Overview

Vendors may be set up in either Purchasing or Accounts Payable. The preference being to set the vendor up in Purchasing and changes can be done in either, with Purchasing related changes normally being made in purchasing and AP changes in AP.
Changes to an Existing Vendor

Navigate to Vendors > Vendor > Setup/Maintenance > Vendor Information

The Vendor Information page displays.

1. Click the **Add a New Vendor** tab

2. Enter the Vendor ID in the space provided (i.e. 0000013161)

3. Click **Search**

This brings you to the Identifying Information page.
Add Additional Addresses

The Identifying Information page displays.

1. Since we are adding an address, select the Address tab.

The Address page displays.

At this point you will need to add an address.

2. Click the Plus (+) sign below the Vendor Address and above Vendor Detail.

Notice that this has created address number 2 and will require you to enter all the information necessary. This includes street address, city, state, zip.
3. Use the **Telephone** link at the bottom of the panel to enter phone numbers.

The **Phone Information** page displays.

4. Enter the appropriate phone numbers as you did in the initial set up of this vendor.

5. Click **OK** when all numbers are entered.

This takes you back to the **Address Panel**.

The **Address page displays**.

*Note: The effective date is not the same as any other date in the system.*

6. Click **Save**

7. Go to the **Location** panel to verify address in the system.

The **Location page displays**.

8. To verify that the address has been successfully entered into the system, click on the magnifying glass on anyone of the functions (Ordering, Invoicing, Remitting, or Returning)
The Look Up Address page displays.

This will show you all the addresses that are currently in the system.

The Address page displays.

Note:

- As a minimum the street address, city, state and zip are required for all US vendors. (Foreign vendors are covered in separate instructions.)

- The Description and Address 1 are the same.

- CSUEB uses a naming convention and the entries should be in UPPERCASE and should follow the naming convention.

9. Enter the Email address if known

10. When you have made the entries, use the Telephone hyperlink at the bottom of the panel

This takes you to the Phone information panel.
The Phone Information page displays.

11. Enter the type of phone and the number

*Note: The Types offered and the abbreviations can be found by using the drop down tab.*

12. Select **Business** and enter the phone number

13. If additional phone numbers are known, use the Plus (+) sign key to the right

*Note: The Prefix section is left blank if the vendor is a US form. (For non US Vendors see instructions for Non US Vendor.)*
14. Select your phone type

Notice that the previous number has had punctuation added by the system.

15. Enter that number and continue as necessary to enter all the numbers desired

16. Click OK

This brings you back to the Address panel.

Note: The system will only allow one of each type of number.

The Address page display.

17. If you have additional addresses you may do so at this time by clicking on the Plus (+) sign at the right of the Description line

Follow the instructions above to enter the necessary information.

Note: Do not use the + at the right of and below the Address Detail Line that is used only when making a change (see separate instructions for making changes to a vendor.)
Enter Location and Description

Matching Options

The Location page displays.

1. Click the Matching hyperlink at the bottom of the panel

The Matching Options page displays.

1. Under Matching Option in the drop down tab select Specified

2. Check the Matching box to the right

3. Use the magnifying glass to select the Specified type

The Search Results page displays.

4. Select Standard Match Rules (This is the only type used by CSUEB)
This takes you back to **Matching Options** and should look as per this example.

5. If correct, click **OK**

This takes you back to the Location Panel.

---

**Procurement Options**

The Location page displays.

1. Click the **Procurement Options** hyperlink
The Procurement Options page displays.

**Note:** A number of Procurement Options are defaulted these include

- **Freight Terms:** DP-Destination Freight Pre Paid
- **Payment Terms:** Net 30 Days
- **Ship via Code:** UPS Ground

2. If the Freight Term Code is any other than DP, change the Default to Specify and use the Magnifying glass to select.

3. Click the VENDOR TRU hyperlink for our example.

This brings you back to the Procurement Options page.
The Procurement Options page displays.

Notice that Freight Terms Code has been changed. Continue to change defaults as necessary.

4. Click the Magnifying Glass icon to select Payment Terms ID

The Search Results page displays.

5. Select 21530 in our example.
This brings you back to the **Procurement Options** Panel once again.

Notice that Payment Terms ID section has been changed.

