

Chapter 2

Reviewing Vendor Information

This chapter explains how to search for vendor information.

Chapter Objectives

After completing this chapter you will be able to:

- Perform vendor searches.

Chapter Lessons

This chapter contains the following lessons:

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Lesson 1:

Vendor Overview

PeopleSoft Vendor tables are designed to efficiently manage vendor information that is shared across all PeopleSoft applications, especially Purchasing and Accounts Payable.

A vendor is a company or a person from whom the business unit purchases goods or services. Since vendors are a part of the PeopleSoft Financials control hierarchy, processing rules can be set up at this level, including:

- Numerous payment options
- Matching and approval options for vouchers
- 1099 and 1042 reporting rules

Allowing processing defaults to be set at this level increases flexibility while still maintaining a level of control and standardization within a vendor.

Vendor Forms

If you cannot locate a vendor in the PeopleSoft FMS vendor table, you may submit a request to add a new vendor. The Vendor Code Electronic Request Forms for employees, consultants, and students, and suppliers can be found at:

<http://is.uth.tmc.edu/css/forms/vendpurc.html>

Links to these forms can also be found through the:

- Procurement Services website: <http://buy.uth.tmc.edu/forms/>
- Financial Administrative Support Team (FAST) website: <http://financialresources.hsc.uth.tmc.edu/fast/webpages/forms.htm>



Be sure to check the PeopleSoft Vendor table to see if a Vendor ID has already been established prior to submitting a request to add a vendor.

SetID

Vendors are used to process transactions with external entities as well as transactions between UT-Houston departments. In order to establish different processing rules for internal versus external transactions, different SetIDs were established. Each SetID has a one-to-one relationship with a business unit.

The following table lists the Accounts Payable (AP) and Purchasing (PO) business units and related SetIDs:

AP / PO Business Unit	Vendor SetID	Description
UTHSC	UTH	All external suppliers, employees and students who receive financial aid payments, contractors and HRMS payees are setup as vendors under the UTH SetID and processed under the UTHSC AP and PO business units. Vendors with this SetID are used when a payment (i.e., check or EFT) is to be processed.
UTINT	INT	All internal service departments are setup as vendors under the INT SetID and processed under the UTINT AP and PO business units. Vendors with this SetID are used on transactions that transfer funds between UTHSC-H departments.

Effective Dates

An effective date is the date that indicates when date-sensitive information becomes active in the application. It allows you to keep historical, current, and future information. It acts as an audit trail for historical information and as a management tool by allowing you to enter information for future changes.

A vendor's addresses, locations, government sources/classifications (HUB identifiers), contacts and withholding information can be associated with transactions on or after their effective dates. For example, a vendor may have an address that is effective 01/01/1990, making it available for today's transactions. The same vendor may have another address that is effective 01/01/2006. That address could not be used until that effective date.

All vendor information converted from The University Financial Information Management System (TUFIMS) was given an effective date of 01/01/1990.

Vendor ID

The Vendor ID is a 10-digit auto-generated sequential number. It is unique within a setID. For example, UTH and INT SetIDs both have a Vendor ID *0000000009*, but they are not the same vendor. **Both SetID and Vendor ID are required to uniquely identify a vendor on a transaction and in reporting.**

Using the % Wildcard

Wildcards allow you to conduct a broad search of many different vendor information combinations. You can use “%” as a wildcard in many of the search fields. Use % before a character or word to return all vendors whose names contain the character or word entered. For example, if you are performing an inquiry and want to search for a consultant type of vendor with the letter “n” in their name, you enter “%n” in the name field and select consultant in the type field. Unless you enter a wildcard, the system assumes you want an exact match.

Vendor Name

Vendor name is comprised of two 30-character fields – **Name 1** and **Name 2**. The UT-Houston standard is to use these fields to capture the vendor’s full legal name. Both Name 1 and Name 2 are printed on checks and remittance advice.

Short Vendor Name

The Short Vendor Name is a 10-character abbreviated version of the vendor’s name. This field is entered manually and appears on many PeopleSoft pages and reports. UT-Houston has developed the following naming conventions:

- For vendors that are individuals (such as employees, students, consultants and patients), short name should consist of last name, underscore (_) and first name. If the last name is more than eight (8) characters long, only the first eight (8) letter will be used and the first initial. For example, the Vendor Short Name for James T. Willerson would be WILLERSO_J.
- For companies or organizations, short name is the first few characters of the first word, underscore (_), then the first few characters of the second word, etc., or a name by which the vendor is commonly known.

