Request for New Vendor

The Request for New Vendor entry point gives district personnel outside the Purchasing Department the ability to search the Frontline ERP database to check if a company is established as a vendor for the district. If the search does not locate a vendor, the user can submit a request to the Purchasing Department that the vendor be approved and added to the system.

Vendor Search

Use the Request for New Vendor entry point to search the Frontline ERP database to see if a company has been previously established as a vendor for the district. If your search does not locate the vendor, you can submit a request for a new vendor that will be reviewed by the Purchasing Department for approval.

Searching for Vendors

- Access the Request for New Vendor entry point to view the Search tab.

- Enter the Vendor Name.

    - With a *Contains* search, your search results will include any vendor with a name that contains the characters you enter in the field. For example, if you enter "off", your search might return Office Depot, City Office Supplies, and Bob's Coffee Service. With an *Exact* search, your search will only return a vendor with a name that matches your complete entry exactly.

- Click the | Search | button to view the Search Results tab with any matching results.

Working With Search Results

The Search Results tab shows a listing of vendors that matched your criteria. The codes next to each search result indicate which information in the vendor record matched your search. The codes are:

- C: Searched value contained in Company

- V: Searched value contained in Vendor

- R: Searched value contained in Remit To

- A: Search value contained in Account Representative

- O: Search value contained in Order From

Reviewing High-Level Information

To review information about a company, click on vendor name in the Vendor Profile Search Results. Information appears in the Search Results Details panel.

Search Results tab with details for a selected company

If the Search Results Details panel contains a ✚ icon next to any of the information, the company has multiple contacts saved in the record (for example, multiple Order From contacts). Hover your cursor over the ✚ icon to view a pop-up box with additional information.

Reviewing Vendor Details

To review more comprehensive information for a company, click it and click the

View Detail button to view the Details tab.

If you have thoroughly searched the database and reviewed company information and did not locate the company, you can click the Create Request For New Company button to create a request that your Purchasing Department add to company as an approved district vendor. See Requesting New Vendors.

Requesting New Vendors

In the Request for New Vendor entry point, if you did not locate the vendor for which you were searching, you can submit a request for your Purchasing Department to approve the vendor.

It is recommended that you search the database to be sure the vendor is not already established in the system. See Searching for Existing Vendors.

- On either the Search Results tab or the Details tab, click the

   Create Request for New Vendor button to view the Request for New Vendor tab.

The system will generate the Vendor ID when you submit your request.

==ENTER ALL INFORMATION IN CAPITAL LETTERS==

- In the Vendor Official Name field, enter the complete name of the vendor.

- By default, the Vendor Short Name shows your entry from the Vendor Official Name field, but you can modify the vendor short name as necessary.

- Select the Business Processes to Which the vendor is Available.

- Enter the Justification for the vendor's approval.

- Enter the name and contact information for the vendor's contact person.

- If you have completed the basic information required for your request, click the Submit button. The Attachments tab of Maintain Vendor Profiles appears with a message stating that your request has been submitted for approval. You must attach a W-9 under the attachments tab.
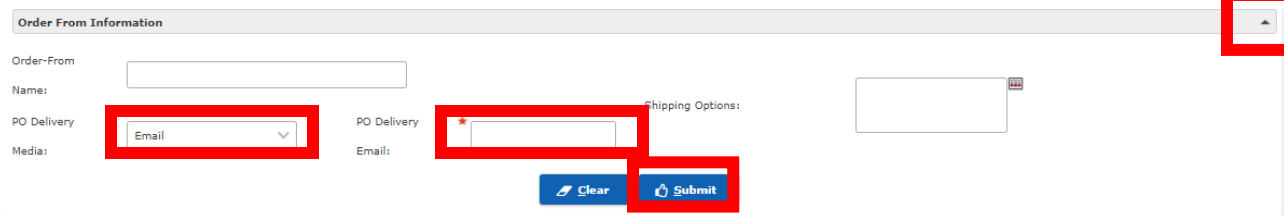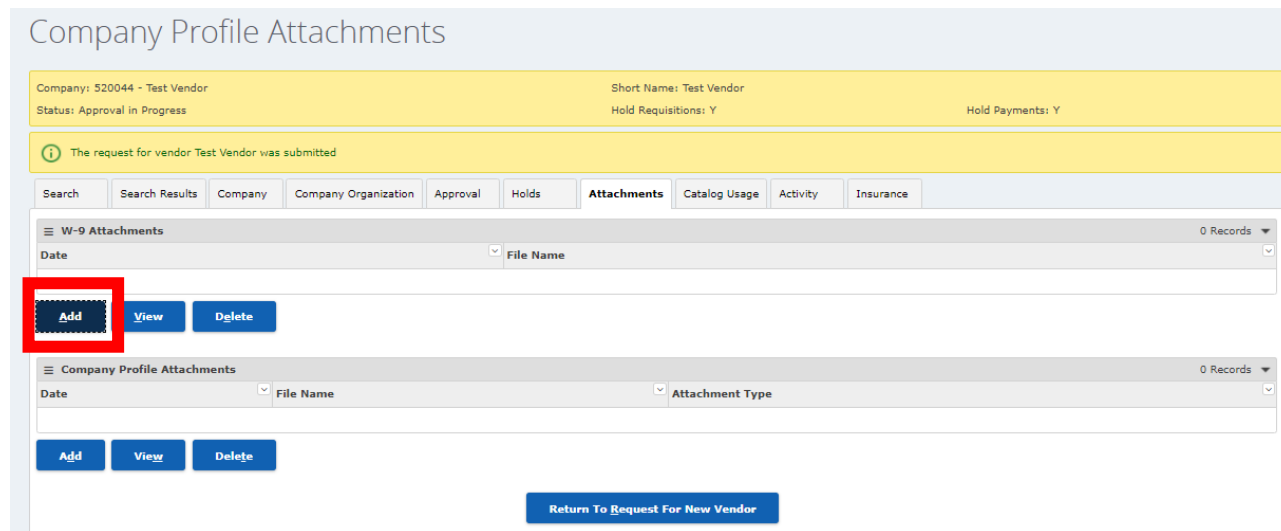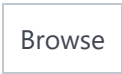
Order From Information

- Click the ▲ icon to open the order from screen

- PO Delivery is always Email
- Enter email of where to send PO
- Click Submit

Attaching a File for a W-9

- In the W-9 Attachments panel, click the Add button to view the W-9 Attachment box.

- Click the Browse button to open a standard Choose File box.

- Navigate to the location of the file and select the file for W-9. The file name is displayed in the W-9 File field.

- Click the OK button to add the file to the W-9 panel.

Viewing an Attachment

In either the W-9 Attachments or Company Profile Attachments panel, click the attachment, then click the View button to view the attachment in a file viewer browser window.

When you are finished viewing the attachment, click the X in the file viewer browser window to close it and return to the Attachments tab.

Deleting Attachments

In either the W-9 Attachments or Company Profile Attachments panels, click the attachment to select it, then click the Delete button. Click the Yes button on the confirmation box to delete the attachment.