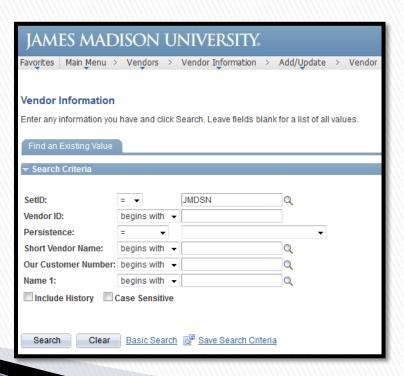# Searching for a Vendor in PeopleSoft Finance

Finance Forum – Fall 2016

Searching for a Vendor in PeopleSoft Finance

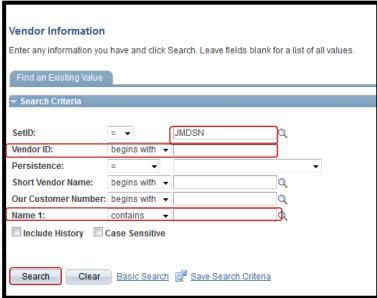- To perform a vendor search, follow the path below to the vendor information page.

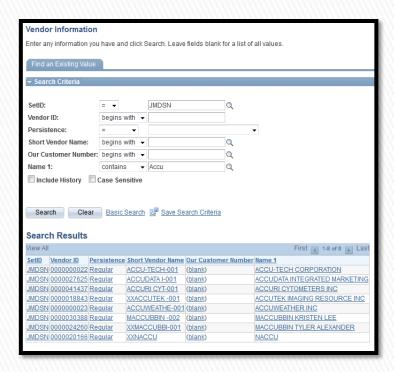Vendors -> Vendor Information ->Add/Update -> Vendor

- ▸ 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] <u>Basic Search</u> <u>Save Search Criteria</u>

- 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.

- 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