



# VENDORS



# Working with Vendors

- Vendors provide goods and services to Michigan State University and are an integral part of the purchasing process. Disbursement vouchers, purchase orders and payment requests all contain vendor information. Keep in mind the following important notes about vendors in the financial system:
  - Vendors must exist or be approved in the database prior to initiating a disbursement voucher.
  - Vendors do not have to exist or be approved in the database prior to initiating a requisition. The vendor must be approved in the database prior to the Contract Manager (CM) approving the Purchase Order.
  - There are three types of vendors. Each vendor type corresponds to a particular method of purchasing, each with specific functions.



# Vendor Types - DV

- The first vendor type is a Disbursement Voucher (DV) vendor. DV vendors are used on the DV document to process direct payments (non-purchase order) or reimbursements. The DV vendor type has the following details:
  - Must be created and approved prior to submitting a DV for approval
  - Requires a Tax ID
  - Requires a remit address
- Note: MSU employees should not be added to the vendor database.



## Vendor Types - SP

- The next type of vendor is a Special Payments (SP) vendor. SP vendors are used on the DV document to process payments to research participants of \$150 or less, and also for non-employee reimbursements. The SP vendor type has the following details:
  - Must be created and approved prior to submitting a DV for approval
  - Does not require a Tax ID
  - Requires a remit address



# Vendor Types – Purchase Order

- The next vendor type is the Purchase Order vendor. Purchase Order vendors are used on the requisition, Purchase Order and DV documents. Only Purchasing will create a Purchase Order type vendor. The Purchase Order vendor type has the following details:
  - Can be created at any time prior to the issuing of the Purchase Order
  - Can be used on a DV. When using a Purchase Order vendor on a DV, the document will be routed to Purchasing as an additional step in the workflow. Purchasing has the ability to disapprove the DV based on the vendor chosen.
  - Requires a Tax ID
  - Requires a purchase order address



# Benefits – New Vendor

- Uses
  - A new vendor could be requested if, for example, it is the first time MSU is purchasing a particular product, and only one vendor sells it.
  - Note: When creating a new vendor, the system does not allow entry of duplicate tax IDs.
- Roles
  - End users and Purchasing populate new vendor information in the e-doc and submit it for approval.
  - The vendor reviewers in the central offices verify and approve the new vendor, and the new vendor is added to the vendor database.



# Benefits – Vendor Division

- Features
  - By being able to create a vendor division, MSU can categorize multiple divisions of the same company and more closely track expenses per vendor.
  - Note: A division will have the same tax ID as a parent.
- Uses

A vendor division may be requested whenever purchasing from a new division of an existing vendor.
- Roles
  - End users or Purchasing populate vendor division information in the e-doc and submit it for approval.
  - The vendor reviewers in the central offices verify and approve the vendor division.



# Benefits – Vendor Search

- Features
  - By being able to search for vendors, end users can perform maintenance on the vendor database and easily find information.
  - Searches can also be performed by contract.
- Uses

There are many instances when the vendor search function is extremely useful, such as creating a vendor division or filling out a requisition.
- Roles

Any user of the financial system can search for a vendor or a vendor contract.





# Benefits – Vendor Edits

- Features
  - Allows MSU to stay up-to-date with vendor information and clean records.
- Uses
  - If a vendor moves to a new business address, a new address record can be added.
  - If contact information changes, it can now be updated by end users.
- Roles
  - When users edit information, yellow stars identify the changes for easy review.
  - The changes are then routed to the vendor reviewer for approval.



# Creating a New Vendor - Workflow

(1) User initiates a new/edit vendor document for disbursement and special payment type vendors only. Purchase order vendors can only be added by the Purchasing department.

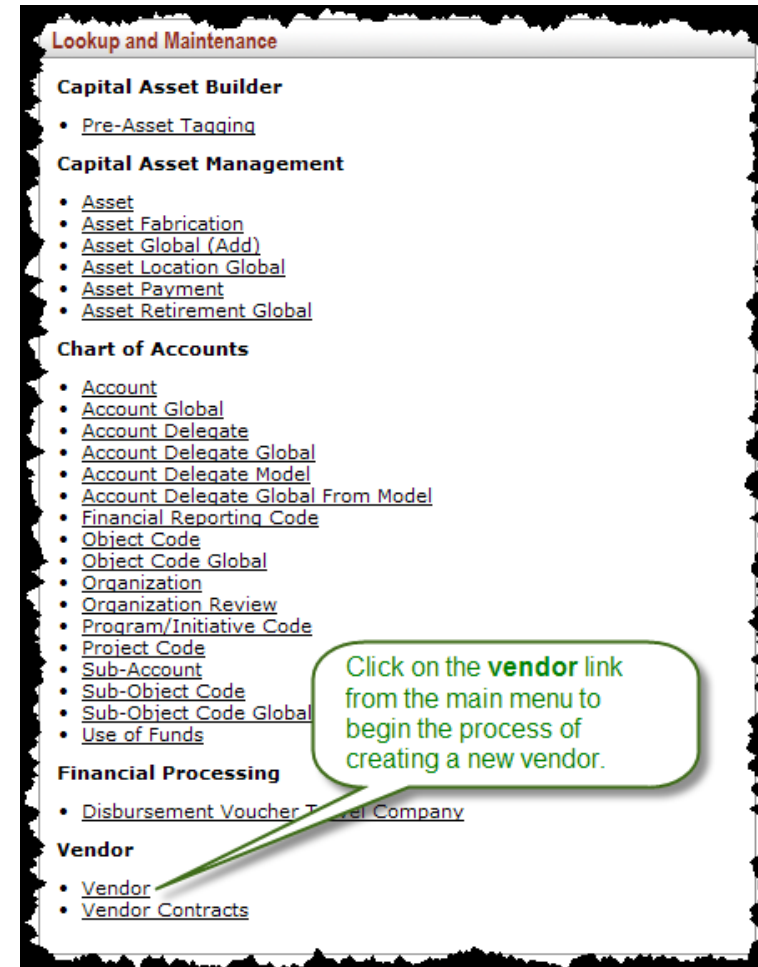
(2) Vendor Reviewer processes vendor document. The Vendor Reviewer:  
1) Verifies vendor information, 2) Applies standards, 3) Verifies tax information, 4) Approves document.

