

One new feature in the Vendors module is the addition of vendor types that enable you to add a set of requirements to a vendor when it's created. Requirements allow you to indicate certain procedural documentation or actions in order for vendors to be compliant with district policy.

Another new feature implements the approval of vendors to release them for use. Vendor approval is NOT required, but can be turned on by setting the **Enable Vendor Approval** value to True in Admin > Admin > Global Settings > Application Settings.

Contents

- Add & edit vendor types 1
 - Add a vendor type..... 1
 - Edit a vendor type..... 3
- Rejection reasons 4
- Mark requirements as fulfilled 5
 - Viewing requirements when not using vendor approval 5
 - Viewing requirements when using vendor approval 7
 - Approving a vendor..... 9

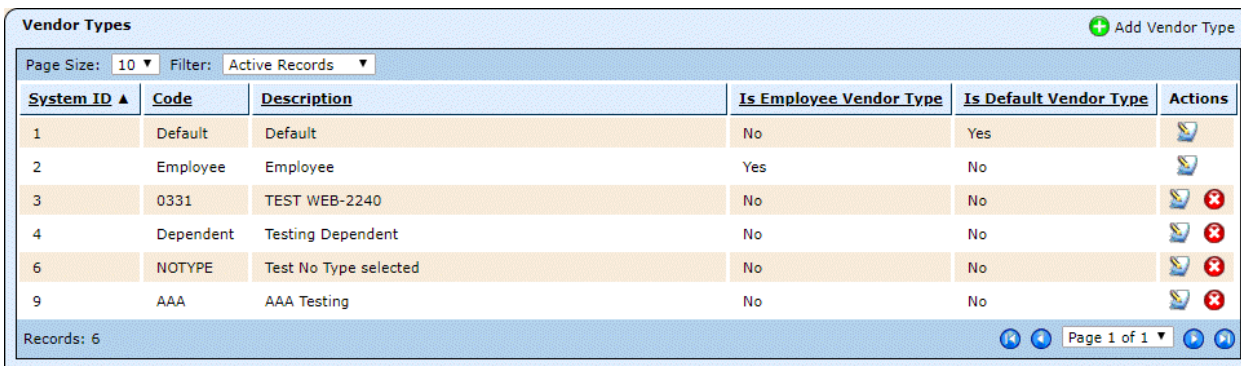
Add & edit vendor types

The Default vendor type is assigned to all existing and new vendors, but it may be changed by editing the Vendor Identifier.

You can also edit the requirements linked to the Default vendor type to meet your specific needs.

Add a vendor type

1. Select Vendors, then Vendor Types from the Purchasing & AP menu.



System ID ▲	Code	Description	Is Employee Vendor Type	Is Default Vendor Type	Actions
1	Default	Default	No	Yes	
2	Employee	Employee	Yes	No	
3	0331	TEST WEB-2240	No	No	
4	Dependent	Testing Dependent	No	No	
6	NOTYPE	Test No Type selected	No	No	
9	AAA	AAA Testing	No	No	

Note: The Default and Employee types cannot be deleted.



- Click Add Vendor Type, and the New Vendor Type window opens.

New Vendor Type

To create a new vendor type, provide a unique code and description.

Identifier

Code*

Description*

- Enter the Code and Description, and click Create. The Edit Vendor Type window opens.

Edit: Default - Default [Return to list](#)

Vendor types control the vendors in the system. Each vendor is assigned type from which they are used.

Identifier [Edit Identifier](#)

Code* Default

Description* Default

Employee Vendor Type No

Default Vendor Type Yes

- Click on the Requirements tab.

Edit: Default - Default [Return to list](#)

Use this editor to manage the requirements that make up this vendor type

Requirements [+ Add Requirement](#)

Page Size: 10

System ID	Name	Requirement Type	Required for Approval	Expiration	Actions
9	Requires 3 Bids	Boolean	Yes	365	
2	Upload Debarment	File	Yes	0	
1	Upload W-9	File	Yes	365	

Records: 3 [Page 1 of 1](#)

- Click Add Requirement.

Edit: Default - Default [Return to list](#)

Item

Name*

Requirement Type Boolean


Required for Approval

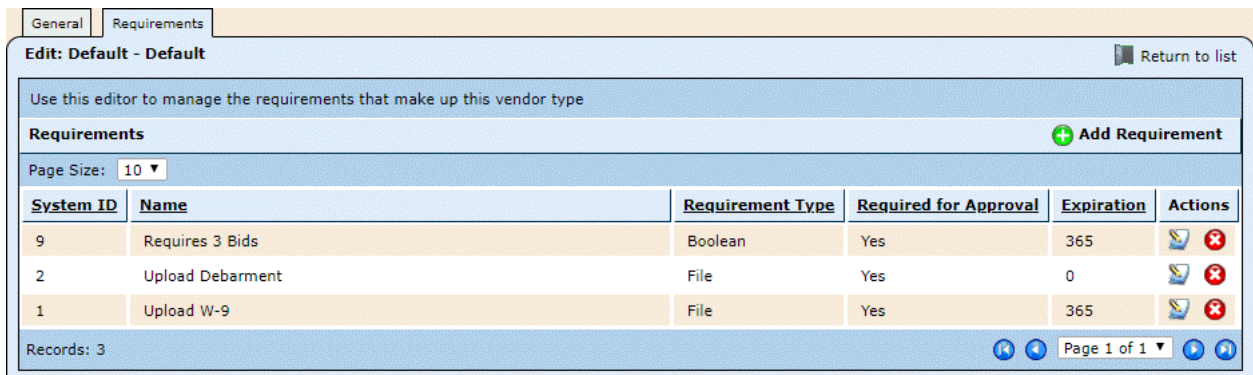
Expiration (days)







Apply to all vendors No



6. Complete the fields as described below.
 - Name: Enter text to describe the requirement.
 - Requirement Type: Select from Boolean (yes/no) and File. The Boolean type will just require a click on the vendor record to indicate fulfillment, while the File type will require the user to upload a file in order to fulfill the requirement.
 - Required for Approval: Check this box if Approval is turned on and this requirement will be required to approve a vendor.
 - Expiration (days): Optional. Enter a number of days if the fulfillment of this requirement will expire — for example, if the requirement is for a W-9, and a new W-9 is required each year.
 - Applies to all vendors: Select Yes or No.
7. Click Save.
8. Repeat steps 5-7 until you've finished adding requirements to this vendor type.

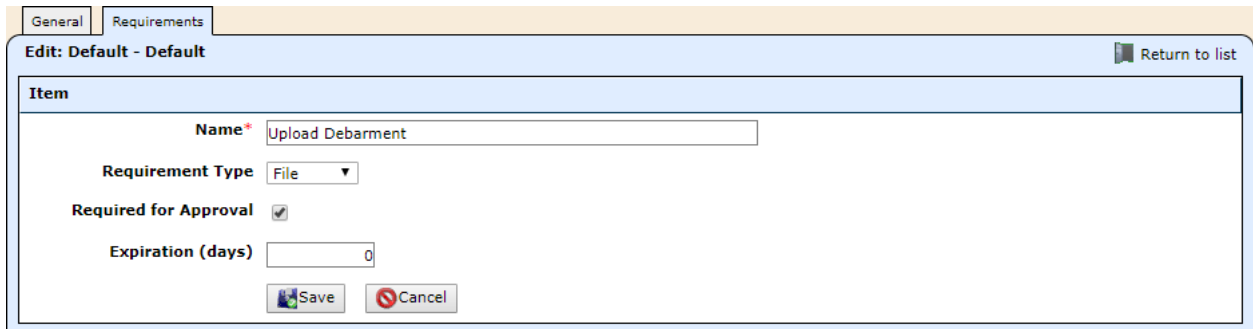
Edit a vendor type

1. While in the Vendor Type window, click the  icon for the vendor type, then click on the Requirements tab.



System ID	Name	Requirement Type	Required for Approval	Expiration	Actions
9	Requires 3 Bids	Boolean	Yes	365	 
2	Upload Debarment	File	Yes	0	 
1	Upload W-9	File	Yes	365	 

2. To delete a requirement, click the  icon.
To edit a requirement, click the  icon.



Name*

Requirement Type

Required for Approval

Expiration (days)

3. Make the needed changes, and click Save.

Rejection reasons

Rejection reasons are used in the vendor approval process. If you're not using the approval process, skip to [Viewing requirements when not using vendor approval](#).

1. Select Vendors, then Rejection Reasons from the Purchasing & AP menu.

System ID	Code	Description	Actions
2	DP	Duplicate	
1	ND	No documentation	

2. Click Add New Code.

3. Enter an alphanumeric code of up to 5 characters.
4. Enter a description, and click Create.

5. Click Edit Identifier, if you want to change the Effective or Expiration Date.

6. Make the needed changes, and click Save.

Mark requirements as fulfilled

The vendor window looks a bit different depending on whether or not the vendor approval feature is being used. This document will first describe marking requirements fulfilled when not using vendor approval.

