


Vendor Addition and Update Forms

Slide 1



Vendor Addition and Update Forms

Slide 2



Learning Objectives

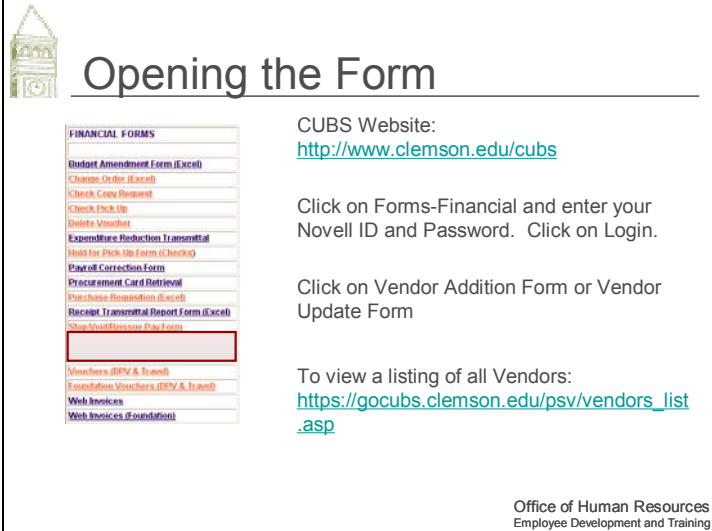
- How to open the Vendor Addition and Update forms
- How to complete the Addition form
- How to complete the Update form

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This course will cover both the Vendor Addition and Update Forms. Topics that we will cover is how to open, complete, and submit the forms.

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Opening the Form

CUBS Website:
<http://www.clemson.edu/cubs>

Click on Forms-Financial and enter your Novell ID and Password. Click on Login.

Click on Vendor Addition Form or Vendor Update Form

To view a listing of all Vendors:
https://gocubs.clemson.edu/psv/vendors_list.asp

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The screenshot shows a list of financial forms under the heading 'FINANCIAL FORMS'. The forms listed are: Budget Amendment Form (Excel), Change Order (Excel), Check Copy Request, Check Print, Delete Vendor, Expenditure Reduction Transmittal, Hold for Pick-Up Form (Check), Payroll Correction Form, Procurement Card Retrieval, Purchase Requisition (Excel), Recent Transmittal Report Form (Excel), Stop/Start/Pause Pay Form, Vouchers (DPV & Travel), Foundation Vouchers (DPV & Travel), Web Invoices, and Web Invoices (Foundation). The 'Vendor Addition Form' link is highlighted with a red box.

To open either of these forms, go to the CUBS website at the URL shown on your screen, then click on Forms – Financial.

Enter your Novell ID and Password. Click on Login.

Click on the Vendor Addition form if you want to enter new vendors in the system.

Click on Vendor Update form if you want to update a vendor in the system.

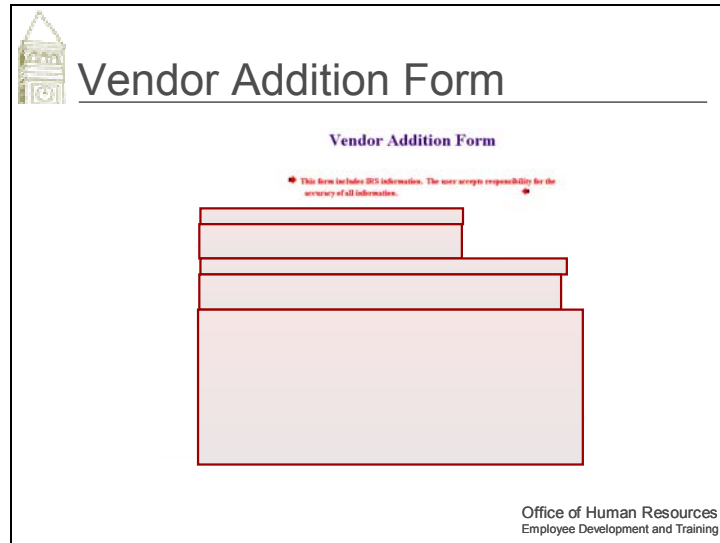
A process runs nightly to update the vendor file. Any vendors added or updated require 24 hours to appear in the system.

To view a listing of all Vendors:

https://gocubs.clemson.edu/psv/vendors_list.asp

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The image shows a template for a "Vendor Addition Form". At the top left is a small icon of a building. To its right is the title "Vendor Addition Form" in a large, bold font. Below the title is a horizontal line. Underneath the line, the text "Vendor Addition Form" is repeated in a smaller font. Below this is a red asterisk followed by the text: "This form includes 2015 information. The user accepts responsibility for the accuracy of all information." Below this text are four rectangular input fields of varying widths, stacked vertically. The bottom-most field is the largest. In the bottom right corner of the form area, the text "Office of Human Resources" and "Employee Development and Training" is displayed.

On the Vendor Addition Form,

Enter the vendor's name.

Select the vendor's payment terms. If the terms are not an option, enter them in the "Other" field.

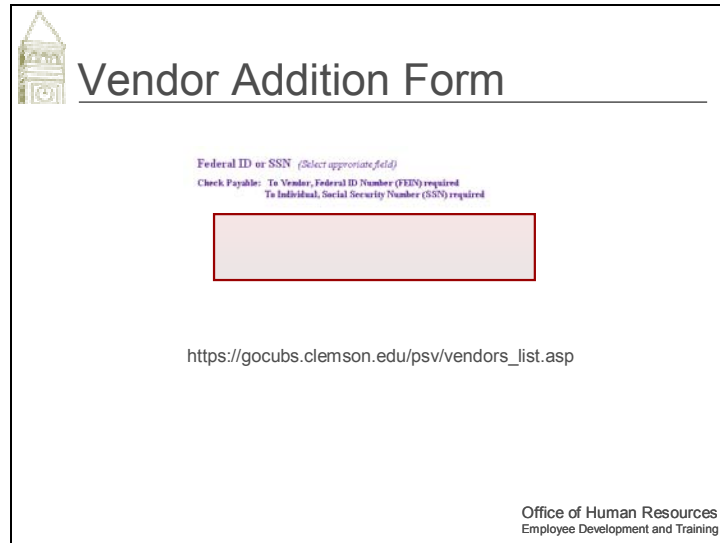
Select the appropriate Payment Handling Code.

Enter an item description for this vendor. If other, enter a description in the "Other" field.

Select if the vendor is a 1099 reporting entity and a description code for their business.

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The slide contains the following text and elements:

- Vendor Addition Form** (Title)
- Federal ID or SSN** (Select appropriate field)
- Check Payable:** To Vendor, Federal ID Number (FEIN) required
To Individual, Social Security Number (SSN) required
- A red rectangular box representing a required input field.
- https://gocubs.clemson.edu/psv/vendors_list.asp
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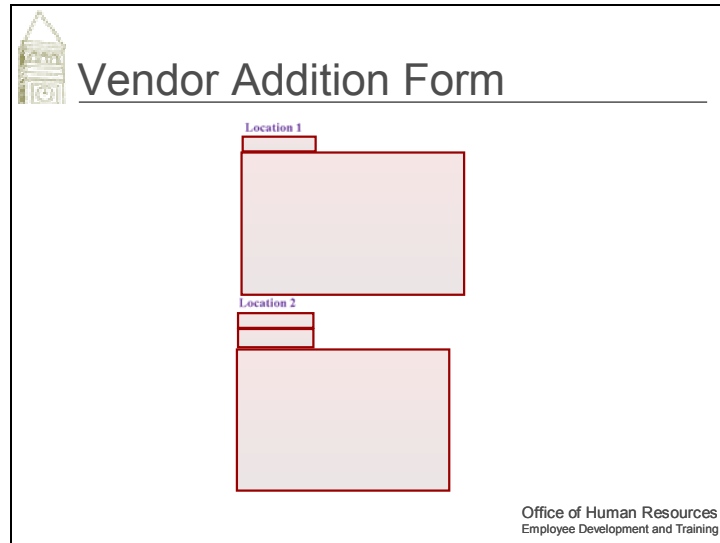
If the vendor is a 1099 reporting entity, enter their Federal ID number (FEIN) or Social Security number (SSN).

**For a listing of vendors, go to:

https://gocubs.clemson.edu/psv/vendors_list.asp

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The image shows a slide titled "Vendor Addition Form" with a small icon of a building on the left. The form itself is a large rectangle with a red border. It contains two sections, "Location 1" and "Location 2", each with a small red box above a larger red box. In the bottom right corner of the form, it says "Office of Human Resources" and "Employee Development and Training".

Check the Remitting box if applicable.

Enter the Vendor's Remitting Address and information.

