20.11 BusinessPlus
Vendor Request Webform

Topics

Overview

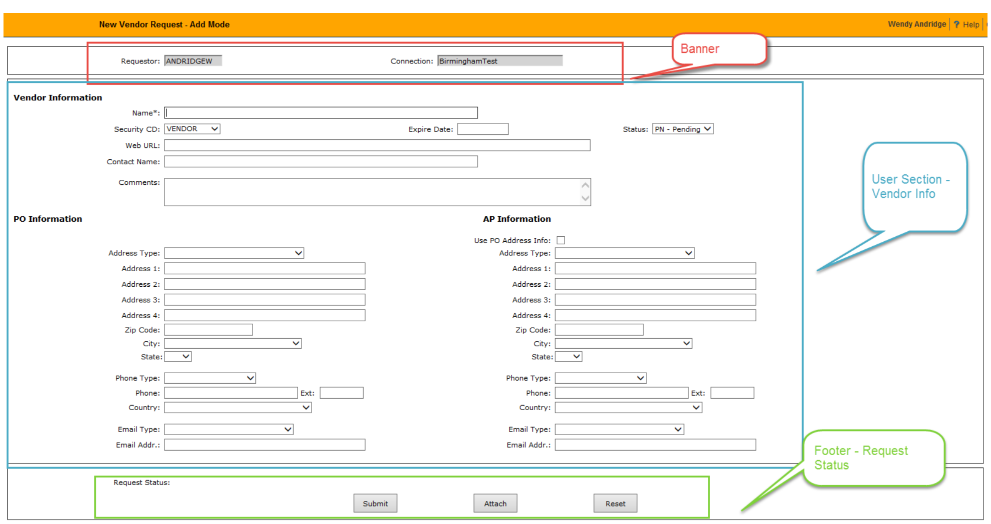
The Vendor Request form will allow a user to enter and submit an electronic request for a new vendor record to be added to BusinessPlus. After the form is submitted, Workflow will route the record electronically for approval. Once approved, a record will be automatically created in the vendor (person entity) database. **NOTE: The vendor record will NOT be ready to use until the Vendor Admin user reviews the W9 form and setup, add the TIN/SSN and completes the 1099 information.**

The Vendor Request form is designed to create *new* vendors. Follow district procedures for adding or updating an address to an existing vendor or customer.

Form Overview:

The Vendor Request Webform has three basic sections:

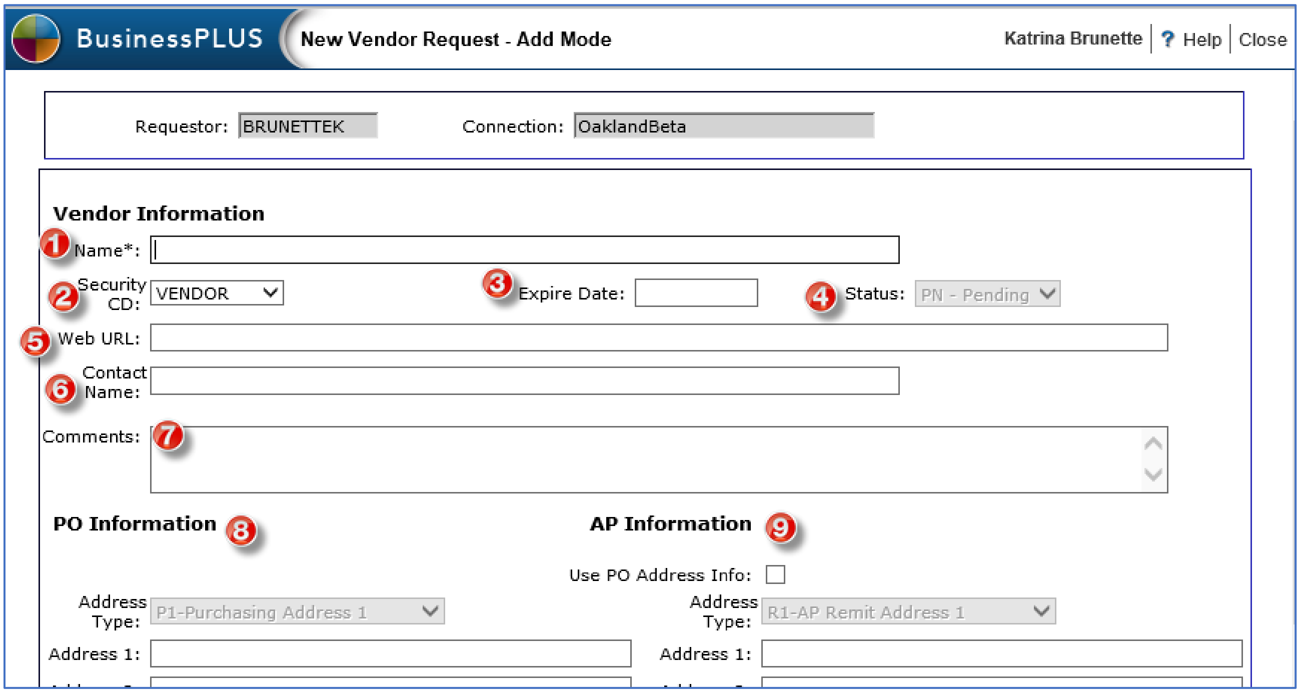
- **Banner –** this area contains information related to who created the request (Requestor) and which district environment (TEST or PRODUCTION) was used to create the request.
- **User Section/Vendor Information** – this area helps identify detailed request information related to the vendor.
- **Footer/Request Status** – this is where the user will be prompted to take action (Submit, Attach, or Reset/clear the form). The Request Status area will not communicate the approval or rejection of a reimbursement request. This is where a user can attach documents.



