



Version	9.0
Document Generation Date	2/24/2009
Last Changed by	System Office
Status	Final

Adding a Vendor

Concept

For any company with which you plan to do business, you must enter vendor-related information into the system. After this information is entered, it is available for procurement processing such as creating Purchase Orders and entering Vouchers. Vendor information includes specific Identifying Information, University Location Information, Payment Options, Procurement Options, Federal Reporting/Tax information and any particular processing controls.



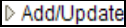

The University shares vendor information across all Business Units. It is not necessary to enter a vendor more than once in order for it to be used by multiple campuses. The University uses the **Location** page of the vendor record to identify the specific campus(s) that conduct business with a vendor. For example, vendor X is used by UMS01, UMS02, and UMS03. Vendor X would be entered into the system once and would have three Locations, each with specific information about how that Location conducts business with the vendor.


The University has specific rules for entering and maintaining vendor records. Please refer to the “Vendor Create & Maintenance” manual for instructions.

Additional Information: Limited staff at each campus have the Vendor Create & Maintenance role. Contact your campus Purchasing Department or Business Office for instructions on requesting a new vendor or a new Location on an existing vendor record.


Navigation



Step	Action
1.	From the Financials menu, click the Vendors link. 
2.	Click the Vendor Information link. 
3.	Click the Add/Update link. 
4.	Click the Vendor link. 



[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)

[New Window](#) | [Help](#) | 

Vendor Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

SetID: = UMSYS

Vendor ID: begins with

Persistence: =

Short Vendor Name: begins with

Our Customer Number: begins with

Name 1: begins with

Vendor Alias Name: begins with

City: begins with

State: begins with

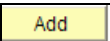
Include History
 Correct History
 Case Sensitive

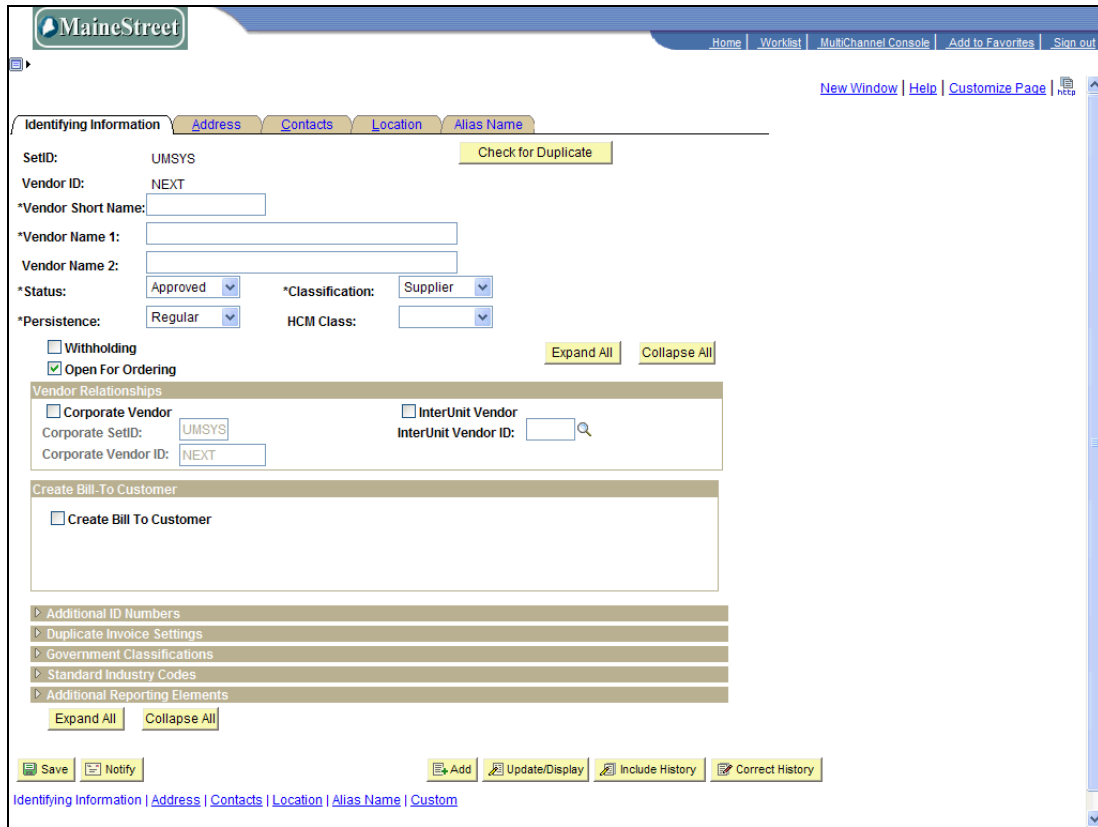
[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
5.	On the Vendor Information Find an Existing Value/Add a New Value page, click the Add a New Value tab. Add a New Value



Step	Action
6.	<p>The Vendor ID appears as NEXT on the search page. <u>DO NOT CHANGE THIS.</u> The system assigns a sequential ID number after you enter the vendor information and save the page.</p> <p>Use the Persistence drop-down list to select a persistence level for this vendor. Values are: One Time, Permanent, Regular, and Single Payment Vendor. Normally Regular is what you need.</p> <p>If you specify a persistence level of Single Payment Vendor when you add a new vendor, the first page in the Vendor Information component that you enter is the Single Payment Vendor page (See “Creating a Single Payment Vendor” document). If you are creating a one-time, permanent, or regular vendor, you first access the Identifying Information page.</p> <p>Click the Add button.</p> 



The screenshot shows the 'Identifying Information' page in the MaineStreet system. The page includes a navigation bar with 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below the navigation bar are links for 'New Window', 'Help', and 'Customize Page'. The main content area is divided into several sections:

- Identifying Information:** Contains fields for SetID (UMSYS), Vendor ID (NEXT), *Vendor Short Name, *Vendor Name 1, Vendor Name 2, *Status (Approved), *Classification (Supplier), *Persistence (Regular), and HCM Class. There is a 'Check for Duplicate' button.
- Withholding:** Includes a checkbox for 'Withholding' and a checked checkbox for 'Open For Ordering'. There are 'Expand All' and 'Collapse All' buttons.
- Vendor Relationships:** Includes checkboxes for 'Corporate Vendor' and 'InterUnit Vendor'. Fields for Corporate SetID (UMSYS), Corporate Vendor ID (NEXT), and InterUnit Vendor ID are present.
- Create Bill-To Customer:** Includes a checkbox for 'Create Bill To Customer'.
- Additional Information:** A list of expandable sections: 'Additional ID Numbers', 'Duplicate Invoice Settings', 'Government Classifications', 'Standard Industry Codes', and 'Additional Reporting Elements'. There are 'Expand All' and 'Collapse All' buttons.

At the bottom of the page, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A breadcrumb trail at the very bottom reads: 'Identifying Information | Address | Contacts | Location | Alias Name | Custom'.

Step	Action
7.	<p>Use the Identifying Information page to enter identifying information for a vendor, including the vendor name and short name, classification, status, persistence, and withholding information. Some fields default for you but can be changed if needed.</p> <p>Minimum Information Required</p> <p>Many of the required fields on a vendor record will default and generally do not need to be changed. At a minimum, the following additional information must be provided in order to successfully save a vendor record:</p> <ul style="list-style-type: none"> - Non-Withholding Vendors: <i>Vendor Short Name</i>, <i>Vendor Name 1</i>, at least one address, at least one location. - Withholding Vendors: In addition to the fields above, check the Withholding Box on the Identifying Information page and complete the Global/1099 Withholding link on the Location page. <p>The default fields may be updated when necessary and additional information may be provided on the vendor record when appropriate. Please refer to the Vendor Create and Maintenance manual for instructions.</p>

Process Document

Financials 9.0: Adding a Vendor



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | [Help](#)

Identifying Information [Address](#) [Contacts](#) [Location](#) [Alias Name](#)

SetID: UMSYS

Vendor ID: NEXT

*Vendor Short Name:

*Vendor Name 1:

Vendor Name 2:

*Status: *Classification:

*Persistence: HCM Class:

Withholding

Open For Ordering

Vendor Relationships

Corporate Vendor InterUnit Vendor

Corporate SetID: UMSYS InterUnit Vendor ID:

Corporate Vendor ID: NEXT

Create Bill-To Customer

Create Bill To Customer

Additional ID Numbers

Duplicate Invoice Settings

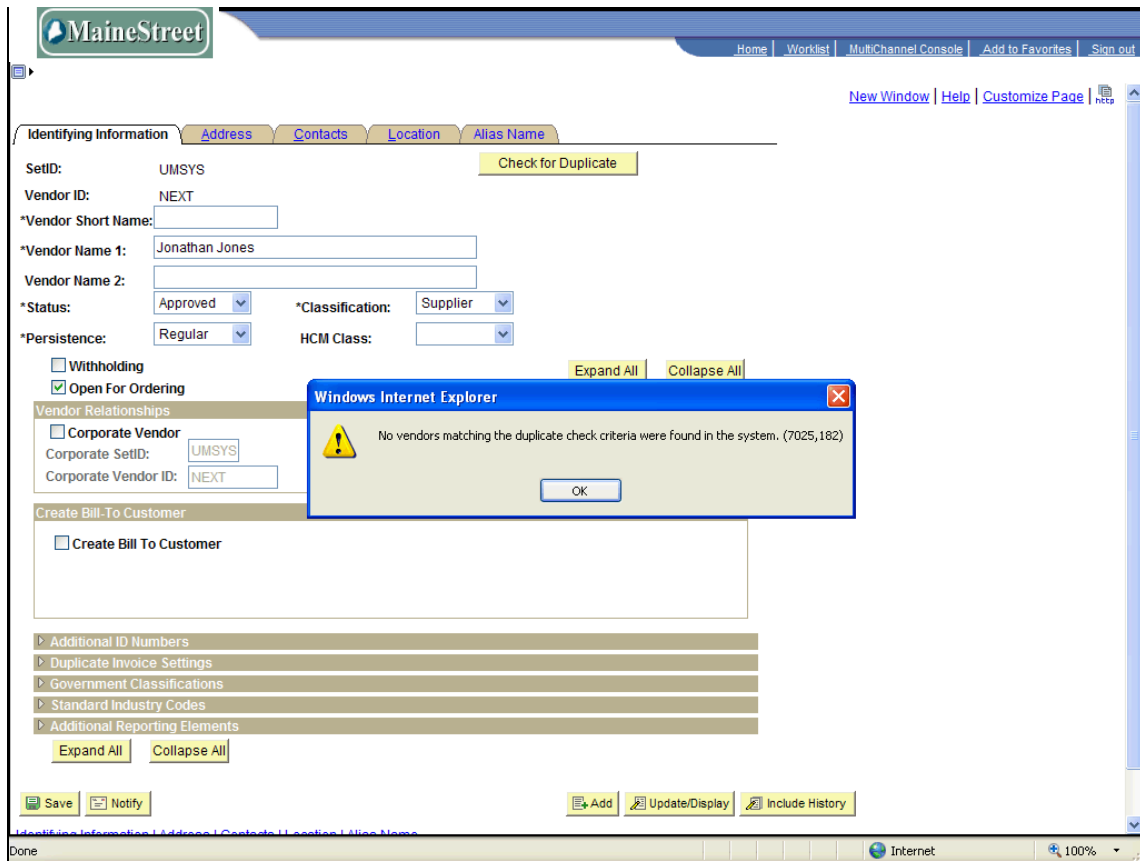
Government Classifications

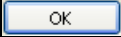
Standard Industry Codes

Additional Reporting Elements

[Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Alias Name](#) | [Custom](#)

