



UNIT 4 BUSINESS WORLD (FRIS) GUIDE

REQUESTING A NEW SUPPLIER

December 2024

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PRELIMINARIES - PRIOR TO COMPLETING A REQUEST

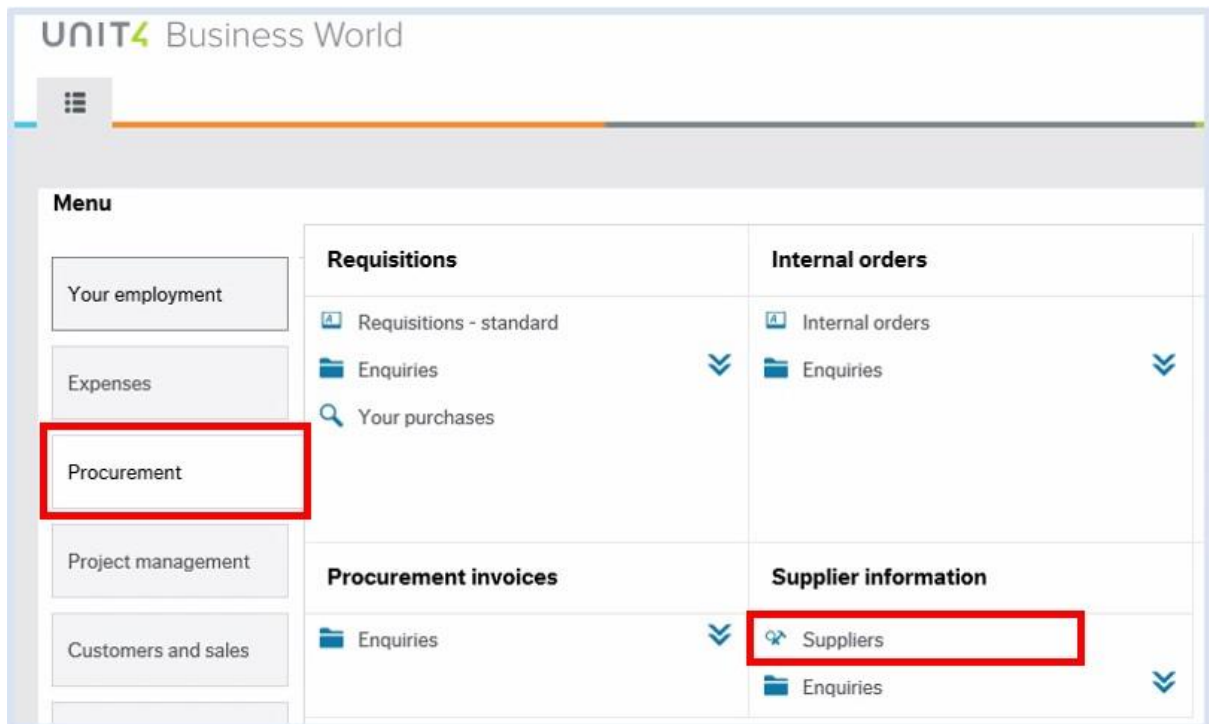
1. Prior to completing a new supplier request, ensure you have the following documents / information available **as applicable**:

- [New Supplier Details form](#)
- Bank details on company letterhead and signed
- Relevant no. of quotations or [Single Tender Justification form](#) or, for JRES Research purchases – Research grant letter or relevant extracts from contract
- [IR35](#) approval email from Payroll
- Information Services (IS) Approval email (for all IT-related purchases including software & hardware)
- Legal approval email for GDPR (where personal data is captured)
- CPU Tender Reference
- Resource Review Committee (RRC) approval
- [Whole Life Costs form](#) (for capital purchases)

These documents will be required for the completion of your request and will need to be attached as part of the new supplier request. If they are missing, the request will be returned by Procurement to the Requestor for completion.

COMPLETING THE TABS

2. In Unit4 Business World (FRIS) go to Suppliers in the Procurement tab:



3. Click on New:

Suppliers

Supplier | Address | Invoice | Start here - Procure data

Supplier

Supplier ID

Supplier name *

Classification

Supplier group *
3rd Party Suppliers ▼ ...
1

Country *
United Kingdom
GB

Language *
English UK
EN

Head office
 ...
head

Supplier identification

Company registration number

VAT registration number

Save | Clear | **New** | Reports / Guides

4. Select and complete the Start here – Procure data tab:



START HERE – PROCURE DATA TAB

This tab needs to be completed at this stage to ensure you are able to complete the new supplier set up request in full. Follow sub steps 1 to 16 as applicable.

