

Using the Vendor Request

Where to find it:

- On the Main Menu of the Quali Financial System (KFS), listed under Purchasing/Accounts Payable

When to use it:

- If a new vendor is needed for a procurement or payment transaction
- If an update is needed to an existing vendor record, such as adding a new address

What you'll need:

- A signed [W9](#) is recommended for a US vendor/person providing a SERVICE or [W8BEN](#) (optional for foreign)
- For a procurement vendor, a [Business Information Form](#) (BIF) (preferable for tracking purposes, e.g., small business information)
- Certificate of Insurance, if vendor is performing repairs or providing services on campus (refer to [BUS-63](#) for these and additional insurance requirements)

How it's done:

	What to do	How to do it
A	Access the Vendor Lookup	1. Click Vendor under the Vendor menu item
B	Determine if the vendor record already exists	1. Search by each of the following criteria (separately, in this order): <ol style="list-style-type: none"> Tax ID: it's possible the vendor is listed under a different name from what you have; the system will not allow a duplicate tax ID Vendor Name: use the wildcard (*) and use the most unique portion of the name; 2. Make sure to leave the Active Indicator set to "Both"
C	If a result is found, determine if an update is needed	1. Check the Active Indicator column, to make sure it is "Yes" 2. Click on the vendor's name to view the addresses and determine if the one you need is there (use your browser's "Find in page" function to easily locate the address in a long list) 3. If you find the address, make sure the Active Indicator for that address is "Yes"

	What to do	How to do it
D	If the record needs changing, request an update	<ol style="list-style-type: none"> 1. Click the “edit” link to the left of the vendor’s name, in the search results 2. Proceed to instructions on Editing a Vendor
E	If no result is found, create a vendor request	<ol style="list-style-type: none"> 1. Click the “create new” button in the upper right of the screen (just above the printer icon) 2. Proceed to instructions on Creating a New Vendor

Creating a New Vendor

The following instructions are for the basic creation of a vendor. Additional fields may be used, depending upon the purpose of the vendor and the information that you have available.

	Complete these fields ...	What to know ...
Document Overview Tab		
1	Description	<ul style="list-style-type: none"> • This is a required field for all KFS documents • Put a basic description, such as “Adding vendor Acme Construction”
Vendor Tab		
2	Vendor Type	<ul style="list-style-type: none"> • The default is PO • Choose the type matching how you plan to use the vendor
3	Is this a foreign vendor	<ul style="list-style-type: none"> • Defaulted to No, so only change if applicable
4	Vendor Name OR Vendor First and Vendor Last	<ul style="list-style-type: none"> • These cannot be used together • Choose the most appropriate: Vendor Name for companies, First and Last for individuals • Enter the name exactly as it appears on the W9 or W8BEN (if available)
5	Does this vendor have a presence in California?	<ul style="list-style-type: none"> • If the vendor has an address in California
6	Vendor Collects Sales Tax?	<ul style="list-style-type: none"> • If vendor is in California, or you are unsure of the tax status, mark “Yes”
7	Tax ID	<ul style="list-style-type: none"> • Recommended for US vendors providing a SERVICE; enter what is on the W9 • Optional for foreign: enter if it’s included on the W8BEN
8	W9 Received OR W9 Not Received Reason OR W8BEN Received	<ul style="list-style-type: none"> • One of these must be completed

Address Tab		
7	Address Type	<ul style="list-style-type: none"> If using vendor on a purchasing document, must have one that is Purchasing type
7	Vendor Address Name	<ul style="list-style-type: none"> Does not have to be the same as the Vendor name, if they are doing business under another name (usually specified on second line of W9 if available) Automatically creates an alias, if different from the main vendor name, that can be used in searches
8	Address Lines	<ul style="list-style-type: none"> Minimum for US address: Address 1, City, State, Postal Code; use other fields as needed Minimum for Foreign: Address 1, City and Country; use other fields as needed Use official USPS abbreviations and avoid punctuation (e.g., use PO BOX, not P.O. BOX) ALL CAPS not required, but preferred by USPS
	Vendor Phone Number	<ul style="list-style-type: none"> Required for each address
	Email Address	<ul style="list-style-type: none"> Strongly recommended for each address
	Add button	<ul style="list-style-type: none"> Click this in order to add the address to the record Continue to create as many addresses as needed or known for the vendor – at a minimum, you should have the address(es) you will be doing business with
Notes and Attachments Tab		
	Note Text	<ul style="list-style-type: none"> A brief note describing what you are attaching
	Attached File	<ul style="list-style-type: none"> Browse for the W9, BIF or insurance file that you have for the vendor
	Attachment Type	<ul style="list-style-type: none"> Select the appropriate type
	Add button	<ul style="list-style-type: none"> Click to add the note and attachment Additional notes and attachments can be added

When completed, submit document for routing to the vendor desk. You will receive an FYI of the document, in your action list, when the vendor record has been added.

Editing an Existing Vendor

The following instructions are for adding a new address to a vendor (the most common update). Other updates can be made to the vendor record, based upon the purpose of the update and the information that you have available.

Please note, the following are NOT reasons to add a new address, if all other information for the address matches an existing address:

- Adding a customer number – there is a separate tab for that, so it can be added independent of the address
- Slight difference in the name – common occurrences are full name vs. acronym, with/without business designation (e.g., INC, LLC)
- Attention lines

	Complete these fields ...	What to know ...
Document Overview Tab		
1	Description	<ul style="list-style-type: none"> • This is a required field for all KFS documents • Put a basic description, such as “Updating vendor Acme Construction”
Address Tab		
7	Address Type	<ul style="list-style-type: none"> • Select the type that corresponds to how you plan to use this address (e.g., purchasing, payment, etc.)
7	Vendor Address Name	<ul style="list-style-type: none"> • Does not have to be the same as the Vendor name, if they are doing business under another name – but you should be sure it is the same business
8	Address Lines	<ul style="list-style-type: none"> • Minimum for US address: Address 1, City, State, Postal Code; use other fields as needed • Minimum for Foreign: Address 1, City and Country; use other fields as needed • Use official USPS abbreviations and avoid punctuation (e.g., use PO BOX, not P.O. BOX) • ALL CAPS not required, but preferred by USPS
	Vendor Phone Number	<ul style="list-style-type: none"> • Required for each address
	Email Address	<ul style="list-style-type: none"> • Strongly recommended for each address

	Complete these fields ...	What to know ...
	Add button	<ul style="list-style-type: none">• Click this in order to add the address to the record• Continue to create as many addresses as needed

When completed, submit document for routing to the vendor desk. You will receive an FYI of the document, in your action list, when the vendor record has been added.