Step	Action
8.	Enter the desired information into the Vendor Short Name field.
9.	Enter the desired information into the Vendor Name 1 field.
10.	Click the Check for Duplicate button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;"><input type="button" value="Check for Duplicate"/></div>



Step	Action
11.	<p>The system will only find a duplicate if another vendor exists exactly as the <i>Vendor Name 1</i> field appears. Any difference whatsoever, including spaces, will not return a possible duplicate. It is important that you search for duplicate vendors using the "Find an Existing Value" search screen prior to entering a new vendor.</p> <p>Click the OK button.</p> 

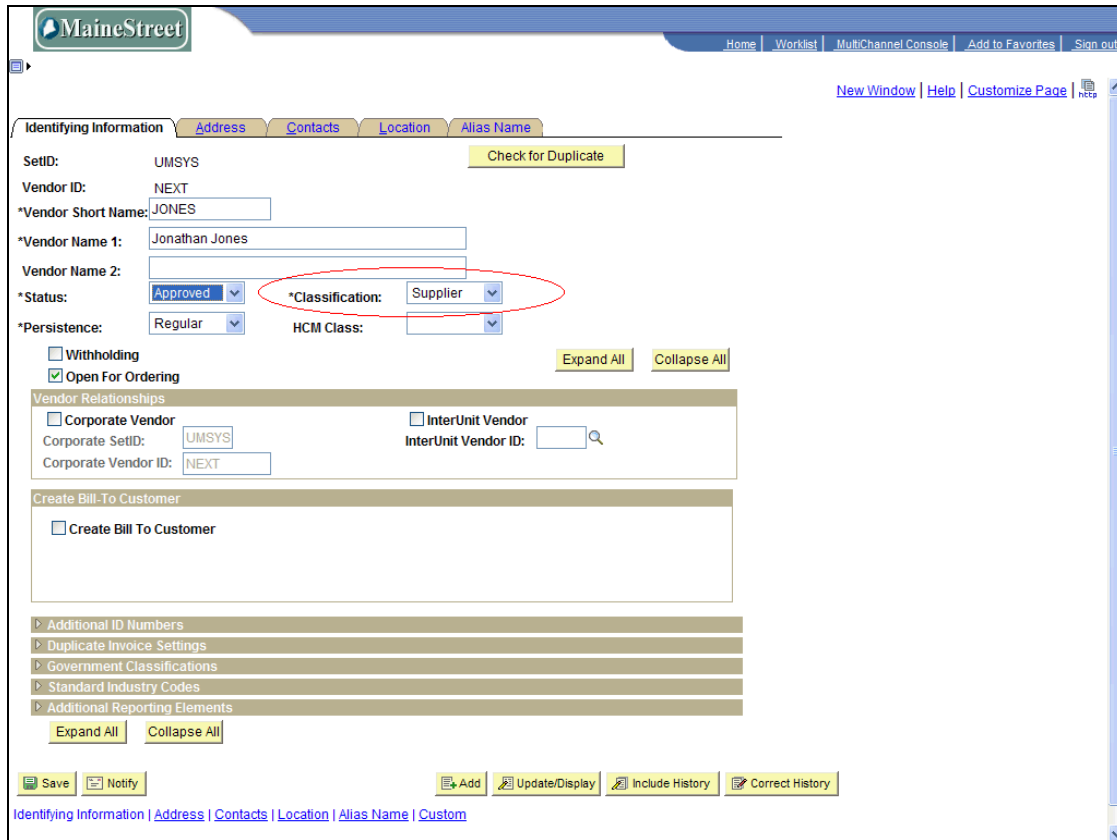
Process Document

Financials 9.0: Adding a Vendor



The screenshot shows the 'Adding a Vendor' form in the MaineStreet Financials 9.0 system. The 'Status' field is highlighted with a red circle, indicating the step in the process. The form includes various fields for vendor identification and classification, such as SetID, Vendor ID, Vendor Short Name, Vendor Name 1, Vendor Name 2, Status, Classification, Persistence, and HCM Class. There are also checkboxes for 'Withholding' and 'Open For Ordering', and a section for 'Vendor Relationships' with 'Corporate Vendor' and 'InterUnit Vendor' options. At the bottom, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.


Step	Action
12.	<p>Use the Status field to select the vendor's status. Values are:</p> <ul style="list-style-type: none"> • Approved: If you have authority to approve vendors as defined in your procurement user preferences, the system automatically assigns a status of Approved to the vendor. The system does not recognize a vendor as approved unless an authorized user enters or approves it. • Inactive: You cannot enter purchase orders or vouchers for this vendor. Do not use this selection. • To Archive: You cannot enter new vouchers for this vendor; the vendor is purged from the system. Do not use this selection. • Unapproved: You cannot enter purchase orders or vouchers for this vendor. <p>Click on the drop-down arrow in the Status field to select the appropriate option.</p>
13.	<p>For this example, click on Approved to select it.</p> <p>Approved</p>



The screenshot shows the 'Adding a Vendor' form in the MaineStreet Financials 9.0 application. The 'Identifying Information' tab is selected. The form includes the following fields and options:

- SetID:** UMSYS
- Vendor ID:** NEXT
- *Vendor Short Name:** JONES
- *Vendor Name 1:** Jonathan Jones
- Vendor Name 2:** (empty)
- *Status:** Approved
- *Classification:** Supplier (highlighted with a red circle)
- *Persistence:** Regular
- HCM Class:** (empty)
- Withholding
- Open For Ordering
- Vendor Relationships:**
 - Corporate Vendor (Corporate SetID: UMSYS, Corporate Vendor ID: NEXT)
 - InterUnit Vendor (InterUnit Vendor ID: [empty])
- Create Bill-To Customer:**
 - Create Bill To Customer
- Additional ID Numbers**
- Duplicate Invoice Settings**
- Government Classifications**
- Standard Industry Codes**
- Additional Reporting Elements**

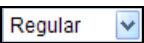
Buttons at the bottom include: Save, Notify, Add, Update/Display, Include History, and Correct History.

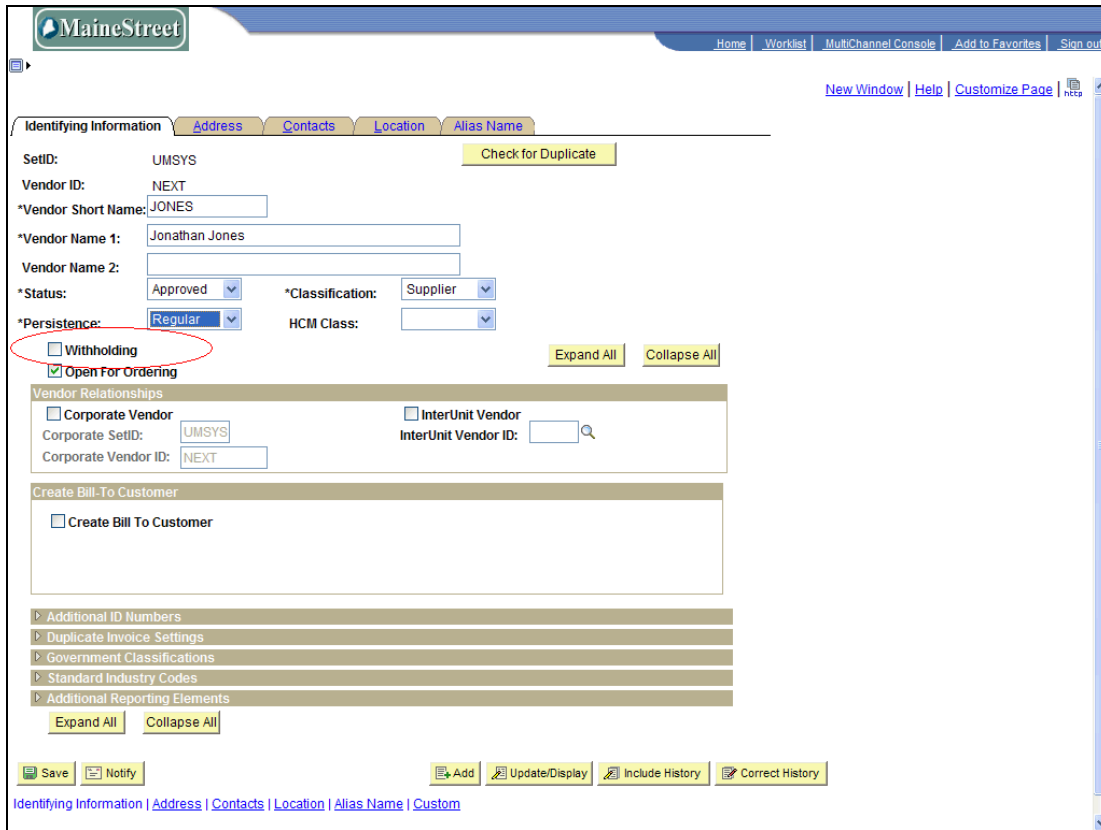
Step	Action
14.	<p>Use the Classification field to select the vendor's classification. Values are:</p> <ul style="list-style-type: none"> • Supplier: Normally this is the one that will be used. <p>The other classifications (Attorney, Employee, HRMS) are used with other University database interfaces. Please do not use them.</p> <p>Click the Classification drop-down arrow.</p>
15.	<p>Click on Supplier to select it.</p> 

Process Document

Financials 9.0: Adding a Vendor



Step	Action
16.	<p>Use the Persistence field to select the vendor's persistence. Values are:</p> <ul style="list-style-type: none"> • One-Time: Select for vendors you know you will use only once. You can enter only one voucher for this vendor, after which the vendor status changes to Inactive automatically. A one-time vendor is different from a single payment vendor in that a one-time vendor adds rows to the vendor tables. • Single Payment: A single payment vendor does not affect vendor tables and is used as the default master vendor for single payment vouchers. • Permanent: Select for vendors you know your organization will always use, even if not on a frequent basis. You can create an unlimited number of vouchers for this vendor. The vendor is not purged from the system unless you specifically request that they be archived in a vendor archive request. • Regular: Select for a vendor only if you don't mind that it is removed from the system once activity for the vendor stops for a designated period. You can create an unlimited number of vouchers for this vendor. However, if there is no activity for the vendor by the as of date in a vendor archive request, the vendor is purged from the system. The University currently does not have a designated period for purging vendors. <p>Click on the drop-down arrow in the Persistence field.</p>
17.	<p>For this example, click on Regular to select it.</p> 



Identifying Information | Address | Contacts | Location | Alias Name

SetID: UMSYS Check for Duplicate
 Vendor ID: NEXT
 *Vendor Short Name: JONES
 *Vendor Name 1: Jonathan Jones
 Vendor Name 2:
 *Status: Approved *Classification: Supplier
 *Persistence: Regular HCM Class:
 Withholding Expand All Collapse All
 Open For Ordering

Vendor Relationships
 Corporate Vendor InterUnit Vendor
 Corporate SetID: UMSYS InterUnit Vendor ID:
 Corporate Vendor ID: NEXT

Create Bill-To Customer
 Create Bill To Customer

Additional ID Numbers
 Duplicate Invoice Settings
 Government Classifications
 Standard Industry Codes
 Additional Reporting Elements
Expand All Collapse All

Save Notify Add Update/Display Include History Correct History

[Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Alias Name](#) | [Custom](#)

Step	Action
18.	<p>When entering 1099 vendors, select the Withholding check box to enable 1099 reporting for the vendor. You will specify withholding information on the Withholding Vendor Information page associated with your Location later.</p> <p>While the Withholding option and the Withholding Vendor Information page are available to you to make updates after you have defined your vendors, the most efficient way to handle 1099 vendors is to make sure that you mark them as withholding when you first enter them. If you do, all vouchers that you enter for the vendor are automatically flagged for withholding reporting as you enter them into the system.</p>