(3) Vendor is now added to vendor database.



# Creating a New Vendor

- When the need for a new vendor is identified, a record of the vendor information must be added to the vendor database. This happens in the financial system by creating a new vendor. To begin this process, click on the **vendor** link on the main menu and then the **create new** button.
- **Note: Be sure to perform a search to see if the vendor exists before creating a new one.** See slide 38 on how to perform vendor searches.





# Creating a New Vendor - Tabs

- The image on the right shows that each vendor record in the database has 10 document specific tabs of information about the vendor. In addition to these specific tabs, the vendor document also has four tabs which are common to all E-Docs:
  - Document Overview
  - Notes and Attachments
  - Ad-hoc Recipients
  - Route Log





## Creating a New Vendor – Document Overview

- The first tab on the vendor document form is Document Overview. Even though this tab is standard to every e-doc and not just specific to the vendor document, it is worth discussing because it contains the following basic information for the vendor:
  - Description is a required field and identifies the e-doc that requested the vendor.
  - Explanation is an optional field, but should be populated with a brief description of the types of goods and services a vendor supplies such as:
    - Professional services
    - Mechanical parts
    - Medical services
  - The Org. Doc. # (Original Document) field is a free-form field used to relate the current document to another document within the department.

The screenshot shows a web-based form titled "Document Overview" with a "hide" button. The form contains three main input fields:

<b>* Description:</b>	<input type="text"/>	<b>Explanation:</b>	<input type="text"/>
<b>Org. Doc. #:</b>	<input type="text"/>		



# Creating a New Vendor – Vendor Tab

- The first document specific tab (second overall) on the vendor document is the Vendor tab. This tab contains the identifying information of the vendor and will be discussed here and in the following slides.
  - Vendor Name should be populated if the vendor being added has a Company Name on their W-9 form.
  - Vendor First Name and Vendor Last Name should be populated if the vendor being added is under an individual's name on their tax form.
- Note: Either the Vendor Name or Vendor First and Vendor Last Name Fields are required.
- Note: The MSU data standard is to enter the name using all capital letters.

<b>Vendor #:</b>	<input type="text"/>
<b>Vendor Parent Indicator:</b>	Yes
<b>Vendor Name:</b>	<input type="text"/>
<b>Vendor Last Name:</b>	<input type="text"/>
<b>Vendor First Name:</b>	<input type="text"/>



# Creating a New Vendor – Vendor Type

- Vendor Type is required and identifies the type of payments and contracts to be used with the vendor. There are three vendor types from which to select:
  - DV (Disbursement Voucher)
  - SP (Special Payments)
  - PO (Purchase Order)
- Note: Only Purchasing will add a Purchase Order type vendor to the database. However, users can add additional remit addresses to an existing PO vendor by performing a vendor edit. More information on this is contained in the section covering editing vendor information.

The screenshot shows a web-based form for creating a new vendor. The form includes several fields and dropdown menus. A red box highlights the 'Vendor Type' dropdown menu, which is currently empty. Below it are fields for 'Tax Number', 'Tax Number Type' (with radio buttons for FEIN, SSN, and NONE), '\* Ownership Type' dropdown, 'Ownership Type Category' dropdown, 'W9 Received' dropdown, 'W-8BEN Received' dropdown, 'Backup Withholding Begin Date' (with a calendar icon), 'Backup Withholding End Date' (with a calendar icon), and 'Debarred' dropdown.



## Creating a New Vendor – Foreign Vendors

- Foreign vendors are:
  - Headquartered outside of U.S.
  - Checked by Purchasing for debarment by U.S. Government when a Purchase Order is issued.
  - Checked by Accounts Payable for debarment by U.S. Government when a payment is being made.