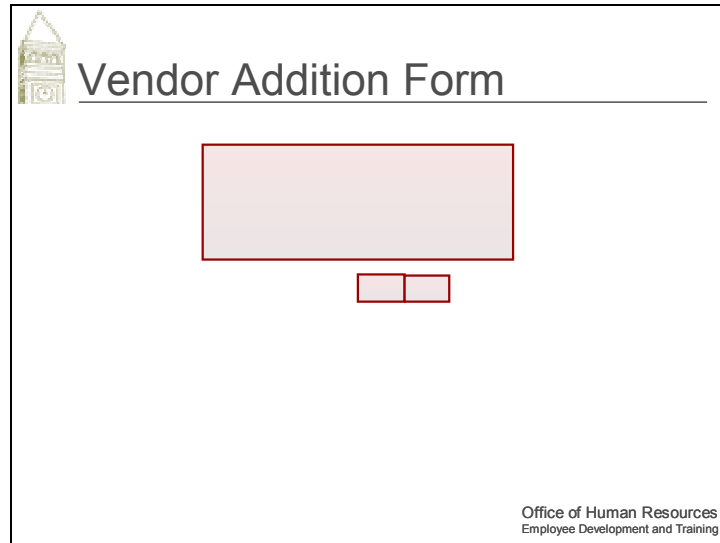
Check the Ordering box if applicable.

Or check this box if the Ordering address is the same as the Remitting address.

Enter the Vendor's Ordering Address and information.

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The screenshot shows a web form titled "Vendor Addition Form" with a small icon of a building to the left of the title. Below the title is a large, empty rectangular input field. Underneath this field are two smaller, side-by-side rectangular buttons, likely labeled "Submit" and "Reset". In the bottom right corner of the form area, there is text that reads "Office of Human Resources" and "Employee Development and Training" below it.

Enter the name of the person making the request, their phone number and e-mail address.


Click Submit to submit the Vendor Addition request to the appropriate person.

Click Reset to clear the form to be blank.

Remember that it will take 24 hours before you will be able to view any additions in CUBS.

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 **Vendor Update Form**

Vendor Update Form

This form includes IRS information. The user accepts responsibility for the accuracy of all information.

All vendors must have a valid mailing address. Vendor checks will not be mailed to campus addresses.

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For the Vendor Update Form,

Select the vendor type.

Enter the vendor's name.

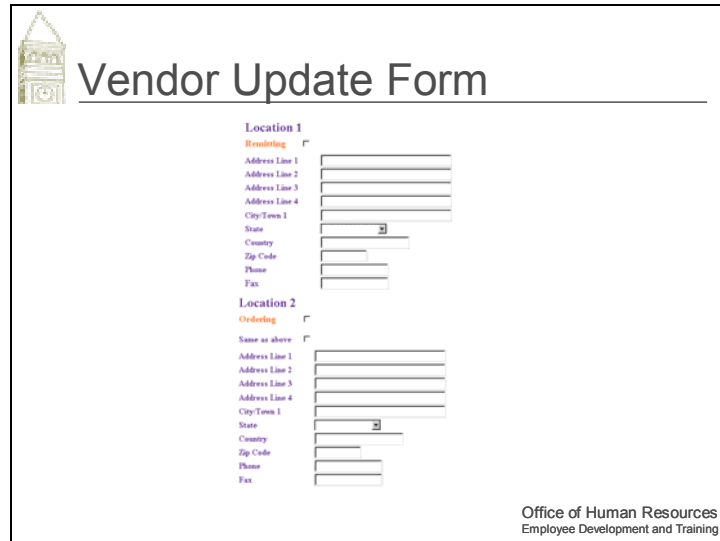
Enter the 10 digit vendor number.

Select the vendor's payment terms. If the terms are not an option, enter them in the "Other" field.

Enter an item description for this vendor. If other, enter a description in the "Other" field.

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The image shows a 'Vendor Update Form' with a header featuring a small building icon and the title 'Vendor Update Form'. The form is divided into two sections: 'Location 1' and 'Location 2'. Each section has a 'Resulting' checkbox. Below each section are fields for 'Address Line 1' through 'Address Line 4', 'City/Town 1', 'State', 'Country', 'Zip Code', 'Phone', and 'Fax'. The 'State' field in both sections has a dropdown arrow. In the bottom right corner, the text reads 'Office of Human Resources Employee Development and Training'.

From this point on, only enter any updates that need to be made.

If changes to the address need to be made, enter the appropriate updates to the mailing addresses here.

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Vendor Update Form

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Enter the name of the person making this request to update this vendor's information.


Enter this person's telephone number.

Enter this person's e-mail address.

Click on the Submit button to submit this request to Procurement Services.


Click on the Reset button to clear the screen.

Remember that it will take 24 hours before you will be able to view any updates in CUBS.



Conclusion

The concludes the training session.



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