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Identifying Information | **Address** | Contacts | Location | Alias Name

SetID: UMSYS Check for Duplicate

Vendor ID: NEXT

*Vendor Short Name: JONES

*Vendor Name 1: Jonathan Jones

Vendor Name 2:

*Status: Approved *Classification: Supplier

*Persistence: Regular HCM Class:

Withholding Expand All Collapse All

Open For Ordering

Vendor Relationships

Corporate Vendor InterUnit Vendor

Corporate SetID: UMSYS InterUnit Vendor ID:

Corporate Vendor ID: NEXT

Create Bill-To Customer

Create Bill To Customer

Additional ID Numbers

Duplicate Invoice Settings

Government Classifications

Standard Industry Codes

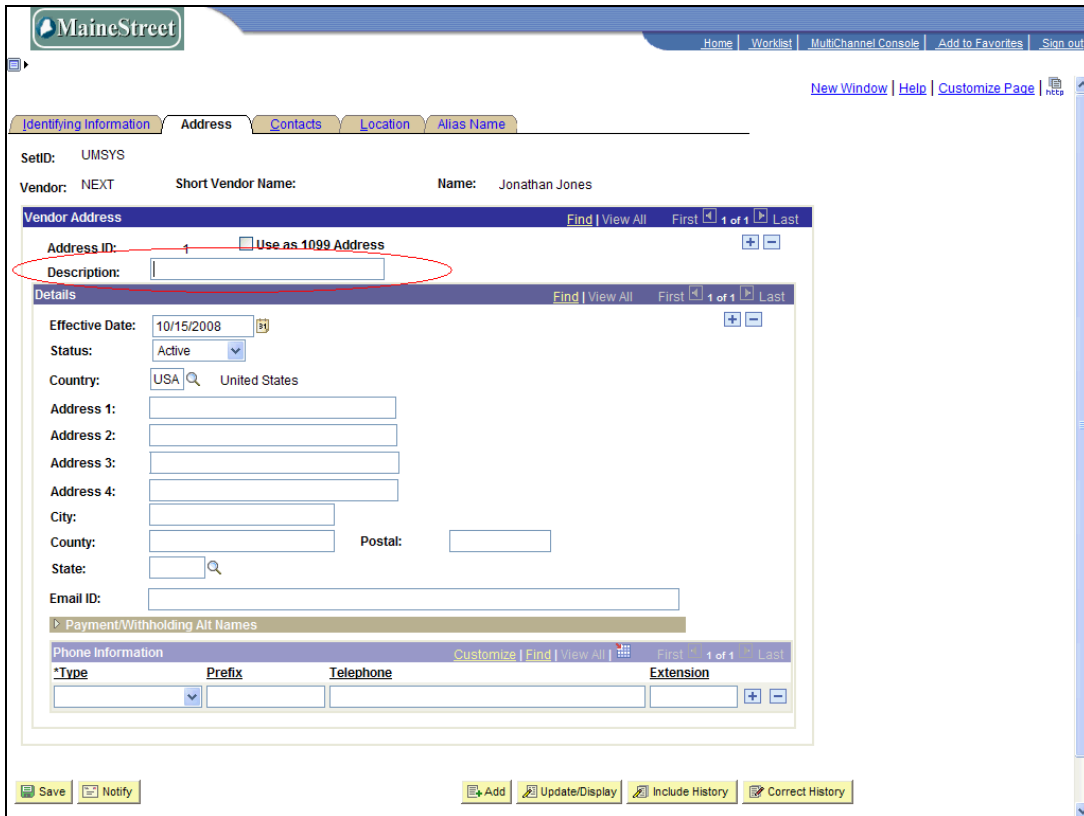
Additional Reporting Elements

Expand All Collapse All

Save Notify Add Update/Display Include History Correct History

Identifying Information | [Address](#) | [Contacts](#) | [Location](#) | [Alias Name](#) | [Custom](#)

Step	Action
19.	Select the <i>Open For Ordering</i> check box to certify the vendor for purchasing goods and services. If this check box is blank, you cannot enter purchase orders (POs) for this vendor in MaineStreet Purchasing.
20.	Next, you need to enter details about the vendor's address(s). Click the Address tab. Address



The screenshot shows the 'MaineStreet' software interface. At the top, there are navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below that, there are tabs for Identifying Information, Address, Contacts, Location, and Alias Name. The 'Address' tab is selected. The vendor information is displayed: SetID: UMSYS, Vendor: NEXT, Short Vendor Name: , Name: Jonathan Jones. The 'Vendor Address' section has a table with one row. The 'Address ID' field is circled in red. Below it is a 'Description' field. The 'Details' section contains various fields: Effective Date (10/15/2008), Status (Active), Country (USA), Address 1-4, City, County, State, and Postal. The 'Phone Information' section has a table with columns for Type, Prefix, Telephone, and Extension. At the bottom, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History.

Step	Action
21.	Use the Address page to specify one or more addresses for the vendor and to specify the address that must be used for 1099 reporting purposes, when applicable or for non-1099 vendors if you want to record the vendors Tax ID #. You can enter multiple addresses for the different sites that a vendor might have. For example, the vendor may have one address for orders, which you would use on your purchase orders and a different address for remitting, which you would use on your payments.

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Identifying Information | Address | **Contacts** | Location | Alias Name

SetID: UMSYS
Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

Vendor Address Find | View All First 1 of 1 Last
Address ID: 1 Use as 1099 Address
Description: Office Address

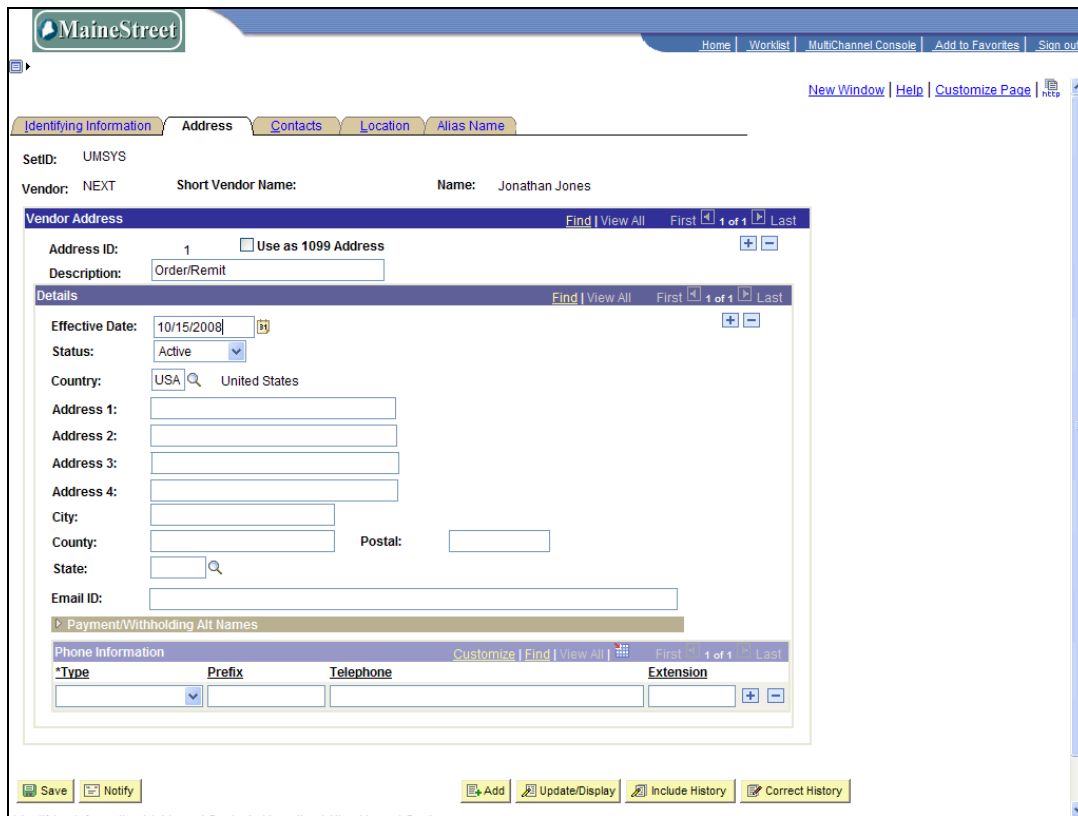
Details Find | View All First 1 of 1 Last
Effective Date: 10/15/2008 **BJ**
Status: Active
Country: USA United States
Address 1:
Address 2:
Address 3:
Address 4:
City:
County: Postal:
State:
Email ID:

Payment/Withholding Alt Names

Phone Information Customize | Find | View All | First 1 of 1 Last
*Type Prefix Telephone Extension

Save Notify Add Update/Display Include History Correct History

Step	Action
22.	<p>You can use the <i>Effective Date</i> field to specify the date from which this address is valid. It defaults to the current system date; however you can future date this, if necessary.</p> <p>NOTE: A future-dated address will not be available to use until that date. Do not backdate.</p>



SetID: UMSYS
 Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

Vendor Address Find | View All First 1 of 1 Last
 Address ID: 1 Use as 1099 Address
 Description: Order/Remit

Details Find | View All First 1 of 1 Last
 Effective Date: 10/15/2008
 Status: Active
 Country: USA United States
 Address 1:
 Address 2:
 Address 3:
 Address 4:
 City:
 County: Postal:
 State:
 Email ID:

Payment/Withholding Alt Names
Phone Information Customize | Find | View All First 1 of 1 Last

Type	Prefix	Telephone	Extension

Save Notify Add Update/Display Include History Correct History

Step	Action
23.	Click on the drop-down arrow in the Status field and select the appropriate status.
24.	Use the Country field to select the vendor's country. Once you select a country, the appropriate address format appears. Depending on the country that you select, the format of the address field varies. Enter all fields that are necessary for the country that you select. The default is USA.

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Identifying Information | Address | Contacts | Location | Alias Name

SetID: UMSYS
 Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

Vendor Address Find | View All First 1 of 1 Last
 Address ID: 1 Use as 1099 Address
 Description: Order/Remit

Details Find | View All First 1 of 1 Last
 Effective Date: 10/15/2008
 Status: Active
 Country: USA United States
 Address 1:
 Address 2:
 Address 3:
 Address 4:
 City:
 County: Postal:
 State:
 Email ID:

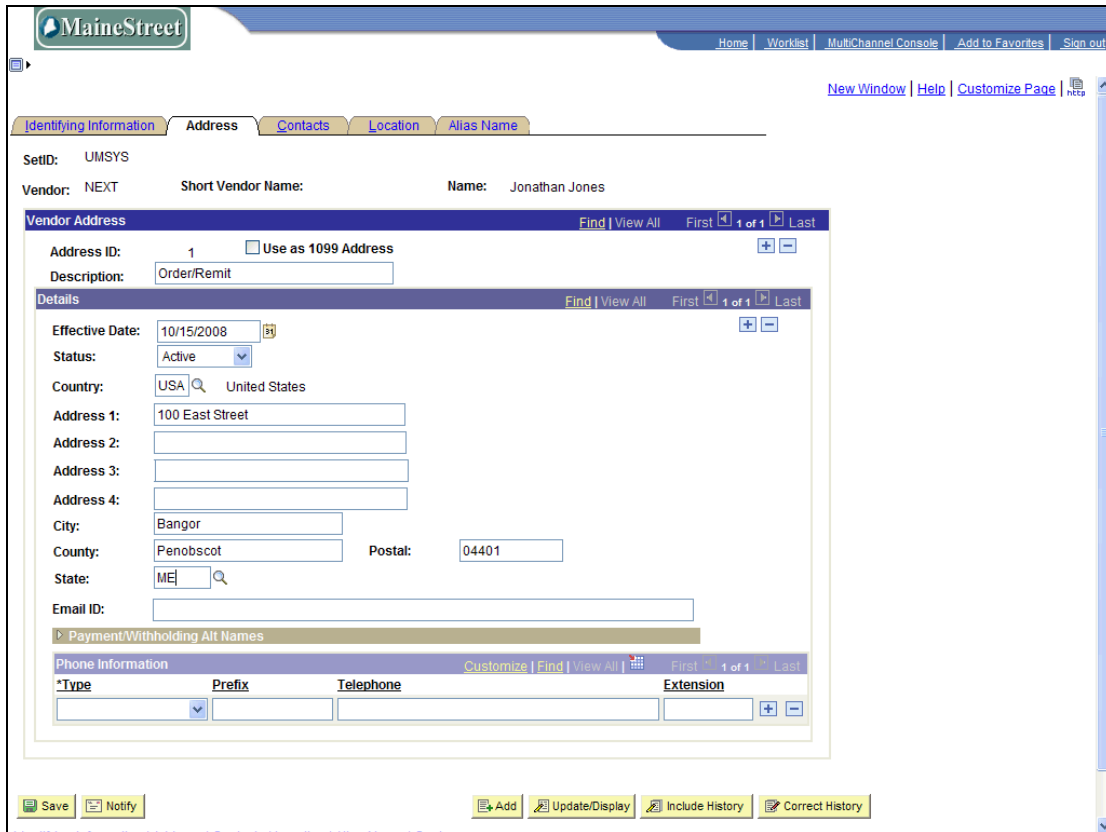
Payment/Withholding Alt Names

Phone Information Customize | Find | View All First 1 of 1 Last

Type	Prefix	Telephone	Extension

Save Notify Add Update/Display Include History Correct History

Step	Action
25.	Enter the address information into the Address 1 field. The Address 2 and 3 fields may be used for additional address information.
26.	Enter the city name into the City field.
27.	Enter the County in the County field.
28.	Enter the postal code in the Postal field.
29.	Enter the State in the State field.



Step	Action
30.	<p>Use the Email ID field to enter the vendor's email address. This is the address that the email application engine process uses when you select the dispatch method of email in MaineStreet Purchasing.</p> <p>Multiple email addresses can be entered in the Email ID field, but they must be separated by semicolons.</p> <p>NOTE: When using the email application engine process to dispatch a purchase order via email the vendor's email address must be on the vendor address that is associated with the location used on the PO or the purchase order will not dispatch.</p>

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Identifying Information | Address | Contacts | Location | Alias Name

SetID: UMSYS
Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

Vendor Address Find | View All First 1 of 1 Last
Address ID: 1 Use as 1099 Address
Description: Order/Remit

Details Find | View All First 1 of 1 Last
Effective Date: 10/15/2008
Status: Active
Country: USA United States
Address 1: 100 East Street
Address 2:
Address 3:
Address 4:
City: Bangor
County: Penobscot Postal: 04401
State: ME Maine
Email ID: jjones@business.com
Payment/Withholding Alt Names

Phone Information Customize | Find | View All First 1 of 1 Last
*Type Prefix Telephone Extension

Save Notify Add Update/Display Include History Correct History

Step	Action
31.	Click the Expand section button adjacent to <i>Payment/Withholding Alt Names</i> .



Process Document Financials 9.0: Adding a Vendor

The screenshot shows the 'Adding a Vendor' form in the MaineStreet system. The form is divided into several sections:

- Identifying Information:** SetID: UMSYS, Vendor: NEXT, Short Vendor Name: , Name: Jonathan Jones.
- Vendor Address:** Address ID: 1, Use as 1099 Address: . Description: Order/Remit.
- Details:** Effective Date: 10/15/2008, Status: Active, Country: USA (United States), Address 1: 100 East Street, City: Bangor, County: Penobscot, Postal: 04401, State: ME (Maine), Email ID: jjones@business.com.
- Payment/Withholding Alt Names:** This section contains two sub-sections: 'Payment Alternate name' with Name 1 and Name 2 fields, and 'Withholding Alternate name' with Withholding Name 1 and Withholding Name 2 fields.
- Phone Information:** Fields for Type, Prefix, Telephone, and Extension.

Step	Action
32.	<p>Use the <i>Payment/Withholding Alt Names</i> section to specify alternate names when the vendor requests an alternate name appear on payments and 1099 reports. When the system generates payments for the location that uses this address, it uses the alternate name information on the payment. Likewise, if you specify an alternate withholding name, the system uses this name on 1099 reports instead of the name that you specified on the Identifying Information page.</p> <p>This function is useful if a vendor wants to conduct business under another name. For example, Alvarez Consulting may be the vendor, but may want to receive payments or 1099 reports under the name of Jose Alvarez.</p>

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Effective Date: 10/15/2008

Status: Active

Country: USA United States

Address 1: 100 East Street

Address 2:

Address 3:

Address 4:

City: Bangor

County: Penobscot Postal: 04401

State: ME Maine

Email ID: jjones@business.com

Payment/Withholding Alt Names

Payment Alternate name

Name 1:

Name 2:

Withholding Alternate name

Withholding Name 1:

Withholding Name 2:


Phone Information

Type	Prefix	Telephone	Extension

Save Notify Add Update/Display Include History Correct History

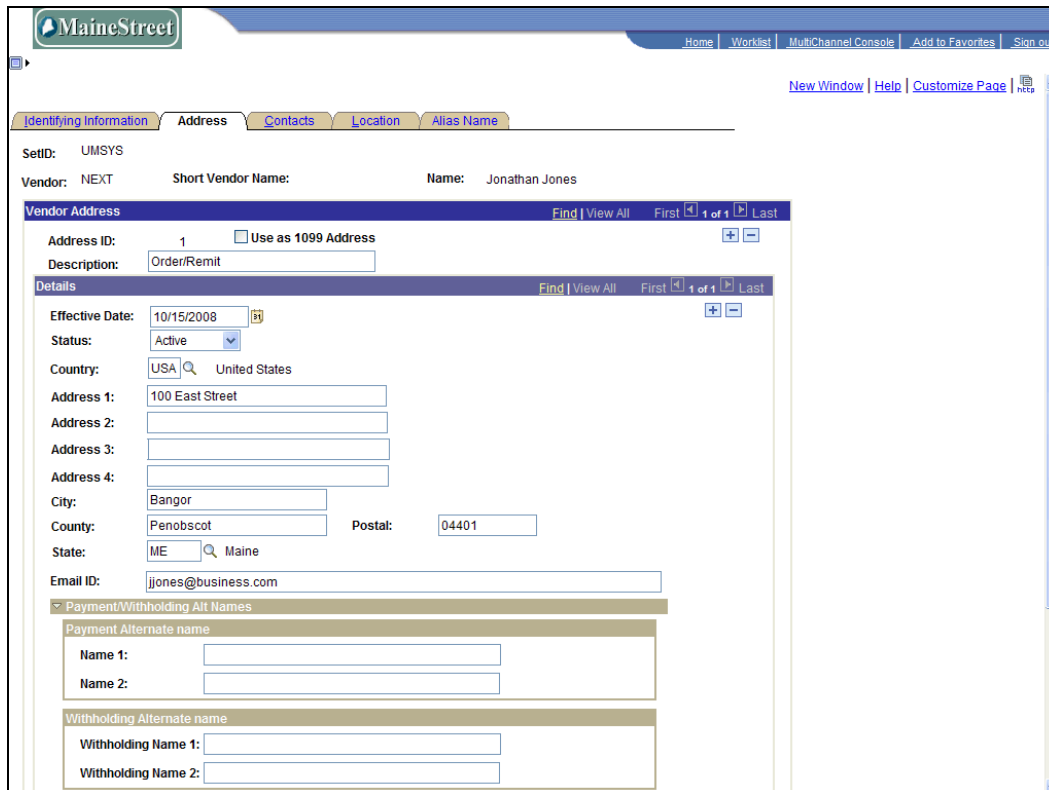
Identifying Information | Address | Contacts | Location | Alias Name | Custom

Step	Action
33.	Use the Phone Information section to enter phone information for the vendor. Click on the drop-down arrow in the Type field to select the type of phone number that you are adding (cellular, business, fax, home, pager, and so on).
34.	The Prefix field is used for International Telephone Numbers. <u>Do not use this field for the Area Code</u> . See “International Telephone Numbers” document for information on entering international telephone numbers.

 Please refer to:
<http://www.maine.edu/pdf/InternationalTelephoneNumbers.pdf>

Step	Action
35.	Enter the 10 digit phone number into the Telephone field. Do not use () or --. The system will format the number for you.

Step	Action
36.	<p>Note: If this is a 1099 vendor (or you wish to record the vendor's Tax ID#) you need to check the "Use as 1099 Address" box at the top of the page associated with the appropriate address. If you are not going to provide information on the Withholding Information page you do not need to select an address for this purpose.</p> <p>If additional addresses are needed click the +... at the <i>Vendor Address</i> section.</p>

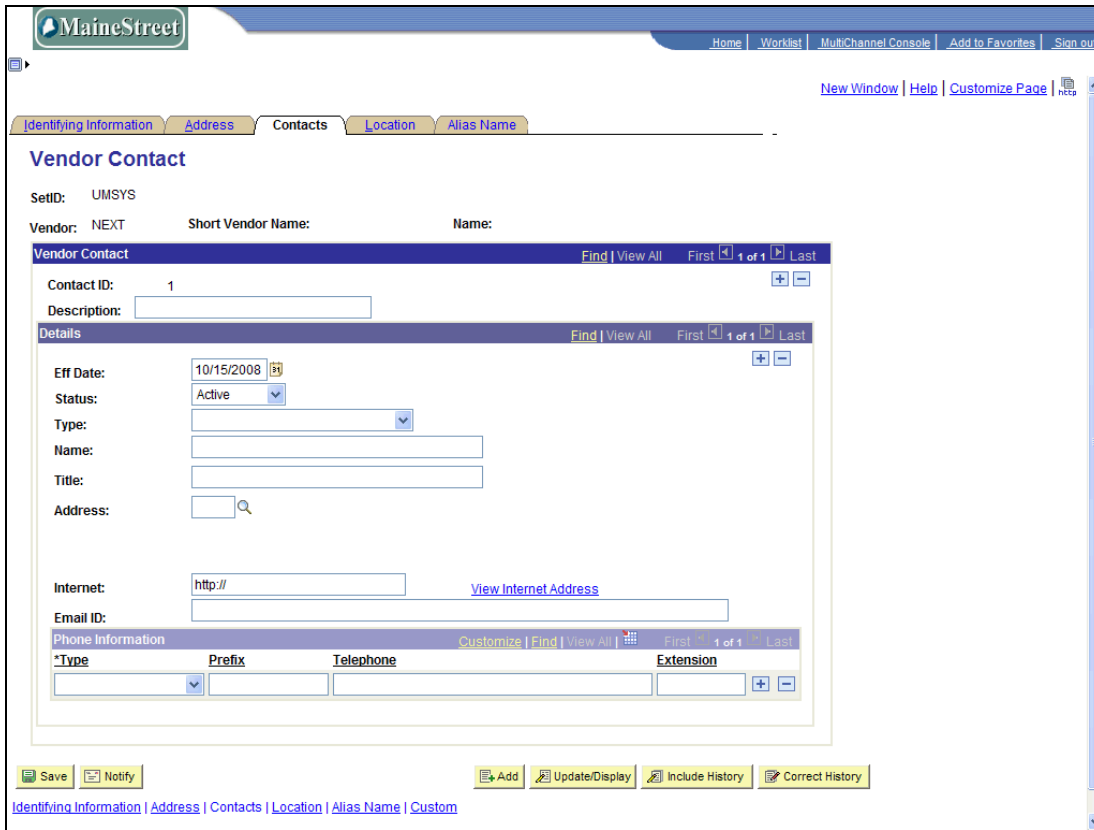


The screenshot shows the 'Vendor Address' form in the MaineStreet application. The form is titled 'Vendor Address' and includes a 'Use as 1099 Address' checkbox. The 'Details' section contains the following information:

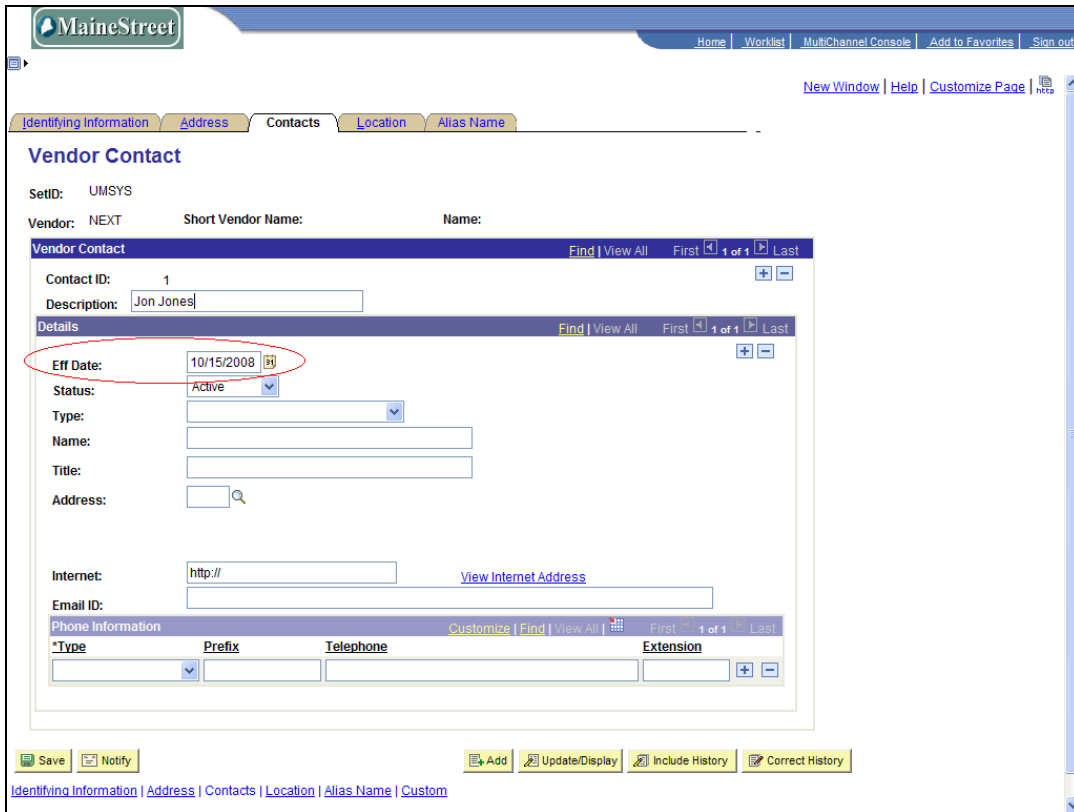
- Effective Date: 10/15/2008
- Status: Active
- Country: USA (United States)
- Address 1: 100 East Street
- City: Bangor
- County: Penobscot
- State: ME (Maine)
- Postal: 04401
- Email ID: jjones@business.com

Below the details section, there are sections for 'Payment/Withholding Alt Names' with fields for 'Payment Alternate name' (Name 1, Name 2) and 'Withholding Alternate name' (Withholding Name 1, Withholding Name 2).

Step	Action
37.	<p>Next, you may specify details of the contact person if desired. For example the Sales or Accounts Receivable representatives. This information is optional.</p> <p>Click the Contacts tab.</p> <p>Contacts</p>



Step	Action
38.	<p>On the Vendor Contact page, The Contact ID field displays the contact ID number. When you add a new vendor contact, the system automatically increments the vendor contact's number in this field.</p> <p>Enter a description for the vendor in the Description field.</p>

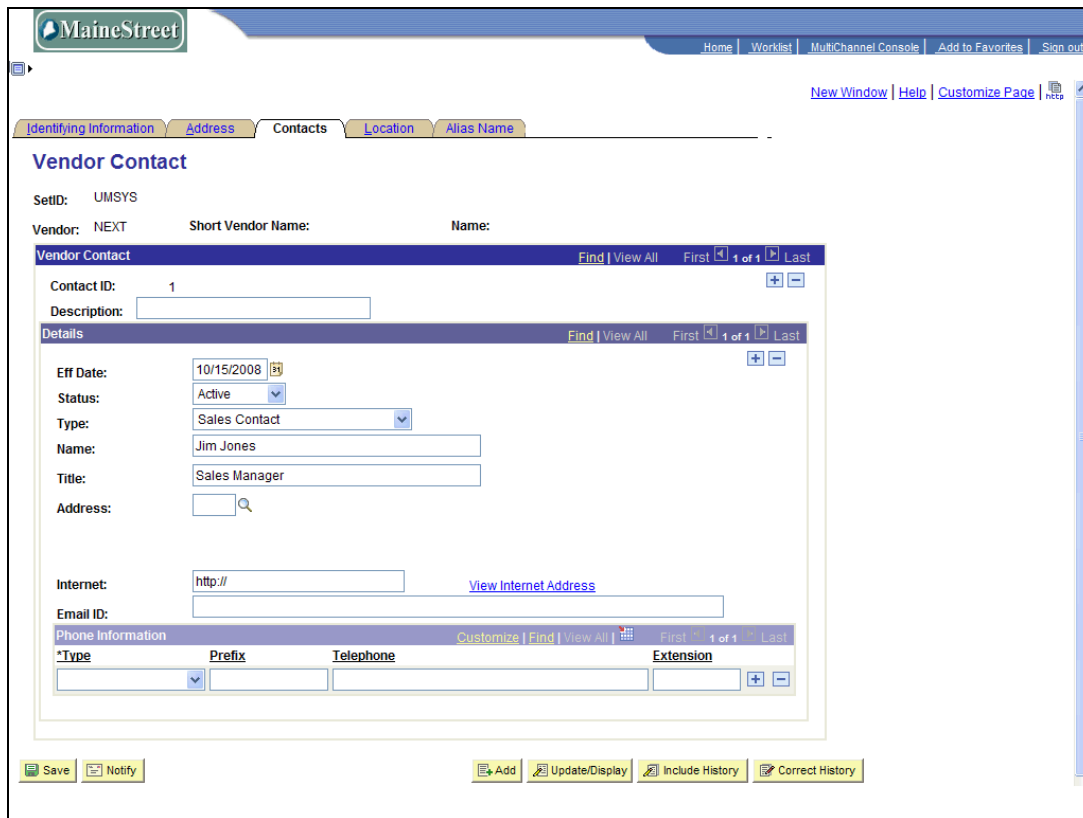


The screenshot shows the 'Vendor Contact' form in the MaineStreet application. The 'Eff Date' field is highlighted with a red circle. The form contains the following fields and sections:

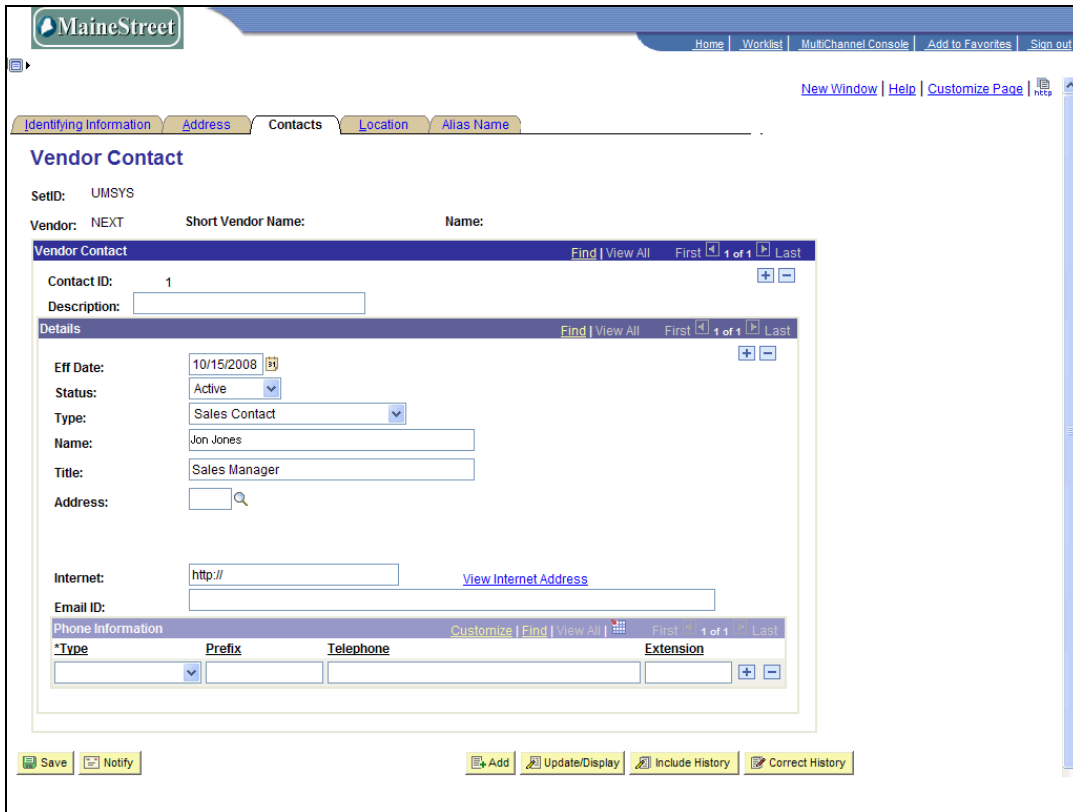
- SetID:** UMSYS
- Vendor:** NEXT
- Short Vendor Name:**
- Name:**
- Vendor Contact Section:**
 - Contact ID: 1
 - Description: Jon Jones
- Details Section:**
 - Eff Date: 10/15/2008 (circled in red)
 - Status: Active
 - Type: (dropdown menu)
 - Name: (text field)
 - Title: (text field)
 - Address: (text field with search icon)
 - Internet: http:// (text field with 'View Internet Address' link)
 - Email ID: (text field)
- Phone Information Section:**
 - Type: (dropdown menu)
 - Prefix: (text field)
 - Telephone: (text field)
 - Extension: (text field)

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A navigation bar at the very bottom includes links for 'Identifying Information', 'Address', 'Contacts', 'Location', 'Alias Name', and 'Custom'.

Step	Action
39.	The Eff Date field specifies the date from which this contact is valid. It defaults to the current system date, but can be changed if needed.
40.	Use the Type field to select a type (such as Management or Sales) to define the contact's role. Click the Type drop-down arrow and select one from the drop down.
41.	Enter the appropriate name in the Name field.
42.	Enter the desired information into the Title field.



Step	Action
43.	<p>Use the Address field to enter the address sequence number for the contact from one of the addresses that you entered on the Address page. This enables you to associate different addresses with each contact.</p> <p>Enter the phone number(s) for the contact in the Phone Information group box.</p> <p>NOTE: When entering a new vendor you need to ENTER the address sequence number on this page. You cannot select it using the look-up icon. When adding Contact information to an existing vendor, you can use the look-up icon and select the address.</p>



The screenshot shows the 'Vendor Contact' form in the MaineStreet application. The form is divided into several sections:

- Identifying Information:** Includes fields for SetID (UMSYS), Vendor (NEXT), Short Vendor Name, and Name.
- Vendor Contact:** A table with one row containing Contact ID (1) and Description.
- Details:** A form with fields for Eff Date (10/15/2008), Status (Active), Type (Sales Contact), Name (Jon Jones), Title (Sales Manager), Address, Internet (http://), and Email ID.
- Phone Information:** A table with columns for Type, Prefix, Telephone, and Extension.