The image shows a screenshot of a web-based form for creating a new vendor. The form contains several fields and dropdown menus. A red rectangular box highlights the field labeled "\* Is this a foreign vendor:" which has a dropdown menu currently set to "No". Other visible fields include:

- \* Vendor Type: [Dropdown]
- \* Tax Number Type:  FEIN  SSN  NONE
- \* Ownership Type: [Dropdown]
- Ownership Type Category: [Dropdown]
- W9 Received: [Dropdown]
- W-8BEN Received: [Dropdown]
- Backup Withholding Begin Date: [Date Picker]
- Backup Withholding End Date: [Date Picker]
- Debarred: [Dropdown]





# Creating a New Vendor – Tax Number

Tax Number is the only location in which to place the vendor's tax number. The tax number is confidential data and will be masked during routing and queries. The Tax Number is:

- Required for DV and Purchase Order vendor types.
- Not required for SP vendor types.
- Also not required if the vendor is indicated as a foreign vendor regardless of vendor type.
- Information entered in these two fields should be verified against the vendor's W-9 form.
- If the W-9 contains an FEIN Number, attach a scanned copy of the W-9 in the notes and attachments tab of the vendor document. W-9's containing an SSN can also be attached. All attachments become confidential data (available to central offices only) once submitted.

The screenshot shows a web form for creating a new vendor. The form includes several fields: Vendor Type (dropdown), Is this a foreign vendor (dropdown set to No), Tax Number (text input), Tax Number Type (radio buttons for FEIN, SSN, and NONE), W9 Received (dropdown), W-8BEN Received (dropdown), Backup Withholding Begin Date (calendar), Backup Withholding End Date (calendar), and Debarred (dropdown). A red box highlights the Tax Number and Tax Number Type fields.



# Creating a New Vendor - Ownership

- The two fields addressing ownership information of the vendor are described below.
  - Ownership Type is a required field. This identifies the business ownership, such as corporation.
  - Ownership Type Category is an optional field and further identifies if the vendor is related to health or legal services for tax reporting purposes.

The screenshot shows a web form for creating a new vendor. The form includes several fields: Vendor Type (dropdown), Is this a foreign vendor (dropdown with 'No' selected), Tax Number (text input), Tax Number Type (radio buttons for FEIN, SSN, and NONE), Ownership Type (dropdown), Ownership Type Category (dropdown), Backup Withholding Begin Date (calendar), Backup Withholding End Date (calendar), and Debarred (dropdown). A red box highlights the Ownership Type and Ownership Type Category fields, indicating they are the focus of the slide's content.



# Creating a New Vendor - Detail

- The detail information under the vendor tab contains standard payment and other order information about the vendor. Populate this portion of the document with the correct information according to the fields. None of this information is required.

Payment Terms:	<input type="text"/>
Pre-Payment:	<input type="text"/>
Credit Card:	<input type="text"/>
Taxable Indicator:	<input type="checkbox"/>
Minimum Order Amount:	<input type="text"/>
Shipping Title:	<input type="text"/>
Shipping Payment Terms:	<input type="text"/>
DUNS Number:	<input type="text"/>
Vendor URL:	<input type="text"/>
Confirmation:	<input type="text"/>
Sold To Lookup:	<input type="text"/>
Sold To Vendor Number:	<input type="text"/>
Sold To Vendor Name:	<input type="text"/>
Restricted:	<input type="text"/>
Restricted Date:	<input type="text"/>
Restricted Person Name:	<input type="text"/>
Restricted By Principal Name:	-
Restricted Reason:	<input type="text"/>
Remit Name:	<input type="text"/>
Active Indicator:	<input checked="" type="checkbox"/>
Inactive Reason:	<input type="text"/>



# Creating a New Vendor - Address

- Each vendor must have at least one default address. DV and SP vendor types must have a minimum of a 'Remit' address type while Purchase Order vendor type must have a minimum of a purchase order (PO) address type. The address type identifies how this address is to be used. For example, if this address is where the Purchase Order is sent, select Purchase Order as the address type. Enter in all applicable information for the address.
- **Note: Be sure to click the add button after inputting the address information.**

The screenshot shows a web form for creating a new vendor address. The form is titled "Creating a New Vendor - Address" and contains the following fields:

- \* Address Type: A dropdown menu with a search icon.
- \* Address 1: A text input field.
- Address 2: A text input field.
- \* City: A text input field.
- State: A dropdown menu with a search icon.
- Postal Code: A text input field.
- Province: A text input field.
- \* Country: A dropdown menu with a search icon.
- Attention: A text input field.
- URL: A text input field.
- Vendor Fax Number: A text input field.
- Email Address: A text input field.
- Set as Default Address: A dropdown menu with "No" selected.
- Active Indicator: A checkbox that is checked.

An "add" button is located at the bottom right of the form.



## Creating a New Vendor – Active Indicator

- An address must be active in order to use it on documents. If the vendor has an address for tax reporting purposes, but does not want it used on documents, it can be added as an inactive address (for example, some vendors prefer to use a PO Box address for orders and business reasons. However, for tax reporting, we must have a physical address. The physical address can be entered as an inactive address.)

