# New World Accounting

*Vendor – How to Add or Edit*

# Vendor Adds / Changes

## Vendor – How to Add or Edit

Note:    You need to attach an updated W-9 form for any new vendor request (or for updating an existing vendor's address) .

**First Step – Inquire on a Vendor to see if they are currently in the system and verify the vendor name and address information.**

- Go to the Financial Management drop down ➡ Inquiries ➡ Vendors
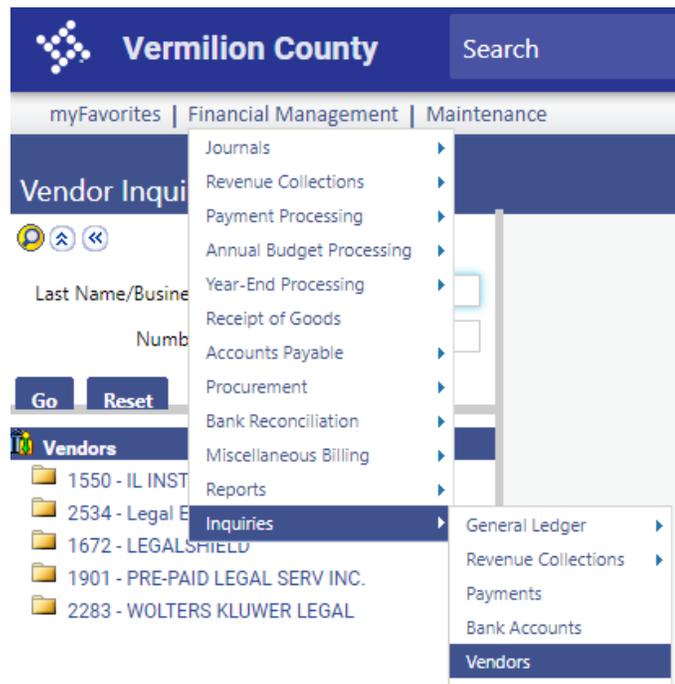


- Enter part or all of the Vendor Name in the Last Name/Business line and hit the <u>Go icon</u> **Go**

- Locate the vendor that you are searching on below (and write down their vendor number).



**Vendor - 1**

# Vendor Adds / Changes

- Highlight and double click on the requested vendor to display and verify their information on the right hand portion of the screen.

# Vendor Adds / Changes

**Second Step – Add or change a vendor**

- Go to the Financial Management drop down ⟹ Procurement ⟹ Vendor Change Request.
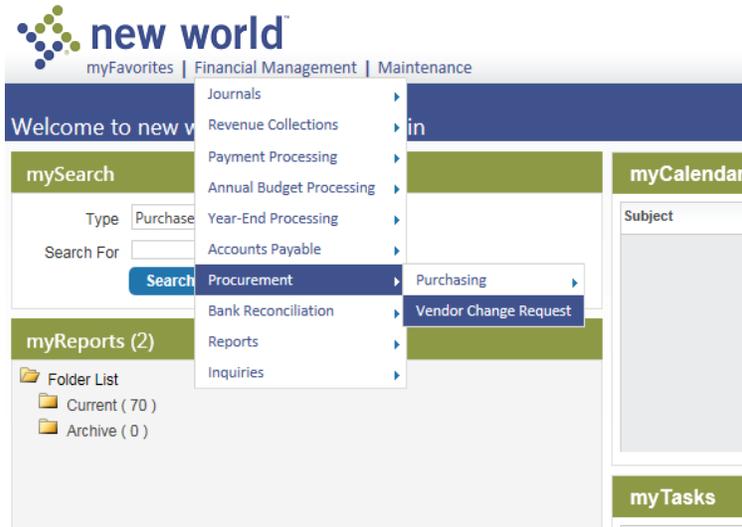


- The user can then choose to Alter Vendor or Add Vendor

# Vendor Adds / Changes

**Change an existing Vendor**

- Select the **Alter Vendor** button if you need to change vendor information. [Alter Vendor]

- This will take you to the Vendor Change Request Entry Screen

  - To update a vendor - enter the Vendor Number (or name) in the vendor field.

  - Select the correct vendor from the dropdown menu.

    - When the vendor is selected, the current information will be populated into the fields
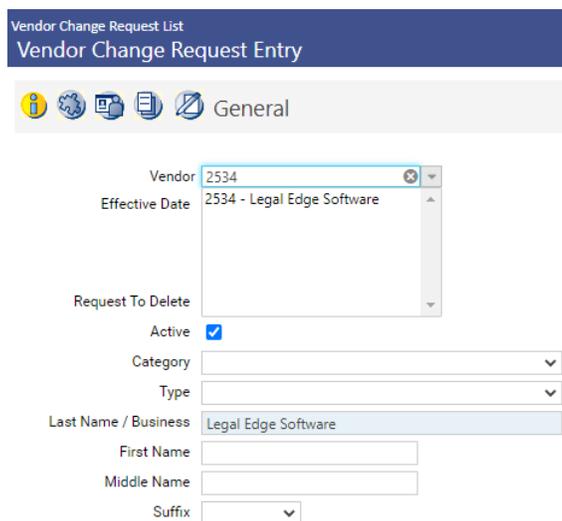


