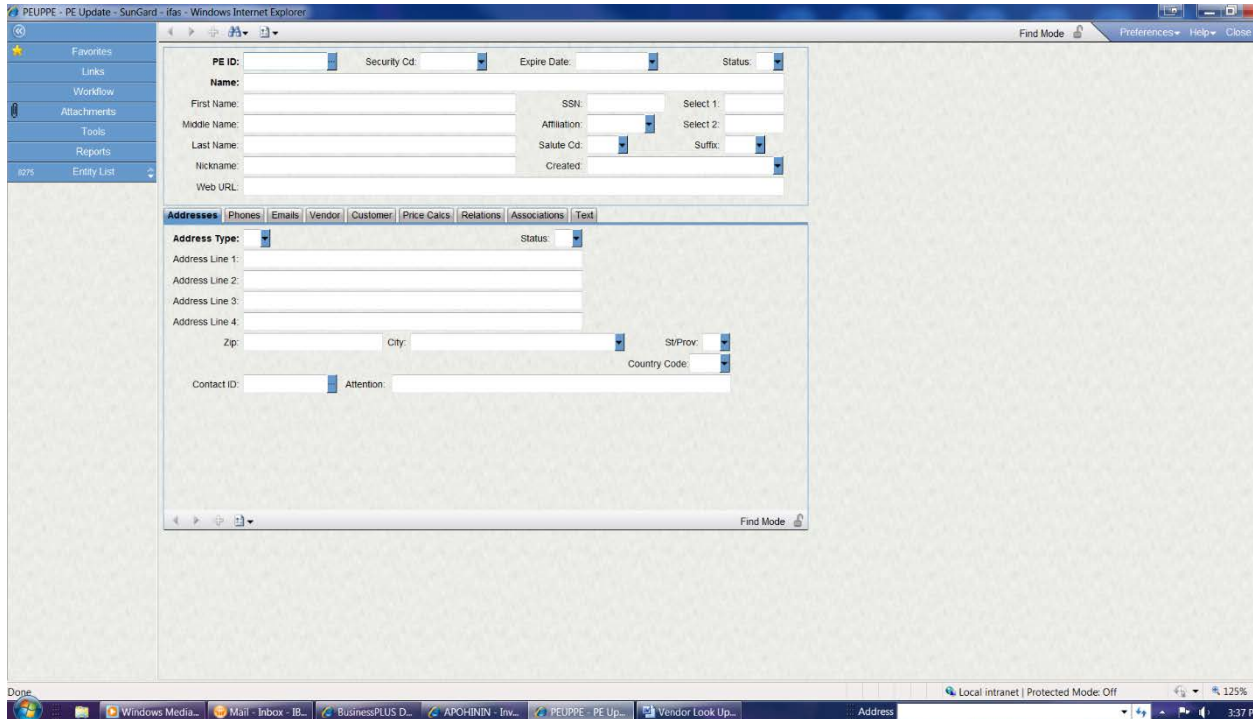


## BusinessPlus 7.9 Vendor Look Up

New to 7.9 is access to view information on PEID (Vendor) files. No access is given to change existing information or to add new information.