The screenshot shows a web form for adding a new vendor address. The form includes the following fields:

- \* Address Type: [Dropdown menu]
- \* Address 1: [Text input]
- Address 2: [Text input]
- \* City: [Text input]
- State: [Dropdown menu]
- Postal Code: [Text input]
- Province: [Text input]
- \* Country: [Dropdown menu]
- Attention: [Text input]
- URL: [Text input]
- Vendor Fax Number: [Text input]
- Email Address: [Text input]
- Set as Default Address: [Dropdown menu, currently set to 'No']
- Active Indicator: [Checked checkbox]

An 'add' button is located at the bottom right of the form. A red box highlights the 'Active Indicator' checkbox, which is checked.



# Creating a New Vendor - Contact

- Each vendor allows for contact information to be populated. If you choose to enter information about a contact, a contact type is required. This field identifies the type of contact associated with information you are about to enter. Populate the fields in this area with the appropriate and correct information.

The screenshot shows a web form for creating a new vendor contact. The form includes the following fields and options:

- \* Contact Type:** A dropdown menu with a search icon. The dropdown is open, showing the following options: ACCOUNTS RECEIVABLE, CONTRACT DEVELOPMENT, CUSTOMER SERVICE, INSIDE SALES, PARTS, SERVICE/MAINTENANCE, OUTSIDE SALES, and TECHNICAL SUPPORT.
- \* Name:** A text input field.
- Email Address:** A text input field.
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu with a search icon.
- Postal Code:** A text input field.
- Province:** A text input field.
- Country:** A dropdown menu with a search icon.
- Attention:** A text input field.
- Comments:** A large text area with scrollbars.
- Active Indicator:** A checkbox that is checked.

An "add" button is located at the bottom right of the form.



## Creating a New Vendor – Supplier Diversity

- The Supplier Diversity information is identified by the vendor. The vendor must be **CERTIFIED** in these diversity fields to qualify. If unsure, please check with Purchasing.
  - MSU does reporting based on this information to federal and state governments and also within MSU.
  - This information is optional. However, if the vendor is certified in a specific category, users should provide this information.

Supplier Diversity ▼ hide

**New Supplier Diversity**

\* Supplier Diversity:  🔍 ▼

Active Indicator:

add



# Creating a New Vendor - Shipping

- Shipping special conditions is an optional field on the vendor form. Based on the items purchased from this vendor, special shipping conditions may exist. Use this field to identify these conditions to ensure that orders placed with this vendor are shipped in the appropriate manner.
- Note: This selection pertains to all orders placed with this vendor. To specify special shipping information on an individual basis, use the notes and attachments on the requisition, not when requesting the vendor.

The screenshot shows a web form titled "Shipping Special Conditions" with a "hide" button. Below the title is a section for "New Shipping Special Condition" containing a dropdown menu for "Shipping Special Condition" with a search icon, and a checked "Active Indicator" checkbox. An "add" button is located at the bottom right of the form.

Shipping Special Conditions	
<a href="#">hide</a>	
<b>New Shipping Special Condition</b>	
* Shipping Special Condition:	<input type="text"/> <input type="button" value="v"/> <input type="button" value="🔍"/>
Active Indicator:	<input checked="" type="checkbox"/>
<a href="#">add</a>	





## Creating a New Vendor – Commodity Codes

- Only Purchasing has the ability to specify commodity code information. This tab identifies commodity information associated with the vendor.

Vendor Commodity Codes	
<input type="checkbox"/> hide	Vendor Commodity Code ( 24102004 )
	Commodity Code: <u>24102004</u>
	Commodity Default Indicator: No
	Active Indicator: Yes
<input type="checkbox"/> hide	Vendor Commodity Code ( 48102001 )
	Commodity Code: <u>48102001</u>
	Commodity Default Indicator: Yes
	Active Indicator: Yes



## Creating a New Vendor – New Search Alias

- The New Search Alias tab is optional and provides a place to enter any other names by which a vendor may be known. Any names entered here will be able to be used as criteria when searching for a vendor. Enter this information if the company is know by a different name than is shown on their W-9 or Tax ID information.

The screenshot shows a web form titled "Search Alias" with a "hide" button. Below the title is a section labeled "New Search Alias". This section contains two input fields: a text field for "\* Search Alias Name:" and a checkbox for "Active Indicator:" which is currently checked. An "add" button is located at the bottom right of the form.



# Creating a New Vendor – Phone

- These fields are not required information for the vendor. Enter the appropriate phone types and phone numbers as applicable.

Vendor Phone Number ▼ hide

**New Phone Numbers**

* Phone Type:	<input type="text" value=""/>
* Phone Number:	<input type="text" value=""/>
Extension:	<input type="text" value=""/>
Active Indicator:	<input checked="" type="checkbox"/>

add



## Creating a New Vendor – Customer Number

- The Customer Number tab is not required information, but is used as an MSU account number with a Purchase Order vendor. For example, if MSU has a university contract set up for voicemail systems, then the customer number that the vendor uses to recognize MSU's account would be entered here.
- Note: MSU will only be using MS as the chart code.

