



OVERVIEW

- ▶ **VENDOR LOOKUP:** The Vendor Lookup process provides different options to searching for a vendor in the Datatel/Colleague and WebAdvisor Systems. The Vendor Lookup process allows end users to locate vendor numbers to place on Check Requests and to select vendors when creating a purchase requisition.
- ▶ **CONTACT:** The contact for “Receiving Goods and Services” is the Office of Support Services (606) 783-2018.

LOGIN

- ▶ Login to Datatel/Colleague

See Section 402, 403 or 404 for login instructions. If you do not have a Datatel account, please contact the Office of Information Technology–Application Services (783-2009).



GETTING AROUND

- ▶ See Section 501 for assistance in Getting Around the System.

VENDOR LOOKUP

PURCHASING 701.5.11

SEARCH USING VEND (VENDOR MAINTENANCE SCREEN)

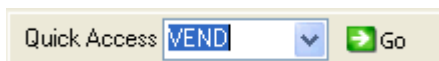
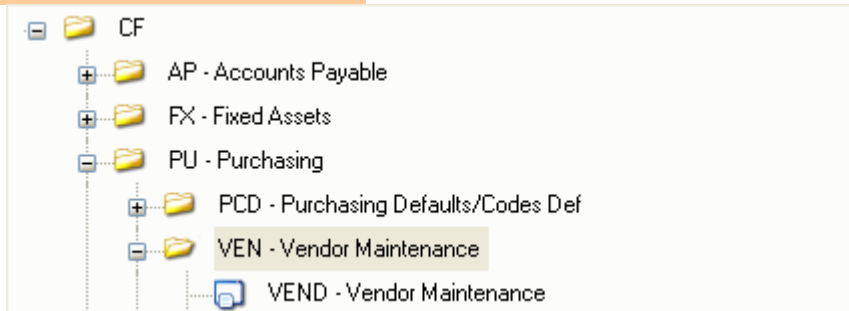
- ▶ Use this process to find vendor numbers to place on Check Request documents.
- ▶ Choose **CF** under the Colleague **Apps** Menu
- ▶ Click the  to expand the **Purchasing** Menu
- ▶ Click the  to expand the **Vendor Maintenance** Menu
- ▶ Click on **VEND – Vendor Maintenance**

OR

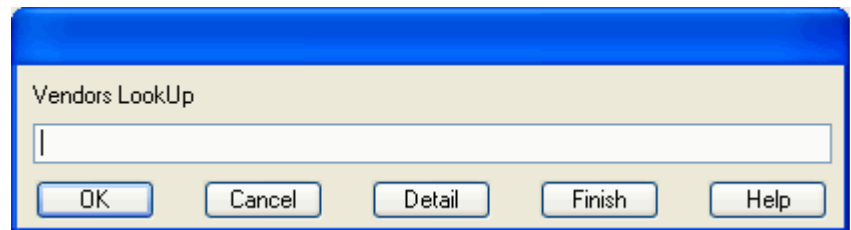
- ▶ Enter **VEND** in the Quick Access Box