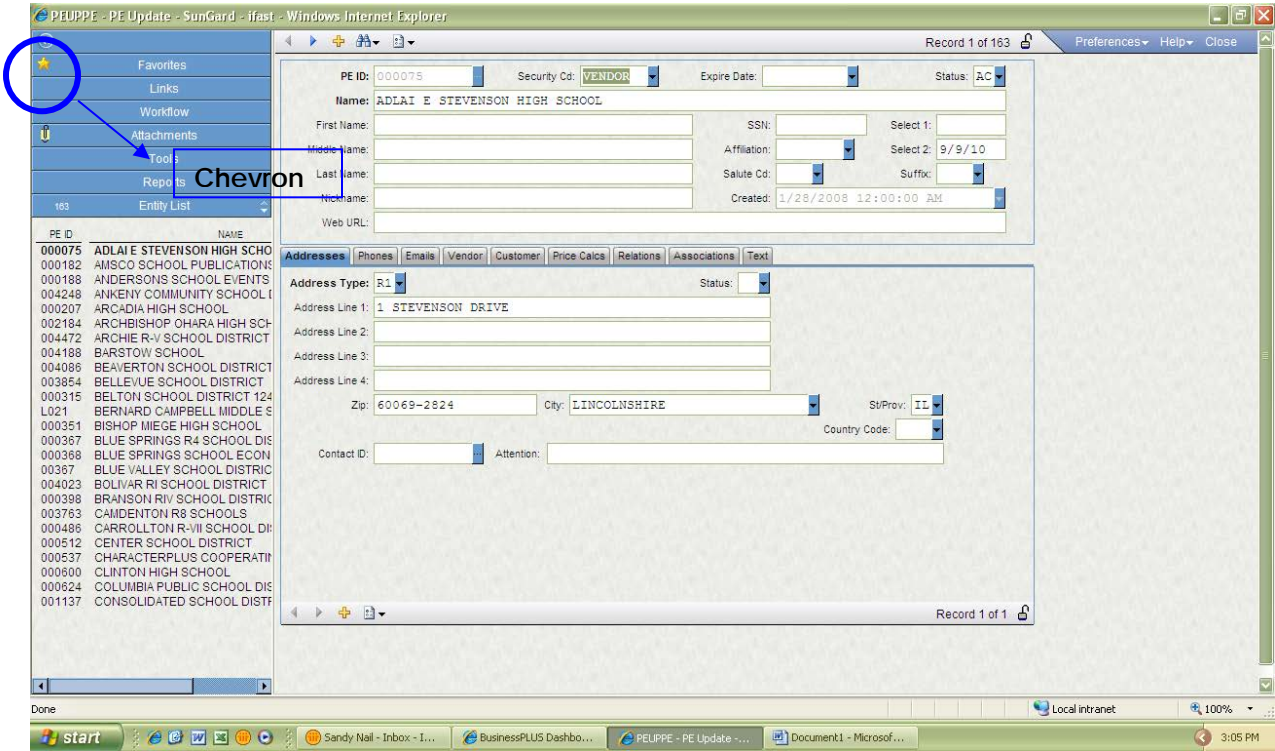
To look up a vendor, begin from your dashboard. Under the tab PE (Person Entity – Vendors), click on View Person Entity – Vendors, Etc.



When you click on the report, your screen should resemble the picture above. It's important to know how to navigate thru to find what you're looking for.

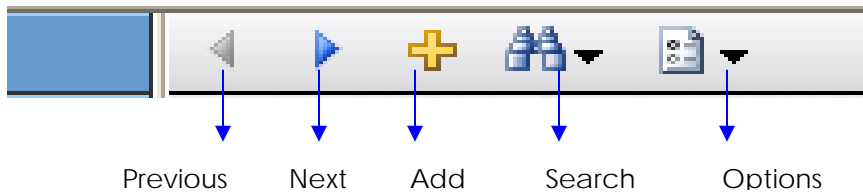
### Chevron button

The chevron button is the symbol in the upper left hand corner. This will open and close the left side of your screen. Opening the left side of your screen is important when you have multiple vendors with the same information you are searching for, such as \*School\*. It will tell you how many vendors have the word school in it. See example below:



## Navigation Buttons

The only navigation buttons for you to use are the left, right arrows and the binoculars. The left and right arrows allow you to maneuver thru the PEID's available and the binoculars allow you to search for a vendor.



You should notice two sets of navigation buttons, one at the top and one at the bottom of the screen. The set of navigation buttons at the top is for the entire record or Parent Record. The buttons on the bottom maneuver thru one specific vendor or Child Record.