Entering a Vendor Request

NOTE: It is important that all data is entered in ALL CAPS.

The Requestor completes the following Vendor Information fields:

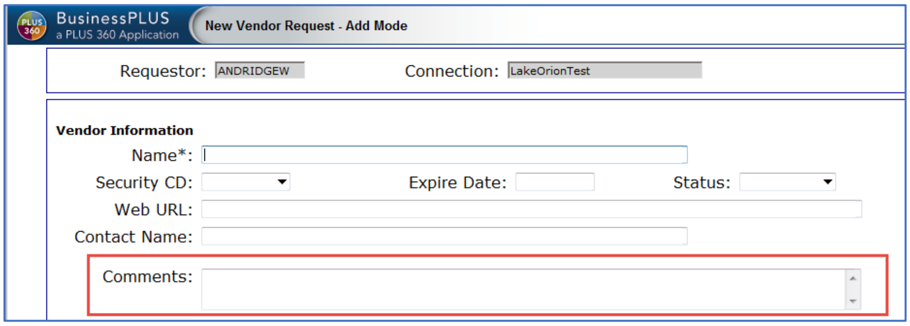


1. **Name* (required):** The Vendor's legal name; this displays on their W-9 form, invoices, correspondence and other official documents. **40 characters maximum** (AP check limit = 30 characters). The name for an individual should be entered as Last Name, First.

   NOTE: Special instructions, nicknames, aliases may be added to the Comment field when requesting the vendor.

2. **Security CD* (required):** Indicates the Vendor as a particular type of Vendor. (Ex: Vendor, Customer, VendCust, etc.). Defaults to VENDOR.
3. **Expire Date: DO NOT USE** this field.
4. **Status:** The status field automatically defaults to **PN** (Pending). The Vendor Admin will update this status to **AC** (active) *once approved and updated with all of the vendor data* (1099 flag, etc.).
5. **Web URL:** Use up to 100 characters to note the vendor's web address.
6. **Contact name:** Enter the person's name the vendor uses in communications (max 90 characters). This is for informational purposes only.
7. **Comments:** This is a text field (up to 300 characters) that can be used to communicate other important information about the vendor. It should be noted:
   - Comments **will be visible for the approver in Workflow**
   - Comments **will** get inserted into the **PEUPPE** page on the **Text tab**

- Comments will **NOT** print on any other forms.

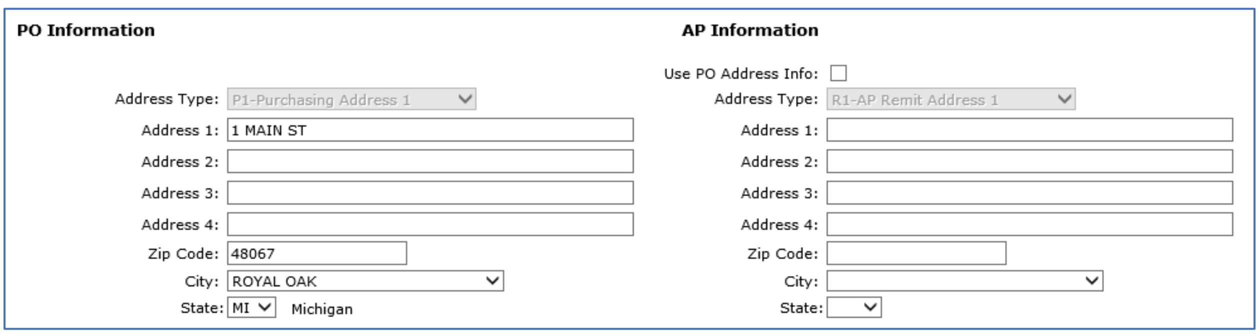


8. Address Information – PO Information

This defaults to the **P1 – Purchasing Address 1** Address Code.

