

QG - Adding a New Vendor/Supplier

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.

TIP:

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

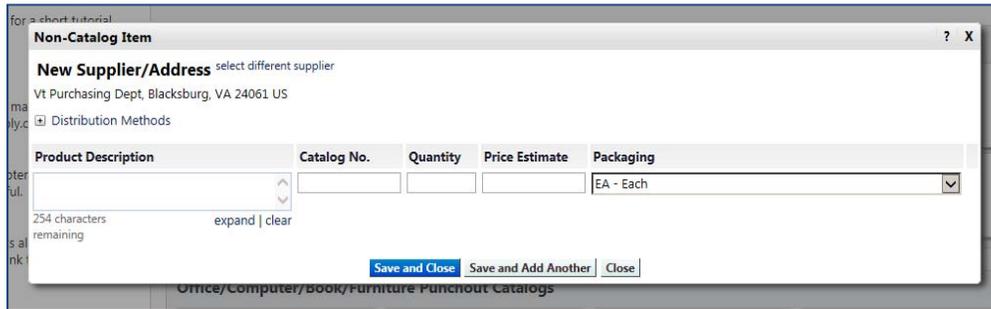
The requestor must select the appropriate form to process the order. The available form options for this type of situation would be either Non-Catalog Item or Reimbursement Request.

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.

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
				EA - Each

The selection will be VT Purchasing (Procurement) Department.



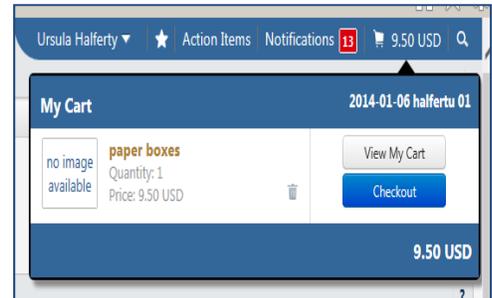
Continue to complete the information for the item, as usual:

- Provide description
- Catalog No. if necessary
- Quantity
- Price Estimate
- Packaging
- Click “Save and Close”

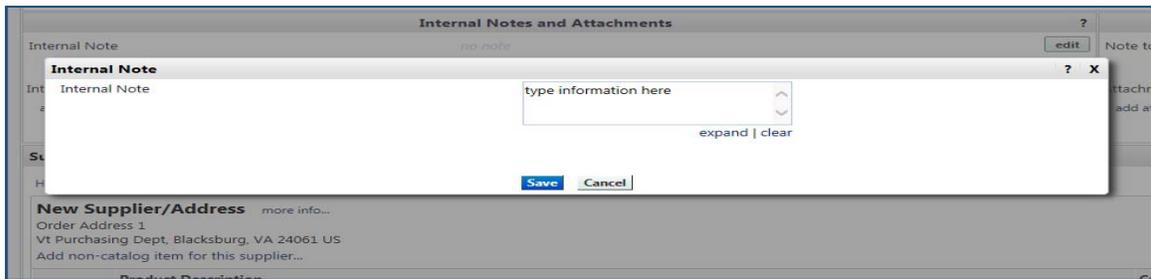
- Locate the “Cart” icon on the upper right hand corner of the page to activate the drop-down menu.

- Select:

- “View My Cart” the user will now be in a Cart – Draft Requisition where the Cart can be reviewed and edited or
- “Checkout” to proceed directly to the PR to submit



- Scroll down to **Internal Notes and Attachments** section on the left-hand side of the cart.
- Click “Edit.”
- An Internal Note box will open.
- Add address information, should be complete (see below).



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; and if available the FIN or banner id (each separated by a semi colon). If using a supplier website, provide the website address.

IMPORTANT – many HokieMart orders are faxed to suppliers.

- Click “Save.”
- 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; and banner id (each separated by a semi colon). If the individual is a student only the last 4 of the banner id should be provided.

- The first and last name
- Banner ID Number with the first 3 digits masked (XXX-456-789)

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

- Click “Save.”
- Complete the PR.

New Supplier /Vendor Follow Up

Follow the instructions for **Requisition and Purchase Order Follow-up**.

Procurement Department will add the new supplier if needed. If address already exists, Procurement will select the supplier and may add an internal note advising the user. 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 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.