PeopleSoft adds a hyphen and a three-digit sequence number to the Vendor Short Name field to create a **unique Short Vendor Name** field, such as WILLERSO_J-001. The Short Vendor Name field is available on several vendor search pages.

Vendor Classifications

PeopleSoft vendor IDs and vendor classifications are completely separate fields. The vendor classifications are:

- Attorney (delivered value, not used at UTHSC-H)
- Consultant
- Department
- Employee
- HRMS
- Patient
- Petty Cash Custodian
- Student
- Supplier or Outside Party

For future reference, the classification table is located on the Procurement website.

Vendor Address

PeopleSoft provides a Vendor Address page to store multiple addresses for one Vendor ID. This capability eliminates the need for setting up multiple IDs to capture multiple addresses for the same vendor.

Every vendor has to have at least one address. There is virtually no limit on the number of addresses that a vendor may have.



The remittance address on a voucher must correspond to the “Remit To” address on the vendor’s invoice to ensure correct delivery of the payment.



If the vendor location is not listed, contact Vendor Administration so that they can add the alternative address before you create your voucher.

Vendor Location

The Vendor Location page specifies default addresses from the Address Page for certain kinds of transactions such as ordering, returning merchandise, invoicing, remitting, and so on. Location codes can also be used for different banking, matching, and payment or procurement options within the same vendor.

This capability has been used to set up special processing rules for:

- UTHSC-H bookstores
- School of Public Health (SPH) clinical studies, and
- USAS direct payments.

Every vendor has to have at least one location. Although there is virtually no limit to the number of locations that a vendor may have, the vast majority will have only one.



Be very attentive when selecting a vendor location and address for use on a voucher. Be certain that you have selected the address to which payment should be remitted and that the location is the appropriate one for the way the transaction should be processed.

Procedure – Looking Up Vendor Information



To help you understand the vendor concepts in this lesson, look up a vendor in the component where the vendor data is entered and maintained:

1. From the left-hand navigation, select **Vendors**.

The Vendor Main Menu appears.



2. Select the **Vendor Information** folder.
3. Select the **Add/Update** folder.
4. Select **Vendor**.

The Vendor Information – Find an Existing Value page appears.

Vendor Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

SetID: = UTH

Vendor ID: begins with

Persistence: =

Short Vendor Name: begins with

Our Customer Number: begins with


Name 1: begins with

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

5. In the **SetID** field, select UTH to search for an external vendor or INT to search for an internal vendor.
6. Enter search criteria in the **Short Vendor Name** or **Name 1** field.
7. Click **Search**.



Where available, change the **Equals To** boolean option to **Contains** for a broader search.

The Vendor Information page displays Search Results that match the specified criteria.

Vendor Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

SetID: = UTH

Vendor ID: begins with

Persistence: =

Short Vendor Name: begins with

Our Customer Number: begins with

Name 1: begins with papp

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results
View All First 1-3 of 3 Last

SetID	Vendor ID	Short Vendor Name	Our Customer Number	Name 1	Persistence
UTH	0000026125	PAPPADEAUX-001	(blank)	PAPPADEAUX SEAFOOD KITCHEN	Regular
UTH	0000020540	PAPP_CATER-001	(blank)	PAPPAS CATERING	Regular
UTH	0000034476	PAPPASITOS-001	(blank)	PAPPASITOS CANTINA	Regular

[Find an Existing Value](#) | [Add a New Value](#)

8. Click on a search results row to view the vendor information.

The Summary page appears.

Summary	Identifying Information	Address	Contacts	Location	UT Gvrmt Classifications
SetID:	UTH				
Vendor ID:	0000020540				
Vendor Short Name:	PAPP_CATER	PAPP_CATER-001			
Vendor Name:	PAPPAS CATERING				
Order:	PAPP_CATER-001	Remit To:	PAPP_CATER-001		
	2525 S. LOOP WEST		2525 S. LOOP WEST		
	HOUSTON, TX 77054		HOUSTON, TX 77054		
Status:	Approved	Last Modified By:	CWILLIAMS8		
Persistence:	Regular	Last modified date:			
Classification:	Supplier	Created By:			
HCM Class:		Created Datetime:			
Open for Ordering:	Yes	Last Activity Date:	04/22/2005		
Withholding:	No				
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Next in List"/> <input type="button" value="Previous in List"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/>					
Summary Identifying Information Address Contacts Location UT Gvrmt Classifications					

9. Review the data on the Summary page (Vendor ID, Vendor Short Name, Vendor Name, default Order/Remit To addresses, Status, Classification, etc.).
10. Click the **Identifying Information** tab.