Supplier Address Invoice **Start here - Procure data**

Supplier

Lookup

Instructions

Next steps

1. Check that an alternative supplier is not already setup in Agresso. Click "Reports / Guides" button for options.

2. Complete the fields under all the tabs to avoid delays. Required documentation MUST be attached but please note that you can only attach these AFTER you have completed all the tabs and saved this request.

Allow 2-3 working days for processing from receipt of the fully completed request.

Supplier details

The Supplier's email containing their details and bank details on company letterhead MUST be attached. However, you can only attach documents after completing all tabs and saving this request.

I will attach both

Tendered via CPU? * **2**

If yes, Procurement Ref: CPU-

If no, provide quotes: * **3**

STJ form completed? **4**

Research Collaborator? * **5**

Buy needs IT consent * **6**

Buy needs GDPR compliance * **7**

Reason for supplier: * State why an alternative supplier already on Agresso is not appropriate for use. **8**

Requirement description: * Provide a comprehensive description of the requirement. **9**

Supplier duration: * How long will supplier be used (months) **10**

Value of spend * Value of spend of the requirement over term of contract or 48 months, expressed in GBP. **11**

One-off purchase? * **12**

Services The information below is required for all individuals/contractors/sole traders and limited companies if payment is for services:

RRC approval obtained? * **13**

HMRC CEST Tool * **14**

Procurement Extra data

Main Activity **15**

Is the supplier an SME? **16**

(1) Supplier Details

Supplier details
The Supplier's email containing their details and bank details on company letterhead MUST be attached. However, you can only attach documents after completing all tabs and saving this request.

1 I will attach both

The information in the New Supplier Details form which has been completed by the potential supplier and the supplier's bank details on company letterhead signed by a senior official are both required to complete the FRIS request. Tick the box to confirm you will attach the email/s from the supplier in which both of these documents are contained. Bank details which have been provided by the potential supplier are to be entered by Procurement later in the workflow. **You do not need to enter the supplier's bank details.**

(2) Tendered via CPU (Corporate Procurement Unit)?

Tendered via CPU? * ▼

2

If the goods or services to be purchased from the new supplier were tendered via CPU, provide the tender reference allocated by Procurement. This usually begins with 'CPU-'

(3) Provide quotes?

If no, provide quotes: * ▼

3

The appropriate number of comparative quotations need to be obtained commensurate to the anticipated value of spend with the supplier and at least one quotation must be attached to the request. Procurement Spend Thresholds can be found in the Procurement Policy (page 9) and the Financial Regulations (page 17).

Currently, in summary:

>£2k – 1 quote

£2k-10k – 2 quotes

£10k-£50k – 3 quotes

Above £50k – Procurement must be consulted

The anticipated value of spend is the total estimated amount to be spent over the duration of the contract or agreement with the supplier. Where the duration is uncertain, calculate the spend over 4 years. See section 4 (11).

(4) STJ (Single Tender Justification) form?

STJ form completed? ▼

4

A Single Tender Justification Form should be completed where the stipulated number of quotes cannot be obtained on the basis of at least one of the following grounds:

- a. It has been confirmed that only one firm or individual has the particular specialist expertise required. If, for technical or artistic reasons or for reasons connected with the protection of exclusive rights, the contract may be awarded only to a particular supplier.

- b. Compatibility with existing services or products, or the task is essential to complete the project and arises as a consequence of a recently completed assignment and engaging different consultants/suppliers for the new task would be inefficient, too costly or require SGUL to change technology.
- c. An exceptional emergency not of SGUL's making. If for reasons of extreme urgency brought about by events unforeseeable by, and not attributable to, the University, the tendering procedure time limits specified in the UK public procurement regulations cannot be met.

(5) Research collaboration

5 Research Collaborator? *

Yes - Grant letter extract attached

Not Applicable

If the new supplier is a research collaborator, select Yes in the dropdown and attach the grant letter or relevant parts of it including the signed page (depending on document size).

(6) Compliance with IT Requirements?

Buy needs IT consent *

6

If the purchase is IT hardware, software or IT-related, there is a requirement to obtain approval from Information Services (IS) to ensure the software complies with all SGUL requirements. This approval is obtained by contacting Information Services with full details of the purchase and its use. The email approving the purchase is to be attached to the new supplier request.