Viewing requirements when not using vendor approval

1. Select Vendors, then Vendors from the Purchasing & AP menu.

Vendors + Add Vendor					
Page Size: 10		Filter: Active Records			
System ID	Vendor Number	Name	Tax Name	Tax ID	Actions
1008	001006	Vendor 1008	Texas Association of School Administrators	74-1540525	
1009	001007	Vendor 1009			
101	003172	Vendor 101			
1010	001008	Vendor 1010			
1011	001009	Vendor 1011			
1012	001010	Vendor 1012			
1013	001011	Vendor 1013			
1014	001012	Vendor 1014			
1015	001013	Vendor 1015			
1016	001014	Vendor 1016			

All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Records: 1829 Page 3 of 183

The available Filter options are Active Records, Deleted Records, and Custom.

2. Click the icon for the vendor whose requirements you want to review.

General	Tax Info	Payment Info	Policy Info	Requirements	Documents	Bulk
Edit: Test Vendor2 Return to list						
Vendors represent entities or individuals with whom your organizations conducts business. This view allows you to track critical, required information for tracking, reporting, and tax purposes.						
Identifier						
Vendor Number* 001928						
Name* Test Vendor2						
Payment Terms* UPON RECEIPT						
Created By Created by mandyshak harriscomputer on 9/25/2019 2:26:26 PM						
Vendor Type* Default - Default						
Addresses		Phone Numbers		Email Addresses		
Address Information						
Order From Address						
Remit To Address						

- Click on the Requirements tab.

General Tax Info Payment Info Policy Info **Requirements** Documents Bulk

Edit: Vendor 1015 Return to list

Requirements allow operators to indicate certain procedural documentation or actions to occur in order for vendors to be compliant with district policy.

Requirements + Add Requirements

Page Size: 10

Audit ID	Requirement	Create Date	Expiration Date	Required	Approval	Actions
2945	Upload Debarment	9/25/2019 9:05:34 AM		Yes		
2944	Upload W-9	9/25/2019 9:05:34 AM		Yes		

Records: 2 Page 1 of 1

- To act on a requirement, click the icon.
If it's for a Boolean requirement, you're indicating that the requirement is fulfilled, and the icon displays as , and the Approval field is completed.
If it's for a file type requirement, the buttons to choose & upload a file become visible.

General Tax Info Payment Info Policy Info **Requirements** Documents Bulk

Edit: Test Vendor2 Return to list

Requirements allow operators to indicate certain procedural documentation or actions to occur in order for vendors to be compliant with district policy.

Requirements + Add Requirements

File* No file chosen

Page Size: 10

Audit ID	Requirement	Create Date	Expiration Date	Required	Approval	Actions
5664	Requires 3 Bids	9/25/2019 2:26:26 PM	9/24/2020	Yes	mandyshak @ 9/25/2019 2:50:29 PM	
5663	Upload Debarment	9/25/2019 2:26:26 PM		Yes		
5662	Upload W-9	9/25/2019 2:26:26 PM		Yes		

Records: 3 Page 1 of 1

- Click Choose File, navigate to, and select the file.
- Once selected, click Choose File. When the file is uploaded, the icon displays to , and the Approval field is completed.

General Tax Info Payment Info Policy Info **Requirements** Documents Bulk

Edit: Test Vendor2 Return to list

Requirements allow operators to indicate certain procedural documentation or actions to occur in order for vendors to be compliant with district policy.

Requirements + Add Requirements

Page Size: 10

Audit ID	Requirement	Create Date	Expiration Date	Required	Approval	Actions
5664	Requires 3 Bids	9/25/2019 2:26:26 PM	9/24/2020	Yes	mandyshak @ 9/25/2019 2:50:29 PM	
5663	Upload Debarment	9/25/2019 2:26:26 PM		Yes		
5662	Upload W-9 - (W9 for Test Vendor.pdf)	9/25/2019 2:26:26 PM	9/24/2020	Yes	mandyshak @ 9/25/2019 4:41:23 PM	

Records: 3 Page 1 of 1

Viewing requirements when using vendor approval

1. Select Vendors, then Vendors from the Purchasing & AP menu.

Vendors + Add Vendor					
Page Size: 10		Filter: Approved Records			
System ID	Vendor Number	Name	Tax Name	Tax ID	Actions
1003	001001	Vendor 1003			
1005	001003	Vendor 1005	esped.com, Inc.	04-3496017	
1006	001004	Vendor 1006	Oriental TradingCompany		
1007	001005	Vendor 1007			
1008	001006	Vendor 1008	Texas Association of School Administrators	74-1540525	
1009	001007	Vendor 1009			
101	003172	Vendor 101			
1010	001008	Vendor 1010			
1011	001009	Vendor 1011			
1012	001010	Vendor 1012			

All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Records: 1822 Page 2 of 183

The available Filter options are illustrated below.