At the bottom of the form, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History.

Step	Action
44.	Use the <i>Email ID</i> field to enter the contact's email address. Multiple email addresses can be entered in this field, but they must be separated by semicolons.

Process Document

Financials 9.0: Adding a Vendor



[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)

[New Window](#) | [Help](#) | [Customize Page](#) | [Print](#)

[Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Alias Name](#)

Vendor Contact

SetID: UMSYS
 Vendor: NEXT Short Vendor Name: Name:

Vendor Contact Find | View All First 1 of 1 Last

Contact ID: 1
 Description:

Details Find | View All First 1 of 1 Last

Eff Date: 10/15/2008
 Status: Active
 Type: Sales Contact
 Name: Jon Jones
 Title: Sales Manager
 Address:

Internet: http:// [View Internet Address](#)
 Email ID: jimjones@business.com

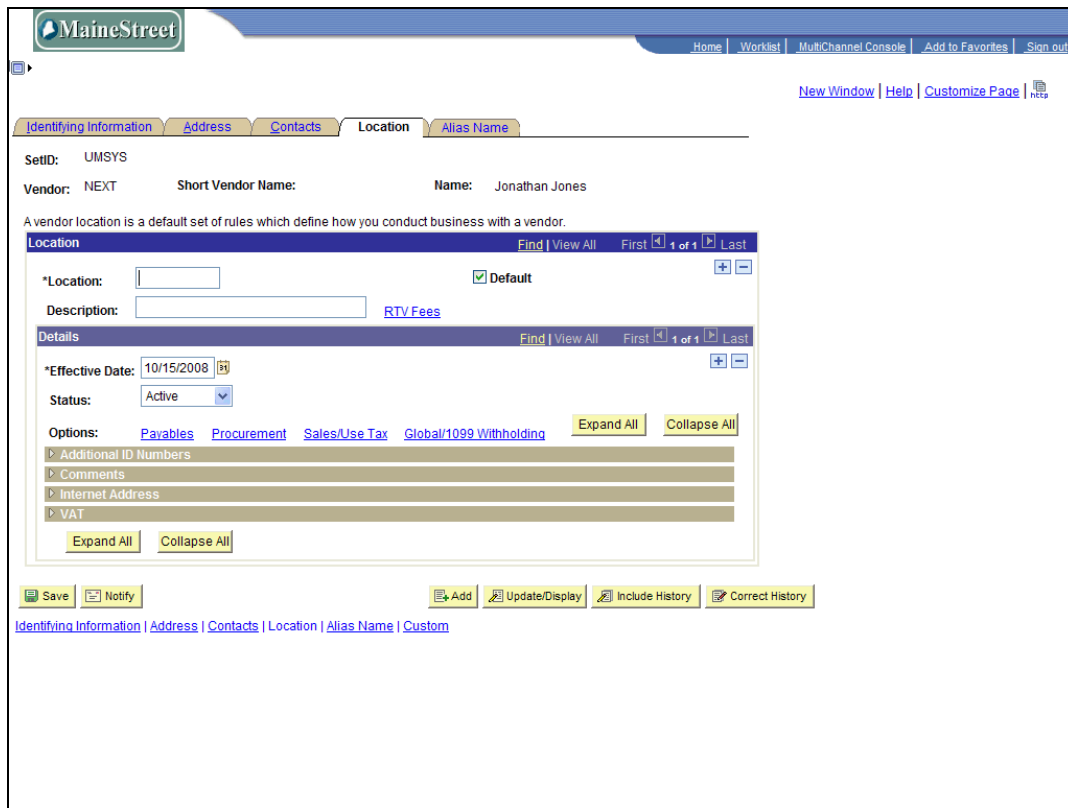
Phone Information Customize | Find | View All First 1 of 1 Last

Type	Prefix	Telephone	Extension
Business	207	222-2222	567

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Alias Name](#) | [Custom](#)

Step	Action
45.	Finally, you need to specify Location details for your campus. Click the Location tab. Location



The screenshot shows the 'Location' tab selected in the vendor profile for Jonathan Jones. The 'Location' section has a 'Default' checkbox checked. The 'Description' field contains 'RTV Fees'. The 'Effective Date' is set to 10/15/2008 and the 'Status' is 'Active'. Below these are expandable sections for 'Additional ID Numbers', 'Comments', 'Internet Address', and 'VAT'. At the bottom of the form are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Step	Action
46.	Use the Location page to enter a location for your campus. A vendor can have multiple locations to accommodate all UMS Business units. You should not use a vendor Location that is not for your campus. Campus Locations are identified by the first digit of the Location Number and Description, which will match the campus Business unit. For example, a UMA location will begin with 1, a UMF location will begin with 2, and a UMFK location will begin with 3. The remainder of the field can be whatever you like. Usually Vendor Locations resemble the following: 1-UMA, 2-UMF, 3-UMFK, and so on. The Location and Location Description fields may be the same.
47.	Enter the desired information into the Description field. Note: If you need more than one location for your campus, add additional locations by selecting the Add Row button (+) in the Location section.

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Identifying Information | Address | Contacts | Location | Alias Name

SetID: UMSYS
 Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 1 Last

*Location: 1-UMA Default

Description: 1-UMA RTV Fees

Details Find | View All First 1 of 1 Last

*Effective Date: 10/15/2008

Status: Active

Options: Pavales Procurement Sales/Use Tax Global/1099 Withholding Expand All Collapse All

Additional ID Numbers
 Comments
 Internet Address
 VAT

Expand All Collapse All

Save Notify Add Update/Display Include History Correct History

Identifying Information | Address | Contacts | Location | Alias Name | Custom

Step	Action
48.	<p>Enter the date from which this location is valid in the <i>Effective Date</i> field. It defaults to the current system date; however, you can change the effective date to a future date, if necessary.</p> <p>NOTE: A future-dated location will not be available for use until that date. Do not backdate.</p> <p>Because location information is effective-dated, you can also update information for each location at any time by selecting the Add Row button (+) in the Details section.</p>



Process Document Financials 9.0: Adding a Vendor

MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Identifying Information | Address | Contacts | Location | Alias Name

SetID: UMSYS
Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 1 Last
*Location: 1-UMA Default + -
Description: 1-UMA RTV Fees

Details Find | View All First 1 of 1 Last
*Effective Date: 10/15/2008 + -
Status: Active
Options: **Payables** Procurement Sales/Use Tax Global/1099 Withholding Expand All Collapse All
Additional ID Numbers
Comments
Internet Address
VAT
Expand All Collapse All

Save Notify Add Update/Display Include History Correct History

Identifying Information | Address | Contacts | Location | Alias Name | Custom

Step	Action
49.	Click the Payables link.

Process Document

Financials 9.0: Adding a Vendor



MaineStreet Home Worklist MultiChannel Console Add to Favorites Sign out

New Window Help Customize Page

Payables Options

SetID: UMSYS Location: 1-UMAJONES
 Vendor ID: NEXT Description:
 Short Vendor Name: JONES

Name 1: Expand All Collapse All

Invoicing

Vendor: NEXT JONES
 Address: [Search](#)
 Location: 1-UMA

Remitting


*Vendor:
 *Address: [Search](#)
 *Location:

Expand All Collapse All

Step	Action
50.	<p>The Payables Options page, is where you define remitting address and payment options. These fields will default for you but may be changed if needed.</p> <p>The Remitting Address will default to Address sequence #1 and should be changed if payments should be made to a different address.</p>



Process Document Financials 9.0: Adding a Vendor

Step	Action
51.	To access the <i>Additional Payables Options</i> section, click the expand section arrow. 

Process Document

Financials 9.0: Adding a Vendor



MaineStreet
Home
Worklist
MultiChannel Console
Add to Favorites
Sign out

SetID: UMSYS Location: 1-UMAJONES
 Vendor ID: NEXT Description:
 Short Vendor Name: JONES


Name 1: Expand All Collapse All

Invoicing
 Vendor: NEXT JONES
 Address: [Search](#)
 Location: 1-UMA

Remitting
 *Vendor: [Search](#)
 *Address: [Search](#)
 *Location: [Search](#)

Additional Payables Options

Payment Control Pay Group: <input type="text"/> Search *Delay Days: Default <input type="text"/> Discount: <input type="text" value="0"/> Net: <input type="text" value="0"/> <input type="checkbox"/> Hold Payment <input type="checkbox"/> Complex Routing <input checked="" type="checkbox"/> Always take discount <input type="checkbox"/> Separate Payment <input type="checkbox"/> Factoring <input type="checkbox"/> Apply Netting	Bank *Bank Options: Default <input type="text"/> Bank: <input type="text"/> Search Account: <input type="text"/> Search Currency: <input type="text"/> Search Rate Type:
Draft Processing Control *Draft Sight: Default <input type="text"/> Search	Additional Payment Information *Payment Method: Default <input type="text"/> *Layout Option: Use Bank Account Default <input type="text"/>

Step	Action
52.	In the <i>Additional Payables Options</i> section, all fields will default for you and should rarely need to be changed. Refer to the Vendor Create and Maintenance manual for rules regarding these fields.
53.	Click the Collapse section button. 



Process Document Financials 9.0: Adding a Vendor

MaineStreet [Home](#) [Worklist](#) [MultiChannel Console](#) [Add to Favorites](#) [Sign out](#)

SetID: UMSYS Location: 1-UMA
Vendor ID: NEXT Description:
Short Vendor Name: JONES

Name 1: [Expand All](#) [Collapse All](#)

Invoicing

Vendor: NEXT JONES
Address: [Search](#)
Location: 1-UMA

Remitting

*Vendor:
*Address: [Search](#)
*Location:

Additional Payables Options
 Matching/Approval Options
 Electronic File Options
 Self-Billed Invoice Options
 Vendor Bank Account Options
 Vendor Type Options
 HIPAA Information
 Debit Memo Options

[Expand All](#) [Collapse All](#)

[OK](#) [Cancel](#)

Step	Action
54.	To access the <i>Vendor Type Options</i> section, click the expand section arrow.

