Adding a new vendor

Step	Action
1.	Begin by navigating to the **Review Vendors** menu. Click the **Main Menu** button. Main Menu
2.	Click the **Vendors** menu. Vendors
3.	Click the **Vendor Information** menu. Vendor Information
4.	Click the **Add/Update** menu. Add/Update
5.	Click the **Review Vendors** menu. Review Vendors
6.	Click the **Name** list. Equal to
7.	When searching for a name, it is a good idea to select the "Contains" option so your search criteria includes the most possible entries. This field is not case sensitive. Click the **Contains** list item. Contains
8.	Click in the **Name** field.
9.	Enter the desired information into the **Name** field.
10.	Click the **Search** button. Search
11.	Use the **Add Vendor** link to enter a new vendor record. Click the **Add Vendor** link. Add Vendor
12.	Click the **Add** button. Add
13.	Click in the **Vendor Name 1** field.
14.	Enter the desired information into the **Vendor Name 1** field.

Step	Action
15.	Click in the **Vendor Short Name** field.
16.	Enter the desired information into the **Vendor Short Name** field.
17.	Click the **Classification** list. (Invalid Value)
18.	Click the **Corporation** list item. Corporation
19.	Use the **Persistence** field to indicate how the vendor should be paid. Click the **Persistence** list. Regular
20.	Click the **Regular** list item. Regular
21.	Continue to enter additional information about the vendor such as Tax ID Number. Click the **Expand Additional ID Number** expand section button.
22.	Use the **Type** field to indicate the type of ID number that you are entering. Some possible values include: • DUNS Number • Tax Identification Number • W2 Identification Number Click the **Look up Type** button.
23.	Click the **Tax Identification Number** link. TIN | Tax Identification Number
24.	Click in the **ID Number** field.
25.	Enter the desired information into the **ID Number** field.
26.	Use the **Check for Duplicate** button to make sure the vendor you are creating does not already exist. Click the **Check for Duplicate** button. Check for Duplicate

Step	Action
27.	You have confirmed that this is a new vendor entry. Click the **OK** button. OK
28.	Use the **Attachments** link to attach the 204 vendor application form completed by the vendor. Click the **Attachments (0)** link. Attachments (0)
29.	Click the **Add Attachment** button. Add Attachment
30.	Click the **Browse...** button. Browse...
31.	Click the **FORM 204** list item. FORM 204 Microsoft Word Document 12.3 KB
32.	Click the **Upload** button. Upload
33.	Click in the **OK** field. OK
34.	Scroll down to see more of the page. Click the **Vertical Scroll bar**.
35.	Expand the **Comments** section to add comments. Click the **Expand section** button.
36.	Click in the **Comments** field.
37.	Enter the desired information into the **Comments** field. Enter a valid value e.g. "**Our main supplier for office furniture and supplies**".
38.	Scroll up to view more of the page. Click the **Vertical Scroll bar**.
39.	Click the **Address** tab. Address
40.	Enter the desired information into the **Description** field. Enter a valid value e.g. "**Main**".

Step	Action
41.	Click in the **Address 1** field.
42.	Enter the desired information into the **Address 1** field. Enter a valid value e.g. "**125 South Street**".
43.	Click in the **City** field.
44.	Enter the desired information into the **City** field. Enter a valid value e.g. "**Roseville**".
45.	Click in the **Postal** field.
46.	Enter the desired information into the **Postal** field. Enter a valid value e.g. "**95678**".
47.	Click in the **State** field.
48.	Enter the desired information into the **State** field. Enter a valid value e.g. "**ca**".
49.	Click the **CA** object. CA California
50.	In the Phone Information section below, click in the **Location** field.
51.	Enter the desired information into the **Location** field. Enter a valid value e.g. "**Main**".
52.	Click in the **Telephone** field.
53.	Enter the desired information into the **Telephone** field. Enter a valid value e.g. "**9167370102**".
54.	Use the vendor **Contacts** page to enter your vendor contact information. Click the **Contacts** tab. Contacts
55.	Enter the desired information into the **Description** field. Enter a valid value e.g. "**Manager**".

Step	Action
56.	Click the **Type** list.
57.	Click the **General** list item. General
58.	Click in the **Name** field.
59.	Enter the desired information into the **Name** field.
60.	Click in the **Title** field.
61.	Enter the desired information into the **Title** field.
62.	Click in the **Address** field.
63.	Use one of the addresses you created on the **Address** tab to select where the this Contact is located. Since Charlie is at the "Main" address entered previously, enter "1" into the **Address** field.
64.	To enter an additional phone number for the contact, click the **Add a new row** button. Click the **Add a new row** button.
65.	Click the **Type** list. Business Phone
66.	Click the **Cellular Phone** list item. Cellular Phone
67.	Click in the **Telephone** field.
68.	Enter the desired information into the **Telephone** field.
69.	Click the **Location** tab. Location
70.	Enter the desired information into the **Location** field.
71.	Use the **Procurement** link to enter location information relative to the procurement. Click the **Procurement** link. Procurement
72.	Click the scrollbar. Scroll down to view more of the page. Click the **Vertical Scroll bar**.

Step	Action
73.	Click the **OK** button. OK
74.	Click the **1099** link. 1099
75.	In the **1099 Reporting Information** section, click the **Look up Entity** button.
76.	Click the **Internal Revenue Service** link. IRS Internal Revenue Service
77.	Click in the **Address** field.
78.	Enter the desired information into the **Address** field.
79.	Indicate whether the TIN is a federal employer ID, or a social security number. Click the **TIN Type Look up** button.
80.	Click the **Federal Employer ID Number** link. F Federal Employer ID Number
81.	Click the **OK** button. OK
82.	Click the **Save** button. Save
83.	Click the **Summary** tab. Summary
84.	Use the **Approval History** link to view the approval path. Click the **Approval History** link. Approval History
85.	Click the **Return** button. Return
86.	You have successfully entered a new vendor record into FI$Cal. **End of Procedure.**