Vendors		
Page Size: 10		Filter: Approved Records
System ID	Vendor Number	Approved Records
1003	001001	Rejected Records (any)
1005	001003	Rejected Records (mine)
1006	001004	Awaiting Approval
1007	001005	Awaiting Requirements (any)
1008	001006	Awaiting Requirements (mine)
101	003172	Deleted Records
1010	001008	Custom
1011	001009	

2. Select a different filter as needed.
3. Click the icon for the vendor whose requirements you want to review.

General	Tax Info	Approval	Documents			
Edit: Test Vendor Return to list						
Vendors represent entities or individuals with whom your organizations conducts business. This view allows you to track critical, required information for tracking, reporting, and tax purposes.						
Identifier						
Vendor Number* 001927						
Name* Test Vendor						
Payment Terms* UPON RECEIPT						
Created By Created by mandyshak harriscomputer on 9/25/2019 1:42:26 PM						
Vendor Type* Default - Default						
<table border="1"> <tr> <td>Addresses</td> <td>Phone Numbers</td> <td>Email Addresses</td> </tr> </table>				Addresses	Phone Numbers	Email Addresses
Addresses	Phone Numbers	Email Addresses				
Address Information						
Order From Address						
Remit To Address						

- Click on the Approval tab.

General Tax Info **Approval** Documents

Edit: Test Vendor Return to list

Approval information is intended to direct the system on whether to release vendors for use.

Approval Information Edit Approval Information

Created By Created by mandyshak harriscomputer on 9/25/2019 1:42:26 PM

Status UNAPPROVED

Requirements Add Requirements

Page Size: 10

Audit ID	Requirement	Create Date	Expiration Date	Required	Approval	Actions
5659	Upload Debarment	9/25/2019 1:42:26 PM		Yes		
5658	Upload W-9	9/25/2019 1:42:26 PM		Yes		

Records: 2 Page 1 of 1

- To act on a requirement, click the icon.
If it's for a Boolean requirement, you're indicating that the requirement is fulfilled, and the icon display as , and the Approval field is completed.
If it's for a file type requirement, the options to choose & upload a file become visible.

Requirements Add Requirements

File* No file chosen

Page Size: 10

Audit ID	Requirement	Create Date	Expiration Date	Required	Approval	Actions
5664	Requires 3 Bids	9/25/2019 2:26:26 PM	9/24/2020	Yes	mandyshak @ 9/25/2019 2:50:29 PM	
5663	Upload Debarment	9/25/2019 2:26:26 PM		Yes		
5662	Upload W-9	9/25/2019 2:26:26 PM		Yes		

Records: 3 Page 1 of 1

- Click Choose File, navigate to, and select the file.
- Once selected, click Choose File. When the file is uploaded, the icon displays as , and the Approval field is completed.

General Tax Info **Approval** Documents

Edit: Test Vendor3 Return to list

Approval information is intended to direct the system on whether to release vendors for use. Requirements allow operators to indicate certain procedural documentation or actions to occur in order for vendors to be compliant with district policy.

Approval Information Edit Approval Information

Created By Created by mandyshak harriscomputer on 9/25/2019 5:03:57 PM

Status UNAPPROVED

Requirements Add Requirements

Page Size: 10

Audit ID	Requirement	Create Date	Expiration Date	Required	Approval	Actions
5667	Requires 3 Bids	9/25/2019 5:03:56 PM	9/24/2020	Yes	mandyshak @ 9/25/2019 5:04:04 PM	
5666	Upload Debarment - (Debarment for Test Vendor.pdf)	9/25/2019 5:03:56 PM		Yes	mandyshak @ 9/25/2019 5:04:33 PM	
5665	Upload W-9 - (W9 for Test Vendor.pdf)	9/25/2019 5:03:56 PM	9/24/2020	Yes	mandyshak @ 9/25/2019 5:04:45 PM	

Records: 3 Page 1 of 1

Approving a vendor

Once all the requirements have been met, an approver can act on the vendor.