Enter the purchasing address information in the Address 1 and Zip Code fields (City and State will automatically populate when you tab from the Zip Code field.

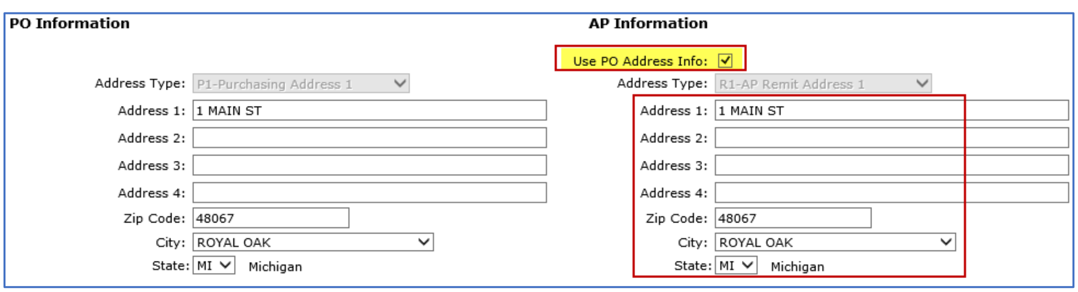
NOTE: Per the US Postal system standards suite information should be at the end of the street address and not on a separate line (example, 1 MAIN ST STE 5)



9. Address Information – AP Information:

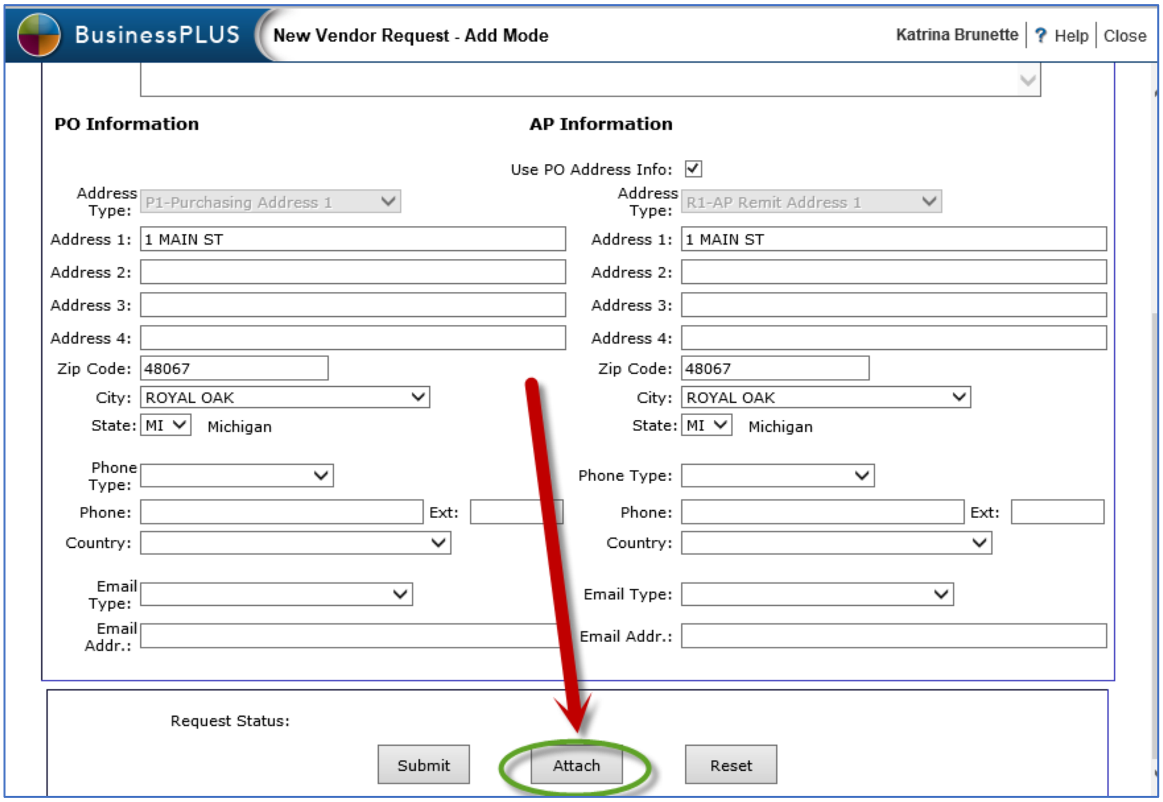
This defaults to the **R1 – AP Remit Address 1** Address Code

Enter the Remit To Address, if it is known. If the remit to address is the same as the purchasing address, click on the **Use PO Address Info Button** and the address will automatically update.