(7) Compliance with GDPR Requirements?

7 Buy needs GDPR compliance *

If the purchase involves the use or processing of personal data by the supplier, there is a requirement to obtain approval from Legal who will ensure the purchase complies with data protection and GDPR requirements. There may be need to complete a Data Protection Impact Assessment.

(8) Reason for requesting the new Supplier

Reason for supplier: *

State why an alternative supplier already on Agresso is not appropriate for use.

8

Before requesting a new supplier, please search FRIS or the preferred supplier list to see if there are alternative suppliers already set up on FRIS. Such suppliers could be approached for quotations.

Supplier

Lookup	
printer	...
100083	Ellis Printers Limited
101047	Printerland
101078	K&K Stationers & Printers Ltd
104276	Alderson Brothers Printers Ltd

If an existing supplier is unable to provide the requirement enter the justification for requesting a potential new supplier in this section.

(9) Description of Requirement

9 Requirement description: *

Provide a comprehensive description of the requirement.

Provide a succinct description of the goods or services being purchased.

(10) Supplier duration

Supplier duration: *

How long will supplier be used (months)

10

Enter the term (in months) you envisage using the supplier for.

(11) Total spend

11 Value of spend *

Value of spend of the requirement over term of contract or 48 months, expressed in GBP:

Total spend should be calculated over the term the supplier is to be used or a maximum period of 48 months where the term is uncertain. For instance you expect to spend £2000 per year with the supplier over the course of 3 years, total spend will be £6000. If the term is unknown, calculate spend over 4 years, total spend will be £8000 in that case.

(12) One Off or Continuous Purchase?

One-off purchase? *

Services

12

Enter 'Yes' if this will be a single one-off purchase and 'No' if there will be recurring transactions over the period of use.

(13) RRC Approval

RRC approval obtained? *



Any staff recruitment spend requires RRC (Resourcing Review Committee) approval and evidence of this needs to be attached to the new supplier request. More information about the RRC can be found [here](#).

(14) HMRC CEST Tool (IR35)



HMRC CEST Tool *

Where the supplier is an individual, **regardless of whether they are based in the UK or overseas**, SGUL needs to determine whether the person is engaged either to be paid against an invoice (self-employed or outside IR35) or whether to be paid via payroll (employment or inside IR35). Use the information provided in the New Supplier Details form and your knowledge of the requirement and follow the guidance provided **at this [link](#)**.

Before we can set up this new supplier the HMRC employment check tool will need to be completed by the engager and the results submitted to payroll@sgul.ac.uk. Any queries regarding this should also be directed to the Payroll, Pensions & Financial Transactions Manager at [this email address](#).

Once the assessment has been completed and Payroll determine that the supplier is not caught by the IR35 rules, you will be sent an approval email from Payroll.

You are required to attach the approval email from Payroll to the new supplier request.

(15) Main Activity of the Supplier

Procurement Extra data

Main Activity 

Using the New Supplier Details form completed by the supplier, insert information relating to the core business of the supplier.

(16) SME?



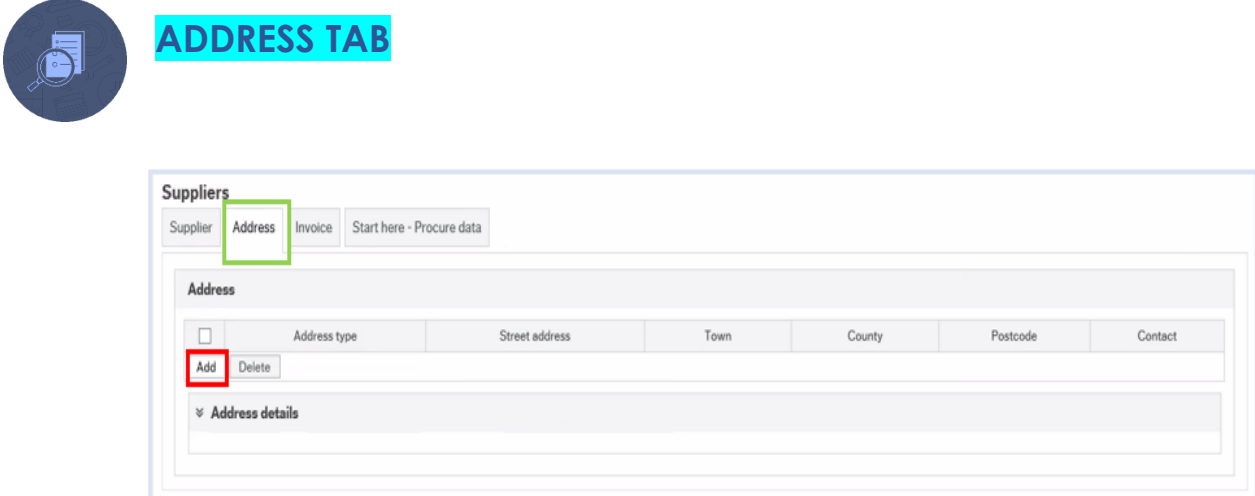
Is the supplier an SME?

