# FRIS QUICK CARD – REQUESTING A NEW SUPPLIER

**TO AVOID YOUR REQUEST BEING REJECTED, PLEASE FOLLOW THE STEPS IN THIS CARD CLOSELY. YOU CAN ALSO REFER TO THE FRIS USER GUIDE FOR FULL STEP-BY-STEP INSTRUCTIONS.**

## PRELIMINARIES - PRIOR TO COMPLETING A REQUEST

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

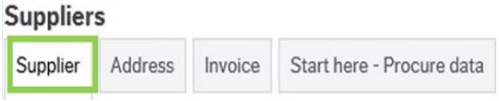
- New Supplier Details form
- Bank details on company letterhead and signed
- Relevant no. of quotations or Single Tender Justification form or, for JRES Research purchases –
- Research grant letter or relevant extracts from contract
- IR35 approval email from Payroll
- Information Services (IS) Approval 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.

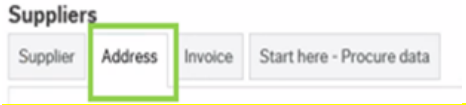
### COMPLETING THE TABS

1. In Unit4 Business World (FRIS) go to **Suppliers** in the **Procurement** tab and click on **New**.
2. Select and complete the **Start here – Procure data** tab

3. Select and complete the **Supplier** tab



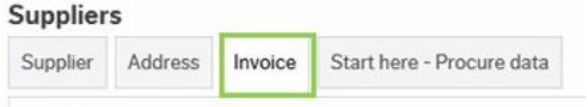

4. Select the Address tab and click **Add**



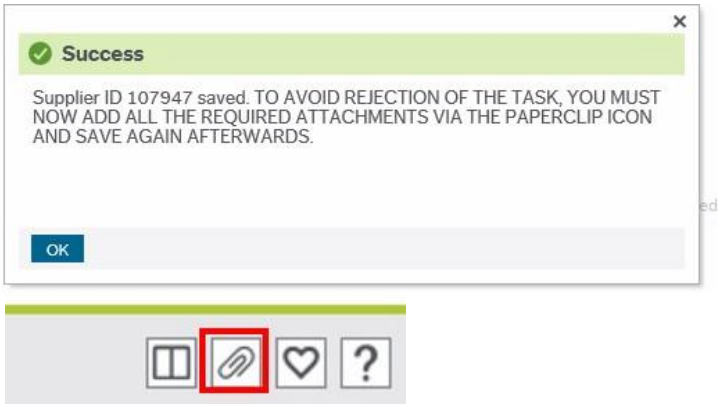

The **Address type** – **Bank** is the default setting. please leave the fields for this address type Unpopulated*, do not make any changes and **move on to step 5**.

** 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 OR MAKE ANY CHANGES TO THESE BOXES.***

5. Select **Add** again then, from the drop down, select **General** as the **Address type**
6. Populate **ALL** fields, overtyping any dots. Please enter international dialling codes where applicable.
7. Select **Add** again and choose **Payment** and populate as in step 6 in relation to the payment address.
8. Select and complete the **Invoice** tab:

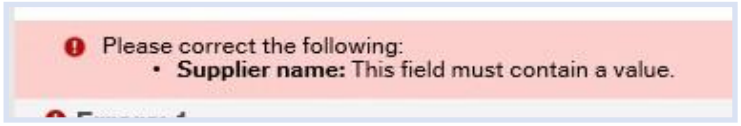
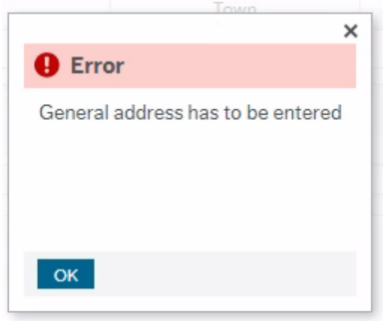


9. Once you have completed the tabs, save the request by clicking the **Save** button. A notification will pop up as shown below:






10. Click OK, then click on the Paper Clip icon.
11. The screen to enable documents to be added will appear. Click on **Add a document**.
12. Click the **Document type** arrow and a dropdown list of document categories will appear e.g. Bank Details, Supplier Quotations etc:
13. Click on the relevant category to insert all the documents required for the request.
    Please note that only PDFs and image files such as jpg and png are supported.
14. When you have finished uploading all required documents, close the screen by clicking the **X** in the top right corner. The request is now in workflow for Procurement to process and will be rejected back to you if any of the information required is incomplete.
15. **Once set up is complete and the new supplier account has been approved by all reviewers and finally by Accounts Payable, you will receive a system email alert letting you know the supplier is ready to use.**
16. To find out where your request is in workflow, go to 'Procurement in FRIS and click on 'Enquiries under the 'Supplier Information. Click 'Workflow enquiry – Supplier' and search for your request by entering the supplier's name or ID. Click the 'Load' button and once loaded, the map icon on the far right to view workflow map.

## ERROR MESSAGES THAT MAY APPREAR

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: