**Vendoring**

**Vendor edit (example is updating a vendor address, but this process is used to update anything on the vendor record):**

Click on “more items” and then “vendor” on the Kuali main screen. Then click on “vendor” under the Activities Box (you can click on the heart next to it to add it to your favorites for next time).



That will bring you to the below screen - Input all or part of the vendor name and click search.



Scroll down until you find your vendor.



Click on vendor name to view all addresses associated with this vendor. Scroll down to find your address. If your address is not there you will need to edit the vendor to add the new address field under address. Once you are ready, click the edit button (circled above). **Please do not change the set as default address unless instructed to do so by Purchasing or Accounts Payable.**

You can now either add a new address by entering a completely new one or editing the existing one depending on the circumstance. For example, if you know the business has moved, you would change the old one. If the business has more than one location, you would want to add a new one. Click “add”.



Your new address will be moved to the bottom of the addresses and look like this.



Add backup in the notes and attachment section so changes can be verified.

Click submit button. If all went well you will get document was successfully submitted message. Once your new address has been approved by Accounts Payable you will get an FYI notification.

**Vendor create:**

Click on “more items” and then “vendor” on the Kuali main screen. Then click on “vendor” under the Activities Box (you can click on the heart next to it to add it to your favorites for next time).

 

Click on Create new



That opens the new Vendor document in Kuali.

The tabs you will need to complete will be Document Overview, Vendor, Address and Notes and Attachments. All tabs will be opened when you are brought into to this screen.



As with all documents in KFS – Input a description in Document Overview – New Vendor – and vendor name.



Under Vendor tab Complete:

New - The Vendor Name

Corporate Information - Vendor Type (Purchase Order)

Ownership Type: Must match the W-9 ownership type

Input the tax number from the W-9

Change W9 Received to yes

Add date W9 was signed



Under the Address tab – complete New Address

Address Type – Purchase Order

Address, City, State, Postal Code, Country

Add Vendor Fax Number and/or email address. **The fax numbers or email address must be added to ensure Purchasing is able to distribute the PO to the vendor.**

Change - Set as Default Address from No to Yes



Click Add

**In the notes and attachment section add the W9, vendor self-certification and copy of invoice if you have one.**

Click submit button. If all went well you will get document was successfully submitted message. Once your new address has been approved by Accounts Payable you will get an FYI notification if you open the document you will see the new vendor number.

**Vendor Create – Individual:**

As with all documents in KFS – Input a description – New Vendor – and vendor name



Under Vendor tab Complete:

New – Vendor Name: First name space Last name. **Do not use Vendor Last Name/Vendor First Name**

Corporate Information - Vendor Type (Purchase Order)

Tax number social security number from W9

Tax number type-SSN

Ownership Type: Individual/Sole Proprietor

W9 Received – yes

Date W9 signed



Under the Address tab – complete New Address

Address Type – Purchase Order

Address, City, State, Postal Code, Country

Change - Set as Default Address from No to Yes



Click Add.

Go to notes and attachments tab and attach the W-9 and any other backup.

Click submit button. If all went well you will get document was successfully submitted message. Once your new address has been approved by Accounts Payable you will get an FYI notification if you open the document you will see the new vendor number.