Additional Actions

Adding a New Supplier/Address

Sometimes the need arises to purchase from or use a vendor/supplier that is not currently listed in the HokieMart or Banner database. The Procurement Department must enter the vendor into the system, so the order can be processed through HokieMart and ultimately that the vendor can be paid through Banner.

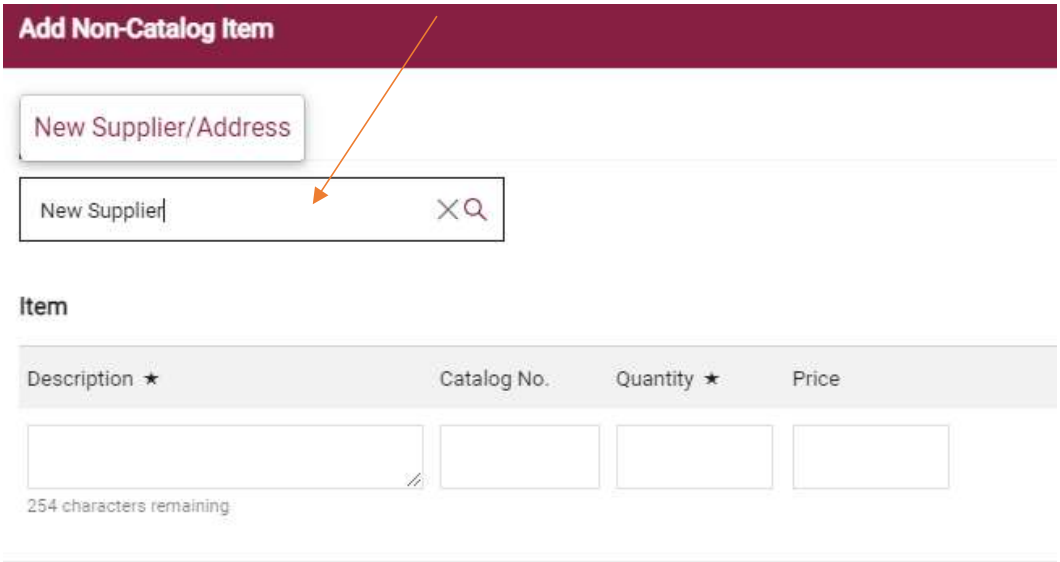
Note that a new vendor/supplier can be an individual or a corporate entity.

This procedure can also be used to communicate changes or updates to existing supplier information, such as addresses, phone or fax numbers.

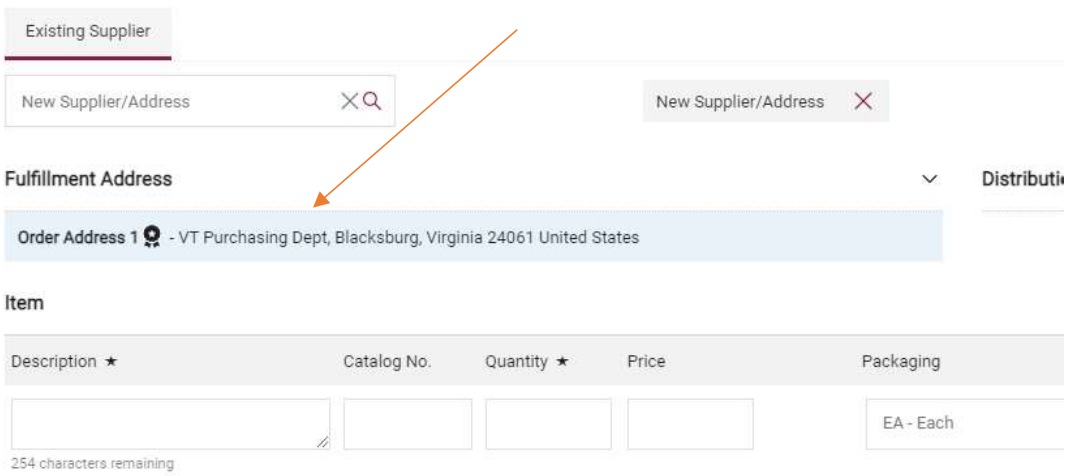
The requestor must select the appropriate form to process the order. New Supplier can be used on the Non-Catalog form or on the Payment Request Forms. If a new internal supplier is needed on the Interdepartmental Service Request form, please contact General Accounting at **genactg@vt.edu**.

From the Main Screen of HokieMart, for this example we will select Non-Catalog Item:

- *Choose and click desired form.*
- *After a search for the supplier has been attempted type the words "New Supplier" in*
  the Supplier box. This will bring up the "New Supplier/Address" option.



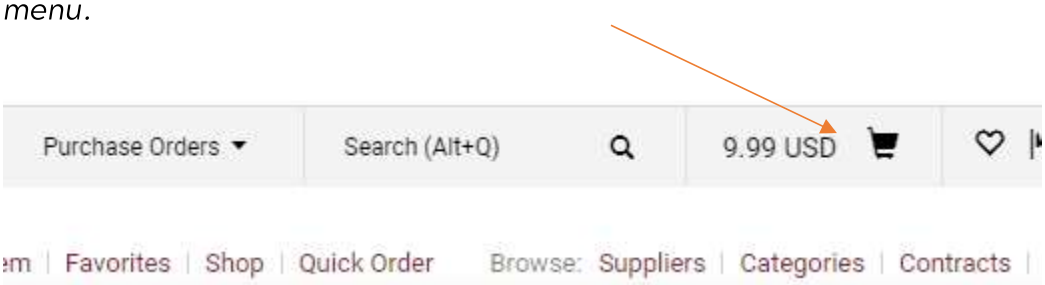
The selection of the Fulfillment Address will default to VT Purchasing (Procurement) Department.