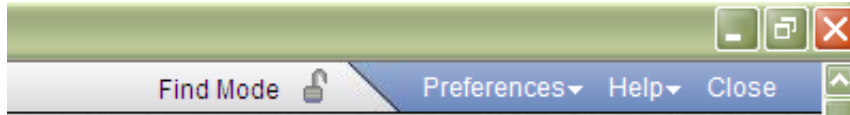
## Browse Mode

Each screen has 3 modes, Add, Browse and Find. To determine which mode you are in – look at the information in the top right-hand corner of the active window. You have not been granted access to Add Mode. **This screen will automatically come up in Find Mode.**

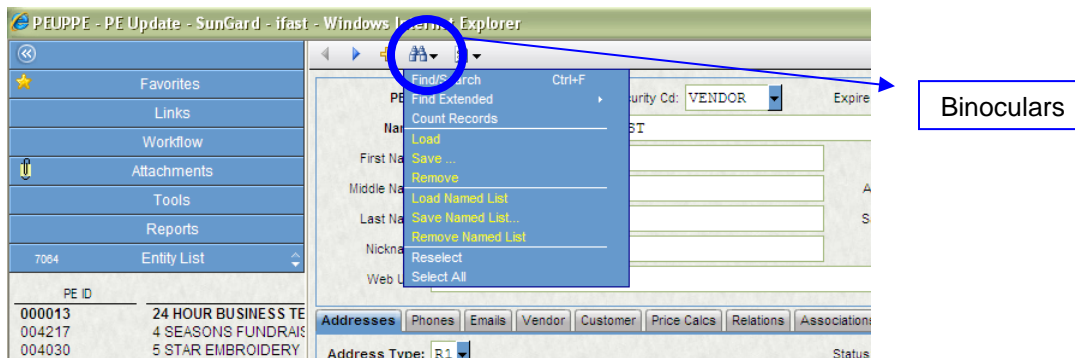
Browse Mode will read Record 1 of XX. This mode will allow you to use the Left or Right Arrows to toggle back and forth to view the information.

## Find Mode

When a user is in Find Mode the user can search on any one or more fields in the active window. **Remember, your screen will automatically open in Find Mode.**



When you are not in Find Mode or need to perform a second search, click on the binoculars.



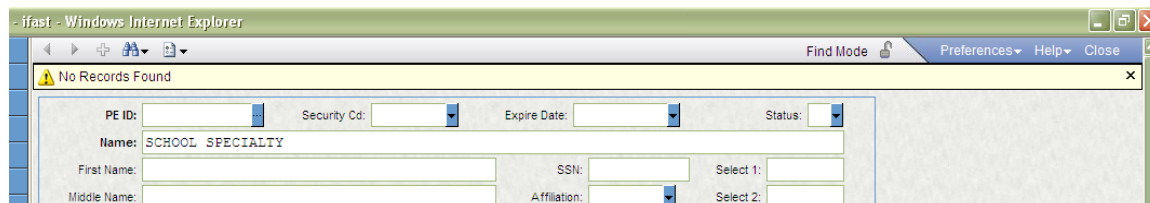
Select Find Search.

This will bring up a blank screen. You can search on most fields or more than 1 field at a time.

**Note:** Due to privacy issues, you do not have access to see any SSN's, Bank Account, and Bank Routing information. Therefore, searching on these fields will not bring up any information.

In most cases when you are looking for a vendor, you will be searching by name. Type in the vendor name you are searching for and press Enter.

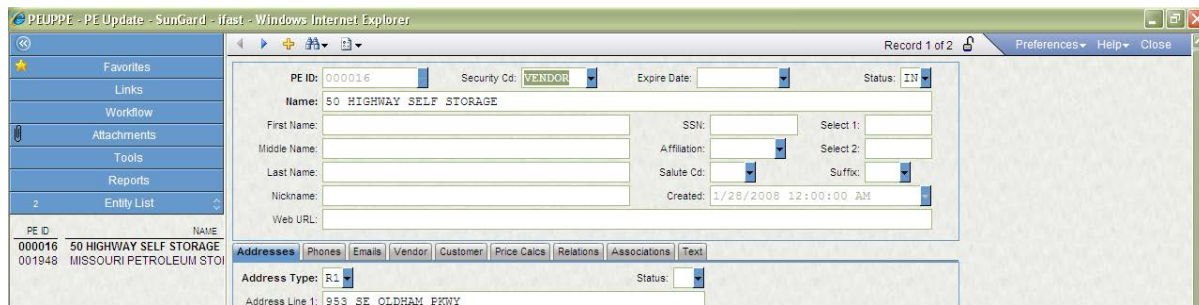
If you typed in School Specialty, you would NOT find the vendor.