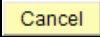
Process Document

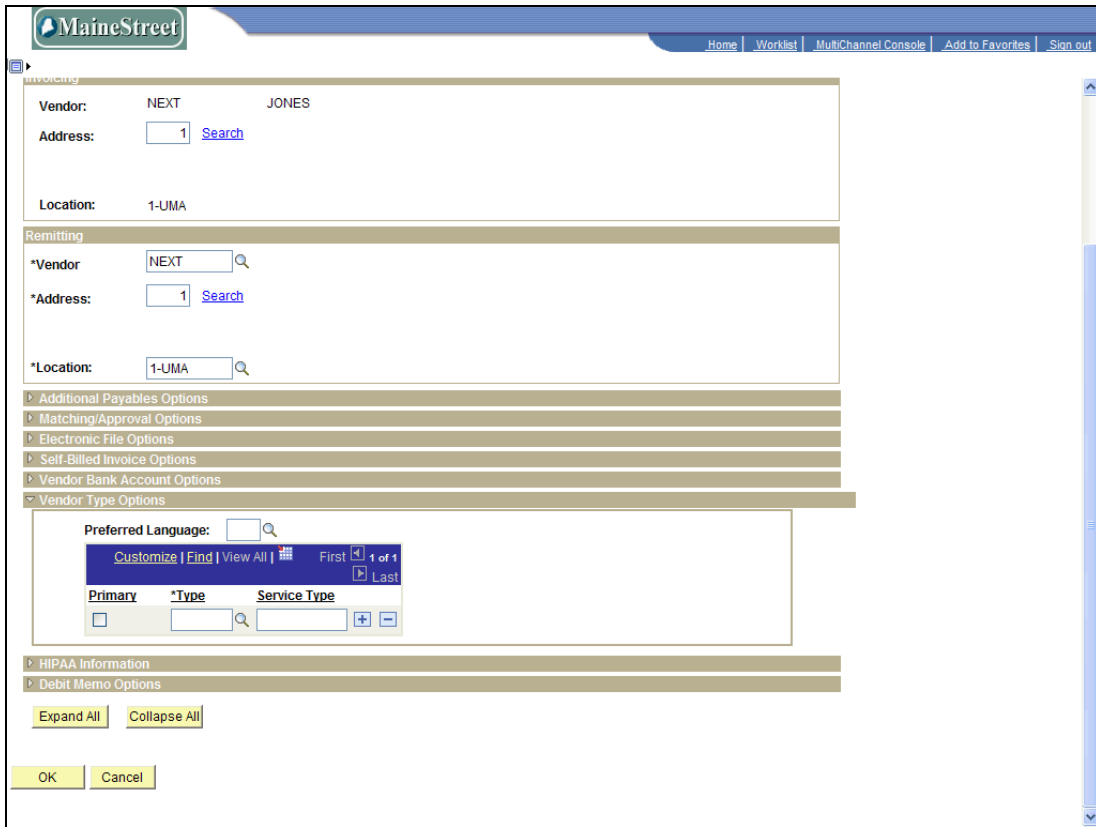
Financials 9.0: Adding a Vendor



The screenshot shows the 'Adding a Vendor' form in the MaineStreet application. The form is divided into several sections:

- Vendor Information:** Vendor: NEXT JONES; Address: 1 (with Search button); Location: 1-UMA.
- Remitting Information:** *Vendor: NEXT (with search icon); *Address: 1 (with Search button); *Location: 1-UMA (with search icon).
- Options:** A list of expandable options including Additional Payables Options, Matching/Approval Options, Electronic File Options, Self-Billed Invoice Options, Vendor Bank Account Options, and Vendor Type Options.
- Vendor Type Options:** This section contains a table with columns for Primary, *Type, and Service Type. A red circle highlights the look-up icon in the *Type field.
- Buttons:** Expand All, Collapse All, OK, and Cancel buttons are located at the bottom of the form.

Step	Action
55.	<p>If desired you may enter additional information about this vendor. For example, if the vendor is a small business, minority-owned, women-owned, handicapped-owned, etc.</p> <p>In the <i>Type</i> field, click the look-up icon to select from the available choices.</p>
56.	<p>Click the Cancel button.</p> <p></p>



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Invoicing

Vendor: NEXT JONES
 Address: 1 Search
 Location: 1-UMA

Remitting

*Vendor: NEXT
 *Address: 1 Search
 *Location: 1-UMA

Additional Payables Options
 Matching/Approval Options
 Electronic File Options
 Self-Billed Invoice Options
 Vendor Bank Account Options
 Vendor Type Options

Preferred Language: []

Primary	*Type	Service Type
<input type="checkbox"/>	[]	[]

Expand All Collapse All

OK Cancel

Step	Action
57.	<p>In the Service field, if desired, enter information about the type of goods or services the vendor provides.</p> <p>Click OK to return to the Location page.</p> <p>OK</p>

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | [icon]

Identifying Information | Address | Contacts | Location | Alias Name

SetID: UMSYS
 Vendor: NEXT Short Vendor Name: Name:

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 1 Last

*Location: 1-UMA Default + -

Description: 1-UMA RTV Fees

Details Find | View All First 1 of 1 Last

*Effective Date: 10/15/2008 + -

Status: Active

Options: [Pavables](#) [Procurement](#) [Sales/Use Tax](#) [Global/1099 Withholding](#) [Expand All](#) [Collapse All](#)

> Additional ID Numbers
 > Comments
 > Internet Address
 > VAT

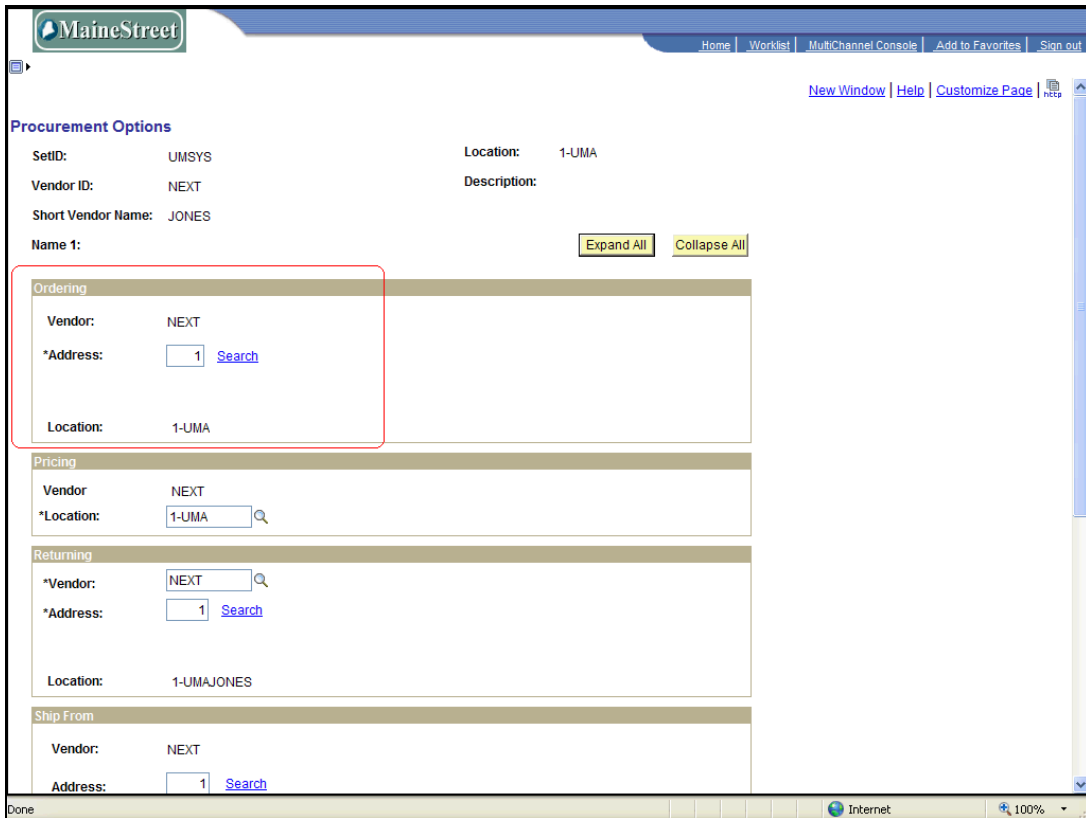
[Expand All](#) [Collapse All](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#)

[Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Alias Name](#)

Internet 100%

Step	Action
58.	Click the Procurement link to open the Procurement Options page. Procurement



Procurement Options

SetID: UMSYS Location: 1-UMA
 Vendor ID: NEXT Description:
 Short Vendor Name: JONES
 Name 1: Expand All Collapse All

Ordering

Vendor: NEXT
 *Address: [Search](#)
 Location: 1-UMA

Pricing

Vendor: NEXT
 *Location: [Search](#)

Returning

*Vendor: [Search](#)
 *Address: [Search](#)
 Location: 1-UMAJONES

Ship From

Vendor: NEXT
 Address: [Search](#)

Step	Action
59.	<p>The Procurement Options page is where you define ordering address and ordering options for your purchase order. These fields will default for you but may be changed if needed.</p> <p>The Ordering Address will default to Address sequence #1 and should be changed if purchase orders should be made to a different address.</p>

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Vendor: NEXT

*Address: [Search](#)

Location: 1-UMAJONES

Pricing

Vendor: NEXT

*Location: [Search](#)

Returning

*Vendor: [Search](#)

*Address: [Search](#)

Location: 1-UMA

Ship From

Vendor: NEXT

Address: [Search](#)

Location: 1-UMA

▶ Additional Procurement Options

▶ Dispatch Methods

▶ POA Settings

▶ RTV Options

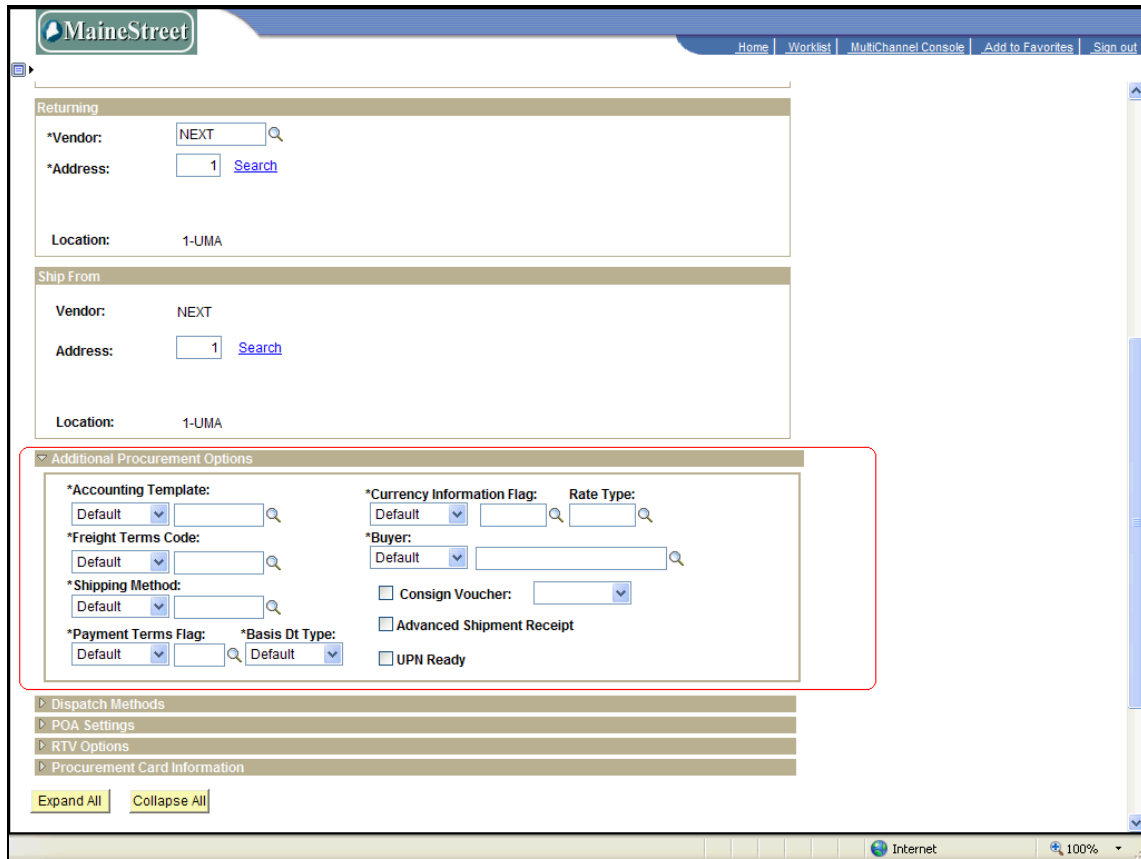
▶ Procurement Card Information

[Expand All](#) [Collapse All](#)

Internet 100%

Step	Action
60.	To access the <i>Additional Procurement Options</i> section, click the expand section arrow.