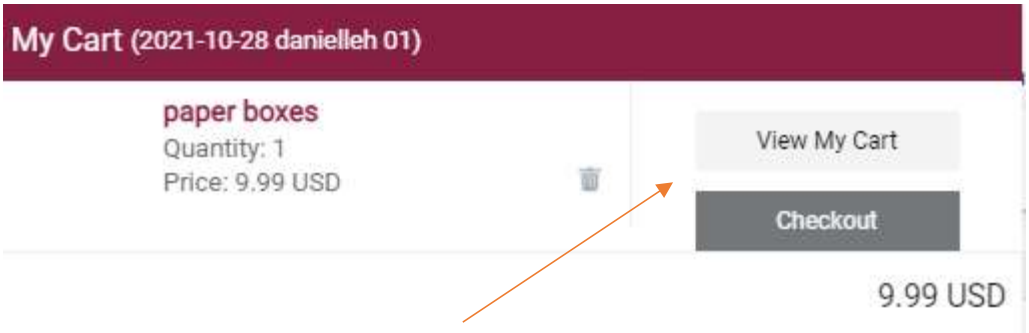
Continue to complete the information for the item as usual:

- *Provide description*
- *Catalog No. if necessary*
- *Quantity*
- *Price*
- *Packaging*
- *Click "Save and Close"*

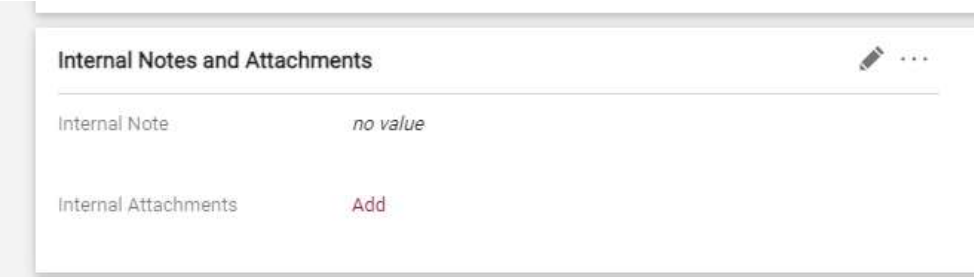
Locate the Cart icon on the upper right-hand corner of the page to activate the dropdown
menu.



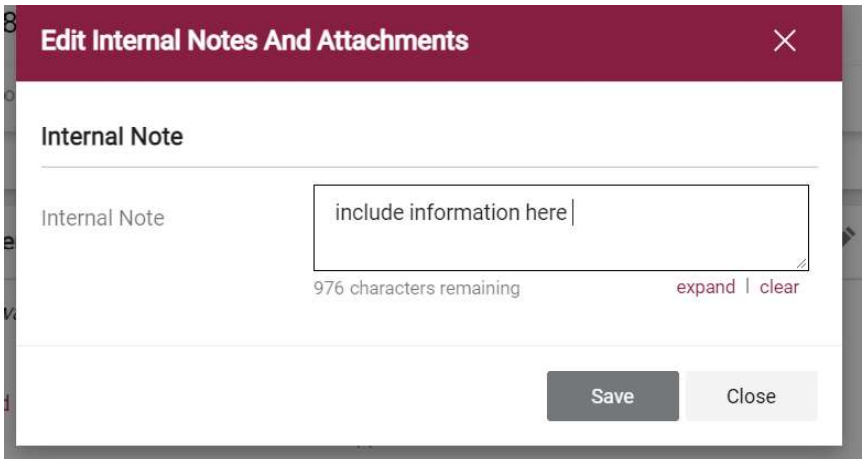
Click **View My Cart** *to navigate to the Cart - Draft Requisition where the Cart can be reviewed and edited or click* **Checkout** *to proceed to input your Requisition information.*



- *Scroll down to* **Internal Notes and Attachments** *section on the left-hand side of the cart.*
- *Select the* *icon to edit.*



- *An Internal Note box will open.*
- *Type the information needed to set up a new supplier in the Internal Note box (see below)*



It is also helpful to attach a quote, invoice, or any other relevant documentation, except a W9. A W9 is not needed at the time of requisition submission, but will be needed prior to payment being made.

W9's can be submitted to the Controller's office secure dropbox:
https://controller.vt.edu/resources/accountspayable/dropbox.html

In order to avoid delays processing the PR, the Procurement Department requests that the following information is provided to set up the New Supplier:

For Vendors

Put the following in the internal notes:

- *Vendor name*
- *Address*
- *Phone and fax number -* **many HokieMart orders are faxed to suppliers**
- *And if available, the FIN or banner id (each separated by a semi colon)*
- *If using a supplier website, provide the website address*

Click Save and complete the PR.

For an Individual or Student

If the vendor/supplier is a VT faculty, staff or student please put the following in the internal notes:

- *First and last name (middle initial when available)*
- *Address*
- *Banner ID Number with the first 3 digits masked (XXX-456-789)*
    - *If the individual is a student only the last 4 of the banner id should be provided*

Due to PII policies, NEVER include social security numbers in the Internal Notes.

Click Save and complete the PR.

New Supplier /Vendor Follow Up

The Vendor Team will add the new supplier if needed.

If the address already exists, the Vendor Team will select the supplier and may add a comment advising the user. The supplier will now be available for future use.

If the PR does not include the above supplier information, the PR will be rejected advising the department of the required information. The requestor will then need to copy the cart to a new cart and add all of the required information.

After the Procurement Department adds the new supplier, the PR will proceed through the approval workflow.