Customer Number	
<span>hide</span>	
<b>New Customer Numbers</b>	
* Customer #:	<input type="text"/>
* Chart Code:	<input type="text"/> <span>▼</span>
Organization Code:	<input type="text"/> <span>🔍</span>
Active Indicator:	<input checked="" type="checkbox"/>
<span>add</span>	



# Creating a New Vendor - Contracts

- The information on the Contracts tab is optional and can only be completed by Purchasing. A financial system user without the system privileges of a Purchasing department user will not be able to edit the fields on this tab. The contracts tab identifies contract information associated with the vendor. The image below shows a read-only version of contract information.

**Contracts** [hide]

**Contract ( EL - EAST LANSING CAMPUS - 201056 )** [hide]

Contract Name:	201056	B2B Contract:	No
Description:	PAPER SUPPLIES	Payment Terms:	1% 10 Days Net 20
Campus:	EL - EAST LANSING CAMPUS	Shipping Terms:	VENDOR PAYS ("ALLOWED")
Begin Date:	09/09/2009	Shipping Title:	DESTINATION
End Date:	08/31/2010	Extension Option Date:	12/31/2010
Contract Manager:		Default APO Limit:	20000.00
PO Cost Source:	SHIPPING VARIANCE	Active Indicator:	Yes

**Contract-Contract Organization ( MS - 10074000 )** [hide]

Chart Code:	MS
Organization Code:	10074000
APD Amount:	75000.00
Exclude:	No
Active Indicator:	Yes

**Contract ( EL - EAST LANSING CAMPUS - 201065 )** [hide]

Contract Name:	201065	B2B Contract:	No
Description:	OFFICESUPPLIES	Payment Terms:	1% 10 Days Net 20
Campus:	EL - EAST LANSING CAMPUS	Shipping Terms:	VENDOR PAYS ("ALLOWED")
Begin Date:	11/01/2009	Shipping Title:	DESTINATION
End Date:	10/31/2010	Extension Option Date:	11/01/2010
Contract Manager:		Default APO Limit:	20000.00
PO Cost Source:	SHIPPING VARIANCE	Active Indicator:	Yes

**Contract-Contract Organization ( MS - 10074000 )** [hide]

Chart Code:	MS
Organization Code:	10074000
APD Amount:	75000.00
Exclude:	No
Active Indicator:	Yes



# Creating a New Vendor – Other Tabs

- These tabs are standard to every e-doc and function in the same manner for the vendor document as on other e-docs. If the W-9 contains an FEIN Number, attach a scanned copy of the W-9 in the notes and attachments tab of the vendor document. W-9's containing an SSN can also be attached. All attachments become confidential data (available to central offices only) once submitted.

The screenshot displays a web application interface with several tabs. The 'Notes and Attachments (1)' tab is active, showing a table with columns for Posted Timestamp, Author, Note Text, Attached File, and Actions. A single entry is visible with a timestamp of 06/16/2010 02:03 PM, author Admin, KFS, and note text 'Add vendor document ID 330874'. Below this, the 'Ad Hoc Recipients' tab is active, showing sections for 'Person Requests' and 'Ad Hoc Group Requests', each with an 'APPROVE' dropdown and an 'add' button. The 'Route Log' tab is also visible, showing a table with columns for Title, Type, Initiator, Status, Node(s), Created, Last Modified, Last Approved, and Finalized. The table contains one row with the following data:

Title	Type	Created
	Vendor	02:03 PM 06/16/2010

Additional data from the table:

Initiator	Status	Node(s)	Last Modified	Last Approved	Finalized
Admin, KFS	INITIATED	AdHoc	02:03 PM 06/16/2010		

At the bottom of the Route Log tab, there is a 'Future Action Requests' section with a 'show' button.



# Creating a New Vendor - Attachments

- Depending on the type of vendor being created (DV or SP), there are certain items that need to be attached before submitting the e-doc. Here's a list of attachments that are needed based on vendor type.
  - DV Vendors
    - Scan and attach the W-9 form.
  - SP Vendors
    - No attachments necessary.



# Creating a New Vendor - Routing

- Once the e-doc is populated, it is submitted for approval. Once a vendor is approved, the initiator receives an FYI as a notice that a disbursement voucher or Purchase Order transaction can now be completed.







# Vendor Division

- A vendor division would be a self-sufficient unit within a company. A division contains all of the departments necessary to operate independently from the parent company. An example is the Chevrolet Division of the General Motors Corporation.
- When a division is created, attributes such as corporate information are automatically populated for the division since it has to be the same, such as the Tax ID.



# Creating a Vendor Division

- The process of creating a vendor division is very similar to creating a new vendor. The process starts at the main menu by clicking the vendor link.