VENDOR LOOKUP

► Click 



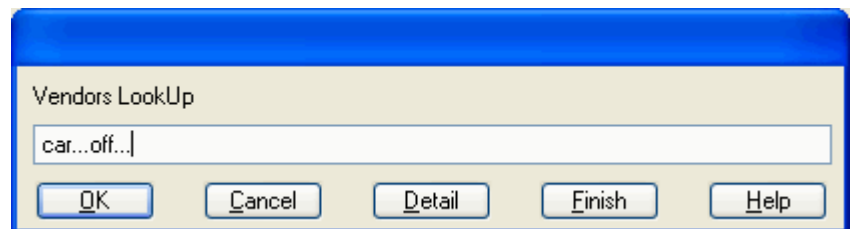
► **Vendor Lookup** box appears




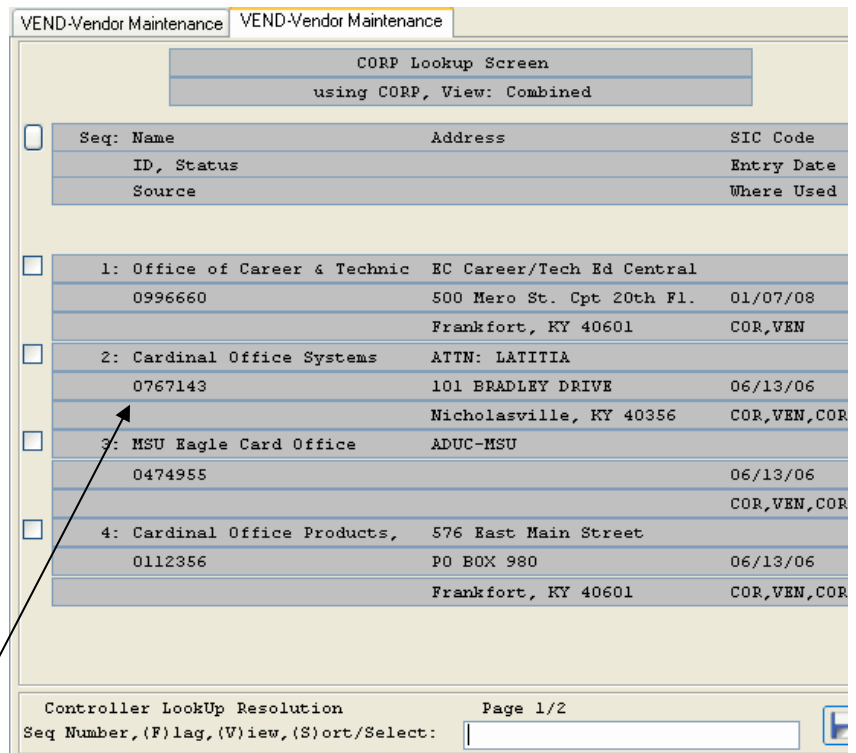
**SEARCH BY PARTIAL
VENDOR NAME
(COMPANY)
BEST PRACTICE**

► Enter the part of the vendor name in the Vendor Lookup box using three letters of the first name followed by ... and three letters of the last named followed by ...
(No caps, No commas, No complete names)

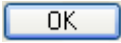
► Select 



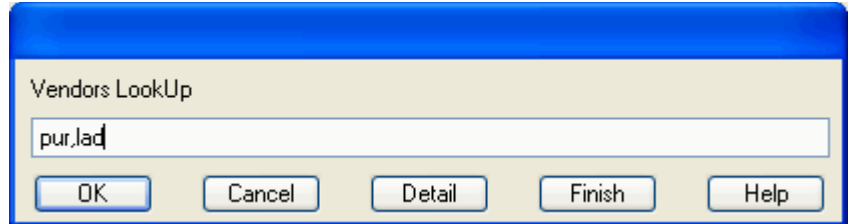
- ▶ Vendor Maintenance Resolution Screen Appears.
- ▶ Scroll through the pages using the Scroll Bar 
- ▶ Vendor Number appears below Vendor Name. Note vendor number if address matches or see Select Different Address for Same Vendor below for alternate address listing.




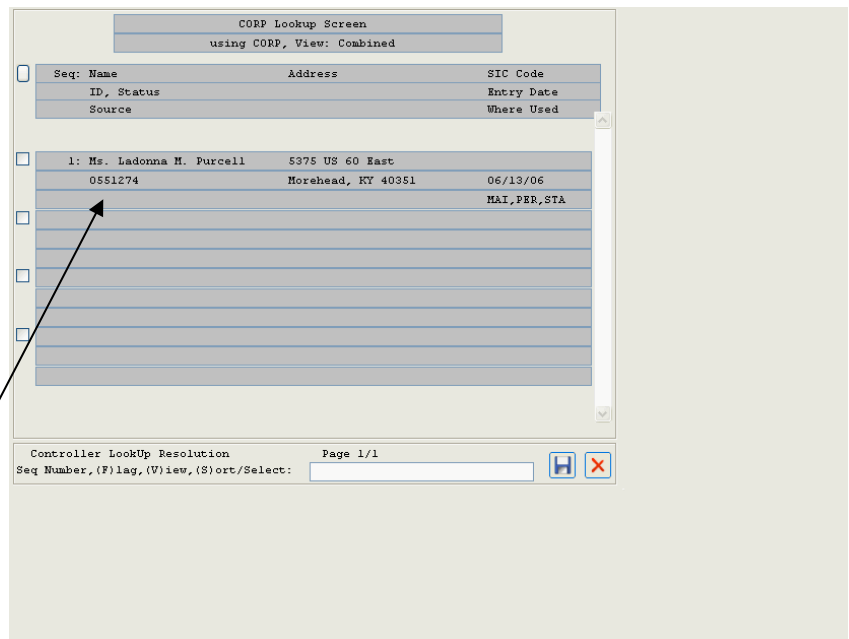
**PERSON VENDOR
LOOKUP**

- ▶ Enter first three letters of the last name, first three letters of the first name
- ▶ Select 

VENDOR LOOKUP




- ▶ Vendor Maintenance Resolution Screen Appears.
- ▶ Scroll through the pages using the Scroll Bar 
- ▶ Vendor Number appears below Vendor Name. Note vendor number if address matches or see Select Different Address for Same Vendor below for alternate address listing.





ALTERNATE SEARCHES (USE ONLY AFTER BEST PRACTICE SEARCH REVEALS NO RESULTS)

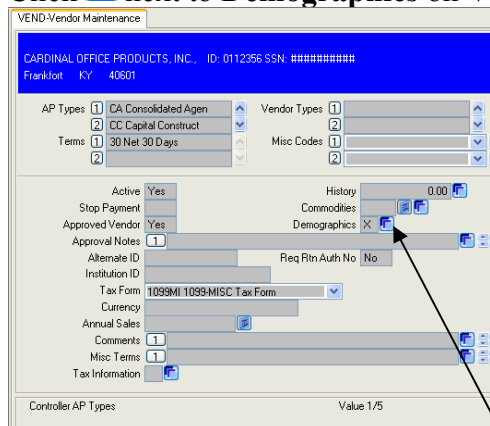
SEARCH FOR DIFFERENT ADDRESS FOR SAME VENDOR - COMPANIES

- ▶ **Companies** – Can do search using full names (Example: Cardinal... Office...)
- ▶ **People** – Can do wildcard searches with names (Example: LaDonna Purcell could be entered as pur...,lad... OR purcell). Can also search by social security number with **no dashes** (XXXXXXXXXX).
- ▶ **REMINDER** – Companies never use commas; they use ... People use commas

- ▶ Follow process above for Vendor Search
- ▶ Click the check box next to the correct vendor
- ▶ Click  in the bottom right hand corner

OR

- ▶ Type the number of the vendor in the box
- ▶ Click  in the bottom right hand corner.
- ▶ **VEND – Vendor Maintenance** Screen appears.
- ▶ Click  next to **Demographics** on Vendor Maintenance Screen




VEND-Vendor Maintenance

CARDINAL OFFICE PRODUCTS, INC. ID: 0112356 SSN: #####

Frankfort KY 40301

AP Types: 1 CA Consolidated Agen, 2 CC Capital Construct
 Vendor Types: 1, 2
 Terms: 1 30 Net 30 Days, 2
 Misc Codes: 1, 2

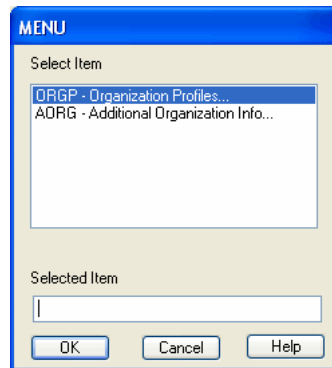
Active: Yes
 Stop Payment:
 Approved Vendor: Yes
 Approval Notes: 1
 Alternate ID:
 Institution ID:
 Tax Form: 1099MI 1099-MISC Tax Form
 Currency:
 Annual Sales:
 Comments: 1
 Misc Terms: 1
 Tax Information:


History: 0.00
 Commodities:
 Demographics: 


Controller AP Types Value 1/5

SEARCH FOR DIFFERENT ADDRESS FOR SAME VENDOR - PERSON


- ▶ Select **ORGP – Organization Profile** in Menu Box



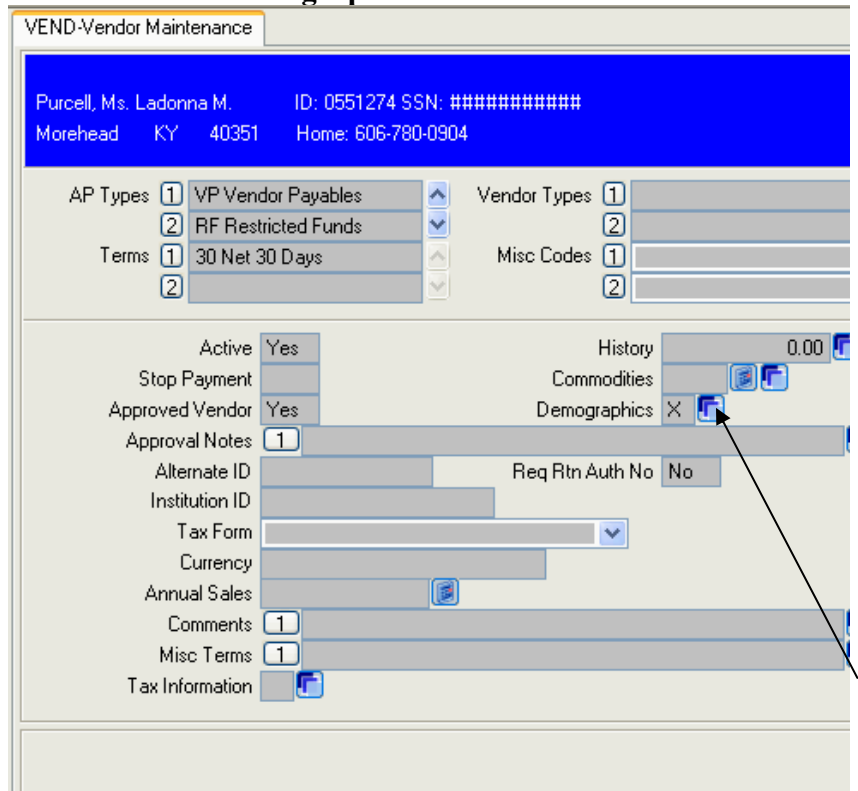
- ▶ Address Resolution Screen appears.
- ▶ Scroll through pages using the Scroll Bar 
- ▶ If address you need is listed, make note of vendor number. If address is not listed, provide the additional address to the Office of Support Services for maintenance of the vendor record.

- ▶ Follow process above for Vendor Search
- ▶ Click the check box next to the correct vendor
- ▶ Click  in the bottom right hand corner

OR

- ▶ Type the number of the vendor in the box
- ▶ Click  in the bottom right hand corner.
- ▶ **VEND – Vendor Maintenance** Screen appears.

- ▶ Click  next to **Demographics** on Vendor Maintenance Screen




VEND-Vendor Maintenance

Purcell, Ms. Ladonna M. ID: 0551274 SSN: #####
 Morehead KY 40351 Home: 606-780-0904

AP Types 1 VP Vendor Payables 2 RF Restricted Funds
 Terms 1 30 Net 30 Days 2

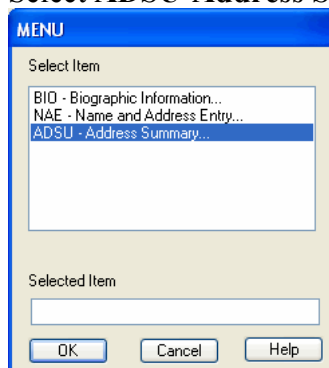
Vendor Types 1 2
 Misc Codes 1 2

Active Yes
 Stop Payment
 Approved Vendor Yes
 Approval Notes 1
 Alternate ID
 Institution ID
 Tax Form
 Currency
 Annual Sales
 Comments 1
 Misc Terms 1
 Tax Information

History 0.00
 Commodities
 Demographics X 

Req Rtn Auth No No

- ▶ Select **ADSU-Address Summary** in the Menu Box.



MENU

Select Item


BIO - Biographic Information...
 NAE - Name and Address Entry...
 ADSU - Address Summary...

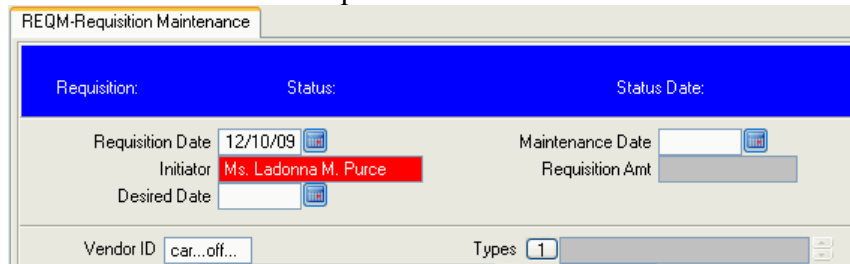
Selected Item

OK Cancel Help

- ▶ Address Resolution Screen appears.

SEARCH FOR VENDOR USING REQ (REQUISITION MAINTENANCE SCREEN)

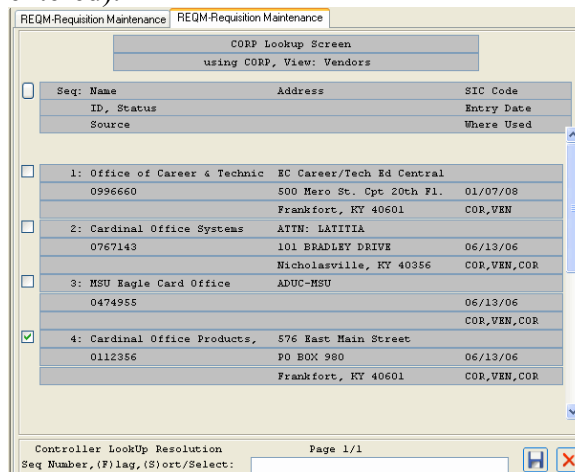
- ▶ Scroll through pages using the Scroll Bar 
- ▶ If address you need is listed, make note of vendor number. If address is not listed, provide the additional address to the Office of Support Services for maintenance of the vendor record.
- ▶ Use this process if creating a purchase requisition.
- ▶ Search is completed as above, except starting point is the Vendor ID box on the Requisition Maintenance Screen.



REQM-Reqquisition Maintenance

Requisition:	Status:	Status Date:
Requisition Date: 12/10/09	Initiator: Ms. Ladonna M. Purce	Maintenance Date:
Desired Date:	Requisition Amt:	
Vendor ID: car...off...	Types: 1	

- ▶ Resolution Screen appears with all vendor matching criteria entered).




REQM-Reqquisition Maintenance

CORP Lookup Screen
using CORP, View: Vendors



Seq	Name	Address	SIC Code	Entry Date
<input type="checkbox"/>	1: Office of Career & Technic	EC Career/Tech Ed Central		
	0996660	500 Hero St., Cpt 20th Fl. Frankfort, KY 40601	COR, VEN	01/07/08
<input type="checkbox"/>	2: Cardinal Office Systems	ATTN: LATITIA		
	0767143	101 BRADLEY DRIVE Nicholasville, KY 40356	COR, VEN, COR	06/13/06
<input type="checkbox"/>	3: MSU Eagle Card Office	ADUC-MSU		
	0474955		COR, VEN, COR	06/13/06
<input checked="" type="checkbox"/>	4: Cardinal Office Products,	576 East Main Street		
	0112356	PO BOX 980 Frankfort, KY 40601	COR, VEN, COR	06/13/06

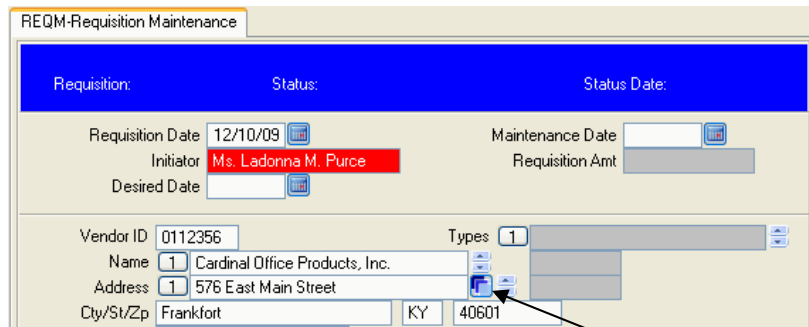
Controller LookUp Resolution Page 1/1
Seq Number, (F)lag, (S)ort/Select:



- ▶ Click the check box next to the correct vendor
- ▶ Click  in the bottom right hand corner

**SEARCH FOR
ALTERNATE
ADDRESS USING
REQM**


OR

- ▶ Type the number of the vendor in the box
- ▶ Click  in the bottom right hand corner.
- ▶ Vendor ID, Name and Address are populated.
- ▶ Click  next to **Address** on **REQM** screen



- ▶ **Address Resolution** screen appears
- ▶ Scroll through pages using the Scroll Bar 
- ▶ Click the check box next to the address you need
- ▶ Click  in the bottom right hand corner


OR

- ▶ Type the number of the vendor in the box
- ▶ Click  in the bottom right hand corner.
- ▶ Address is changed on **REQM** Screen.

VENDOR LOOKUP

VENDOR LOOKUP IN WEBADVISOR

- ▶ Enter part of the vendor name in the **Vendor ID or Name** box (use same criteria as explained above for companies or people search except (...) should be omitted for company searches)

▶ Click 

Requisitions for Goods and Services

Vendor ID or Name

- ▶ Click the radio button next to the requested vendor

▶ Click 

Vendor LookUp Results

Choose One	Vendor ID	Vendor Name	Vendor Address
<input checked="" type="radio"/>	0112356	Cardinal Office Products, Inc.	576 East Main Street PO BOX 980 Frankfort KY 40601
<input type="radio"/>	0474955	MSU Eagle Card Office	ADUC-MSU
<input type="radio"/>	0767143	Cardinal Office Systems	ATTN: LATTIA 101 BRADLEY DRIVE Nicholasville KY 40356
<input type="radio"/>	0998660	Office of Career & Technical Educat	EC Career/Tech Ed Central Ofc 500 Mero St. Cpt 20th Fl. Frankfort I



- ▶ **VENDOR ID** is populated.

- ▶ Provide vendor demographic data to the Office of Support Services for creation of vendor record.

NO VENDOR ON FILE



Last Revision: 12/10/09