

## Before You Begin –

Please have the vendor complete a W-9 and fax it to Purchasing at 903-590-4011. A W-9 is available at <http://www.irs.gov/pub/irs-fill/fw9.pdf> or you can find a link on the Financial Services Department website, under Accounting Forms. You do not have to get a W-9 from an employee.

## New Vendor Request

To create a new vendor request, select menu option *New Vendor Request Entry* (XPUR.381) from your menu and press **Enter**. On the screen that displays, type **A** at the action bar and press **Enter**. Type in vendor name and press **Enter**.

6/20/02	FY 02	TYLER INDEPENDENT SCHOOL DISTRICT	10:23:01	TAYLORDB1
TXCUSTOM		New Vendor Request Entry		Ref: XPUR.381.01

  

<u>A</u>	Record Number: _____
Add	
Change	
Delete	
Lookup	
Index	Index: <u>1</u>
End	1 = Vendor By Name:
	2 = Vendor By Record Number.
	3 = Vendor By Category:
	4 = Vendor By Short Name:
	5 = Vendor By Zip/Addr:

  

Auto Next Record? N

On the screen that displays, complete all the required fields and press **Enter**. On the sample screen, the required fields are marked with an asterisk at the end of the field. Please provide an accurate zip code and phone as well.

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6/20/02  FY 02          TYLER INDEPENDENT SCHOOL DISTRICT      10:30:52 TAYLORDB1
TXCUSTOM                New Vendor Request Entry              Ref: XPUR.381.11
Record Number:          3                      Related to vendor group: _____

Name: _____ *
Attention: _____
Address: _____ *
City: _____ *
State:  ___ * Zip: 00000 0000
Province: _____ P/C: _____
Telephone: ( ___ ) _____ Ext: _____
Fax Phone: ( ___ ) _____
Vendor's Usual Terms:
Cash discount:  .0000 %
Trade discount:  .0000 %
Minimum order $ _____
Hold new orders?  N
Hold payments?   N
Maximum payable without P/O: _____
Payment priority: 5 (9 = Highest)
Liability account keyword: PAYABLE
Mode: Add

Shipping terms: _____
Payment terms:  _____
Recipient Number: _____
Open orders:
Unpaid invoices:
Volume this year:
Volume last year:
Box Number if 1099 Vendor:
1099 Volume:

F3=Exit F4=Index F5=Reset F12=Cancel Cancel? N

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If this new vendor happens to be an employee (and you are entering him/her only for the purpose of reimbursement, not any payment for services), you will get a message informing you that the person is an employee. Just press **Enter** again.

On the next screen, please enter a description of the purchases we'll be making from this vendor.

7/12/02	FY 02	TYLER INDEPENDENT SCHOOL DISTRICT	08:47:47	YORKRA1
TXCUSTOM		New Vendor Request Entry		Ref: XPUR.381.12
Record Number:		3 Sample New Vendor		
Short Vendor Name:				
1099 Vendor Name:				
Comments:	<u>PAYMENTS FOR SUPPLIES</u>			
	_____			
	_____			
	_____			
	_____			
	_____			
	_____			
<b>Category Codes:</b>				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
Mode: Add	F3=Exit F4=Index F5=Reset F12=Cancel Cancel? N			

Once your vendor request has been processed by the purchasing department, it will disappear from your list of vendor requests. **Note well:** you cannot work with vendor requests created by other staff.

Some general guidelines:

- Before you request a new vendor, please research it first to ensure that the vendor does not already exist.
- If entering an individual, put his/her last name first
- Do not use commas or periods
- When required, enter the Social Security number in this format:

**XXX-XX-XXXX**

- On comments, enter reason for new vendor
- Do not enter in any other fields.