The official vendor name is School Specialty Inc. It is important to remember to use the \* (wildcard) symbol. This will help you to find the vendor, especially since you may not know the full name of the vendor.

**Note:** The asterisk (\*) or wildcard button is great for searching tool. If you use the \* button in front of a word like school (\*SCHOOL), it will bring up all vendors that end in school. Should you use the \* button in back of school (SCHOOL\*), it will bring up all vendors that begin with school. Likewise, if you surround your word with asterisks (\*SCHOOL\*), it will bring up all vendors with the word school in it.

Following the same steps, search again for a vendor using \*STORAGE\*. This should bring up a screen with 2 possible vendors.



If your chevron is closed, click on it to view the two possible vendors, 50 Highway Self Storage and Missouri Petroleum Storage.

Once again it is important to be familiar with the information contained on the screen.

**PE ID:** This number is automatically given by the system at the time of vendor set up. It is grayed out and cannot be changed. This vendor number is used for purchase orders and to issue payments.

**Security Cd:** This is the type of vendor. The types of vendors are: Customers, Employees, Location or Vendor.

**Status:** The code is either AC for Active or IN for Inactive. Active means the vendor information is correct and can be used for PO's, Invoice Payment Requests, etc. Inactive means that the vendor cannot be used at this time and is shut down. There are 3 other areas to look at to determine why this vendor is inactive – Vendor tab, Association tab, and Text tab. Information on these tabs will be explained further in the Child Record of the PEID screen.

**Name:** Vendor name is based off the W9 received. You may ask for a vendor to be set up, but the name may change due to the information on the W9 and/or the invoice received.

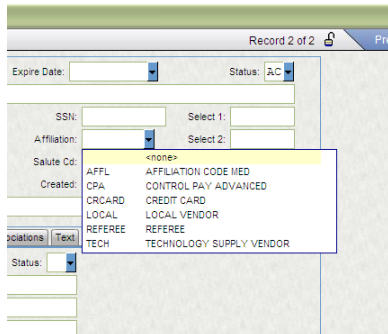
**First, Middle, Last Name:** Currently being update so that eventually you will be able to search on these fields.

**SSN:** Blanked out for privacy purposes.

**Select 1:** Date a W9 was mailed to the vendor to be filled out.

**Select 2:** Date W9 received in Business Services.

**Affiliation:** Tags a specific vendor. If this box is tagged CPA or CRCARD, this vendor is paid by Accounts Payable personnel with a special credit account.



The screenshot shows a software interface with a dropdown menu for 'Affiliation'. The menu is open, displaying a list of options: <none>, AFFL AFFILIATION CODE I/ED, CPA CONTROL PAY ADVANCED, CRCARD CREDIT CARD, LOCAL LOCAL VENDOR, REFEREE REFEREE, and TECH TECHNOLOGY SUPPLY VENDOR. The 'Affiliation' field is currently blank. Other fields visible include 'SSN', 'Select 1', 'Select 2', 'Salute Cd', 'Created', and 'Status'.

**Nickname:** This box is used for Everification (EV) purposes. In 2009, Missouri state law requires vendors performing a service verify by affidavit that they do not hire illegal aliens. This is how we designate which vendors have sent an Everification form back to us.

**Created:** This is the date and time stamp the system enters when the vendor set up is completed.

**Web URL:** Web address for this company.

**Note:** This completes the Parent Record. The information contained in the top portion of the screen applies to the entire record. Subsidiary company information are in the bottom portion of the screen which is called the Child Record.