The screenshot shows a web application menu titled "Lookup and Maintenance". The menu is organized into several sections:

- Capital Asset Builder**
  - [Pre-Asset Tagging](#)
- Capital Asset Management**
  - [Asset](#)
  - [Asset Fabrication](#)
  - [Asset Global \(Add\)](#)
  - [Asset Location Global](#)
  - [Asset Payment](#)
  - [Asset Retirement Global](#)
- Chart of Accounts**
  - [Account](#)
  - [Account Global](#)
  - [Account Delegate](#)
  - [Account Delegate Global](#)
  - [Account Delegate Model](#)
  - [Account Delegate Global From Model](#)
  - [Financial Reporting Code](#)
  - [Object Code](#)
  - [Object Code Global](#)
  - [Organization](#)
  - [Organization Review](#)
  - [Program/Initiative Code](#)
  - [Project Code](#)
  - [Sub-Account](#)
  - [Sub-Object Code](#)
  - [Sub-Object Code Global](#)
  - [Use of Funds](#)
- Financial Processing**
  - [Disbursement Voucher Transfer Company](#)
- Vendor**
  - [Vendor](#)
  - [Vendor Contracts](#)

A green callout bubble with a white background and a green border points to the "Vendor" link. The text inside the bubble reads: "Click on the **vendor** link from the main menu to begin the process of creating a vendor division."



# Vendor Search

- When creating a vendor division, an existing vendor must already be present in the database. Therefore, first search for the vendor and then create the division. Enter the criteria and then run a search to find the vendor.

financial systems® Main Menu Maintenance Administration

action list doc search

Vendor Lookup ?

10-07-08 19:52:45 -0400 login

create new \* required field

Vendor Name:

Tax Number:

Vendor #:

Active Indicator:  Yes  No  Both

Vendor Type:

State:

Commodity Code:

Supplier Diversity:

search clear cancel

Use the fields on the vendor look-up to locate the vendor as the first step to creating a vendor division.



# Create Division Link

- After performing the search, results like the ones shown below will appear under the vendor look-up. The link to create a vendor division appears in the action column next to the edit link. Click on the create division link to open and populate the division information.

6189 items found. Please refine your search criteria to narrow down your search.  
1,004 items retrieved, displaying 1 to 100.[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Actions	Vendor Name	Search Alias	Vendor #	Active Indicator	Vendor Type	State	Commodity Codes	Supplier Diversities
<a href="#">edit</a> <a href="#">create division</a>	VEND C	9691763	8395-0	Yes	PO	VIRGINIA		
<a href="#">edit</a> <a href="#">create division</a>	VENDOR	9689086	7884-0	Yes	PO	MICHIGAN		
<a href="#">edit</a> <a href="#">create division</a>	VENDOR C	9674250	7868-0	Yes	PO	CALIFORNIA		
<a href="#">edit</a> <a href="#">create division</a>	VENDOR D	9697388	8236-0	Yes	PO	CALIFORNIA		

Click the **create division** link to open and populate the vendor information.



# Division Information

- The information for the vendor division is populated in the same manner as when creating a new vendor. The image at the right shows the information from the Vendor tab within the document. Since some information has to be the same as the parent company, it cannot be edited. As shown, not all fields are editable and those that are not editable are the same as the parent vendor.

<b>Vendor #:</b>	
<b>Vendor Parent Indicator:</b>	No <input type="button" value="v"/>
<b>Vendor Parent Name:</b>	ACME GEO
<b>Vendor Name:</b>	
<b>Vendor Last Name:</b>	
<b>Vendor First Name:</b>	
<hr/>	
<b>Vendor Type:</b>	PO - Purchase Order
<b>Is this a foreign vendor:</b>	No
<b>Tax Number:</b>	*****
<b>Tax Number Type:</b>	SSN
<b>Ownership Type:</b>	INDIVIDUAL/SOLE PROPRIETOR
<b>Ownership Type Category:</b>	
<b>W9 Received:</b>	
<b>W-8BEN Received:</b>	
<b>Backup Withholding Begin Date:</b>	
<b>Backup Withholding End Date:</b>	
<b>Debarred:</b>	



# Searching Vendor Information

- Like any e-doc, vendors can be searched for in the database. Vendors can be searched for by criteria, contract or document. All users with access to the Financial System can search for vendors for any number of reasons, including:
  - To see if the needed vendor already exists.
  - To see if more information is needed about a vendor.
  - To locate a vendor document in workflow.



# Searching Vendor Information

- To begin a vendor search using criteria, click on the vendor link from the financial system main menu (right) to open the vendor lookup form (below). The following pages will discuss the vendor search form.

Vendor Name:	<input type="text"/>
Tax Number:	<input type="text"/>
Vendor #:	<input type="text"/>
Active Indicator:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
Vendor Type:	<input type="text"/> [v] [m]
State:	<input type="text"/> [v]
Commodity Code:	<input type="text"/> [m]
Supplier Diversity:	<input type="text"/> [v] [m]
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