The screenshot shows the MaineStreet web application interface. The top navigation bar includes links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main content area is divided into several sections:

- Returning:** Fields for *Vendor (NEXT), *Address (1), and Location (1-UMA).
- Ship From:** Fields for Vendor (NEXT), Address (1), and Location (1-UMA).
- Additional Procurement Options:** This section is highlighted with a red box and contains the following fields:
 - *Accounting Template: Default
 - *Freight Terms Code: Default
 - *Shipping Method: Default
 - *Payment Terms Flag: Default
 - *Basis Dt Type: Default
 - *Currency Information Flag: Default
 - Rate Type: [empty]
 - *Buyer: Default
 - Consign Voucher: [empty]
 - Advanced Shipment Receipt:
 - UPN Ready:
- Dispatch Methods**
- POA Settings**
- RTV Options**
- Procurement Card Information**

At the bottom of the 'Additional Procurement Options' section, there are two buttons: 'Expand All' and 'Collapse All'.

Step	Action
61.	<p>In the <i>Additional Procurement Options</i> section, all fields will default for you and should rarely need to be changed. Refer to the Vendor Create and Maintenance manual for rules regarding these fields.</p> <p>Click the Collapse section button.</p>

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Location: 1-UMA

Returning

*Vendor: NEXT

*Address:

Location: 1-UMA

Ship From

Vendor: NEXT

Address:

Location: 1-UMA

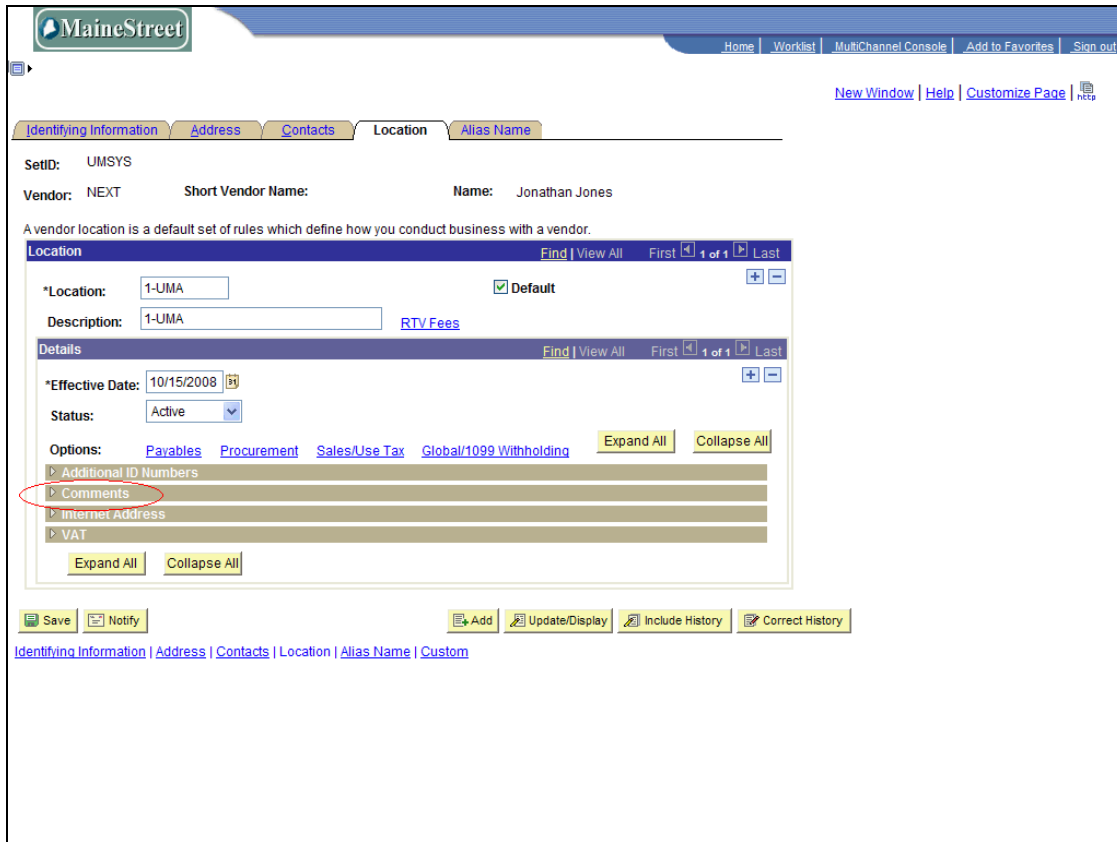
Internet 100%

Step	Action
62.	Click the OK button to return to the Location page.



The screenshot shows the 'MaineStreet' application interface. At the top, there are navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below this, there are tabs for Identifying Information, Address, Contacts, Location, and Alias Name. The 'Location' tab is active, showing details for a vendor location. The vendor information includes SetID: UMSYS, Vendor: NEXT, Short Vendor Name, and Name: Jonathan Jones. A note states: 'A vendor location is a default set of rules which define how you conduct business with a vendor.' The 'Location' section shows a table with one entry: *Location: 1-UMA, Description: 1-UMA, and a checked 'Default' checkbox. Below this is the 'Details' section, which includes fields for *Effective Date (10/15/2008) and Status (Active). Under 'Options', there are links for Payables, Procurement, Sales/Use Tax, and Global/1099 Withholding. The 'Global/1099 Withholding' link is circled in red. There are also 'Expand All' and 'Collapse All' buttons. At the bottom of the form, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History. A breadcrumb trail at the bottom reads: Identifying Information | Address | Contacts | Location | Alias Name | Custom.

Step	Action
63.	<p>If this is a 1099 vendor (or if the vendor is not 1099 but you want to record the vendors TAX ID#) click the Global/1099 Withholding link to access the Withholding Vendor Information page, where you can specify withholding options and Tax ID information for this vendor location.</p> <p>Click the Global/1099 Withholding link.</p> <p>Global/1099 Withholding</p>



[Home](#) | [Worklist](#) | [MultiChannel Console](#) | [Add to Favorites](#) | [Sign out](#)
[New Window](#) | [Help](#) | [Customize Page](#) | 

[Identifying Information](#) | [Address](#) | [Contacts](#) | **Location** | [Alias Name](#)

SetID: UMSYS
 Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 1 Last

*Location: 1-UMA Default

Description: 1-UMA [RTV Fees](#)

Details Find | View All First 1 of 1 Last

*Effective Date: 10/15/2008

Status: Active


Options: [Payables](#) | [Procurement](#) | [Sales/Use Tax](#) | [Global/1099 Withholding](#) [Expand All](#) [Collapse All](#)

> Additional ID Numbers
 > **Comments** (highlighted)
 > Internet Address
 > VAT

[Expand All](#) [Collapse All](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Identifying Information](#) | [Address](#) | [Contacts](#) | [Location](#) | [Alias Name](#) | [Custom](#)

Step	Action
65.	On the Location page, click the <i>Comments</i> Expand section button.
	

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page

Identifying Information | Address | Contacts | **Location** | Alias Name

SetID: UMSYS
 Vendor: NEXT Short Vendor Name: Name: Jonathan Jones

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 1 Last

*Location: 1-UMA Default

Description: 1-UMA [RTV Fees](#)

Details Find | View All First 1 of 1 Last

*Effective Date: 10/15/2008

Status: Active

Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [Global/1099 Withholding](#) [Expand All](#) [Collapse All](#)

Additional ID Numbers

Comments


Internet Address

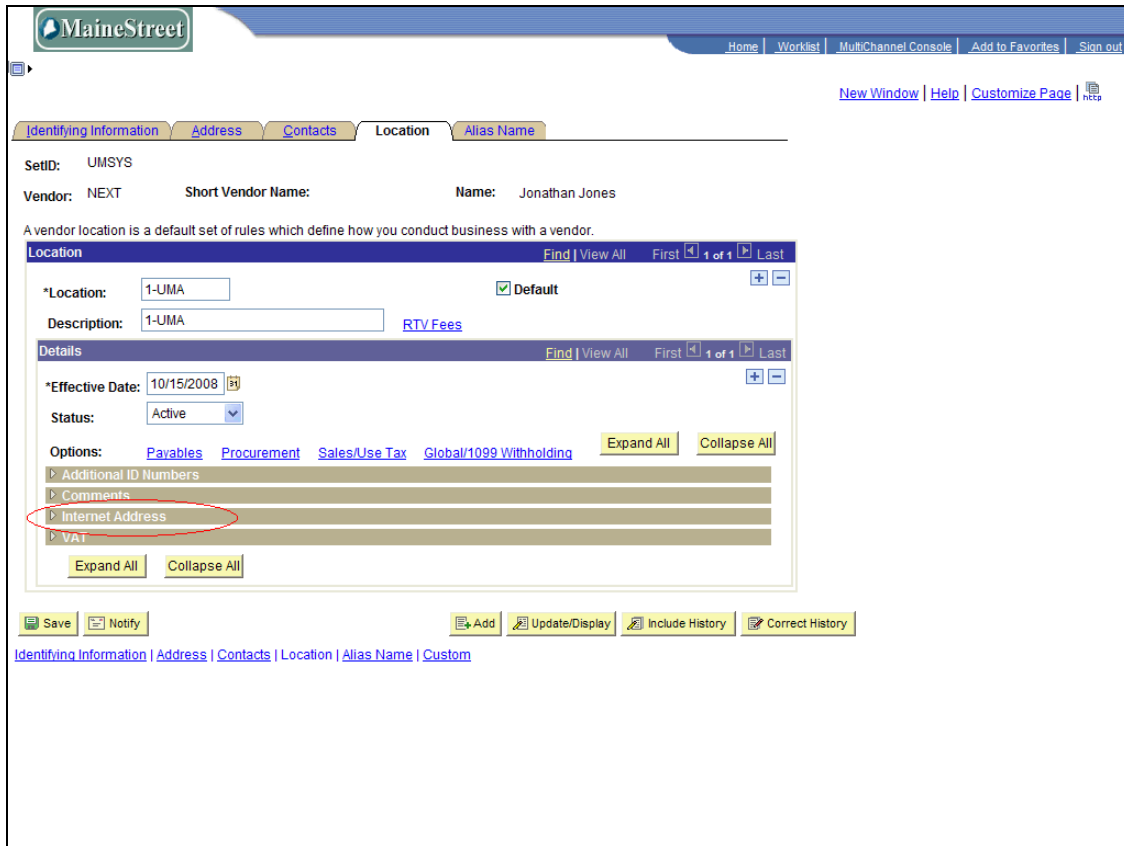
VAT




[Expand All](#) [Collapse All](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

Identifying Information | Address | Contacts | Location | Alias Name | Custom

Step	Action
66.	<p>Use the Comments section to enter comments about the vendor that pertain to this Location.</p> <p>Click the Collapse section button.</p> 



Step	Action
67.	Click the Internet Address Expand section button. 
68.	Use the Internet Address section to enter URLs and descriptions for the vendor's websites. Click the Open URL link in this section to open a URL in your browser. Click the Collapse section button. 
69.	Click the Save button. 

Process Document

Financials 9.0: Adding a Vendor



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Summary | Identifying Information | Address | Contacts | Location | Alias Name

SetID: UMSYS

Vendor: 0000131188 Short Vendor Name: JONES-004 Name: Jonathan Jones

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All First 1 of 1 Last

*Location: 1-UMA Default

Description: 1-UMA RTV Fees

Details Find | View All First 1 of 1 Last

*Effective Date: 10/15/2008

Status: Active

Options: Payables Procurement Sales/Use Tax Global/1099 Withholding Expand All Collapse All

Additional ID Numbers

Comments

Internet Address

VAT

Expand All Collapse All

Save Notify Add Update/Display Include History Correct History

Summary | Identifying Information | Address | Contacts | Location | Alias Name | Custom

Step	Action
70.	Note that the system has generated a Vendor ID for the new vendor. You have successfully added a new vendor to the system. NOTE: There is now a Summary page that provides basic information about this vendor.
71.	End of Procedure.