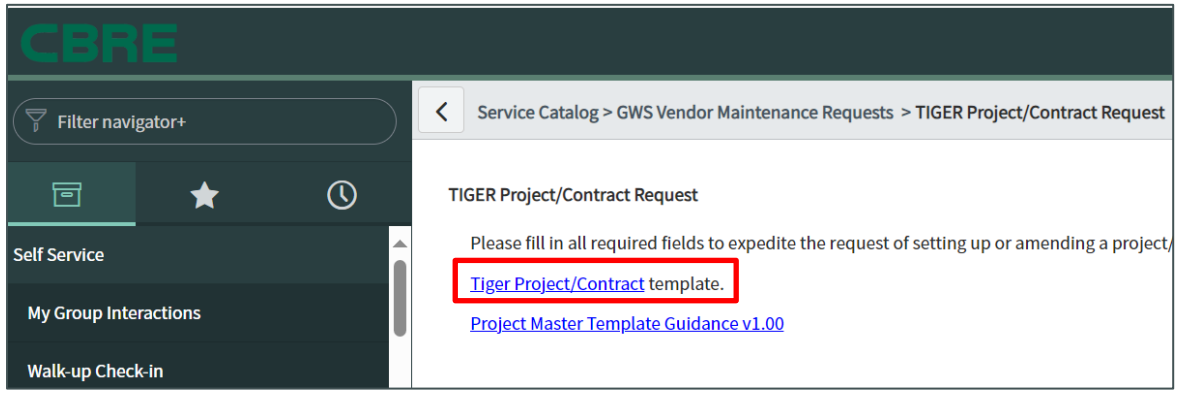
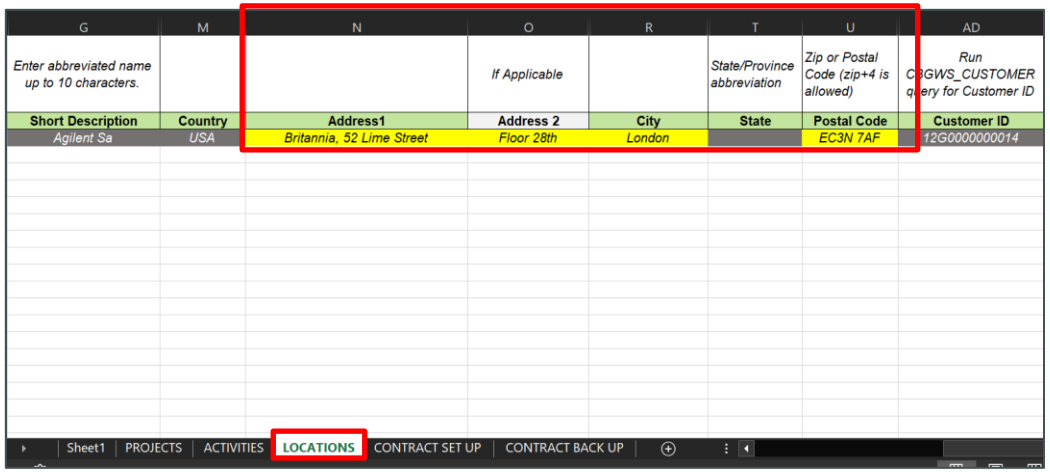
Adding a ship to address

1



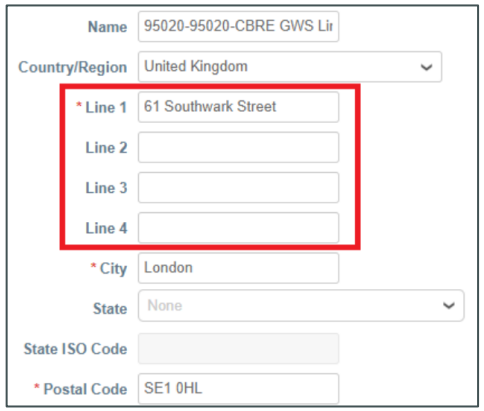
- To add a Location – you will need to submit a "Location Code Request"
- Raise a SNOW ticket (TIGER Project/Contract Request | ServiceNow (service-now.com)