**Lookup and Maintenance**

- Capital Asset Builder**
  - [Pre-Asset Tagging](#)
- Capital Asset Management**
  - [Asset](#)
  - [Asset Fabrication](#)
  - [Asset Global \(Add\)](#)
  - [Asset Location Global](#)
  - [Asset Payment](#)
  - [Asset Retirement Global](#)
- Chart of Accounts**
  - [Account](#)
  - [Account Global](#)
  - [Account Delegate](#)
  - [Account Delegate Global](#)
  - [Account Delegate Model](#)
  - [Account Delegate Global From Model](#)
  - [Financial Reporting Code](#)
  - [Object Code](#)
  - [Object Code Global](#)
  - [Organization](#)
  - [Organization Review](#)
  - [Program/Initiative Code](#)
  - [Project Code](#)
  - [Sub-Account](#)
  - [Sub-Object Code](#)
  - [Sub-Object Code Global](#)
  - [Use of Funds](#)
- Financial Processing**
  - [Disbursement Voucher Travel Agency](#)
- Vendor**
  - [Vendor](#)
  - [Vendor Contracts](#)

Click on the **vendor** link from the main menu to begin the process of searching.



## Vendor Search Form – Vendor Name

- Use this field to search for a vendor by name. Remember that any search aliases entered on the vendor document will work in this field.

The screenshot shows a web-based search form with the following fields and controls:

- Vendor Name:** A text input field, highlighted with a red box.
- Vendor #:** A text input field.
- Active Indicator:** Radio buttons for Yes, No, and Both. The 'Both' option is selected.
- Vendor Type:** A dropdown menu with a search icon.
- State:** A dropdown menu.
- Commodity Code:** A text input field with a search icon.
- Supplier Diversity:** A dropdown menu with a search icon.
- Buttons:** search, clear, and cancel.





# Vendor Search Form – Tax Number

- This field is used to search for a vendor by tax number. This allows searching by the vendor's tax number if known, but still provides for confidentiality of the vendor's Tax Number. When the search results are returned, the tax number will appear masked.

The screenshot shows a web-based search form with the following fields and controls:

- Vendor Name:** A text input field.
- Tax Number:** A text input field, highlighted with a red box.
- Active Indicator:** Radio buttons for Yes, No, and Both.
- Vendor Type:** A dropdown menu with a search icon.
- State:** A dropdown menu.
- Commodity Code:** A text input field with a search icon.
- Supplier Diversity:** A dropdown menu with a search icon.
- Buttons:** search, clear, and cancel.



# Vendor Search Form – Vendor #

- This field will return a specific vendor with a matching number.

The image shows a screenshot of a web-based Vendor Search Form. The form is set against a white background with a black, torn-edge border. It contains several input fields and dropdown menus. The 'Vendor #' field is highlighted with a red rectangular box. At the bottom of the form, there are three buttons: 'search', 'clear', and 'cancel'.

Vendor Name:	<input type="text"/>
Tax Number:	<input type="text"/>
Vendor #:	<input type="text"/>
Active:	<input type="checkbox"/>
Vendor Type:	<input type="text"/> <span>▼</span> <span>🔍</span>
State:	<input type="text"/> <span>▼</span>
Commodity Code:	<input type="text"/> <span>🔍</span>
Supplier Diversity:	<input type="text"/> <span>▼</span> <span>🔍</span>



# Vendor Search Form – Active Indicator

- Use this field as an additional qualifier to return active and or inactive vendors to the search results.

The screenshot shows a web-based search form with the following fields and controls:

- Vendor Name:** Text input field.
- Tax Number:** Text input field.
- Vendor #:** Text input field.
- Active Indicator:** Radio button selection with options:  Yes,  No, and  Both. This field is highlighted with a red box.
- State:** Dropdown menu.
- Commodity Code:** Text input field with a search icon.
- Supplier Diversity:** Dropdown menu with a search icon.
- Buttons:** search, clear, and cancel.



## Vendor Search Form – Vendor Type

- This field will return all vendors of a specific type; purchase order, disbursement voucher, or special payments. (PO, DV or SP)

The screenshot shows a web-based search form with the following fields and controls:

- Vendor Name:** Text input field.
- Tax Number:** Text input field.
- Vendor #:** Text input field.
- Active Indicator:** Radio buttons for Yes, No, and Both. The 'Both' option is selected.
- Vendor Type:** A dropdown menu with a search icon, highlighted by a red box.
- Commodity Code:** Text input field with a search icon.
- Supplier Diversity:** A dropdown menu with a search icon.
- Buttons:** search, clear, and cancel buttons at the bottom.



# Vendor Search Results

- Once the search is executed, results are returned at the bottom of the screen.
- Note: Click on the vendor name link for a read-only version of the vendor information.

The screenshot displays a vendor search form with the following fields: Vendor Name (containing 'b\*'), Tax Number, Vendor #, Active Indicator (radio buttons for Yes, No, Both), Vendor Type (dropdown), State (dropdown), Commodity Code, and Supplier Diversity (dropdown). Below the form are buttons for search, clear, and cancel.

