

SUPPLIER ENTRY

PROCEDURES FOR ADDING A SUPPLIER

Before adding a new supplier, always search to verify that the supplier does not already exist in the system. This eliminates the chances of creating duplicates. Due to IRS TIN matching rules, please be sure to check for all possible spellings (ex. Kentucky State Treasurer should be searched by “KENTUCK” and “KYSTATE”).

An IRS Form W-9 and vendor survey are required for all new suppliers (except for reimbursement for employees and active students and for refunds to individuals).

Please send the completed W-9 Form and vendor survey with the disbursement request (or in the case of a PO-related supplier, please send the forms via campus mail, fax to 852-8228 or e-mail to acctspay@louisville.edu) to the U of L Controller’s Office.

Please do not send forms to the Purchasing Department.

Review Suppliers

Review Suppliers

Search Criteria

*SetID

Supplier Status

Name

Withholding Name

Supplier ID

Classification

Type

Persistence

Customer Number

ID Type

VAT Registration ID

Withholding Tax ID

Address

City

Country

State

Postal

Bank Account #

Search Results

[Main Information](#) [Additional Supplier Info](#) [Audit Information](#)

[Personalize](#) [Find](#) [View](#)

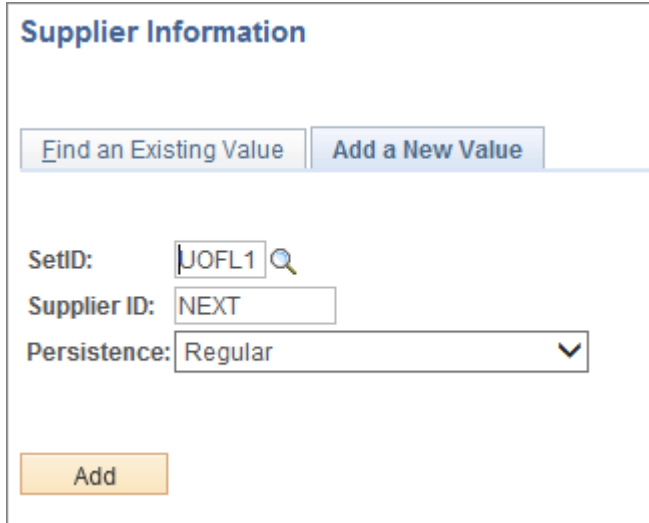
Actions	SetID	Supplier ID	Supplier Name	Short Name	Address	Address Line 2	City	State	Postal Code	Country
▼ Actions	UOFL1	0000114872	West, James	JAMESWEST-001	123 West St		San Diego	CA	92101	USA

Main Menu - Supplier > Add Update > Review Supplier

You may search on any of the fields available under Search Criteria: **Supplier ID, Name, or ShortName** fields to retrieve supplier information. SetID “UOFL1” is a required field. If the supplier does not exist, proceed to the “Add Supplier” link

Add Supplier

Select the “**Add Supplier**” link. The next available **Supplier ID** will be assigned when you complete the data entry and save the new supplier.



Supplier Information

SetID:

Supplier ID:

Persistence:

Review formatting rules and naming conventions found at the end of this document prior to entering supplier information.

The following fields will default as follows.

SetID: **UOFL1** Supplier ID: **NEXT** Persistence: **Regular**

Select “**ADD**”

Identifying Information Panel

Required Fields:

Supplier Short Name: Enter the first ten characters of supplier name in all caps. *Do not use any spaces or punctuation.*

Example: The short names for these examples would be entered as follows:

- Johnson,Bob = JOHNSONBOB
- John H Smith Jr = SMITHJOHNH
- O'Connor's Sales and Svcs = OCONNORSSA

Supplier Name 1: Last name, comma, first name - use upper & lower case as appropriate.

Example: If you are entering Bob Johnson as a supplier, the name would be entered as Johnson,Bob. Note that there are no spaces between the last name, comma, and first name.