The Identifying Information page appears.

Summary	Identifying Information	Address	Contacts	Location	UT Gvrmt Classifications
SetID:	UTH	<input type="button" value="Check for Duplicate"/>			
Vendor ID:	0000020540				
*Vendor Short Name:	PAPP_CATER	PAPP_CATER-001			
*Vendor Name 1:	PAPPAS CATERING				
Vendor Name 2:					
*Status:	Approved	*Classification:	Supplier		
*Persistence:	Regular	HCM Class:			
<input type="checkbox"/> Withholding					<input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>
<input checked="" type="checkbox"/> Open For Ordering					
Vendor Relationships					
<input type="checkbox"/> Corporate Vendor	<input type="checkbox"/> InterUnit Vendor				
Corporate Vendor ID:	<input type="text"/>	InterUnit Vendor ID:	<input type="text"/>		
<input type="button" value="Expand All"/> <input type="button" value="Collapse All"/>					
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Next in List"/> <input type="button" value="Previous in List"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/>					
Summary Identifying Information Address Contacts Location UT Gvrmt Classifications					

11. Review the data on the Identifying Information page (Vendor ID, Vendor Short Name, Vendor Name 1, Vendor Name 2, Status, Classification, etc.).
12. Click the **Address** tab to see the physical addresses stored for the Vendor.

The Address page appears.

13. Click the **Location** tab to view how the addresses are being used.

The Location page appears with at least one Location Code row.

14. Click the [Payables](#) hyperlink.

The Payables Options page appears.

Payables Options			
SetID:	UTH	Location:	MAIN
Vendor ID:	0000020540	Description:	MAIN
Short Vendor Name:	PAPP_CATER-001		
Name 1:	PAPPAS CATERING	Expand All	Collapse All
Invoicing			
Vendor:	0000020540	PAPP_CATER-001	
Address:	<input type="text" value="9"/>	HOUSTON - 2525 S. LOOP WEST 2525 S. LOOP WEST HOUSTON, TX 77054	
Location:	MAIN	MAIN	
Remitting			
Vendor:	<input type="text" value="0000020540"/>	PAPP_CATER-001	
Address:	<input type="text" value="9"/>	HOUSTON - 2525 S. LOOP WEST 2525 S. LOOP WEST HOUSTON, TX 77054	
Location:	<input type="text" value="MAIN"/>	MAIN	
Additional Payables Options			
Matching/Approval Options			
EFT Options			
Self-Billed Invoice Options			
Vendor Bank Account Options			
Vendor Type Options			
HIPAA Information			
Expand All		Collapse All	


15. Click [OK](#).

The Location page reappears.

16. Click the [Procurement](#) hyperlink.

The Procurement Options page appears.

Procurement Options			
SetID:	UTH	Location:	MAIN
Vendor ID:	0000020540	Description:	MAIN
Short Vendor Name:	PAPP_CATER-001		
Name 1:	PAPPAS CATERING	Expand All	Collapse All
Ordering			
Vendor:	0000020540	PAPPAS CATERING	
Address:	<input type="text" value="9"/>	HOUSTON - 2525 S. LOOP WEST 2525 S. LOOP WEST HOUSTON, TX 77054	
Location:	MAIN	MAIN	
Pricing			
Vendor:	0000020540	PAPPAS CATERING	
Location:	<input type="text" value="MAIN"/>	MAIN	
Returning			
Vendor:	<input type="text" value="0000020540"/>	PAPPAS CATERING	
Address:	<input type="text" value="9"/>	HOUSTON - 2525 S. LOOP WEST 2525 S. LOOP WEST HOUSTON, TX 77054	
Location:	MAIN	MAIN	
Ship From			
Vendor:	0000020540	PAPPAS CATERING	
Address:	<input type="text" value="1"/>	HOUSTON - BOX 36620	

17. Click .
The Location page reappears.

Lesson 2: Searching for Vendors

The most important part of creating an Accounts Payable voucher is to ensure that you are paying the correct vendor. Several search options are available to look-up a vendor.

Using the Review Vendors Page

If you want to search for a vendor **prior** to creating a voucher, use the Review Vendors search page.

The Review Vendors page can be located by following this navigation:



Vendors ➔ **Vendor Information** ➔ **Add/Update** ➔ **Review Vendors**



This is the Review Vendors page:

Review Vendors

Search Criteria

'SetID: <input type="text" value="UTH"/> <input type="button" value="🔍"/> Name: <input type="text" value="Equal to"/> <input type="button" value="🔍"/> Withholding Name: <input type="text" value="Equal to"/> <input type="button" value="🔍"/> Vendor Status: <input type="text"/> <input type="button" value="🔍"/>	Vendor ID: <input type="text"/> <input type="button" value="🔍"/> ShortName: <input type="text" value="Equal to"/> <input type="button" value="🔍"/> Classification: <input type="text"/> <input type="button" value="🔍"/> Type: <input type="text"/> <input type="button" value="🔍"/> Persistence: <input type="text"/> <input type="button" value="🔍"/>
Address: <input type="text" value="Equal to"/> <input type="button" value="🔍"/> Customer Number: <input type="text"/> ID Type: <input type="text" value="Tax ID"/> <input type="button" value="🔍"/> VAT Registration ID: <input type="text"/> Withholding Tax ID: <input type="text"/>	City: <input type="text"/> Country: <input type="text"/> <input type="button" value="🔍"/> State: <input type="text"/> <input type="button" value="🔍"/> Postal: <input type="text"/> Bank Account #: <input type="text"/>

Search Results

Customize | Find | View All
First 1 of 1 Last

SetID	Vendor ID	Name 1	ShortName	Address	City	State	Country
UTH							

These are the fields on the Review Vendors page:

Field	Description/Function
Search Criteria Group Box	
SetID	SetID associated with the vendor. UTH for external vendors and INT for internal vendors. Defaults to UTH.
Vendor ID	System-generated 10-digit identifier.

Field	Description/Function
Name	Name 1 field from the vendor table. Full/legal name of the vendor.
ShortName	Vendor's ShortName (10-characters-###).
Withholding Name	Vendor name used for withholding data, if applicable. Do Not Use.
Classification	Vendor classification code (Consultant, Department, Employee, Student, Supplier, etc.)
Vendor Status	Vendor's status (Approved, Inactive, To Archive, Unapproved).
Type	Do Not Use.
Persistence	Displays the regularity of usage (One Time, Permanent, Regular, and Single Payment). Do Not Use.
Address	First line of vendors' address.
City	City portion of the vendor's address.
Customer Number	Customer ID if the vendor is also a billing customer of the university.
Country	Country Code portion of the vendor's address.
ID Type / Value	Vendor ID Type, such as Tax ID, Department ID, or EmplID and the corresponding value.
State	State Code portion of the vendor's address.
VAT Registration ID	Vendor's Value Added Tax (VAT) registration ID, if applicable. Do Not Use.
Postal	Postal Code portion of the vendor's address.
Withholding Tax ID	Vendor's Withholding Tax ID, if applicable.
Bank Account	Do Not Use.
Search Results group box	
Main Information Tab	Displays SetID, Vendor ID, Name 1, ShortName, Address, City, State, Country values.
Additional Vendor Information Tab	Displays Status, Classification, Persistence, AR Number, Withholding, Wthld Name, VAT Vendor, and Open for Ordering values.
Audit Information Tab	Displays Last Activity Date, Last Modified By, Last modified date, Created By, Created Datetime values.

Procedure – Using the Review Vendors Page

Use the following steps to search for a vendor using the Review Vendors page.



To search for a vendor:

1. From the left-hand navigation, select **Vendors**.

The Vendors Main Menu appears.

2. Select the **Vendor Information** folder.

3. Select the **Add/Update** folder.

4. Select **Review Vendors**.

The Review Vendors page appears.

SetID	Vendor ID	Name	ShortName	Address	City	State	Country
UTH							

5. In the **SetID** field, select UTH to search for an external vendor or INT to search for an internal vendor.

6. Enter any other know search criteria, such as:

- Name or ShortName
- Classification
- Address
- City



Where available, change the **Equals To** boolean option to **Contains** for a broader search.

- Click **Search**.

The Review Vendors page displays Search Results that match the specified criteria.

The screenshot shows the 'Review Vendors' interface. The 'Search Criteria' section includes fields for SetID (UTH), Name (Contains papp), Withholding Name (Equal to), Vendor Status, Vendor ID, ShortName (Equal to), Classification, Type, Persistence, Address, City, Customer Number, Country, ID Type (Tax ID), State, VAT Registration ID, Postal, and Withholding Tax ID. A red circle highlights the 'Search Results' section, which contains a table with the following data:

SetID	Vendor ID	Name 1	ShortName	Address	City	State	Country	Status	Classification	Persistence	Alt Number	W
UTH	0000020540	PAPPAS CATERING	PAPP_CATER-001	P O BOX 36620	HOUSTON TX	USA	Approved	Supplier	Regular			
UTH	0000020540	PAPPAS CATERING	PAPP_CATER-001	HOUSTON DINING & DELIVERY	HOUSTON TX	USA	Approved	Supplier	Regular			
UTH	0000020540	PAPPAS CATERING	PAPP_CATER-001	5378 RICHMOND AVENUE	HOUSTON TX	USA	Approved	Supplier	Regular			
UTH	0000020540	PAPPAS CATERING	PAPP_CATER-001	2536 RICHMOND AVE	HOUSTON TX	USA	Approved	Supplier	Regular			

- In the Search Results group box, use Main, Additional Vendor, and Audit Information tabs as needed or click to show all columns.

Using the Voucher – Add a New Value Page

If you want to search for a vendor **as you create a new voucher**, use the Voucher – Add a New Value Page.

The Voucher – Add a New Value page can be located by following this navigation:



Accounts Payable ➔ Vouchers ➔ Add/Update ➔ Regular Entry

This is the Voucher – Add a New Value Page

Voucher

Business Unit:

Voucher Style:

Short Vendor Name:

Vendor ID:

Vendor Location:

Address Sequence Number:

Invoice Number:


Invoice Date:

Gross Invoice Amount:

Estimated No. of Invoice Lines:

[Find an Existing Value](#) | [Add a New Value](#)

Look Up Short Vendor Name Page

From the Voucher – Add a New Value page, click  by the Short Vendor Name field and the Look Up Short Vendor Name page appears.

This is the Look Up Short Vendor Name page:

Look Up Short Vendor Name

SetID: UTH

Short Vendor Name:

Name 1:

Vendor ID:

Classification:



Persistence:

[Basic Lookup](#)


Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

Short Vendor Name	Name 1	Vendor ID	Classification	Persistence
10K WIZARD-001	10-K WIZARD TECHNOLOGY	0000035021	Supplier	Regular
123CCTV-001	123CCTV	0000028001	Supplier	Regular
1800CONFER-001	1-800-CONFERENCE	0000029781	Supplier	Regular

These are the fields on the Look Up Short Vendor Name page:

Field	Description
SetID	SetID associated with the Vendor ID. Defaults based on the Business Unit selected on the Voucher – Add a New Value page.
Short Vendor Name	Vendor’s ShortName (10-characters-###).
Name 1	Name 1 field from the vendor table. Full/legal name of the vendor.
Vendor ID	System-generated 10-digit identifier.
Classification	Vendor classification code (Consultant, Department, Employee, Student, Supplier, etc.)
 Persistence	Displays the regularity of usage (One Time, Permanent, Regular, Single Payment). Do Not Use.
<input type="text" value="begins with"/> 	Boolean search options (begins with, contains, =, no=, <. <=, >. >=)
<input type="button" value="Look Up"/>	Initiates the search based on the criteria entered.
<input type="button" value="Clear"/>	Clears values from all search fields.
<input type="button" value="Cancel"/>	Cancel the search and returns to the Voucher – Add a New Value page.
Basic Lookup	Switch from advanced lookup page to the basic lookup page with one search field. Do Not Use.

Look Up Vendor ID Page

From the Voucher – Add a New Value page, click  by the Vendor ID field and the Look Up Vendor ID page appears.

This is the Look up Vendor ID page:

Look Up Vendor ID

SetID: UTH

Vendor ID:

Short Vendor Name:

Name 1:

Classification: =

Persistence: =

[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) First Last

Vendor ID	Short Vendor Name	Name 1	Classification	Persistence
0000000001	COUNC_PUBL-001	COUNCIL PUBLIC UNIV PRESIDENTS	Supplier	Regular
0000000002	AARON_ASHL-001	ASHLEY AARON	Consultant	Regular
0000000003	ABADEER_RA-001	RAMIA ABADEER	Consultant	Regular

The Look Up Vendor ID page has the same search fields (but in a different order) as the Look Up Short Vendor Name page.

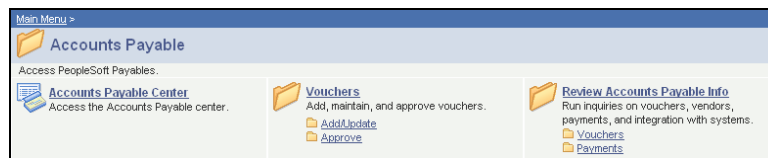
Procedure – Using the Vendor Look Up Pages



To search for a vendor using the look up pages:


1. From the left-hand navigation, select **Accounts Payable**.

The Accounts Payable Main Menu appears.