1393 items found. Please refine your search criteria to narrow down your search.  
1,046 items retrieved, displaying 1 to 100.[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Actions	Vendor Name	Search Alias	Vendor #	Active Indicator	Vendor Type	State	Commodity Codes	Supplier Diversities
<a href="#">edit</a> <a href="#">create</a> <a href="#">division</a>	X COMPANY	9692397	5206-0	Yes	PO	NEBRASKA		
<a href="#">edit</a> <a href="#">create</a> <a href="#">division</a>	Y COMPANY	9697967	5749-0	Yes	PO	MICHIGAN		



# Vendor Record Edits

- Over the course of time, information about a vendor may change. One of the features of the financial system is being able to perform edits on vendor information. Some examples as to why vendor information may need to be edited include:
  - Adding an additional address to a vendor
  - Adding a remit address to a PO vendor
  - Updating contact information
- Before being able to edit vendor information, first search for and locate the vendor record.



# Vendor Record Edits – Edit Link

- The search results are returned at the bottom of the screen. Clicking edit next to a specific record will take you to the vendor document where you can update information (see image below).

6189 items found. Please refine your search criteria to narrow down your search.  
1,004 items retrieved, displaying 1 to 100.[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Actions	Vendor Name	Search Alias	Vendor #	Active Indicator	Vendor Type	State	Commodity Codes	Supplier Diversities
<a href="#">edit</a> <a href="#">create</a> <a href="#">division</a>	VENDC	9691763	8395-0	Yes	<a href="#">PO</a>	VIRGINIA		
<a href="#">edit</a> <a href="#">create</a> <a href="#">division</a>	VENDOR	9689086	7884-0	Yes	<a href="#">PO</a>	MICHIGAN		
<a href="#">edit</a> <a href="#">create</a> <a href="#">division</a>	VENDOR C	9674250	7868-0	Yes	<a href="#">PO</a>	CALIFORNIA		
<a href="#">edit</a> <a href="#">create</a>	VENDOR D	9697288	8236-0	Yes	<a href="#">PO</a>	CALIFORNIA		

Click the **edit** link to open and change the vendor information.



# Vendor Record Edits – Old vs. New

- When editing, the “old information” is compared against the “new.” Simply enter the changes in information as you would when creating a new vendor. Any changes are routed for approval in the same manner as when creating a new vendor.
- Note: Users are able to add remit addresses to PO vendors if they need to pay a particular vendor using a Disbursement Voucher. When doing this, the user that is adding the remit address to the PO vendor must attach a document (such as an invoice) that proves the remit address is needed.

The screenshot displays a web interface for managing Vendor Commodity Codes. It features two main sections, each with a 'hide' button. The first section is for Vendor Commodity Code (23152104) and the second is for Vendor Commodity Code (21111602). Each section contains a table with 'Old' and 'New' columns for comparison. Red callout boxes highlight the 'Old' and 'New' headers in the first section.

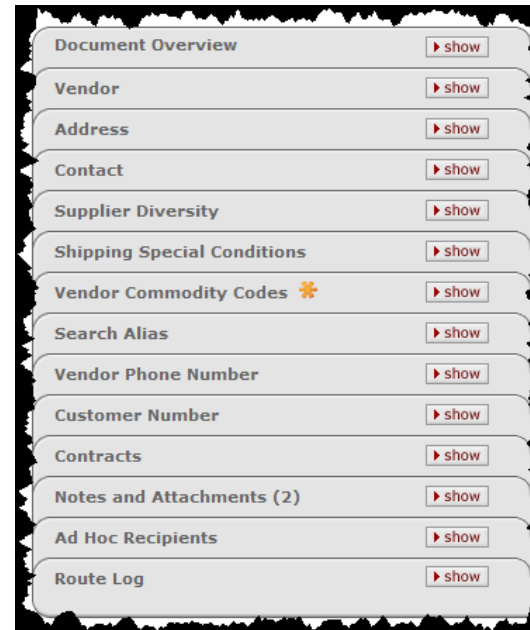
Vendor Commodity Codes	
<input type="button" value="hide"/> Vendor Commodity Code ( 23152104 )	
<input type="button" value="Old"/>	<input type="button" value="New"/>
Commodity Code: <u>23152104</u>	Commodity Code: <u>23152104</u>
Commodity Default Indicator: Yes	Commodity Default Indicator: Yes
Active Indicator: Yes	Active Indicator: Yes
<input type="button" value="hide"/> Vendor Commodity Code ( 21111602 )	
Old	New
Commodity Code:	Commodity Code: <u>21111602</u>
Commodity Default Indicator: No	Commodity Default Indicator: No
Active Indicator: No	Active Indicator: No





# Vendor Record Edits – Identifying Changes

- When finished editing, changes are indicated by gold stars on the form tabs, and also at the locations within the form where changes have been made. This shows that the vendor information in that area has been changed.



Vendor Commodity Codes *	
▼ hide Vendor Commodity Code ( 23152104 )	
Old	New
Commodity Code: 23152104	Commodity Code: 23152104
Commodity Default Indicator: Yes	Commodity Default Indicator: Yes
Active Indicator: Yes	Active Indicator: Yes
▼ hide Vendor Commodity Code ( 21111602 ) *	
Old	New
Commodity Code:	Commodity Code: 21111602 *
Commodity Default Indicator: No	Commodity Default Indicator: No
Active Indicator: No	Active Indicator: Yes *



**END**