

**FINANCE & PROCUREMENT: Add a Vendor**

FROM DATATEL'S COLLEAGUE FINANCIALS (CF) MODULE...

**\*\*\* CAUTION – AVOID RECORD DUPLICATION – CAUTION \*\*\***

**ALWAYS VERIFY THAT THE VENDOR DOES NOT EXIST BEFORE INITIATING THE VENDOR CREATION PROCESS.**

1. Type **VEND** in the Quick Access drop-box
2. Select **GO**
3. Type the **vendor's Social Security Number or Federal Tax ID number** (from the W9 form) **or** the **vendor's name** in the Vendor Look-up text field (if searching by the Federal Tax ID, type the following syntax: **PERSON.CORP.TAX.ID EQ 'xx-xxxxxxx'**)
4. Select **OK** and search the list thoroughly for the vendor

**IF THE VENDOR EXISTS:**

5. Check the **checkbox** that corresponds to the correct vendor (no corresponding capture)

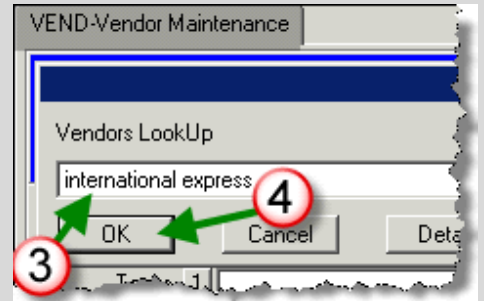
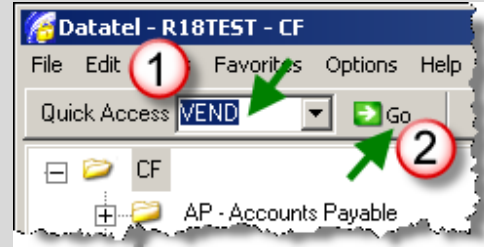
Verify that the vendor information is correct; if discrepancies exist, resolve them now.

6. Select the **SAVE** icon **or** the **F9** key (no corresponding capture)

**IF THE VENDOR RECORD IS NOT RETURNED:**

Continue to search.

- If available, search by the **SSN or Fed. Tax ID number**
- Search by **similar names or abbreviated names**
- Search by possible **acronyms** representing the name



**NOTE:** Only after carefully examining all search results **AND** exhausting search possibilities, continue the vendor creation process (below).

**SEARCH VERIFICATION IS COMPLETE; THE RECORD IN QUESTION DOES NOT EXIST. PROCEED TO ADD THIS VENDOR TO THE COLLEGE'S DATABASE.**

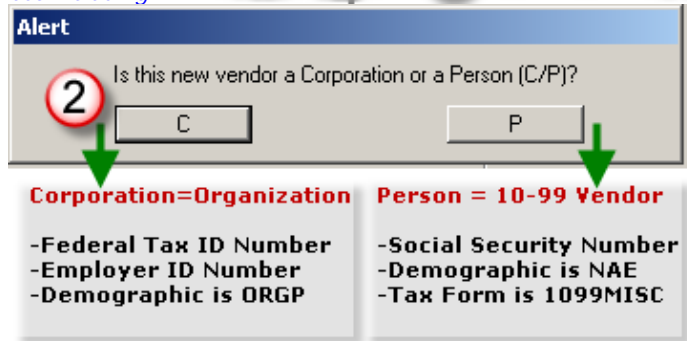
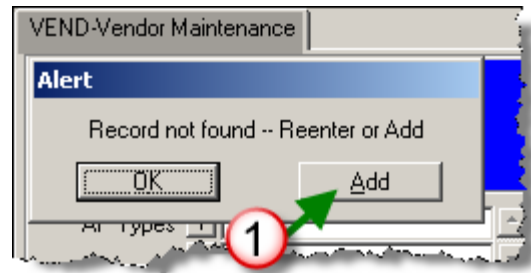
1. Type the **new vendor's search criteria** in the Vendors Lookup text field, **click OK**, and **click ADD**

**NOTE:** The **10-99 Vendor** classification includes **INDIVIDUALS, SOLE PROPRIETORS, AND LIMITED LIABILITY COMPANIES (LLC)** that provide services to the College. Examples of vendors within this classification include: continuing education instructors and individuals providing consulting services or personal services including labor. Accounts Payable is responsible for determining a vendor's 10-99 classification.