1. Select Vendors, then Vendors from the Purchasing & AP menu.

Vendors + Add Vendor

Page Size: 10 Filter: Approved Records

System ID	Vendor Number	Name	Tax Name	Tax ID	Actions
1003	001001	Vendor 1003			
1005	001003	Vendor 1005	esped.com, Inc.	04-3496017	
1006	001004	Vendor 1006	Oriental TradingCompany		
1007	001005	Vendor 1007			
1008	001006	Vendor 1008	Texas Association of School Administrators	74-1540525	
1009	001007	Vendor 1009			
101	003172	Vendor 101			
1010	001008	Vendor 1010			
1011	001009	Vendor 1011			
1012	001010	Vendor 1012			

Records: 1822 Page 2 of 183

2. Click the icon for the vendor.

General Tax Info Approval Documents

Edit: Test Vendor Return to list

Vendors represent entities or individuals with whom your organizations conducts business. This view allows you to track critical, required information for tracking, reporting, and tax purposes.

Identifier Edit Identifier

Vendor Number* 001927
Name* Test Vendor
Payment Terms* UPON RECEIPT
Created By Created by mandyshak harriscomputer on 9/25/2019 1:42:26 PM
Vendor Type* Default - Default

Addresses Phone Numbers Email Addresses

Address Information Edit Address Information

Order From Address
Remit To Address

3. Click on the Approval tab.

General Tax Info Approval Documents

Edit: Test Vendor Return to list

Approval information is intended to direct the system on whether to release vendors for use.

Approval Information Edit Approval Information

Created By Created by mandyshak harriscomputer on 9/25/2019 1:42:26 PM
Status UNAPPROVED

Requirements + Add Requirements

Page Size: 10

Audit ID	Requirement	Create Date	Expiration Date	Required	Approval	Actions
5659	Upload Debarment	9/25/2019 1:42:26 PM		Yes		
5658	Upload W-9	9/25/2019 1:42:26 PM		Yes		

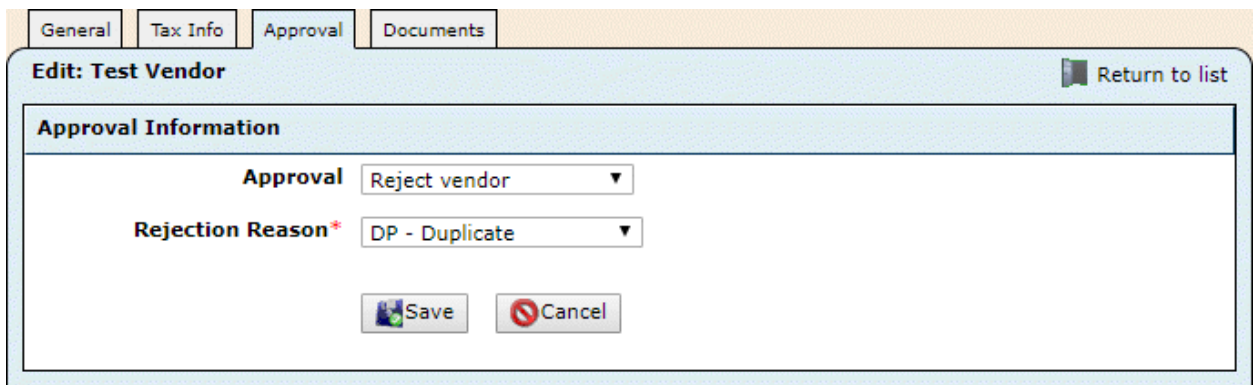
Records: 2 Page 1 of 1

4. Click **Edit Approval Information**.



The screenshot shows the 'Edit: Test Vendor' form with the 'Approval' tab selected. The 'Approval Information' section contains an 'Approval' dropdown menu that is open, showing three options: 'Leave in pending state' (highlighted), 'Approve vendor', and 'Reject vendor'.

5. If you want to approve the vendor, select Approve vendor, and click Save.
If you want to reject the vendor, select Reject vendor. You will be required to enter a rejection reason.



The screenshot shows the 'Edit: Test Vendor' form with the 'Approval' tab selected. The 'Approval Information' section contains an 'Approval' dropdown menu set to 'Reject vendor' and a 'Rejection Reason*' dropdown menu set to 'DP - Duplicate'. There are 'Save' and 'Cancel' buttons at the bottom of the section. A 'Return to list' link is visible in the top right corner of the form.

6. Change the Rejection Reason if needed, and click Save.