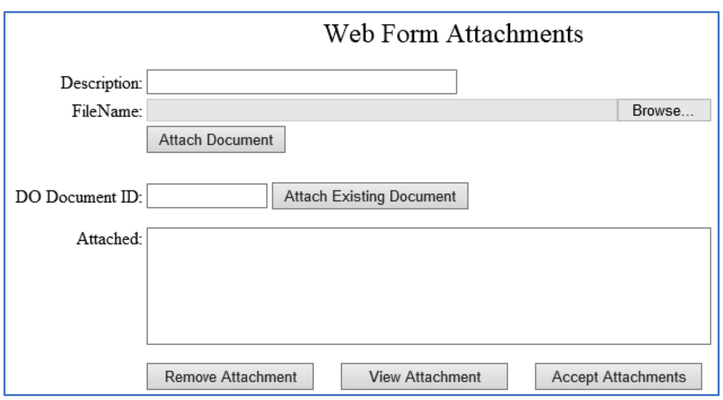


Adding an Attachment

10. The Business Office may require the W9 or other form(s) be attached in order to approve the vendor. Click on **Attach**.



The following screen will display:



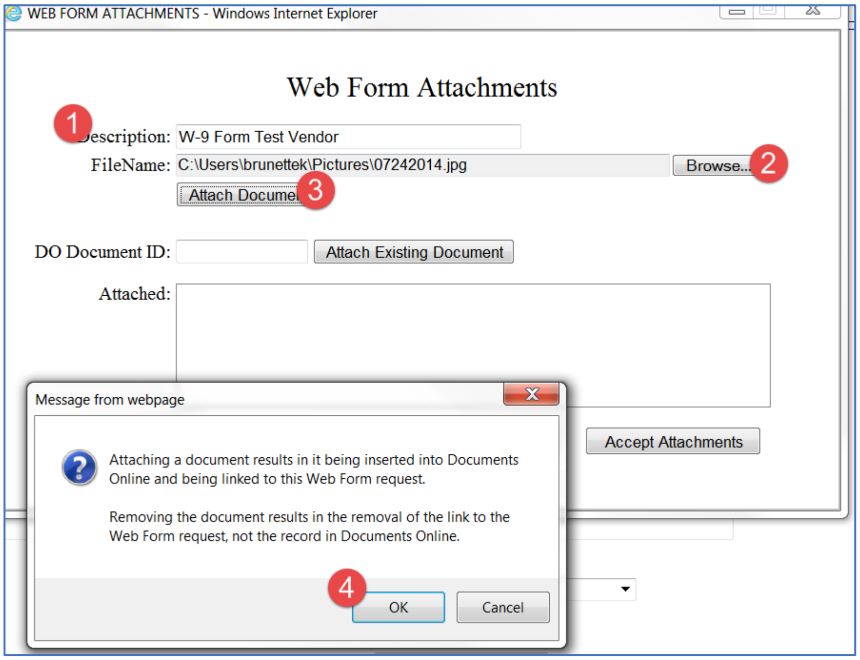
11. Enter the items as numbered:

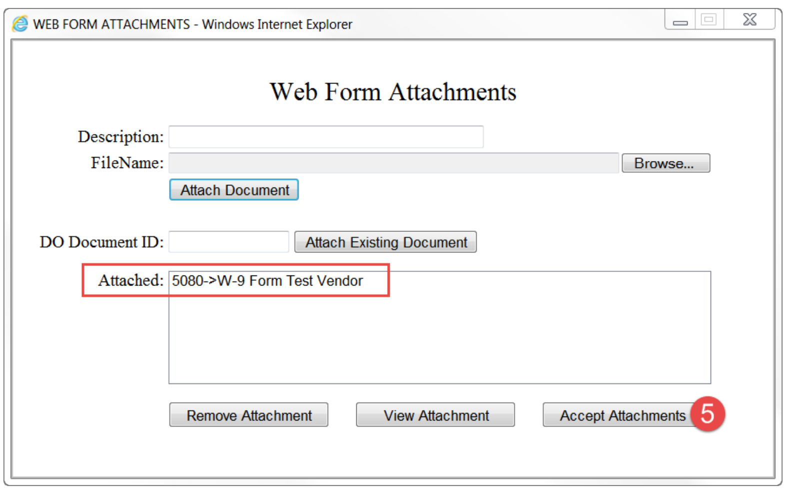
A. Enter a **Description** (max 40 characters). Be sure to enter a specific description identifying the document name, for example, **W-9 for ABC Company**.