You must **EVALUATE** whether this vendor's classification fits a **Corporation or a Person** and select the appropriate action.

In this example the vendor is a **Corporation**.

2. Select **"C"** for Corporation.



3. Enter the appropriate **data** in the corresponding fields and/or text boxes (see below).

Datatel - R18TEST - CF

File Edit **3** Favorites Tools Help

Quick Access VEND Go

VEND-Vendor Maintenance ORGP-Organization Profiles

International Express ID: 0418601  
Goose Creek, SC 29445 SIC: Contact:

Source 1  
Origin/Dt  
Name 1 International Express  
Mail Label 1 International Express  
Other Name 1 IE  
Sort Name INTERNATIONAL EXPRESS

EIN 34-5678912

Type the vendor's Federal Tax ID number here.  
Do not use spaces or punctuation. The system will add hyphens in the appropriate position(s) automatically.

**IF THERE ARE OTHER NAMES THIS VENDOR GOES BY, LIST THEM IN THE OTHER NAME FIELD.**

Name 1 International Express  
Mail Label 1 International Express  
Other Name 2 =Inatl Express  
Sort Name INTERNATIONAL EXPRESS

Name 1 International Express  
Mail Label 1 International Express  
Other Name 3 =INATL XPRS  
Sort Name INTERNATIONAL EXPRESS

Name 1 International Express  
Mail Label 1 International Express  
Other Name 4 =IE  
Sort Name INTERNATIONAL EXPRESS

Use the equal sign [=] to force the name to remain in the EXACT same case as you type it.

Campus Org -

Address 1 147 Whipperdale Blvd  
2  
CSZ Goose Creek SC 29445  
Country DO NOT INCLUDE COUNTRY OR IT WILL APPEAR IN THE ADDRESS.  
County 08 Berkeley  
Address Type 1 RT Remit To/Accts Payable  
Home Office Yes  
Phone(s) 2 843-552-0111 Ext Type RTFX

Source  
Date By  
CAF Change of Address Form  
REG Registration Form  
CER Con Ed Registration  
RTN Return Mail  
VEN Vendor Notification  
COR Correction  
ORG Organization Reported  
OBT Obituary  
WEB WEB Notification

If available, enter the address included on the vendor's W9 form.

Do not use spaces or punctuation. The system will add hyphens in the appropriate position(s) automatically.

Be careful to select the appropriate TYPES for both address and phone numbers (see details below).

See the following page for:  
GENERAL ADDRESS & NAME ENTRY RULES and  
VENDOR NAME & ADDRESS ABBREVIATIONS  
and a link to  
USPS ADDRESS ABBREVIATIONS.

**ADDRESS AND PHONE TYPES: Do NOT USE the types with strikethroughs**

**ADDRESS TYPES:**

- ~~LC Local~~
- WR Work
- BL Billing
- ~~PR Permanent~~
- RT Remit To/Accts Payable
- PO Purchase Order
- CH HR Check/Direct Deposit
- EM Emergency
- SS Seasonal
- CO Correction

AD Additional  
NOTE: Procurement will ALWAYS use the PO Purchase Order ADDRESS and PHONE types. NOT Allowed

**PHONE TYPES:**

- ~~LC Local~~
- WR Work
- OF Do not use
- CL Cell
- FX Fax Number

- HM Do not use
- PG Pager
- EM Emergency
- SS Seasonal
- ~~PR Permanent~~
- RT Remit To/Accts Payable
- RTFX Remit To/AP Fax
- PO Purchase Order
- POFX Purchase Order Fax
- SR Service
- TF Toll Free

- VM Voice Mail
  - MN Main
  - BR Berkeley
  - PL Palmer
  - EP Employer
  - CH HR Check/Direct Deposit
  - BL Billing
  - AP Accounts Payable
- NOTE: Accounts Payable (AP) will ALWAYS use the RT Remit To/Accts Payable ADDRESS and PHONE types.