This relates to the size of the supplier's business. Using the New Supplier Request – Supplier Details form, state whether the supplier is a SME (small or medium enterprise).

5. Complete the Supplier tab:

Supplier group – use the 3 dots ...to go to the list. Most requests will be 3rd party suppliers, some requests are for GP Practice for student placement providers.

6. Select the **Address** tab and click **Add**:



ADDRESS TAB

Suppliers
Supplier **Address** Invoice Start here - Procure data

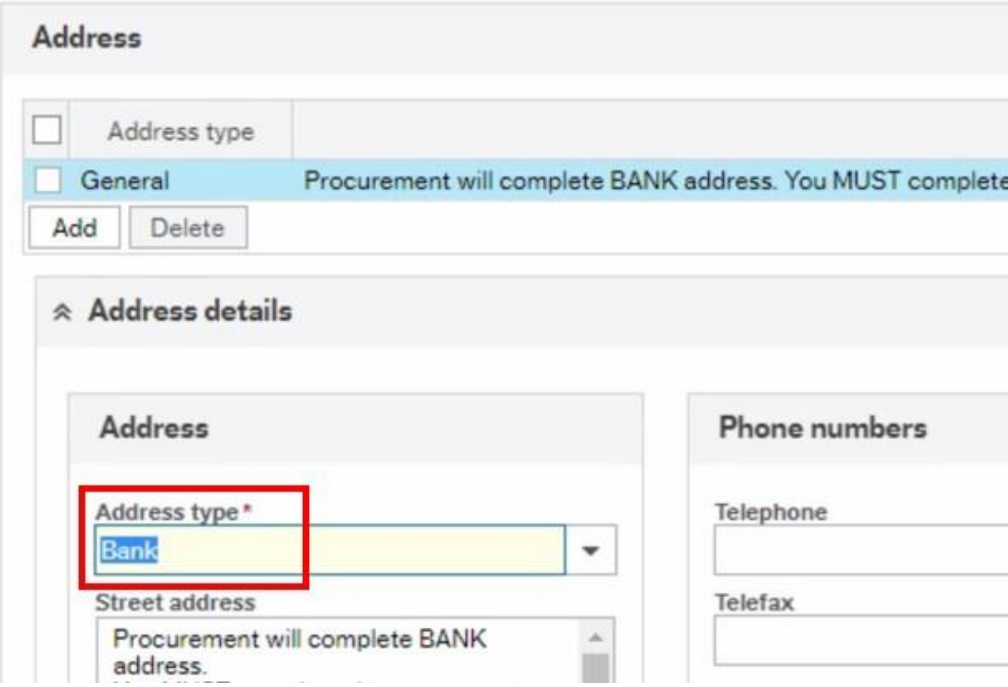
Address

<input type="checkbox"/>	Address type	Street address	Town	County	Postcode	Contact
Add	Delete					

∨ Address details

The **Address type** – Bank is the default setting (as highlighted in red). Please leave the fields for this address type unpopulated* and move on to step 7. Ignore the 'General' Address type in the header.

* The Bank address fields show as a default as there are circumstances with some suppliers where Procurement will need to insert information here dependent on the payment/currency type. These fields have to be opened at the request stage. **DO NOT POPULATE THESE BOXES.**



Address

Address type

General Procurement will complete BANK address. You MUST complete

Add **Delete**

∧ **Address details**

Address

Address type *
Bank

Street address
Procurement will complete BANK address.

Phone numbers

Telephone

Telefax

7. Select **Add** again then, from the drop down, select **General** as the **Address type**:

The screenshot shows a web interface for adding an address. At the top, there is a section titled 'Address' with a table of address types. The 'Add' button is highlighted with a red box. Below this, the 'Address details' section is expanded, showing a dropdown menu for 'Address type *' with 'General' selected and highlighted by a red box. Other fields like 'Telephone', 'Telefax', and 'Fax number' are visible but not highlighted.

