SP.020.010 – Adding a New Supplier

Purpose	• To add a new supplier. • To explain what is included in supplier Location information. • To explain how the system selects alternate name information. • To identify how the system assigns the supplier statuses for a supplier added and saved in the system.
Description	To purchase goods or services or make a payment to a supplier, the supplier must exist in the system. Therefore, any time Procurement wishes to purchase goods & services, and the supplier is not in the system, the supplier must be added. Likewise, when Accounts Payable needs to issue payment and no purchase order was issued, the supplier must exist in the system before a voucher can be created. There are three required categories of information when adding a supplier – Identifying Information, Address and Location Information. Location information is not a physical address. It is a default set of rules or attributes that define how to conduct business with a particular supplier. However, while Location is not an address, it does reference addresses. A supplier must be approved and open for ordering before users can enter Purchase Orders or Vouchers for the supplier.
Security Role	BOR_PO_VENDORS_MAINT
Assumptions	User was granted the Authority to Enter user preference, via the Supplier Processing Authority page (Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Supplier Processing Authority).

Additional Information	Suppliers are entered by SetID. Banner suppliers are entered in the "B" SetID, and as such, users must have special security to add or update a "B" SetID supplier. For Institutions not using Travel & Expenses, that are also using the SHARE Supplier SetID, Employee & Student suppliers are entered in the "B" SetID. Employee & Student suppliers should NOT be added to the SHARE SetID. Institutions using Travel & Expenses may also use the "B" Supplier SetID for AP payments to employees that were unable to go through T&E or miscellaneous payments to students, such as student stipends The "B" Supplier SetID remains under the Institutions authority. Banner Suppliers are added by the Banner to AP Interface and Employee or Student suppliers will be manually entered and maintained by the Institution. To access the "B" SetID the user will need the BOR_BU_xx00B security role. Contact the institution's local Security Administrator if "B" SetID access is needed.

Procedure

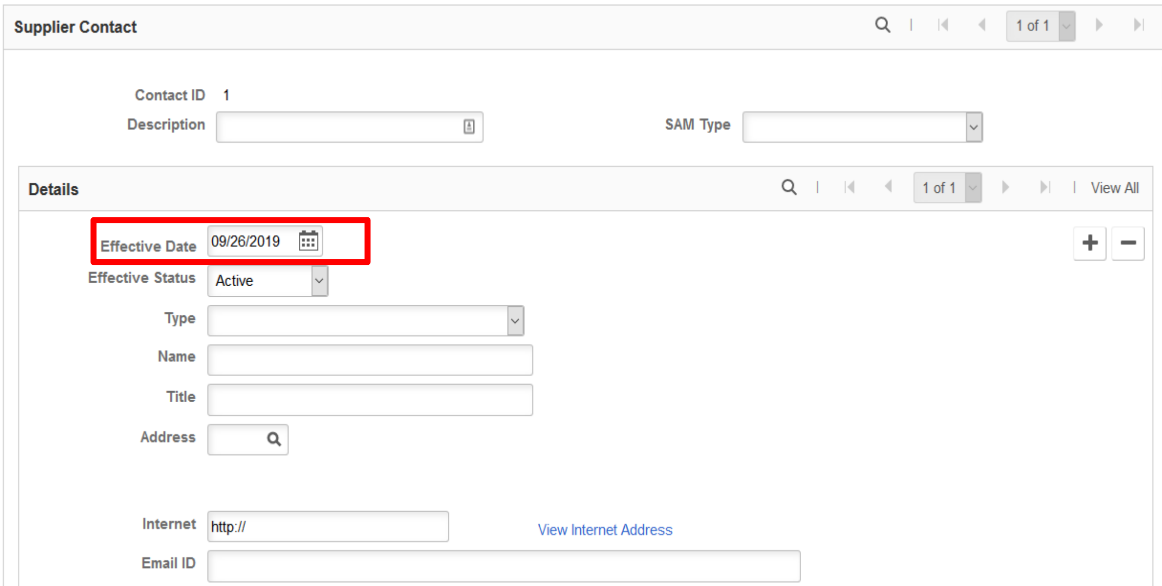
Below are step by step instructions on how to add a Supplier.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Suppliers** link.
4.	Click the **Supplier Information** link.
5.	Click the **Add/Update** link.
6.	Click the **Supplier** link. The system navigates to the Supplier Information page.
7.	Click the **Add a New Value** tab.

