Company Name

Request design: New Vendor Setup

Service catalog proposal · one of four request types

Request type
☑ New catalog item ☐ Change to an existing item

Short description
Submit a request to set up a new vendor in the company's vendor master.

1 · Why this is needed

New vendor requests arrive by email to a shared inbox, with a PDF registration form attached. The form captures the detail, but email gives no view of where a request stands, how long it takes, or how the work is spread across the team. Missing documents are found late.

Moving intake to the service portal centralizes tracking, routes each request to the right team, and gives the requester a live status. **The registration form stays.** The portal adds the workflow and reporting layer that email cannot provide.

2 · Expected benefits

- One place to see every request, its status and its owner
- Fewer follow-up emails: requesters can check for themselves
- Numbers on volume and turnaround, for the first time
- Automatic routing, so nothing waits in an inbox

3 · Fields

Field	Kind	Required	What it holds
Who is this request for?	Name lookup	Yes	The requester, picked from the directory.
Vendor Name	Text	Yes	Legal name of the vendor being set up.
Country	Dropdown	Yes	Where the vendor is based. Decides which tax form applies.
Vendor Type	Dropdown	Yes	Goods, Services or Other.
Scope of Work	Text area	Yes	A short description of what the vendor provides.
Attachments	File upload	Yes	The tax form: W-9 for a U.S. vendor, W-8 for a vendor outside the U.S. The completed Vendor Registration Form goes with it.

4 · Validation rules

- Vendor Name cannot be blank.
- Country and Vendor Type must be chosen from their lists. Free text is not accepted.
- **The tax form is mandatory. The request cannot be submitted without it.**

5 · Who works it

The **Vendor Team** assignment group already exists and receives every request. The team owns ticket assignment, resolution and reporting. **Procurement** is the approving group for new vendors that need approval.

6 • The workflow, step by step

Today (email)

1. Requester completes the registration form and attaches the tax form.
2. Requester emails both to the shared inbox.
3. The Vendor Team watches the inbox and sorts requests by hand.
4. If approval is needed, the request is forwarded to Procurement by email.
5. Once approved, the Vendor Team enters the vendor in the ERP system.
6. The requester hears back by email reply.

Proposed (service portal)

1. Requester submits the request with the key fields and both documents.
   Changed: one standard intake replaces email.
2. The request routes to the Vendor Team for first review.
   Changed: automatic routing replaces watching an inbox.
3. The Vendor Team decides whether Procurement approval is needed.
   Changed: the decision is recorded on the ticket.
4. Procurement approves or rejects. Approved requests return to the Vendor Team; rejected ones return to the requester with comments.
   Changed: the decision is on the record.
5. The Vendor Team enters the vendor in the ERP system, posts the vendor number and closes the ticket.
   Changed: completion is tracked; the requester is notified.

7 • Approvals

Question	Answer
Who approves?	Procurement, for most new vendors. The Vendor Team decides during first review whether approval is needed.
On approval	The request returns to the Vendor Team for entry.
On rejection	The ticket returns to the requester with Procurement's comments.

8 • What does not change

The registration form stays the detailed record. Compliance screening still comes before entry. Bank details are still confirmed by phone, on a number the team finds independently.

9 • The other three request types

Request	What makes it different
Existing Vendor Update	No form existed before. Requester picks the kind of update and gives old and new values. Routes to the Vendor Team.
Payment / Bank Change	A signed form or an official bank document is a required attachment. The Vendor Team checks it, then confirms the bank details by phone.
Payment Terms Change	A written business reason is required. Routes to Procurement first, then to the Vendor Team.

A generic version of a real proposal; names are changed. Designed by Grant Williams · grantwilliams.ai/portfolio