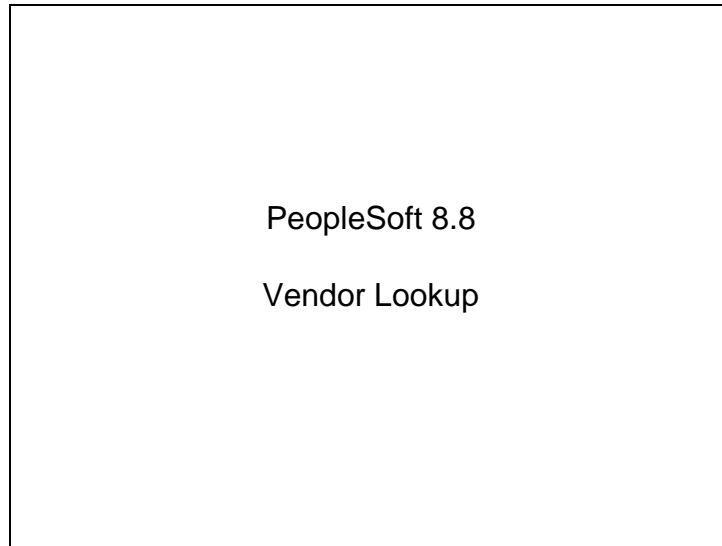


Vendor Lookup

Slide 1



Learning Objectives

- How to Get to the Vendors Screen
- How to Lookup Vendor Information

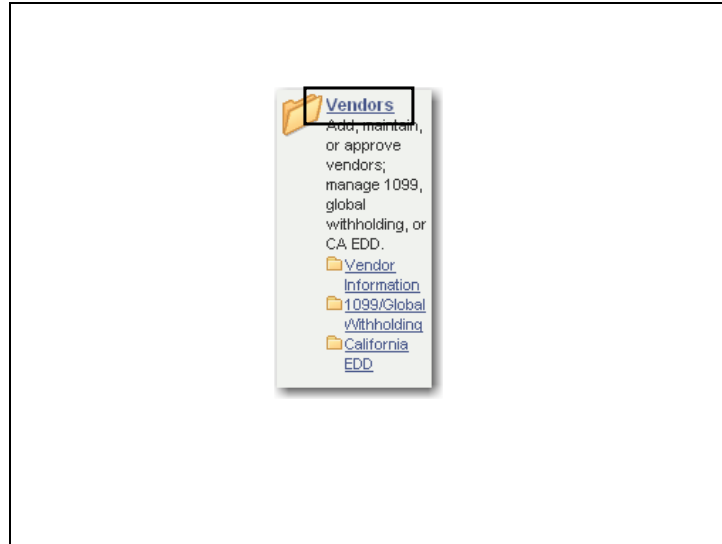
This course will cover:

How to Get to the Vendors Screen

How to Lookup Vendor Information

Vendor Lookup

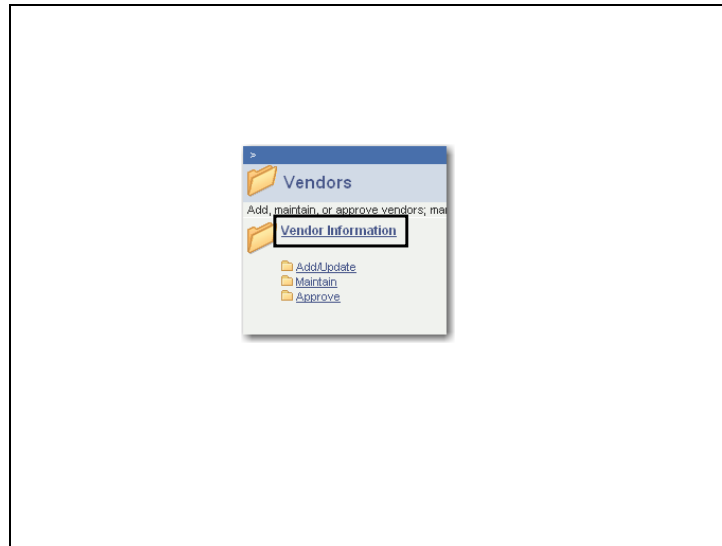
Slide 3



Once you are logged in to CUBS, click on Vendors.

Vendor Lookup

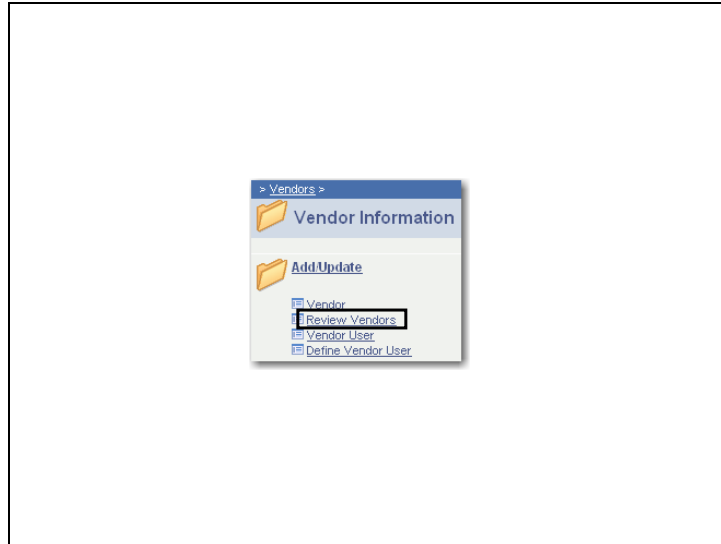
Slide 4



Click on Vendor Information.