**Verify information has been selected in the reason code field at the righthand screen (drop down menu).**
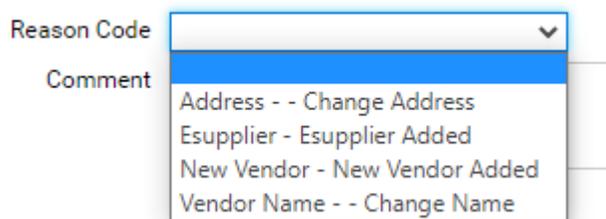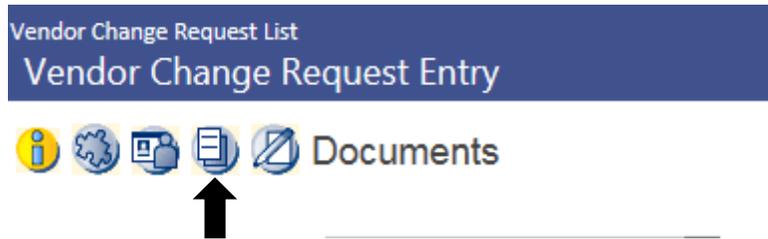


**Verify that there is a checkmark in the Active box.**



**Vendor - 4**

# Vendor Adds / Changes

**You must attach an updated W-9 for existing vendors whose address or federal id information has been changed.**



- To attach a W-9, click on the Documents button and then proceed with uploading the **W-9** in the same way as the PO entry or Invoice entry processes.

- Before leaving/navigating from the page - make sure to hit the **Save** button at the bottom so the information is not erased.

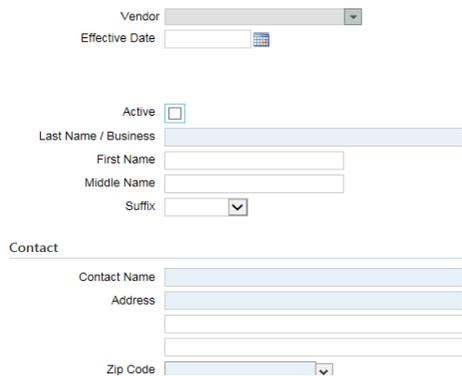- Change the information that is needed and click on the **Submit** button (located at the bottom of the screen.
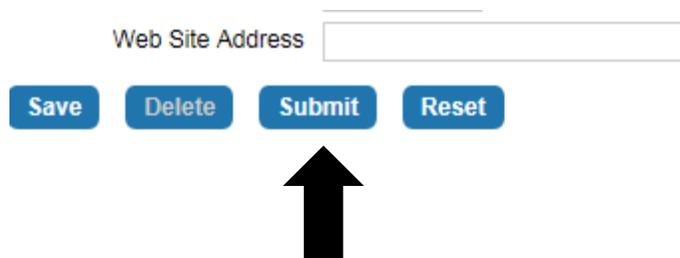


- After the Request is submitted, it will be sent to the Auditor's office for approval.

# Vendor Adds / Changes

**Add a new Vendor**

- Select the Add Vendor button if you need to add a new vendor  **Add Vendor**
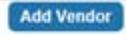
- This will also take you to the Vendor Change Request Entry Screen but the Vendor number drop down will be grayed out and the information will have to be filled in below.
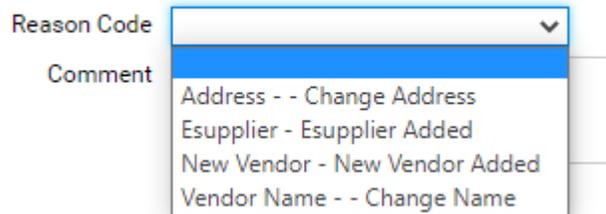
  A vendor number will automatically be assigned once the vendor has been approved. Everything shaded in blue will have to be filled in and the effective date, reason code, and either Federal ID, State ID, or Social Security Number.
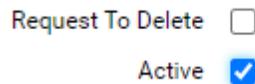
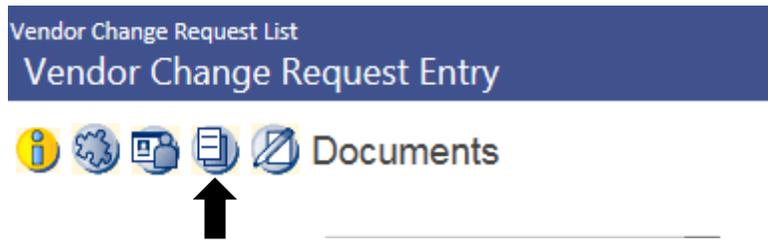**Verify information has been selected in the reason code field at the righthand screen (drop down menu).**

**Verify that there is a checkmark in the Active box.**

# Vendor Adds / Changes

**You must attach an updated W-9 for all new vendors by selecting the document button.**



- To attach a W-9, click on the Documents button and then proceed with uploading the **W-9** in the same way as the PO entry or Invoice entry processes.

- Before leaving/navigating from the page - make sure to hit the **Save** button at the bottom so the information is not erased.

- Change the information that is needed and click on the **Submit** button (located at the bottom of the screen.



- After the Request is submitted, it will be sent to the Auditor's office for approval.