If you are entering a business name as a supplier, use standard abbreviations if known. DO NOT use any punctuation other than a hyphen (-), slash mark (/), or apostrophe (') if included in the Supplier's name. DO NOT use the prefix "The."

Example: If you are entering O'Connor's Sales & Services as a new Supplier, the name would be entered as *O'Connor's Sales & Svcs*

If an individual's name includes a generational suffix, the name should be entered as:

Example: If you are entering John H Smith Jr as a new supplier, the name would be entered as Smith,John H Jr

If the complete supplier name will not fit into the **Name 1** field, enter the remainder of the names in the **Address 1** field on the Address panel.

Status Field: All new suppliers are automatically saved as "Unapproved". The Vendor Database Administrators in the Controller's Office will review and approve all new suppliers after their W-9 and vendor survey has been received, in cases of PO-related purchases. Individuals and/or 1099 suppliers will be approved once all applicable paperwork has been received in the Controller's Office (i.e. the disbursement or travel voucher, or a description of what is being purchased on the PO). In cases of foreign suppliers, please contact the Vendor Database Administrators via e-mail after the supplier has been entered to request that it be approved.

Classification: Indicates whether the supplier is an individual, supplier or an employee. Please only select from these 3 options.

Withholding: Do not use this box. The Vendor Database Administrators will make this determination.

Persistence Field: This should always remain set to "**Regular**".

After completing the required fields on the Identifying Information panel, click on the tab marked "**Address**".

Address

Required Fields:

Description: “Remit”, “Order”, or “Remit & Order”.

Effective Date: Date will default to the current date.

Status: Active

Country: **USA** - If you are entering a supplier from a country other than the United States, select the icon next to the “Country” field for the country of origin. {Different countries will have different field requirements.} If you need a country that is not in the table or additional assistance, contact the Vendor Database Administrators. In cases of foreign suppliers, please contact the Vendor Database Administrators via e-mail after the supplier has been entered to request that it be approved.

Populate **Address 1**, **Address 2** as needed, **City**, **State** and **Postal**.

If the supplier uses a dba (“doing business as”) enter it on Address 1, and the street address on Address 2.

If the full name of the supplier will not fit in the Name 1 field of the Identifying Information panel, add the rest of the supplier name in the Address 1 field, and enter the street address on Address 2.

Payment Withholding Alt Names

Payment/Withholding Alt Names

Payment Alternate name

Name 1 Susan North

Name 2

Withholding Alternate name

Withholding Name 1 Susan North x

Withholding Name 2

If your supplier is an individual, click on the “Payment/Withholding Alt Name” arrow. Enter the individual’s name as you want it to appear on the payment. Please do not use this field for companies. Enter the individual’s first and last name.

Example: For supplier Johnson,Joe, the Alternate/Withholding name will be Joe Johnson. Type the name in upper & lower case and use spaces here. Do not use punctuation (i.e. commas or periods, etc.) in this field.

Multiple Addresses

If a supplier has more than one address, select “+” sign under “Supplier Address” to insert a row. This will open a new address field. Use the same procedures as above to enter the multiple addresses.

Supplier Contact

Identifying Information | Address | **Contacts** | Location | Custom

SetID UOFL1
Supplier ID NEXT Short Supplier Name Supplier North,Susan

Supplier Contact Find | View All First 1 of 1 Last

Contact ID 1
Description Accounts Receivable

Details Find | View All First 1 of 1 Last

Effective Date 10/10/2014
Effective Status Active
Type
Name Susan North
Title CO
Address

Internet http:// View Internet Address
Email ID

Phone Information Personalize | Find | First 1 of 1 Last

*Type	Prefix	Telephone	Extension
Business Phone	01	502/634-8525	1234

Supplier contact information is not required, but fields are available to the user for data storage.