Step	Action
8.	In the **Persistence** drop-down menu, select the Persistence Type that describes how frequently the Supplier will be used. The Persistence Types are: • **Regular**: Select this option for a supplier to be used repeatedly. Additionally, if users select this type, the Supplier will be removed from the system once activity for the supplier stops for a designated period. Users can create an unlimited number of vouchers for this supplier. However, if there is no activity for the supplier by the as of date in a supplier archive request, the supplier is purged from the system. • **One-Time**: Select this option for suppliers to be used only once. Users can enter only one voucher for this supplier, after which the supplier status changes to Inactive automatically. A one-time supplier adds rows to the supplier tables. • **Single Payment Supplier:** A single payment supplier does not affect supplier tables and is used as the default master supplier for single payment vouchers.
9.	Click the **Add** button. The system navigates to the Identifying Information tab on the Supplier page. The Identifying Information page includes the supplier status, classification, and other basic business information for the supplier.
10.	Enter the supplier's short name in the **Supplier Short Name** field. ***Note:*** *For more information on supplier short name specifications, see the "Supplier Naming Conventions and Best Practices" job aid.*
11.	Enter the supplier's full name in the **Supplier Name** field. ***Note:*** *For more information on supplier short name specifications, see the "Supplier Naming Conventions and Best Practices" job aid.*
12.	Specify the Classification type from the **Classification** drop-down menu. For a business select Federal. For an individual select Social Security #.
13.	Navigate down to the **Additional ID Numbers** section and click the expand triangle.
14.	In the **ID Numbers** section, click the search icon in the **Type** field. The Look Up Type window appears with a list of ID types including TIN (tax identification number) and W2 (Social Security number).
15.	From the Loop Up Type popup window, select the appropriate value for the supplier. The system navigates back to the Supplier page.

Step	Action
16.	In the **ID Number** field, enter the supplier's tax identification or Social Security number. The field should contain 9 digits only (no characters).
17.	To add e-Verify information, navigate to the **Government Classifications** section and click the expand triangle to record the supplier's E-Verify information. Follow Steps 18 and 19.
18.	Click the search icon in the **Certification Source** field. The Look Up Certification Source pop up window appears.
19.	Select **E-VERIFY**. The system navigates back to the Supplier page. End of E-Verify Procedure.
20.	Enter the date the verification was completed in the **Effective Date** field.
21.	Enter the E-Verify Company ID Number in the **Certification Number** field.
22.	Enter the date the verification begins in the **Certificate Begin Date** field.
23.	Enter the date the verification expires in the **Certificate Expiration** field.
24.	Navigate to the **Additional Reporting Elements** section and click the expand triangle to add or update information such as Common Parent's TIN, Type of Contractor, HUBZone Program, etc. ***Note:*** *If applicable, users can record W8BEN or W9 information in the* ***Type of Contractor*** *field.*
25.	Navigate up to the **Check for Duplicate** button near the top of the page.
26.	Click the **Check for Duplicate** button to check for any duplicate suppliers.
27.	When a pop-up message appears to verify no duplicate supplier names exist, click the **OK** button. ***Note****: If any duplicate entries are present, an error message will display with all the duplicate supplier IDs. Research to determine if the supplier should be added again, or if a location or address should simply be added to the supplier that already exists.*
28.	Click the **Address** tab.
29.	Enter a description of the address in the **Description** field. (Ex: Main, Secondary, Remote Office, etc.) ***Note:*** *If entering more than one address, enter a unique description for each one.*
30.	Navigate down to the Details section.
31.	Enter the supplier's address in the **Address 1** field.
32.	Enter the supplier's city in the **City** field.