Tutorial continues on page 4.

**GENERAL ADDRESS AND NAME ENTRY RULES:**

- All person records must have a prefix unless indicated otherwise. The default prefix for a female is "Ms'.
- Do not use punctuation or spaces between initials in a vendor's name (e.g., *OW Duplicating, IBM, USAF Recruiting Office, etc.*).
- There are no periods in record names or addresses, including middle initials.
- Watch for automatic capitalization and case rules, because these may affect entries. To bypass the rules, a user must enter "=" before typing information in a field.
- To ensure the correct capitalization of initials, before the vendor name type "=" (e.g., =UPS).
- If a vendor's registered name begins with numbers (e.g., *84 Lumber, 82 Queen, etc.*), use numerals when entering the name. However, enter the spelled-out numbers in "Other Names" (e.g., *Eighty-Four Lumber, Eighty-Two Queen, etc.*).
- Use the "Other Names" field to enter any nicknames or other names that might be used to look up the record.
- Vendors with registered names that begin with the article "The", "A", or "An" should be entered at the beginning of the name. Datatel will ignore the article and sort on the next word.
- Abbreviated state names follow [USPS abbreviations](#) for use in company names or addresses (e.g., *SC Aquarium, NC State University, etc.*).
- Name and Address information will be entered in the following order:
  - Name
  - Apartment/Suite (if applicable)
  - Street or PO Box
  - City State Zip
- Do not populate the "Country" field, or it will appear on correspondence.
- Address history will be saved in all change-of-address cases except COR (correction), unless there is a justifiable reason for keeping the history on a correction.
- Refer to USPS abbreviations at [http://www.usps.com/ncsc/lookups/usps\\_abbreviations.html](http://www.usps.com/ncsc/lookups/usps_abbreviations.html).
- All person records must have a SSN, birth date, and ethnic/gender, if known.

**VENDOR/PERSON NAME AND/OR ADDRESS ABBREVIATIONS:**

**USPS ADDRESS ABBREVIATIONS**

[http://www.usps.com/ncsc/lookups/usps\\_abbreviations.html](http://www.usps.com/ncsc/lookups/usps_abbreviations.html)

<b>AMER</b> American	<b>DEPT</b> Department	<b>N CHAS</b> North Charleston
<b>APT</b> Apartment	<b>DR</b> Doctor or Drive	<b>PROD</b> Production
<b>ASSOC</b> Associated, Associates, Association	<b>EDUC</b> Education	<b>PROF</b> Professional
<b>BLVD</b> Boulevard	<b>INC</b> Incorporated	<b>PUB</b> Publishers, Publishing
<b>CTR</b> Center	<b>INST</b> Institute, Institutional	<b>ST</b> Saint or Street
<b>CHAS</b> Charleston	<b>INATL</b> International	<b>STE</b> Suite
<b>COLL</b> College	<b>MGMT</b> Management	<b>SOC</b> Society
<b>CO</b> Company	<b>MFG</b> Manufacturing	<b>SC</b> South Carolina
<b>COMM</b> Commission, Community	<b>MT</b> Mount	<b>TEC</b> Technical, Technology
<b>CONF</b> Conference	<b>MTN</b> Mountain	<b>US</b> United States
<b>CORP</b> Corporation	<b>NATL</b> National	<b>UNIV</b> University
<b>CNTY</b> County	<b>NC</b> North Carolina	<b>VOC</b> Vocational



Continued from page 2.

4. When the ORGP-Organization Profiles screen data entries are complete, *select UPDATE (no corresponding capture)*. You will return to the VEND screen.
5. Enter the appropriate **data** in the corresponding fields and/or text boxes (*see below*).
6. Select the **Save All** icon or the **F10** key.


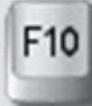
**NOTE:** This vendor is now ready for use in the Datatel system.