B. Click **Browse** and identify the file to attach. Click on the file twice or highlight the file name, then click "**Open**" (the file name will populate in the File Name field)

C. Click on **Attach Document**

D. The "Message from Webpage" dialog box will appear. Click **OK** (after clicking **OK**, the file name will display in the '**Attached'** box (see below).





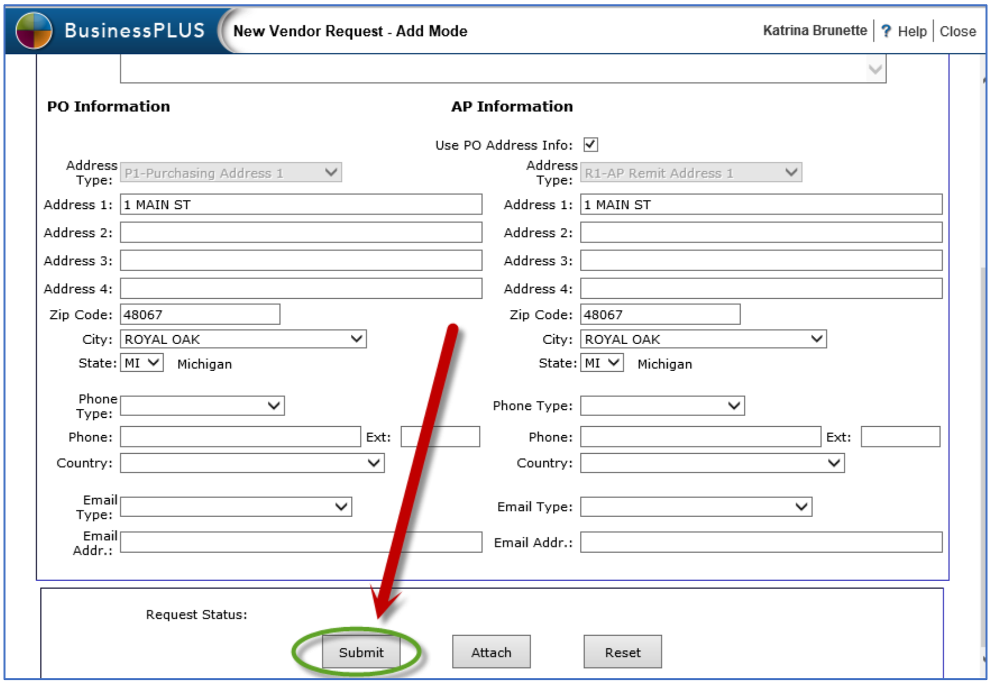
E. Click **Accept Attachments** and the window will close.

NOTE: **To see attachments from here, click **View Attachments**

**There are no messages or symbols indicating that the records are attached. However, once attached, the documents will be visible within the Workflow Tasks

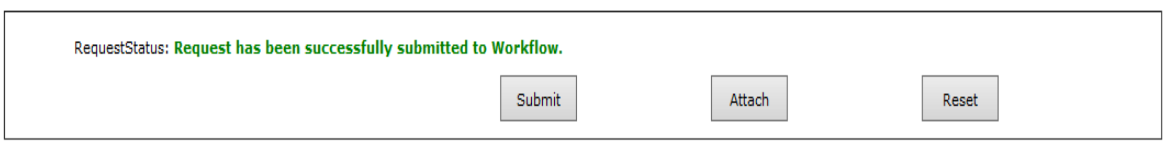
F. Click **Submit.**

BE CAREFUL! – The **Reset** button **CLEARS ALL information.**



BE CAREFUL! – The **Reset** button **CLEARS ALL information**.

G. Upon clicking **Submit**, the following message will appear:



NOTE: Once the vendor request has been reviewed and approved, it will be inserted into the vendor database and an email will be sent to the requester indicating it has been approved. **While the record has been approved, additional work is required by the Vendor Admin so Vendor ID (PEID) will NOT be available to use until the record has been updated and the Status has changed from PN (pending) to AC (active).**