

Searching for a Vendor in PeopleSoft Finance

Finance Forum – Fall 2016

Searching for a Vendor in PeopleSoft Finance

- ▶ To perform a vendor search, follow the path below to the vendor information page.

Vendors -> Vendor Information -> Add/Update -> Vendor

The screenshot shows the 'Vendor Information' search page in the PeopleSoft Finance system for James Madison University. The breadcrumb trail at the top reads: 'Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor'. Below the breadcrumb, the page title is 'Vendor Information'. A message states: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a button labeled 'Find an Existing Value'. A section titled 'Search Criteria' contains several search fields: 'SetID:' with a dropdown set to '=' and a text box containing 'JMDSN'; 'Vendor ID:' with a dropdown set to 'begins with' and an empty text box; 'Persistence:' with a dropdown set to '=' and an empty dropdown menu; 'Short Vendor Name:' with a dropdown set to 'begins with' and an empty text box; 'Our Customer Number:' with a dropdown set to 'begins with' and an empty text box; and 'Name 1:' with a dropdown set to 'begins with' and an empty text box. At the bottom of the search criteria section, there are two checkboxes: 'Include History' and 'Case Sensitive', both of which are unchecked. At the very bottom of the page, there are four buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

- ▶ Make sure that JMDSN is entered as the value in the field 'SetID'.
- ▶ To search by a Vendor ID (PS #), enter that ID number in the empty box to the right of the field 'Vendor ID' and click search.
 - A Vendor ID is 10 digits long, so you will need to use leading zeros.
 - This is a way to search if you already know that the vendor is in the system, but want to verify they are active and that a W9 is not required.
- ▶ To search by a vendor's name, go to the field 'Name 1' and change the dropdown selection from 'begins with' to 'contains'.
 - Enter the vendor's full name, or portion of the name in the empty box to the right of the dropdown menu and click search.
 - This is the most common way to search, and can be used when you are not sure if a vendor is in the system or not.

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

Find an Existing Value

▼ Search Criteria

SetID: = JMDSN

Vendor ID: begins with

Persistence: =

Short Vendor Name: begins with

Our Customer Number: begins with

Name 1: contains

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

Vendor Information

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

Find an Existing Value

Search Criteria

SetID: = JMDSN

Vendor ID: begins with

Persistence: =

Short Vendor Name: begins with

Our Customer Number: begins with

Name 1: contains Accu

Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-8 of 8 Last

SetID	Vendor ID	Persistence	Short Vendor Name	Our Customer Number	Name 1
JMDSN	0000000022	Regular	ACCU-TECH-001	(blank)	ACCU-TECH CORPORATION
JMDSN	0000027625	Regular	ACCU-TECH-001	(blank)	ACCU-TECH CORPORATION
JMDSN	0000041437	Regular	ACCURITEK-001	(blank)	ACCURITEK IMAGING RESOURCE INC
JMDSN	0000018843	Regular	ACCURITEK-001	(blank)	ACCURITEK IMAGING RESOURCE INC
JMDSN	0000000023	Regular	ACCUWEATHER-001	(blank)	ACCUWEATHER INC
JMDSN	0000030388	Regular	MACCUBBIN-002	(blank)	MACCUBBIN KRISTEN LEE
JMDSN	0000024260	Regular	MACCUBBIN-001	(blank)	MACCUBBIN TYLER ALEXANDER
JMDSN	0000020166	Regular	MACCUBBIN-001	(blank)	MACCUBBIN TYLER ALEXANDER

- ▶ If the vendor is not in your search results, then you will need to obtain a COVA W-9 in order for them to be setup in the system.
- ▶ The W-9 is not required for reimbursements to individuals where they are not being paid additionality for goods/services. A Tax ID will still need to be provided on your voucher to Accounts Payable (or SA # for students, HR # for employees).
- ▶ If the vendor is in your search results, then click on any of their fields to bring up the vendor record.

Summary

SetID: JMDSN

Vendor ID: 0000027625

Vendor Short Name: ACCUDATA I ACCUDATA I-001

Vendor Name: ACCUDATA INTEGRATED MARKETING

Order: ACCUDATA I-001
PO BOX 636011
CINCINNATI, OH 45263-6011

Remit To: ACCUDATA I-001
PO BOX 636011
CINCINNATI, OH 45263-6011

W9 Date: 06/11/2007

Status: Approved

Persistence: Regular

Classification: Outside Party

HCM Class:

Open for Ordering: Yes

Withholding: No

VAT: No

Last Modified By: JCRDVNDR.SQR

Last modified date: 01/05/2016 1:52PM

Created By: SHIFLESE

Created Date/time: 06/19/2007 1:20PM

Last Activity Date: 07/18/2012

Save Return to Search Previous in List Next in List Notify Update/Display Include History

- ▶ If the vendor has a status of 'Approved', then no W9 is required.
- ▶ If the vendor has a status of 'Inactive', then a COVA W9 will be required to activate them. Please send the W9 along with your paperwork to Accounts Payable.

▶ Questions

- Contact Accounting Technology for a vendor specific question/issue.
 - Sandy Pitchard – 8/2941 – pitchase@jmu.edu
 - Brittany Sherman – 8/2289 – shermabm@jmu.edu
 - Josh Dameron – 8/4866 – damerojm@jmu.edu



▶ Forms/Resources

- COVA W9
http://www.jmu.edu/financeoffice/forms/W9_COVSubstitute_new.pdf
- W8 for Foreign Vendors
(Link to Finance Forms page – 3 forms to choose from depending on situation)
<http://www.jmu.edu/financemanual/procedures/1020.shtml>
- Properly completed W9 example
http://www.jmu.edu/financeoffice/usertips/properly_completed_W9_instructions.pdf
- IS Access Request to Finance System (IT Training is required for new users)
<https://remedy.jmu.edu/isaccess.asp>