**TIP . TIP . TIP . TIP . TIP . TIP TIP . TIP**

### Function Keys as Keyboard Shortcuts

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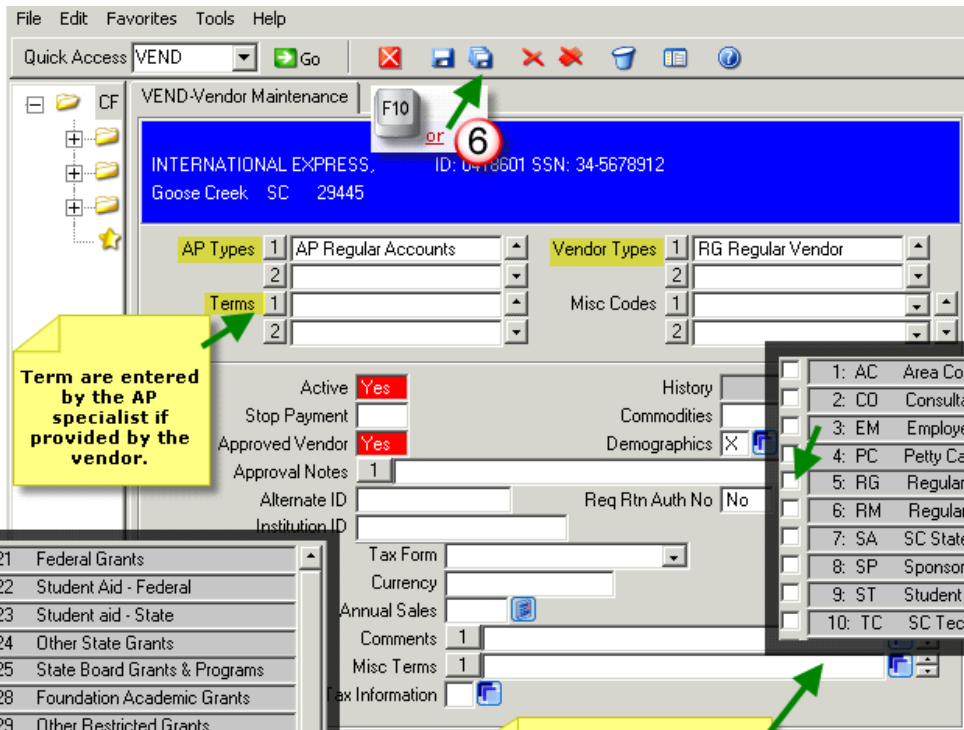
**Update AND continue working with this screen**

 = 

**Save AND close this screen**

**TIP . TIP . TIP . TIP . TIP . TIP TIP . TIP**

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**Term are entered by the AP specialist if provided by the vendor.**

**AP TYPES**

- 1: 0021 Federal Grants
- 2: 0022 Student Aid - Federal
- 3: 0023 Student aid - State
- 4: 0024 Other State Grants
- 5: 0025 State Board Grants & Programs
- 6: 0028 Foundation Academic Grants
- 7: 0029 Other Restricted Grants
- 8: 0051 Unexpended Plant
- 9: 0052 Investment-in-Plant
- 10: 0053 Retirement-of-Indebtedness
- 11: 0060 Agency Funds
- 12: 0070 Enterprise Campus Authority
- 13: AP Regular Accounts Payable
- 14: FA Datatel Financial Aid Refunds
- 15: HR Payroll DED/BED Vouchers
- 16: SP Sponsor Refunds
- 17: ST Datatel Student Refunds

**VENDOR TYPES**

- 1: AC Area Commission
- 2: CO Consultant
- 3: EM Employee
- 4: PC Petty Cash
- 5: RG Regular Vendor
- 6: RM Regular Minority
- 7: SA SC State Agency
- 8: SP Sponsor
- 9: ST Student
- 10: TC SC Technical

To produce the complete list of **AP TYPES** or **VENDOR TYPES**

*type . . .*

in the position 1 blank text field and *click* the **ENTER** key.