2. Select the **Vouchers** folder.
3. Select the **Add/Update** folder.
4. Select **Regular Entry**.

The Voucher – Add a New Value page appears.

5. Accept **UTHSC** in the Business Unit field to search for an external vendor or change to UTINT to search for an internal vendor.
6. Accept **Regular Voucher** in the Voucher Style field.
7. Click  for the **Short Vendor Name** field or the **Vendor ID** field.

The Look Up Short Vendor Name page appears.

Look Up Short Vendor Name

SetID: UTH

Short Vendor Name: begins with

Name 1: begins with

Vendor ID: begins with

Classification: =

Persistence: =

Look Up Clear Cancel Basic Lookup

Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

Short Vendor Name	Name 1	Vendor ID	Classification	Persistence
10K WIZARD-001	10-K WIZARD TECHNOLOGY	0000035021	Supplier	Regular
123CCTV-001	123CCTV	0000028001	Supplier	Regular
1800CONFER-001	1-800-CONFERENCE	0000029781	Supplier	Regular

Or the Look Up Vendor ID page appears.

Look Up Vendor ID

SetID: UTH

Vendor ID: begins with

Short Vendor Name: begins with

Name 1: begins with

Classification: =

Persistence: =

Look Up Clear Cancel Basic Lookup

Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

Vendor ID	Short Vendor Name	Name 1	Classification	Persistence
0000000001	COUNC_PUBL-001	COUNCIL PUBLIC UNIV PRESIDENTS	Supplier	Regular
0000000002	AARON_ASHL-001	ASHLEY AARON	Consultant	Regular
0000000003	ABADEER_RA-001	RAMIA ABADEER	Consultant	Regular



You can use the % wildcard to help you search. For example, enter Amer%Health in the Name 1 field.

8. Select **contains** from the drop-down list beside the Name 1 field.
9. Enter **all or part of the vendor's name** in the Name 1 field.
10. Select the vendor's Classification from the drop-down list (Consultant, Employee, Supplier, etc.)
11. Click **Look Up**.

The *Look Up* page displays Search Results that match the specified criteria.

Look Up Short Vendor Name

SetID: UTH

Short Vendor Name: begins with

Name 1: begins with

Vendor ID: begins with

Classification: =

Persistence: =

[Basic Lookup](#)

Search Results

View All First 1-3 of 3 Last

Short Vendor Name	Name 1	Vendor ID	Classification	Persistence
PAPPADEAUX-001	PAPPADEAUX SEAFOOD KITCHEN	0000026125	Supplier	Regular
PAPP_CATER-001	PAPPAS CATERING	0000020540	Supplier	Regular
PAPPASITOS-001	PAPPASITOS CANTINA	0000034476	Supplier	Regular

12. Click the desired row in the Search Results.

The *Voucher – Add a New Value* page appears with Short Vendor Name, Vendor ID, and default Vendor Location and Address Sequence Number fields populated.

13. Click  beside the **Vendor Location** field to confirm/change the default value.

The *Look Up Vendor Location* page appears.

Look Up Vendor Location

SetID: UTH

Vendor ID: 0000020540

Vendor Location: begins with

[Basic Lookup](#)

Search Results

View All First 1-2 of 2 Last

Vendor Location	Description
HOUSTON	HOUSTON
MAIN	MAIN

14. Click the desired row in the Search Results.

The *Voucher – Add a New Value* page appears with the selected Vendor Location.

15. Click  beside the **Address Sequence Number** field to confirm/change the default value.

The Look Up Address Sequence Number page appears.

Look Up Address Sequence Number

SetID: UTH
 Vendor ID: 0000020540
 Address Sequence Number: =
 Address Type: =

Look Up Clear Cancel Basic Lookup

Search Results

View All First 19 of 9 Last

Address Sequence Number	Address Type	Description	Address Line 1	City	County	State	Country
1	Business	HOUSTON - BOX 36620	P.O. BOX 36620	HOUSTON	(clark)	TX	USA
2	Business	HOUSTON - BOX 200690	HOUSTON DINING & DELIVERY	HOUSTON	(clark)	TX	USA
3	Business	HOUSTON - 6378 RICHMOND	6378 RICHMOND AVENUE	HOUSTON	(clark)	TX	USA
4	Business	HOUSTON - 2536 RICHMOND	2536 RICHMOND AVE	HOUSTON	(clark)	TX	USA
5	Business	HOUSTON - REMITTANCE PAYMENT	REMITTANCE PAYMENT	HOUSTON	(clark)	TX	USA
6	Business	HOUSTON - 2515 SOUTH LOOP	2515 SOUTH LOOP WEST	HOUSTON	(clark)	TX	USA
7	Business	HOUSTON - 6445 RICHMOND	6445 RICHMOND	HOUSTON	(clark)	TX	USA
8	Business	HOUSTON - 2525 S. LOOP WEST	2525 S. LOOP WEST	HOUSTON	(clark)	TX	USA
10	Business	HOUSTON - P.O. BOX 571749	P.O. BOX 571749	HOUSTON	(clark)	TX	USA

- Click the desired row in the Search Results.