Step	Action
33.	Enter the supplier’s state or click the search icon to find the state in the **State** field.
34.	Enter the supplier’s ZIP code in the **Postal** field.
35.	To specify alternate names for the supplier that can be used for payment and withholding purposes, click the expand triangle next to the **Payment/Withholding Alt Names** section. ***Note:*** *When an alternate name is entered for payment/withholding, the system uses that name on the payment form and on withholding reports.* ***Note:*** *For more information on supplier short name specifications, see the “Supplier Naming Conventions and Best Practices” job aid.*
36.	Navigate down to the Phone Information section.
37.	Select the appropriate phone type from the **Type** dropdown menu. ***Note****: A **Type** should only be used once. Phone information should not have two rows where the **Type** is Business Phone, etc. This will cause an issue with PO Dispatch, when the address is referenced on the Purchase Order.*
38.	Enter the supplier’s area code in the **Prefix** field. (Ex: 800, 706, 404)
39.	Enter the supplier’s 7-digit phone number in the **Telephone** field. (Ex: 555-1212)
40.	Click the **Contacts** tab to add supplier contact information. ***Note****: Multiple contacts may be added by clicking on the add button **(+)** in the Supplier Contact section. (Ex: Accounts Receivable, Sales, etc.)*
41. s	Navigate to the Details section.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>42.</td><td>The system generates an effective date for this contact.


Note: Users can backdate, if needed.</td></tr>
<tr><td>43.</td><td>Select Contact Type from the dropdown menu.</td></tr>
<tr><td>44.</td><td>Enter contact’s name in the Name field.</td></tr>
<tr><td>45.</td><td>Enter contact’s title in the Title field.</td></tr>
<tr><td>46.</td><td>Click the search icon and search for the contact’s address.</td></tr>
<tr><td>47.</td><td>Enter contact’s email address in the Email ID field.</td></tr>
<tr><td>48.</td><td>Navigate to the Phone Information section.</td></tr>
<tr><td>49.</td><td>Select the contact’s phone type from the Type dropdown menu.</td></tr>
<tr><td>50.</td><td>Enter the contact’s area code in the Prefix field. (Ex: 800, 706, 404)</td></tr>
<tr><td>51.</td><td>Enter the contact’s 7-digit phone number in the Telephone field. (Ex: 555-1212)</td></tr>
<tr><td>52.</td><td>Click the Location tab.</td></tr>
</table>

Step	Action
53.	Enter the name of the location in the **Location** field. Each supplier must have one default location but can have multiple locations. If entering more than one location, enter a unique name for each one. (Ex: Main, Remit To, Return) ***Note:*** *A supplier's location is not a physical address, but a default set of rules, or attributes that define how the institution conducts business with a particular supplier. Additionally, supplier location does refer to physical addresses within the Payables and Procurement links.* ***Note:*** *For more information on supplier short name specifications, see the "Supplier Naming Conventions and Best Practices" job aid.*
54.	Enter the description of the supplier's location in the **Description** field. (Ex: "Business Office")
55.	Verify the **Default** checkbox is selected for the first location entered. ***Note:*** *The default location can be changed if there is more than one location.*
56.	To enter additional supplier information such as remit address, supplier bank account information, supplier ordering address, withholding options, etc. navigate to the Details section click on either the **Payables** link**, Procurement** link**,** and/or the **1099** link. Details about supplier information found in each link are below: • **Payables**: where users define what remit address to use for the supplier, supplier payment options, electronic file options, supplier bank account information, supplier type options and payment notification information. For more information, see SP.020.021 – Adding Banking Information to a Supplier. • **Procurement**: where users define the supplier's ordering address. • **1099/Withholding Supplier Information:** where users specify withholding options for the supplier location. For more information, see SP.020.030 – Adding 1099 Information to a Supplier.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>57.</td><td>Click the Save button. A pop window appears with three options: Select Yes to Submit Approval after saving (Yes button), No to Submit Approval later (No button), or Cancel to Cancel saving (Cancel). Definitions for each option are below:
Yes to Submit Approval after saving: opens an Approval Comments box where users can add notes to notify Approvers about details with which they would be concerned (Ex: Banking information). Select OK. Workflow routes the supplier approval request to the appropriate Approvers
No to Submit Approval later: saves the supplier, creates the Supplier ID, and saves the supplier as Unapproved. When ready to approve, user must click on the Submit for Approval box found on the Identifying Information tab, next to the Supplier Status.
Selecting Cancel will not save the supplier</td></tr>
<tr><td>58.</td><td>Verify a supplier number was assigned, and the Summary tab appears.</td></tr>
<tr><td>59.</td><td>Once saved, the supplier status will be Unapproved. The supplier must route through all approvals before it is available for ordering or payment.</td></tr>
</table>