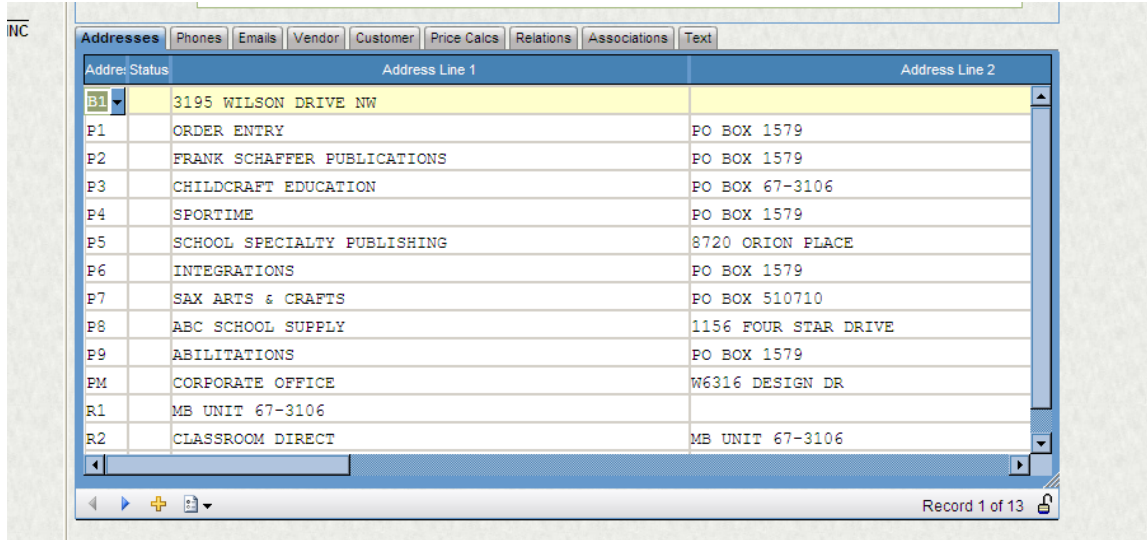
**Address Tab:** There are many types of addresses: Purchasing, Billing, Delivery, Remittance, Home. The first letter determines which type of address it is. You can have up to 9 different addresses per type.





To navigate thru all the available addresses, use the navigation tools at the **bottom** of the screen. The number of addresses available are shown at the bottom right hand side, Record 1 of XX.

An easy way to see all the addresses available at once is to click on the Option button and select Show Grid.

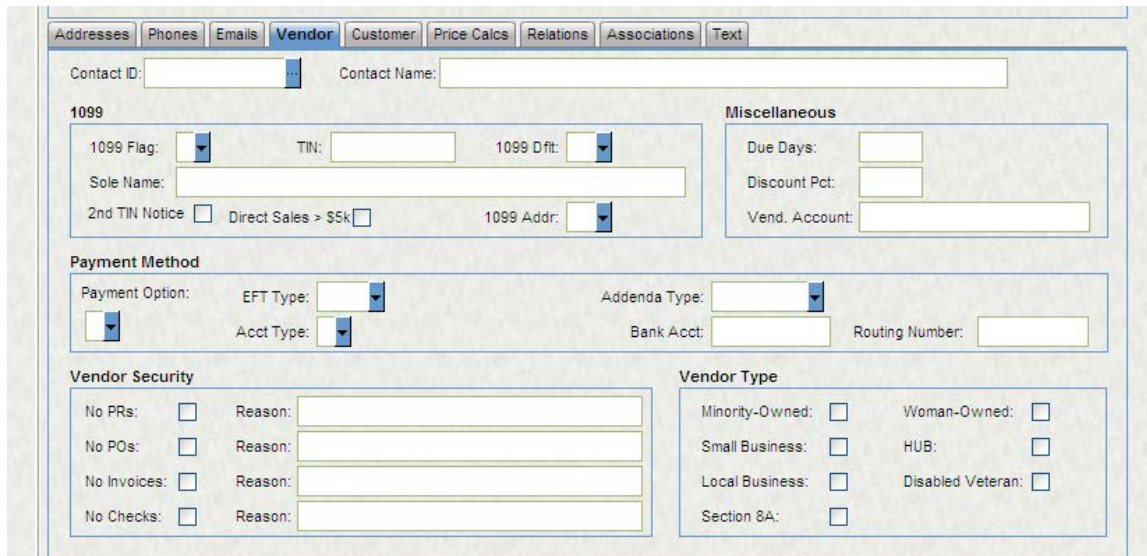


To close the grid, Select Options and Hide Grid.

If you don't see an address that is needed for a vendor, e-mail Accounts Payable or Purchasing personnel and they will add the address for you.

**Phone & Email Tabs:** New in 7.9 is the phone and email tab, which can be specific to a particular address. This is helpful since subsidiaries can have different phone numbers and email addresses from the parent company.