The Voucher – Add a New Value page appears with the selected Address Sequence Number.

Using the Voucher – Invoice Information Page

Another way to search for a vendor **as you create a new voucher** is to use the Voucher – Invoice Information Page.

The Voucher – Invoice Information page can be located by following this navigation:



Accounts Payable ➔ Vouchers ➔ Add/Update ➔ Regular Entry

This is the Invoice Information page:

The Invoice Information page has three vendor search options:

- Vendor field – Look Up Vendor page.
- Name field – Look Up Name page.
- Advanced Vendor Search hyperlink – Vendor Lookup page.

Look Up Vendor Page

This is the Look Up Vendor page:

Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000000001	COUNC_PUBL-001	COUNCIL PUBLIC UNIV PRESIDENTS	(blank)	(blank)	old vanid
0000000002	AARON_ASHL-001	ASHLEY AARON	(blank)	(blank)	CAAR002
0000000003	ABADEER_RA-001	RAMIA ABADEER	(blank)	(blank)	CABAD001
0000000004	ABARCA_LUI-001	LUIS BOZA ABARCA	(blank)	(blank)	CABAR002

Look Up Name Page

This is the Look Up Name page:

Look Up Name

SetID:

Short Vendor Name:

Name 1:

Vendor ID:

Default Location:

[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All First 1-100 of 300 Last

Short Vendor Name	Name 1	Vendor ID	Default Location
10K WIZARD-001	10-K WIZARD TECHNOLOGY	0000035021	MAIN
123CCTV-001	123CCTV	0000028001	W.REMINGTO
1800CONFER-001	1-800-CONFERENCE	0000029781	MAIN

Advanced Vendor Lookup Page

This is the advanced Vendor Lookup page:

Vendor Lookup

Search Criteria

Name:

City:

State: ShortName:

Country: Type:

Postal: Class:

Manage Search Result

[Back to Header](#)

Max Rows

Search Results

Customize | Find | View All | First 1 of 1 Last

Vendor	Address	Name

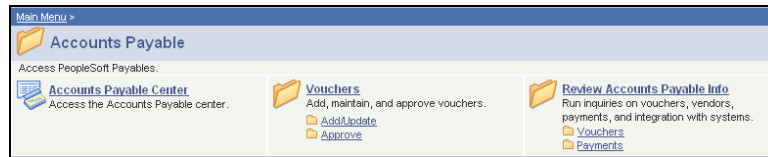
Procedure – Using the Invoice Information Search Options



To search for a vendor using the search options on the Invoice Information page (Look Up Vendor, Look Up Name, Advanced Vendor Search):

1. From the left-hand navigation, select **Accounts Payable**.

The Accounts Payable Main Menu appears.



2. Select the **Vouchers** folder.
3. Select the **Add/Update** folder.
4. Select **Regular Entry**.

The Voucher – Add a New Value page appears.

5. Accept **UTHSC** in the Business Unit field to search for an external vendor or change to UTINT to search for an internal vendor.
6. Accept **Regular Voucher** in the Voucher Style field.
7. Click **Add**.

The Invoice Information page appears.




To search using the Look Up Vendor page:

- Click for the **Vendor** field on the Invoice Information field.

The Look Up Vendor page appears.

Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000000001	COUNC_PUBL-001	COUNCIL PUBLIC UNIV PRESIDENTS	(blank)	(blank)	oldvanid
0000000002	AARON_ASHL-001	ASHLEY AARON	(blank)	(blank)	CAARO002
0000000003	ABADEER_RA-001	RAMIA ABADEER	(blank)	(blank)	CABAD001
0000000004	ABARCA_LUI-001	LUIS BOZA ABARCA	(blank)	(blank)	CABAR002

- Enter search criteria in the **Short Vendor Name** field.
 - Click **Look Up**.
- The Look Up Vendor page displays Search Results that match the specified criteria.
- Click the desired row in the Search Results.
- The Invoice Information page appears with the Vendor ID, Short Vendor Name, and default Vendor Location and Address Sequenc Number fields populated.
- Click beside the **Location** field to confirm/change the default value.