Vendor Lookup

Slide 5



Click on Review Vendors.

Vendor Lookup

Slide 6

The screenshot shows a 'Search Criteria' panel with the following fields:

- SetID:** CU
- Name:** Contains
- Withholding Name:** Equal to
- Vendor Status:** [Dropdown]
- Vendor ID:** [Input]
- ShortName:** Equal to
- Classification:** [Dropdown]
- Type:** [Dropdown]
- Persistence:** [Dropdown]
- Address:** Equal to
- City:** [Input]
- Customer Number:** [Input]
- Country:** [Input]
- ID Type:** Tax ID
- State:** [Input]
- VAT Registration ID:** [Input]
- Postal:** [Input]
- Withholding Tax ID:** [Input]
- Bank Account #:** [Input]

Buttons: Search, Clear

Search Results

SetID	Vendor ID	Name 1	ShortName	Address	City	State	Country
CU							

The Search Criteria panel appears. You will need to enter a SetID to look up a Vendor. The Set ID CU is to view “regular” Vendors, EMPLY is used to view Employees, and STDNT is used to view Students.

Vendor Lookup

Slide 7

The screenshot shows a web application interface titled "Review Vendors" with a "Search Criteria" section. The "Name" field is highlighted with a red box, and the "Search Parameters" dropdown is set to "Contains". A red arrow points to the "Search Parameters" dropdown. The "Search" button is circled in red.

Search Criteria	
*SetID: <input type="text" value="CU"/>	Vendor ID: <input type="text"/>
Name: <input type="text" value="Dell"/> Search Parameters: Contains	ShortName: <input type="text" value="Equal to"/>
Withholding Name: <input type="text" value="Equal to"/>	Classification: <input type="text"/>
Vendor Status: <input type="text"/>	Type: <input type="text"/>
	Persistence: <input type="text"/>
Address: <input type="text" value="Equal to"/>	City: <input type="text"/>
Customer Number: <input type="text"/>	Country: <input type="text"/>
ID Type: <input type="text" value="Tax ID"/>	State: <input type="text"/>
VAT Registration ID: <input type="text"/>	Postal: <input type="text"/>
Withholding Tax ID: <input type="text"/>	Bank Account #: <input type="text"/>
	<input type="button" value="Search"/> <input type="button" value="Clear"/>

Next, you will need to enter the Name of the Vendor. If you enter the Full Name of the Vendor, then set the Search Parameters to Equal To. If you enter Part of the Vendor Name, set the Search Parameters to Contains. In most cases, Vendor Name is the only information that you will need to enter in order to lookup the Vendor. Click Search to Lookup the Vendor.

Vendor Lookup

Slide 8

The screenshot displays the 'Review Vendors' application window. The top section is titled 'Search Criteria' and contains several input fields and dropdown menus for filtering vendors. Below this is a 'Search' button and a 'Clear' button. The bottom section is titled 'Search Results' and contains a table with columns for SetID, Vendor ID, Name, ShortName, Address, City, State, and Country. A scroll bar is visible on the right side of the window. A right-pointing arrow and a 'View All' button are highlighted in the search results area.

SetID	Vendor ID	Name	ShortName	Address	City	State	Country
CU	0000002155	Dell Computer Corp.	DELL COMPUTER	Dept AI 40275	Atlanta	GA	USA
CU	0000002473	Dell Marketing	DELL MARKETING	Dept AI 40275	Atlanta	GA	USA
CU	0000002473	Dell Marketing	DELL MARKETING	One Dell Way	Round Rock	TX	USA
CU	0000002473	Dell Marketing	DELL MARKETING	One Commerce	Valhalla	N	USA

Click the right arrow to view the next 10 records or click View All

If the Vendor is in the system, the information will appear. Scroll down using the scroll bar to see the list of Vendors. The first 10 records will appear. Click the right arrow in the Search Results Window to view the next 10 records or click View All to see all of the Vendors that contain the Vendor Name you searched for. Columns can be sorted by clicking on each column header. When you find the correct Vendor you are searching for, you will be able to view that Vendor's ID # and Address.

Vendor Lookup

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Status	Classification	Persistence	AR Number	Withholding	Withd Name	VAT Vendor	Open For Ordering
Inactive	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approved	Supplier	Regular		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click on the Additional Vendor Info tab to see if the specific Vendor entry is Inactive, Unapproved, or Approved. Only Approved Vendors will be used in Voucher or PO entry.