2



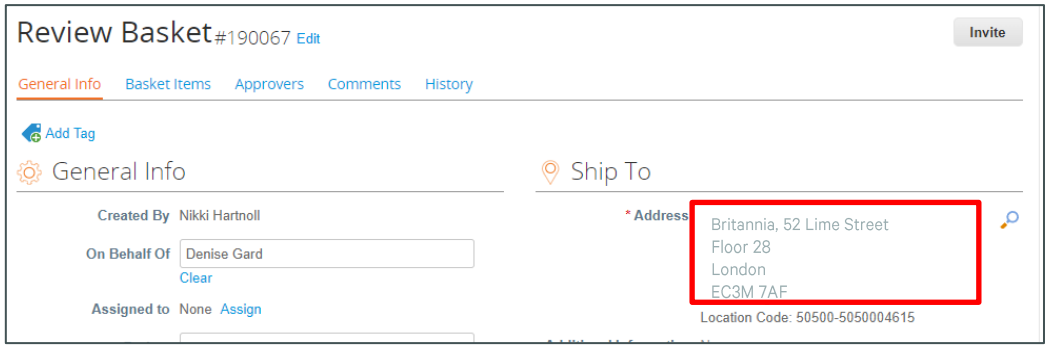
- Open up the **Tiger Project/Contract template – TAB Location**
- Line 1 to include the Client name, building name/street (column N)
- Line 2 should floor of building if applicable (column O)
- City (column R)
- Postal code (column U)

3



Creating a requisition on behalf of someone else will default the ship to address and some of the billing information. Please ensure they have the correct Ship to Address.

The ship to address will appear as follows:



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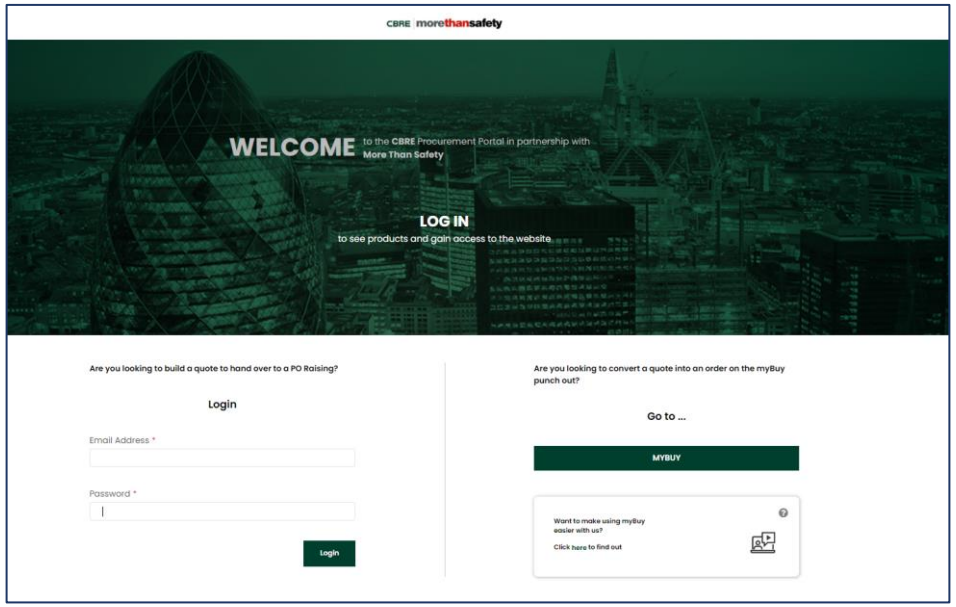
Live Demo – MTS myBuy Web Quote Processor (Punchout into PR Creation

