VENDORS

New Vendors

- **If a vendor has never been used by JSU before** - the Procurement and Fixed Asset Department will have to create a vendor record for you to use before the purchase can be made. In order to set up a vendor, you will need to acquire a W-9 form (required by the IRS). Procurement will accept a faxed or emailed copy of the form to purchasing@jsu.edu. The form can be found on the Purchasing website:

  http://www.irs.gov/pub/irs-pdf/fw9.pdf

- **If a vendor is a current student or employee** – they can be added to the vendor file without a W-9. Procurement and Fixed Assets must be notified by email – include and student/employee number and name. If the name has changed, students must be upated through the Registrar's office and employees must be updated through HR before the vendor file can be completed**.**

- **If a vendor is a former student or employee** – they will have to fill out a W-9.

- **If a vendor needs a name change** – they will have to fill out a new W-9.

- **If a vendor changes tax id numbers** – they will have to fill out a new W-9.

- **If a vendor address changes** – no new W-9 is required. Just email Procurement & Fixed Assets with the new address. Make sure to include the vendor id#. **Keep a copy for your files.** Once added, note the vendor number on the W-9 to save the trouble of looking it up in a query.

- **Procurement will accept faxed or emailed copies of W-9s at purchasing@jsu.edu.**

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Vendor Queries

Vendor queries can be difficult in Banner because a company's legal name may not always be the name we are familiar with and Banner queries are specific and case sensitive. The following tips make queries more successful:

- **Queries are case sensitive** – use capital letters where required.
- Don't spell out the entire name – only use a portion with wildcards.
- A wildcard is the '%' sign – use them before and after a name or just a portion of the name to broaden the results.
- When you create a Requisition for a vendor you use often, save that req as a template in that vendor's name. Then you only have to retrieve the template and change the commodity info next time you use that vendor. DO NOT SHARE TEMPLATES!
- Make sure to always validate the vendor when creating a requisition so that vendor info will populate and you can make sure you are using the correct vendor.

Queries can be performed in Self Service or Administrative Banner as follows:

SELF SERVICE

1. Click on 'Finance'.
2. Click on 'Requisition'.
3. Scroll to the bottom of the page to the *'CODE LOOKUP'* section.
4. Click on the drop down arrow by type and select 'Vendor'
5. In 'Title Criteria' enter a portion of the name using capital letters where required and the wildcard '%' before and/or after to broaden your search.
6. Increase the maximum rows if it is a common name to broaden your search.
7. Execute query.
8. If you see multiple entries with the same name, use the one with the highest vendor number – that means it is the most recent version of that vendor.

ADMINISTRATIVE

1. Enter **FTIIDEN** and hit enter.

2. Hit 'F7' to begin the query. Tab to the 'Last Name' field, and enter the first few letters of your vendor followed by a %. Make sure to use capital letters where required.

3. Hit 'F8' to complete the query.

4. The % is a wildcard in Banner and can be used before and/or after to widen your query results. For example – to look for Office Max, enter Offi%. This tells Banner to give you every vendor that begins with Offi.