Location

Summary | Identifying Information | Address | Contacts | **Location** | Custom

SetID UOFL1
Supplier ID 0000114878 Short Supplier Name NORTHSUSAN-001 Supplier North,Susan

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

Location Find | View All First 1 of 1 Last

*Location NORTHSUSAN Default RTV Fees Attachments (0)

Description 123 North Main St

Details Find | View All First 1 of 1 Last

*Effective Date 10/10/2014 Effective Status Active

Expand All Collapse All

Options Payables Procurement Sales/Use Tax 1099

▷ Additional ID Numbers

▷ Comments

▷ Internet Address

▷ VAT

Expand All Collapse All

Required Fields:

Location: Should be entered with the same name you entered in the SUPPLIER SHORT NAME field on the Identifying Information panel (10 characters, all caps).

Description: Enter the street address as in Address1 on the Address page. (Used to identify supplier's address on requisitions.)

Effective Date: Date will default to the current date.

Status: Active

Entering Multiple Locations: If the supplier you are entering has multiple addresses, a separate location must be entered for each address. To enter a second location, click on the "+" sign in the outer box under "Location". A new blank location panel will open. For creating subsequent locations (after the initial location #1), enter the first nine characters of the Supplier Short Name and the number of the location in the "Location" field (ex. In this case, enter JOHNSONJO2). Enter the street address in the "Description" field.

"Save" the Supplier.

Supplier numbers will start with a 0 and will be 10 characters long. Ex: 0000054215

If you receive an error message, find the required field that is missing and populate the field, then click **“Save”** again. The missing/incorrect field is highlighted in red.

The Vendor Database Administrators (Controller’s Office) are the only people who can approve, inactivate, and put a supplier on hold. The supplier is ready to be used when the status says **“Approved”** and the **“Open for Ordering”** box is checked.

Editing an Existing Supplier

To make any changes on the address or location pages of an existing supplier or to change the status of a supplier, please contact the appropriate Vendor Database Administrator in the Controller’s Office. You can also email acctspay@louisville.edu to request these changes.

DEFINITIONS OF 1099 PAYMENTS:

The University of Louisville is required to report payments made during the calendar year, on Form 1099-MISC, to any person paid:

- at least \$10 in royalties
- at least \$600 in rents, services (including parts and materials), prizes and awards, other income payments, and medical and health care payments
- gross proceeds paid to an attorney regardless of amount

Exceptions:

- Payments made to corporations (except medical and health care payments, or payments for legal services)
- Payments for merchandise, telegrams, telephone, freight, storage, etc.
- Payments of rent to real estate agents
- Payments to a tax-exempt organization, the United States, a state, the District of Columbia, or a foreign government
- Scholarship or fellowship payments
- Employee business expense reimbursements (less than 60 days old)
-

REPORTING REQUIREMENTS FOR 1099's

Request for 1099 reportable payment must include the following information:

- Full name of payee
- Permanent home address
- Social security or tax identification number
- Payment description

SUPPLIER DATA ENTRY APPENDICES

GENERAL GUIDELINES

DO'S

Do include a hyphen (-), slash marks (/) or apostrophes (') if included in the Supplier's name.

Do include a person's generation if listed as part of their name (such as: Jr, Sr, II, III, etc.).

Do include telephone and fax numbers, Tax ID numbers, and Contact Name information.

Do enter the FULL Supplier name, which could include a department or division.

Do enter the PO Box after the street address, if both are given. The zip-code should be for the PO Box.

Do spell out "North, South, East, West" when it is the actual street name or part of a city.

Do abbreviate "North, South, East, West" when part of a street directional.

DON'T'S

When entering a Supplier that starts with 'United States', don't put extra spaces between initials (US, not U_S, or U S)

Don't include periods (even after a person's middle initial, or on PO Box addresses) US not U.S.

Don't include commas (such as before the word "Inc", or within street addresses)

Don't use medical, educational, religious, judicial, or political titles in Supplier names (such as: Mr., Mrs., Ph.D., Pres., Sntr, Atty., Your Holiness, Honorable, etc.)