Vendor ASSIST

Overview

Welcome to the Vendor ASSIST. In this ASSIST, you will find information on using the Vendor components of the Financials system.

If you do not have access to the Financials system, and you think you should, please follow the system access procedures. If you are not familiar with the Financials system, visit the Financials System ASSIST, which also includes step-by-step instructions for processes common to all parts of the Financials system.

Topics

- Vendor Maintenance Process Overview
- How to Search for Vendors in PeopleSoft
- How to request a New Vendor, Change a Vendor Name, Reactivate or Update an Existing Vendor in Peoplesoft
Vendor Maintenance Process Overview

What is the vendor maintenance Process?

Vendor Maintenance refers to the university process of keeping the vendors in the vendor database up to date for Financials system users in the university community. The vendor database is an electronic means of storing information about vendors who supply goods and services to the university.

The vendor database is used for both Purchasing and Accounts Payable processes. A vendor’s record must exist in the database before a Purchasing or Accounts Payable transaction for a particular vendor can be completed. The Vendor Maintenance team members are responsible for updating existing vendor records in the database and adding new vendor records to the database as needed.

Who is affected by the UNIV vendor maintenance process?

There are two vendor databases kept within the university, UNIV and OSUMC. The information contained within this Vendor ASSIST page applies to the UNIV vendor database. Areas of the university affected by the UNIV vendor database are:

- UNIV AP
- UNIV Purchasing
- OSP
- Anyone in the OSU community searching for UNIV vendors in PeopleSoft

*NOTE: OSUMC maintains a separate vendor database and therefore has a separate vendor maintenance process for OSUMC vendors.

Why is the vendor maintenance process important?

The vendor maintenance process is important for several reasons:

- A well maintained database is more efficient
- Data consistency for all users
- Easier to find the right vendor which makes the purchasing and payment processes easier for users
- The university can leverage spending and save money on goods and services
- Utilizing negotiated contracts is easier
How to Search for Vendors in PeopleSoft

Searching for an existing Approved/Open for ordering vendor

- Searching from the REQ/PO screen
  - First click on 'Header Defaults' then on 'Vendor Lookup'
    - Search by vendor “Name”
      - Include % if you are unsure of spelling or full vendor name (Example: Search for %holiday% if you are searching for Holiday Inn)
      - The more you type, the fewer results you will get. If you are unsure of the exact vendor name, try searching using key words from the vendor name. Remember, “less is best”.
    - Search by vendor “ShortName”
      - This is the vendor’s Tax ID number or a combination of part last name and part social security number.
      - Do not use (-). Example: 123456789
      - Type the Tax ID number into the “ShortName” field and click the hourglass.
        (Hourglass= more fields to search by)
      - If you are missing any information change “begins with” to “contains”

Searching for a vendor who may or may not be Active/Open for ordering

- Searching from the Vendor menu
  - Click on “Vendor Information”
    - Search by “Name”
      - Include % if you are unsure of spelling or full vendor name (Example: Search for %holiday% if you are searching for Holiday Inn)
      - The more you type, the fewer results you will get. If you are unsure of the exact vendor name, try just searching for key words in the name.
      - If individual, enter last name. Do not use suffix or prefix (Example: III, Jr., Dr.)
      - If you are missing any information change “begins with” to “contains”
    - Search by “Short Vendor Name”
      - This is the vendor’s Tax ID number or a combination of part last name and part social security number.
      - Do not use (-). Example: 123456789
      - Type the Tax ID number into the “ShortName” field and click the search button.
      - If you are missing any information change “begins with” to “contains”

I couldn’t find the vendor I need. Can I request a new vendor or change an existing vendor record?

University departments/units initiate requests to create or update vendor records in the vendor database. The request should be for suppliers with whom the department/unit desires to enter into a transaction. Before submitting a request, the department/unit should search the Financials System using the following guide for any possible abbreviated business names.
How to Request a New Vendor, Change a Vendor Name, Reactivate or Update an Existing Vendor in PeopleSoft

How do I add or update a Vendor Record?

All requests to add or update vendor records start with the Vendor Maintenance Request Form. This form is an online form exclusively used by Central Purchasing Buyers, OSP Buyers and Departmental Requesters to add or change existing Vendors in the PeopleSoft Financials System. It is for University use only. Suppliers may register for upcoming Bid opportunities at Supplier Registration & Bid Information.

What Documents are required?

Requests for a New Vendor, Name Change or Reactivation require proper documentation to be attached (see appropriate Instructions document below). You will be required to upload your documents before submitting your online form. Certain vendor types require a detailed description of goods or service provided, website, eRequest PR# and quote.

UNIV Instructions.pdf
OSURF Instructions.pdf

Who can I contact with questions?

For Vendor Maintenance related questions view the Vendor Maintenance Contact List for an appropriate Department Contact.