https://cbre.morethansafety.com/

1



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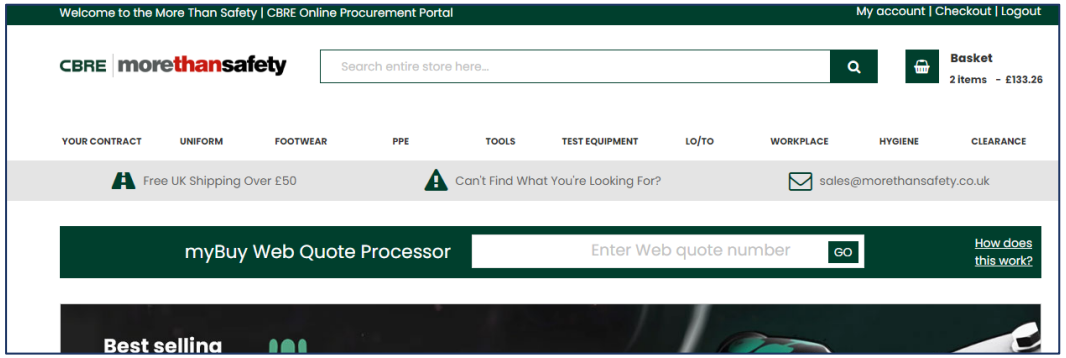
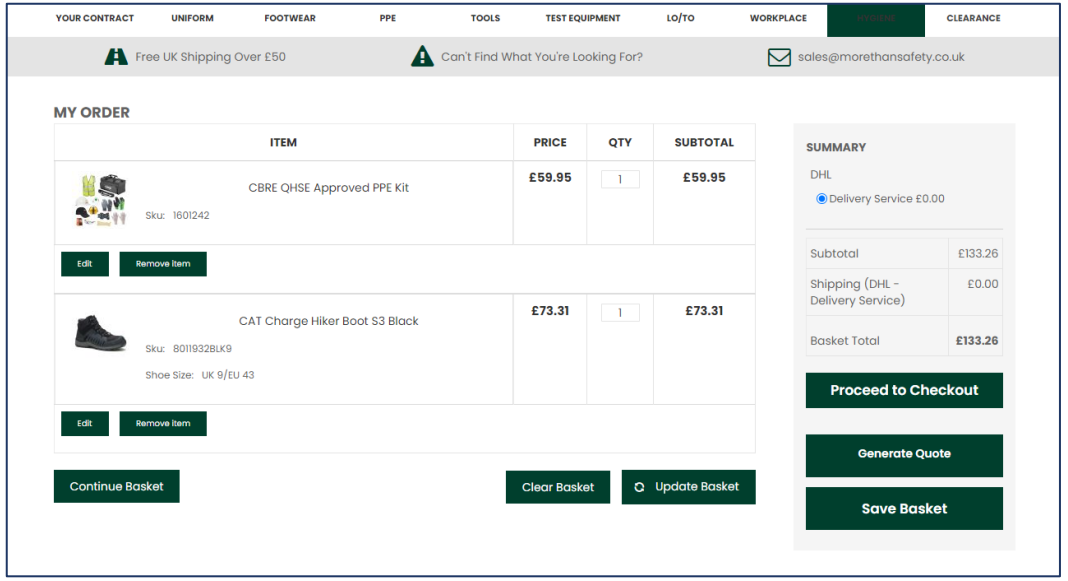