6. If Shipping Method is any other than default to UPS Ground, specify shipping Method

7. Click the Magnifying glass for selections

8. Once again for our example, we will use **VENDORTRUC** for Vendors' Own Truck

<table>
<thead>
<tr>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ship Via Code</strong></td>
</tr>
<tr>
<td>2DAYAIR</td>
</tr>
<tr>
<td>AIRBORNE</td>
</tr>
<tr>
<td>BESTWAY</td>
</tr>
<tr>
<td>BURLINGTON</td>
</tr>
<tr>
<td>CALIF CART</td>
</tr>
<tr>
<td>COMCAR</td>
</tr>
<tr>
<td>CONSOLIDAT</td>
</tr>
<tr>
<td>DHL</td>
</tr>
<tr>
<td>E Merry</td>
</tr>
<tr>
<td>FEDEx</td>
</tr>
<tr>
<td>NA</td>
</tr>
<tr>
<td>OVERNITE</td>
</tr>
<tr>
<td>PICKUP</td>
</tr>
<tr>
<td>ROADWAY</td>
</tr>
<tr>
<td>UPS</td>
</tr>
<tr>
<td>UPSGROUND</td>
</tr>
<tr>
<td>USPs</td>
</tr>
<tr>
<td>UVL</td>
</tr>
<tr>
<td>VENDORTRUC</td>
</tr>
<tr>
<td>VIKING</td>
</tr>
<tr>
<td>YELLOW FRT</td>
</tr>
</tbody>
</table>
This brings us back to the **Procurement Options** page.

9. If all information is correct, Click OK as the bottom of the page

### Procurement Options

- **Accounting Template**
  - Default

- **Freight Terms Code**
  - Specify: VENDOR.TRU

- **Shipping Method**
  - Specify: VENDOR.TRU

- **Buyer**
  - Default

- **Payment Terms ID**
  - Specify: 21530

- **Currency Information**
  - Default

- **Dispatch Methods**
  - 'PO': Default
  - 'RFO': Default
  - 'RIV': Default
  - 'Contract': Default

- **Advanced Shipment Receipt**
  - Unselected

- **Vendor UPN Ready**
  - Unselected

---

Sales/Use Tax Options

The Location page displays.

1. If the vendor collects sales tax, click the **Sales/Use Tax Option** hyperlink at the bottom left of the page
The Sales/Use Tax Options page displays.

Note that the default for sales tax is none. You can use the drop down tab to select the sales tax option.

2. Select **Sales** Tax
3. Click **OK**

Note: If sales tax is collected, additional actions are needed but cannot be done until the Vendor has been assigned a Vendor number within the PeopleSoft system.

This brings you back to Location Panel once again.

4. Select **Contacts**

**Enter Contacts**

The Contacts page displays.

1. Enter the **Contact Name** for the vendor and the **URL** link if known of the Vendor

   Note: If the vendor is a small business or disabled vet, you will enter information on that as well.

2. Click **Save** once completed

   This takes you back to the Location Panel and gives you a **Vendor Number**.
The Location page displays.

Note: In this case the Vendor Number is 000013161.

Vendor Types

The Location page displays.

If you know that the vendor is Small Business or DVBE, you should set Vendor Type up at this time.

3. Use the drop down box to select **Vendor Types**

The Vendor Types Table page displays.

4. Click the Office of Small Business (OSB) hyperlink

The Vendor Types page displays.

5. If certified by the Office of Small Business, select **OSB**
6. If the vendor has additional types (for instance DVBE), you will need to add a line by using the Plus (+) sign.

Note: In this case DVBE for Disabled Veteran Business Enterprise.

![Vendor Types]

7. If multiple entries, select one of these to be the primary.

Note: In this case we have chosen the OSB.

8. Click OK.

This will take you back to the Location Panel.

Review Information on all the panels.

If incorrect you may change them now, since changing information later requires additional steps.

If correct you may continue entering vendors or go elsewhere in the system.

Note: In this example we have additional steps required because of the sales tax issue. See the process paper for entering Sales Tax for those steps.

Whom to Contact for Help?

For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).