**Vendor Tab:** This tab contains a variety of information concerning the vendor, such as 1099 information, banking information, vendor security, and type of vendor.



1099 Information – Each vendor is tagged for 1099 purposes. We require a 1099 on all vendors, with a few exceptions: temporary/one time vendors (who purchase supplies only), employees, student/parent reimbursements. A W9 must be received **before** a payment can be made to a vendor.

Sole Name – Here is where you may find a persons name. We have many companies that are DBA (Doing Business As). For instance, you may need to hire Mike Shortino as a DJ for a dance. When you do a Find Search for Shortino\*, his vendor will not be one to select. His business name is Entertainment to Go. You could do a Find Search in this field as \*SHORTINO\*, and his vendor information will be available to be viewed.

Payment Method – Due to privacy issues, you will only be able to see whether a vendor is issued a check or will receive payment via EFT/ACH. Employee reimbursements are made via EFT/ACH. You will not be able to view bank account or routing numbers. All payments made to employees are deposited into the bank account in which they receive their payroll deposits.

Vendor Security – This is the first area to check to view the reason for an inactive vendor. Under Vendor Security you will find boxes labeled NO PR, NO PO's, No Invoices, and No Checks. When these boxes are checked to the right will be the reason as to why this vendor has been shut down.

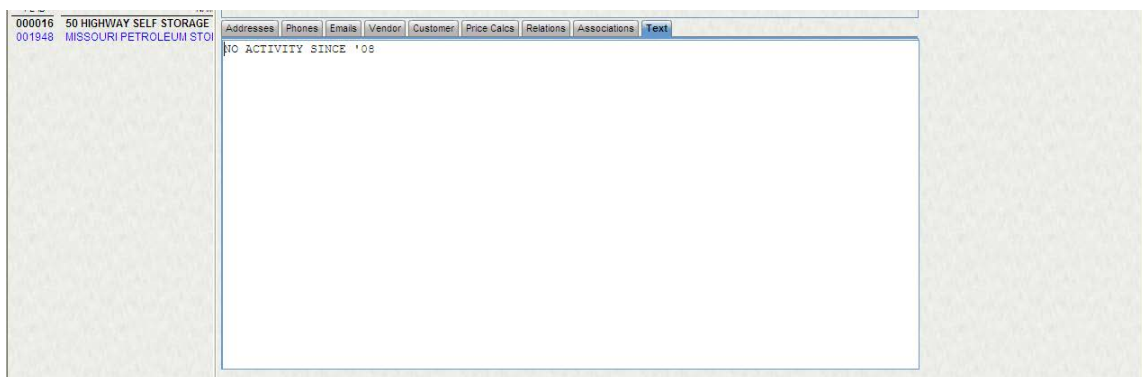
It is important to note the No Checks box. It is our policy to have a W9 on file **before** payment can be made.

**Association Tab:** Association codes are another way for us to tag or label a vendor. We may need to know how many vendors are local, how many we are waiting for W9 information on, etc. There are a variety of different association codes. A vendor can have multiple codes.

This is second area to check to view the reason for an inactive vendor. This area is not as detailed as the Vendor tab, but will contain some information. You can use the navigation button on the bottom of the screen, or the option button to Open Grid to view the Association Codes.

**Text Tab:** Contains written information about the vendor such as person requesting vendor set up, vendor provides a service or purchasing goods, or any information necessary to know about the vendor.

This is the third area to look to view the reason for an inactive vendor.



Now that you have an understanding of the information found in the PEUPPE screens, you can do a FIND SEARCH in any field, with the exception of SSN, Bank Account and Routing Number fields.

### **Tips**

- Use the asterisk (\*) button. The name of a vendor may be different than what you believe it to be.
- When searching for a vendor using the Zip Code, place an asterisk (\*) after your 5 digits. We enter the 4 digit tail to our vendors.
- You can search for a vendor using information in more than one field.  
Example: Part of a vendor name, and city name.
- Remember to open your Chevron button. This will show all possibilities of your search query.
- If you have information on a particular vendor that is not in the system, such as contact information, please contact us to put it into the system. This will be helpful to all users.