3



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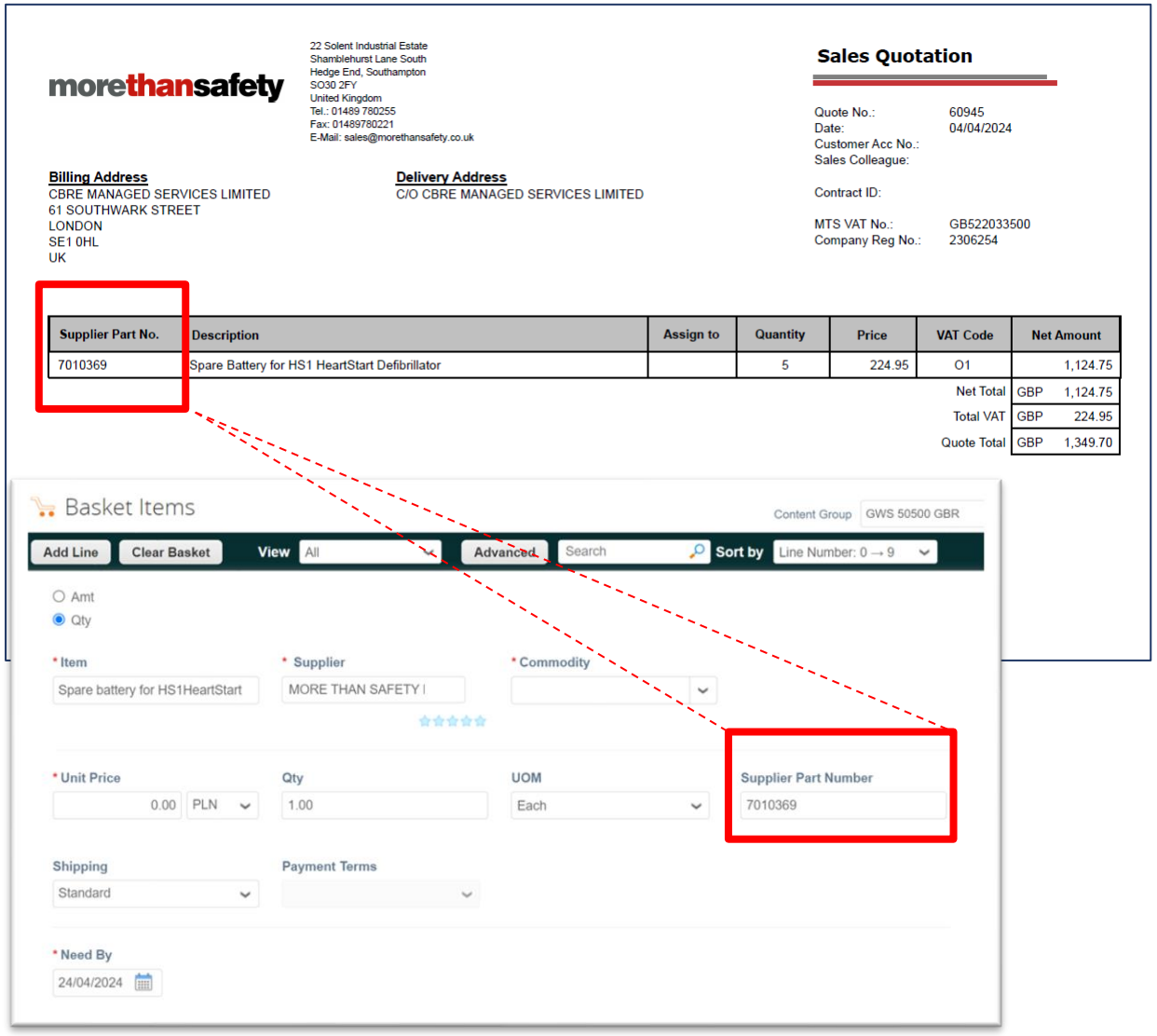

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22 Solent Industrial Estate
Shamblehurst Lane South
Hedge End, Southampton
SO30 2FY
United Kingdom
Tel.: 01489 780255
Fax: 01489780221
E-Mail: sales@morethansafety.co.uk

Sales Quotation

Quote No.: 60945
Date: 04/04/2024
Customer Acc No.:
Sales Colleague:

Contract ID:

MTS VAT No.: GB522033500
Company Reg No.: 2306254

Billing Address
CBRE MANAGED SERVICES LIMITED
61 SOUTHWARK STREET
LONDON
SE1 0HL
UK

Delivery Address
C/O CBRE MANAGED SERVICES LIMITED

Supplier Part No.	Description	Assign to	Quantity	Price	VAT Code	Net Amount
7010369	Spare Battery for HS1 HeartStart Defibrillator		5	224.95	O1	1,124.75