8. Populate ALL fields as highlighted below, overtyping any dots as required:

The screenshot shows the 'Suppliers' form with the 'Address' section expanded. The 'Address' table shows a row with 'General' as the address type and '1 Wimer Way' as the street address. Below this, the 'Address details' section is expanded, showing several fields highlighted with red boxes: 'Address type *' (General), 'Street address' (1 Wimer Way), 'Country *' (United Kingdom), 'Postcode *' (SA4 8AT), 'Town *' (Swansea), 'Telephone' (01792 321471), 'E-mail *' (s.jones@supplynet.com), and 'Contact person' (Name: Simon Jones, Position: Administrator). A 'Note' at the bottom states: 'Note: Insert the dial codes for all international phone numbers'.

9. Select Add again and choose Payment and populate as in step 8 in relation to the payment address:

The screenshot shows a web interface for adding an address. At the top, there is a list of address types with checkboxes: 'Bank', 'General', and another 'Bank'. The 'Add' button is highlighted with a red box. Below this is the 'Address details' section. Under 'Address details', there is a sub-section 'Address' containing a dropdown menu for 'Address type*'. The 'Payment' option is selected and highlighted with a red box. To the right of the address details are fields for 'Phone number', 'Telephone', 'Telefax', 'Fax number', and 'Telephone 2'.

10. Select the Invoice tab:

The screenshot shows the 'INVOICE TAB' in the Suppliers section. The 'Invoice' tab is highlighted with a green box. Below this is the 'Invoice details' section. Under 'Invoice details', there are two fields: 'Currency*' and 'Payment terms*'. The 'Currency*' field is set to 'GB Sterling' and the 'Payment terms*' field is set to '30 Days'. A red box highlights these two fields.

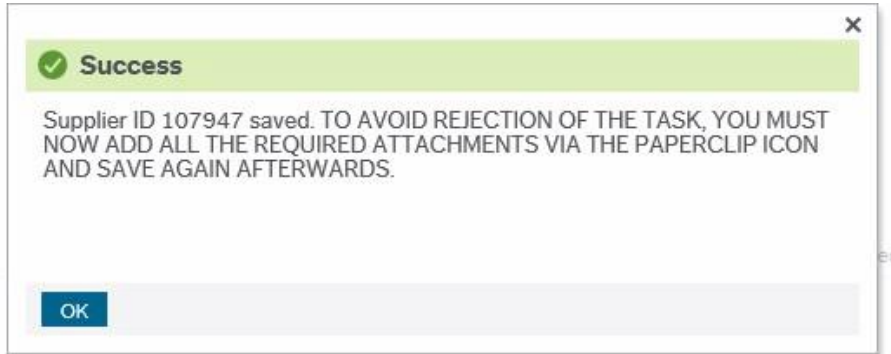
The **Currency** and **Payment terms** default to GBP Sterling and 30 days. Only change if necessary to do so.

For assistance with finding the currency, click on the 3 dots to the right of the field. Not all currencies are set up in FRIS. If you cannot find the currency required, save the form and contact Procurement. It will take 2-3 days for a new currency to be set up and Procurement will advise when this is actioned for you to progress with this request.

11. Save the request following the steps in the '**SAVING THE REQUEST**' section below:

SAVING THE REQUEST

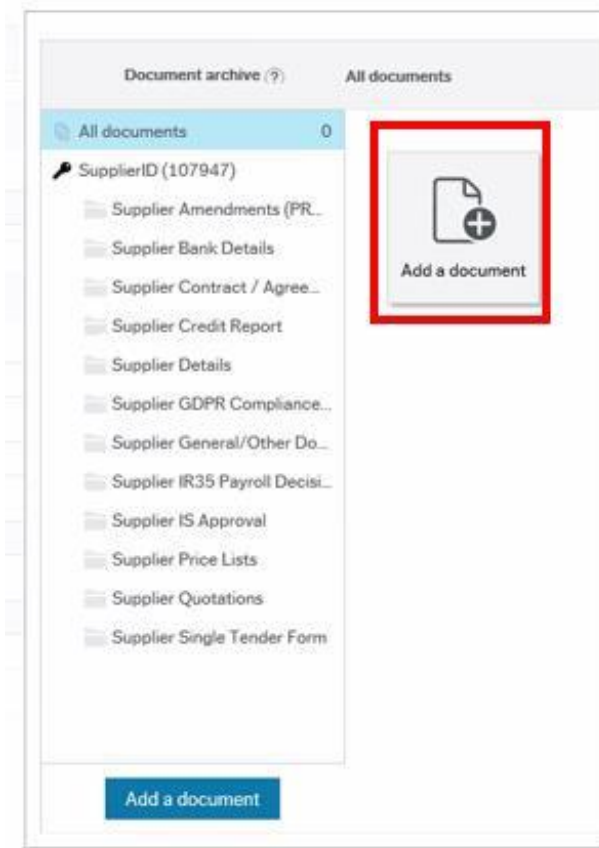
1. Once you have completed the tabs, click the **Save** button. A notification will pop up as shown below:



2. Click **OK**, then click on the Paper Clip icon.



3. The screen to enable documents to be added will appear. Click on **Add a document**.



- Click the **Document type** arrow and a dropdown list of document categories will appear e.g. Bank Details, Supplier Quotations etc:

Note re Supplier Contract/Agreement (JRES ONLY):

Please note that document storage space is limited and contracts/ agreements can be quite large. JRES suppliers are usually grant-related therefore only JRES are required to attach a copy of the relevant extracts from related contracts for audit purposes.

- To insert all the documents required for the request, click on the relevant category. This will open the box below:

File name*

Click the **Upload** button to upload the document from your PC

Note re accepted document types:

Please note that the only supported document types for uploading in the FRIS document viewer are PDFs and image files such as jpg and png.

Labelling protocol for documents you attach to the New Supplier request:

Document Title – Provide an appropriate name for the document you have uploaded

Document Description – DO NOT LEAVE THIS FIELD BLANK. Insert the description and the date e.g. as follows `Bank Details - 2022.09`, `IR35 Decision` etc. When uploading more than a single quotation, please label these as Quote 1, Quote 2 etc.

- When you have finished uploading all required documents, close the screen by clicking the **X** in the top right corner. To exit the supplier request either close the **Supplier** tab at the top or use the **Clear** button at the bottom. The request is now in workflow for Procurement to process.

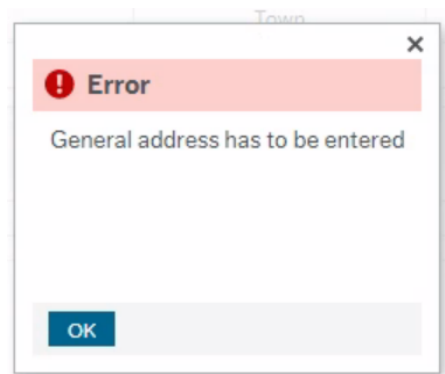
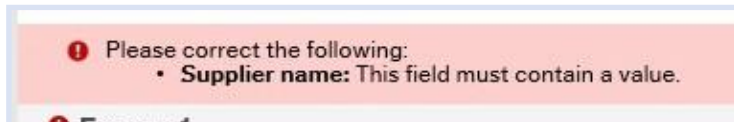
WHAT HAPPENS NEXT?

Procurement will receive the new supplier request, however, if any of the information is incomplete or required documents have not been provided, the request will be rejected back to you with a note asking you to complete the required boxes and/or upload the missing documentation. Once you have done this, click **Save** and the amended request will workflow back to Procurement.

You will receive a system email alert letting you know the supplier is ready to use once set up is complete and the new supplier account has been approved by all reviewers and finally by Accounts Payable.

ERROR MESSAGES THAT MAY APPEAR

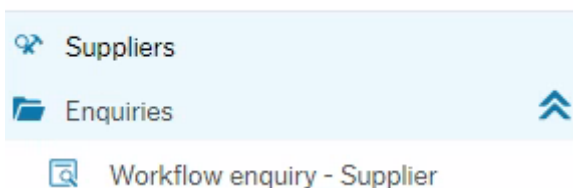
Error messages may appear at the bottom of the screen. The incorrect / missing fields will be highlighted in red as shown below and will need to be corrected before you can proceed or move to the next tab:



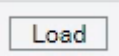

WORKFLOW ENQUIRY

1. To find out where your request is in workflow, go to '**Procurement**' in FRIS and click on '**Enquiries**' under the '**Supplier Information**' section.

Supplier information



2. Click on '**Workflow enquiry – Supplier**' and search for your request by entering the supplier name or ID.

3. Click the 'Load' button  and once loaded, click the map icon  on the far right to view the workflow map and see which stage in the workflow your request is at.