13. Click  beside the **Address** (sequence number) field to confirm/change the default value.



To search using the Look Up Name page:

14. Click  for the **Name** field on the Invoice Information page.

The Look Up Name page appears.

Look Up Name

SetID: UTH

Short Vendor Name:

Name 1:

Vendor ID:

Default Location:

[Basic Lookup](#)

Search Results
Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

Short Vendor Name	Name 1	Vendor ID	Default Location
10K WIZARD-001	10-K WIZARD TECHNOLOGY	0000035021	MAIN
123CCTV-001	123CCTV	0000028001	W.REMINGTO
1800CONFER-001	1-800-CONFERENCE	0000029781	MAIN

15. Enter search criteria in the **Short Vendor Name or Name 1** field.

16. Click .

The Look Up Name page displays Search Results that match the specified criteria.

17. Click the desired row in the Search Results.

The Invoice Information page appears with the Vendor ID, Short Vendor Name, and default Vendor Location and Address Sequenc Number fields populated.

18. Click  beside the **Location** field to confirm/change the default value.


19. Click  beside the **Address** (sequence number) field to confirm/change the default value.



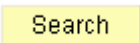
To search using the Advanced Vendor Search page:

20. Click the [Advanced Vendor Search](#) hyperlink on the Invoice Information page.

The Advanced Vendor Lookup page appears.

21. Enter **any know vendor data** in the Search Criteria group box. (Use the % wildcard as needed.)
22. Click  beside the **Class** field.

A page of vendor classification codes appears.

23. Select the appropriate vendor classification code.
24. If needed, adjust the **Max Rows** to retrieve in the Manage Search Results group box.
25. Click .

The Advanced Vendor Lookup page displays Search Results that match the specified criteria.

Vendor Lookup

Search Criteria

Name: %depot
City:
State: ShortName:
Country: USA Type:
Postal: Class: R

Manage Search Result

[Back to Header](#) [Add Vendor](#)

Max Rows
10 Search 1 to 10 of 18

Search Results Customize | Find | View All | First 1-6 of 10 Last

Vendor	Address	Name	Detail
<input checked="" type="checkbox"/> 0000017963		1 HOME DEPOT U S A, INC	Detail
<input checked="" type="checkbox"/> 0000017963		2 HOME DEPOT U S A, INC	Detail
<input checked="" type="checkbox"/> 0000017963		3 HOME DEPOT U S A, INC	Detail
<input checked="" type="checkbox"/> 0000017963		4 HOME DEPOT U S A, INC	Detail
<input checked="" type="checkbox"/> 0000017963		5 HOME DEPOT U S A, INC	Detail
<input checked="" type="checkbox"/> 0000017963		6 HOME DEPOT U S A, INC	Detail

26. Click the [Detail](#) hyperlink on the desired row in the Search Results.

The Vendor Lookup Details page appears.

Vendor Lookup Details

SetID: UTH Vendor ID: 0000017963 [Search](#) [Back to Header](#)

Vendor Detail

ShortName: HOME_DEPOT-001 Status: Approved
Name 1: HOME DEPOT U S A, INC Class: Supplier
Name 2: HR Class:
Address: 001 HOUSTON - 7110 BELLERIVE DRIVE Persistence: Regular
Dist Loc: MAIN MAIN
Corporate Vendor: UTH 0000017963 HOME DEPOT U S A, INC
Remit Vendor: UTH 0000017963 HOME DEPOT U S A, INC
 Open For Ordering Withholding Applicable VAT Applicable

Vendor Types Find | View All | First 1 of 1 Last

27. If needed, click .

The Vendor Address page appears.



You can also click [Search](#) to return to the Advanced Vendor Lookup page or click [Back to Header](#) to cancel the search and return to the Invoice Information page.

Vendor Address



Country: USA United States
Address 1: 7110 BELLERIVE DRIVE
Address 2:
Address 3:
City: HOUSTON
County: Postal: 77074
State: TX Texas

28. Click .

The Vendor Lookup Details page reappears.

29. Click .

The Invoice Information page appears with the Vendor ID, Short Vendor Name, and default Vendor Location and Address Sequence Number fields populated.

30. Click  beside the **Location** field to confirm/change the default value.
31. Click  beside the **Address** (sequence number) field to confirm/change the default value.

Review Questions

1. Where can you go to look up a vendor prior to creating a voucher?
2. What symbol would you use if you were using a wildcard to search for a vendor in PeopleSoft?
3. If you are creating a voucher and don't want to use any of the vendor look up pages, where else can you go to find a vendor?