Net Total	GBP	1,124.75
Total VAT	GBP	224.95
Quote Total	GBP	1,349.70

Basket Items

Content Group GWS 50500 GBR

Add Line | Clear Basket | View All | Advanced | Search | Sort by Line Number: 0 → 9

Amt
Qty

* Item: Spare battery for HS1HeartStart
* Supplier: MORE THAN SAFETY I
* Commodity:

* Unit Price: 0.00 PLN
Qty: 1.00
UOM: Each
Supplier Part Number: 7010369

Shipping: Standard
Payment Terms:

* Need By: 24/04/2024

MTS **Supplier Part Number** can be found in the first box of the sales quotation and this same number needs to be populated in the basket items section in **Supplier Part Number** field when raising manual Purchase Requisition (Free Form Order)

Quote to be requested

This should only be used as an **exception** to punch-out when items required are not hosted on punch-out catalogue or when quotation cannot be loaded.

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Invoicing tips:

All PO’s should be a quantity based PO’s

Ensure, if all items have not been received that the PO remains open

Back-order items will be invoiced separately by MTS still on the same PO

Ensure you change your need by date for the outstanding items to be delivered

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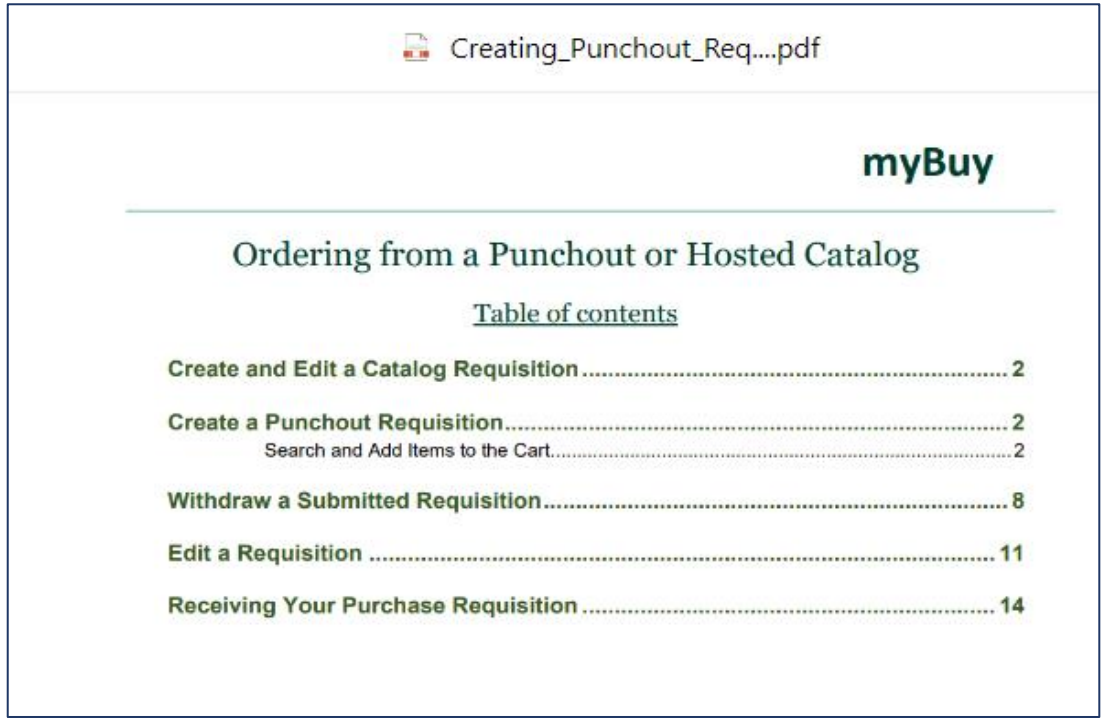
Appendix

myBuy internal training on punchout:

Internal CBRE Link to punchout training



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