

Adding a Vendor

Before you add a new vendor, a thorough search of the database should be conducted to avoid duplicate entries. If you can not find the vendor you want to use, then proceed with this set up.

PeopleSoft

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Vendor Information

Find an Existing Value | Add a New Value

SetID: SDUSD
 Vendor ID: NEXT
 Add
 Find an Existing Value | Add a New Value

1. Navigate to **Vendors**→**Vendor Setup/ Maintenance**→**Vendor Information**→**Add a New Value**

2. Enter SDUSD as **SetID**.

3. Click **Add**.

Identifying Information | Address | Location | Contacts | 1099

SetID: SDUSD Vendor: 0000000019

Vendor Name

Name 1: YourFirstName Office Supplies & Cleaning
 Name 2:
 ShortName: YOURFIRSTN YOURFIRSTN-001

Vendor Classification

Classification: Supplier
 Status: Unapproved
 Persistence: Regular
 Withholding: Open For Ordering:

Vendor Relationships

Corporate Vendor
 InterUnit Vendor

Additional ID Numbers Duplicate Invoice Settings Government Classifications Sld Industry Codes

Save Return to Search Query Refresh Add Open to Order Include History Connect History

Identifying Information | Address | Location | Contacts | 1099

4. Enter the vendor's name.

(Note: If dealing with an individual's name, the last name should be placed in the short name field followed by the first name. Use all 10 characters so that as much of the vendor name as possible will be available for searching.)

5. Define the vendor **Classification**.

6. Define the vendor **Persistence**.

7. Click the **Additional ID Numbers** hyperlink.

Additional ID Numbers

Customer ID:
 Our Customer Number:

ID Numbers Customize | Find | View All | First 1 of 1 | Last

Type	SetID	ID Number	D+B Number
TIN		01-23456789	

OK Cancel Refresh

8. Enter TIN as the **ID Type**.

9. Enter the vendor's Tax ID as the **ID-Number**.

10. Click **OK**.

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11. Click on the **Address** tab.
12. Enter the vendor's address information. If you need to add additional lines, click the **+** icon.
13. Click the **Telephone** hyperlink.

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14. Enter the vendor's **Telephone** number.
15. If the vendor has more than one telephone number, click the **+** icon to add additional lines.
16. Click **OK**.

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17. Click the **Location** tab.
18. Fill in location details. (To search for location specifications click on the  icon.)
19. Click the **Sales/Use Tax Options** hyperlink.

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20. Enter **Sales/Use Tax Applicability**.
21. Leave **Ship to Location** and **Sales Tax Tolerance** as default values.
22. Click **OK**.

Accounts Payable

Identifying Information | Address | Location | Contacts | 1099

SetID: SDUSD Vendor: NEXT YourFirstName Office Supplies & Cleaning

Vendor Location Find | View All | First | 1 of 4 | Last

*Location: 001 Descr: PRIMARY Default

Location Detail Find | View All | First | 1 of 4 | Last

*Eff Date: 05/22/2003 Active

Pricing Vendor: NEXT *Location: 001 Doc Type: Default Specify

Ordering Vendor: NEXT Location: 001 *Address: 1

Invoicing Vendor: NEXT Location: 001 Address: 1

Remitting *Vendor: NEXT *Location: 001 *Address: 1

Retaining *Vendor: NEXT Location: 001 *Address: 23

Go To: Bank Accounts EFT Options Matching Payment Options Procurement Options RTV Options
Sales/Use Tax Options Self-Billed Invoice Info VAT Options Withholding Setup More...

23. Click on the **Payment Options** hyperlink.

Payment Options

Payment Control 24
 Hold Payment Complex Rounding
 Always take discount Separate Payment
 Factoring Apply Netting

Bank 24
 Default Bank: Account: Currency: Rate Type:

Delay Days
 *Delay Days: Default Discount: 0 Net: 0

Draft Slight Code
 *Draft Slight: Default
 Draft Slight Code:

Payment Method
 Default Method:

Payment Handling
 *Payment Handling: Default
 Handling: 24

Draft Rounding
 *Draft Rounding: Do Not Use
 Rounding Position:
 *Remaining Amount Action: Do not issue Draft
 *Payment Method: CHK Check

Holiday Processing Options
 *Holiday Processing: Default
 Holiday Options:
 Days: Allow due date in next month

Draft Optimization
 *Draft Optimize: Do Not Use
 Max Number of Drafts:

Special Condition Options
 Payment Split ID:

24. Input **Payment Control**, **Bank**, and **Payment Handling** information.

25. Click **OK**.

Identifying Information | Address | Location | Contacts | 1099

SetID: SDUSD Vendor: NEXT YourFirstName Office Supplies & Cleaning

Vendor Location Find | View All | First | 1 of 4 | Last

*Location: 001 Descr: PRIMARY Default

Location Detail Find | View All | First | 1 of 4 | Last

*Eff Date: 05/22/2003 Active

Pricing Vendor: NEXT *Location: 001 Doc Type: Default Specify

Ordering Vendor: NEXT Location: 001 *Address: 1

Invoicing Vendor: NEXT Location: 001 Address: 1

Remitting *Vendor: NEXT *Location: 001 *Address: 1

Retaining *Vendor: NEXT Location: 001 *Address: 26

Go To: Bank Accounts EFT Options Matching Payment Options Procurement Options RTV Options
Sales/Use Tax Options Self-Billed Invoice Info VAT Options Withholding Setup More...

26. Click on the **Withholding Setup** hyperlink.

Withholding Vendor Information

SetID: SDUSD Vendor: 0000000013 Location: 001 Eff Date: 01/01/1901

Reporting Info

Withholding Jurisdiction Customize | Find | View All | First | 1-2 of 2 | Last

Main Information Hold/Condition Rent

*Entity	*Type	*Jurisdiction	Default Jur	*Default Class	*Rule Indicator	Rule	Withhold
IRS	1099	FED	<input type="checkbox"/>	07	Default	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CA	1099	CA	<input type="checkbox"/>	07	Default	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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OK Cancel Refresh

27. Complete withholding information.

28. Click **OK**.

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The screenshot shows a web-based form for vendor management. At the top, there are tabs for 'Identifying Information', 'Address', 'Location', 'Contacts', and '1099'. The 'Identifying Information' tab is active. The form contains the following sections:

- Vendor Name:** Fields for 'Name 1' (containing 'YourFirstName Office Supplies & Cleaning'), 'Name 2', and 'Short Name' (containing 'YOURFIRSTN' and 'YOURFIRSTN-001').
- Vendor Classification:** Fields for 'Classification' (set to 'Supplier'), 'HR Class', 'Status', and 'Persistence' (set to 'Regular'). There are checkboxes for 'VAT Registration', 'Withholding', and 'Open For Ordering'.
- Vendor Relationships:** Checkboxes for 'Corporate Vendor' and 'Inter Unit Vendor'.

At the bottom of the form, there are several buttons: 'Save' (highlighted with a blue box and the number 30), 'Return to Search', 'History', 'Duplicate Invoice Settings', 'Government Classifications', 'B2B Industry Codes', 'Include History', and 'Connect History'. The bottom navigation bar shows 'Identifying Information | Address | Location | Contacts | 1099'.

29. Click on the **Identifying Information** tab.

30. Click **Save**.

Accounts Payable