

## Look Up a Vendor



This job aid describes how to look up a vendor in the PeopleSoft Finance 8.9 database.

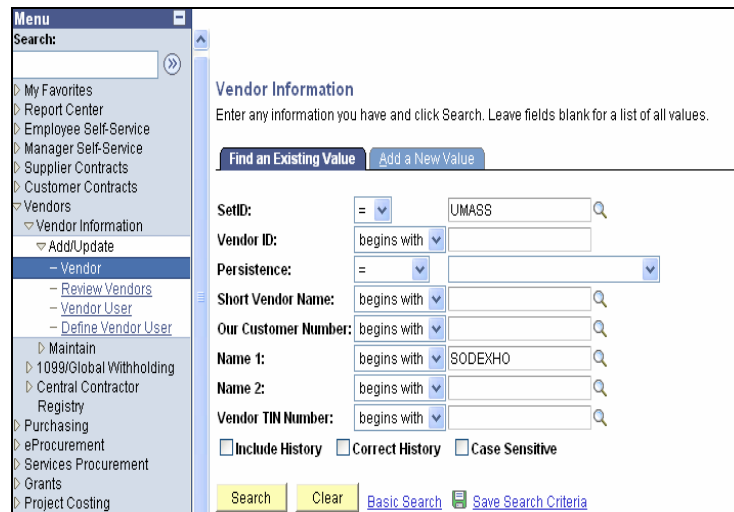
**Step 1.** Log into the Finance system with your Finance Username and Password.



Navigate to the following path:


**Vendors > Vendor Information > Add/Update > Vendor**

The *Vendor Information (Find an Existing Value)* page opens.



The screenshot shows the 'Vendor Information' page in PeopleSoft Finance 8.9. On the left is a 'Menu' pane with a search box and a tree view. The tree view is expanded to 'Vendors > Vendor Information > Add/Update > Vendor'. The main content area is titled 'Vendor Information' and contains a search form. The form has two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs are several search criteria fields, each with a dropdown menu and a search icon: 'SetID:' (dropdown set to '=', text box with 'UMASS'), 'Vendor ID:' (dropdown set to 'begins with', text box), 'Persistence:' (dropdown set to '=', dropdown menu), 'Short Vendor Name:' (dropdown set to 'begins with', text box), 'Our Customer Number:' (dropdown set to 'begins with', text box), 'Name 1:' (dropdown set to 'begins with', text box with 'SODEXHO'), 'Name 2:' (dropdown set to 'begins with', text box), and 'Vendor TIN Number:' (dropdown set to 'begins with', text box). At the bottom of the form are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the very bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

**Step 2.**

Enter the appropriate search criteria to find the vendor, and click .



**Note:** Not all fields are required. Fill in the fields necessary to narrow down the results.

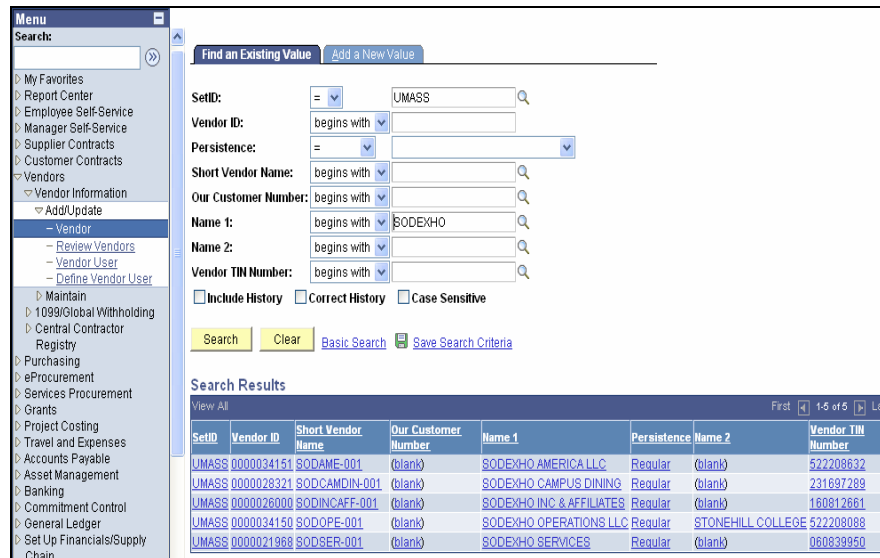
The **SetID** should be set to **UMASS**.

The **Vendor ID** field can be used to search for the vendor by vendor code.

The **Name 1** field can be used to search for the vendor by vendor name. The % symbol can be used as a wildcard to broaden the vendor name search. When using the % wildcard to search for a vendor, including a small number of characters in the search criteria may result in multiple results and a more accurate search.

The **Vendor TIN Number** field can be used to search for the vendor by tax identification number.

The **Search Results** appear.



The screenshot shows a web-based search interface for vendors. On the left is a navigation menu with categories like 'My Favorites', 'Report Center', 'Employee Self-Service', 'Manager Self-Service', 'Supplier Contracts', 'Customer Contracts', 'Vendors', 'Maintain', and 'Purchasing'. The 'Vendors' section is expanded to show 'Add/Update' and 'Vendor' options.

The main search area has a 'Find an Existing Value' tab selected. Search criteria are as follows:

- SetID:** dropdown set to 'UMASS'
- Vendor ID:** dropdown set to 'begins with'
- Persistence:** dropdown set to '='
- Short Vendor Name:** dropdown set to 'begins with'
- Our Customer Number:** dropdown set to 'begins with'
- Name 1:** dropdown set to 'begins with' with the value 'SODEXHO' entered.
- Name 2:** dropdown set to 'begins with'
- Vendor TIN Number:** dropdown set to 'begins with'

Below the search criteria are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. There are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

The 'Search Results' section shows a table with 5 columns: SetID, Vendor ID, Short Vendor Name, Our Customer Number, Name 1, Persistence, Name 2, and Vendor TIN Number. The results are as follows:

SetID	Vendor ID	Short Vendor Name	Our Customer Number	Name 1	Persistence	Name 2	Vendor TIN Number
UMASS 0000034151	SODAME-001	(blank)	(blank)	SODEXHO AMERICA LLC	Regular	(blank)	522208632
UMASS 0000028321	SODCAMDIN-001	(blank)	(blank)	SODEXHO CAMPUS DINING	Regular	(blank)	231697289
UMASS 0000026000	SODINCAFF-001	(blank)	(blank)	SODEXHO INC & AFFILIATES	Regular	(blank)	160812661
UMASS 0000034150	SODOPE-001	(blank)	(blank)	SODEXHO OPERATIONS LLC	Regular	STONEHILL COLLEGE	522208088
UMASS 0000021968	SODSER-001	(blank)	(blank)	SODEXHO SERVICES	Regular	(blank)	060839950

**Step 3.** Click a link for the appropriate vendor on the **Search Results** list.



**Note:** If only one vendor matches the criteria entered, the system will bypass the **Search Results** and immediately open the **Vendor Summary** page.

The **Vendor Summary** page opens.

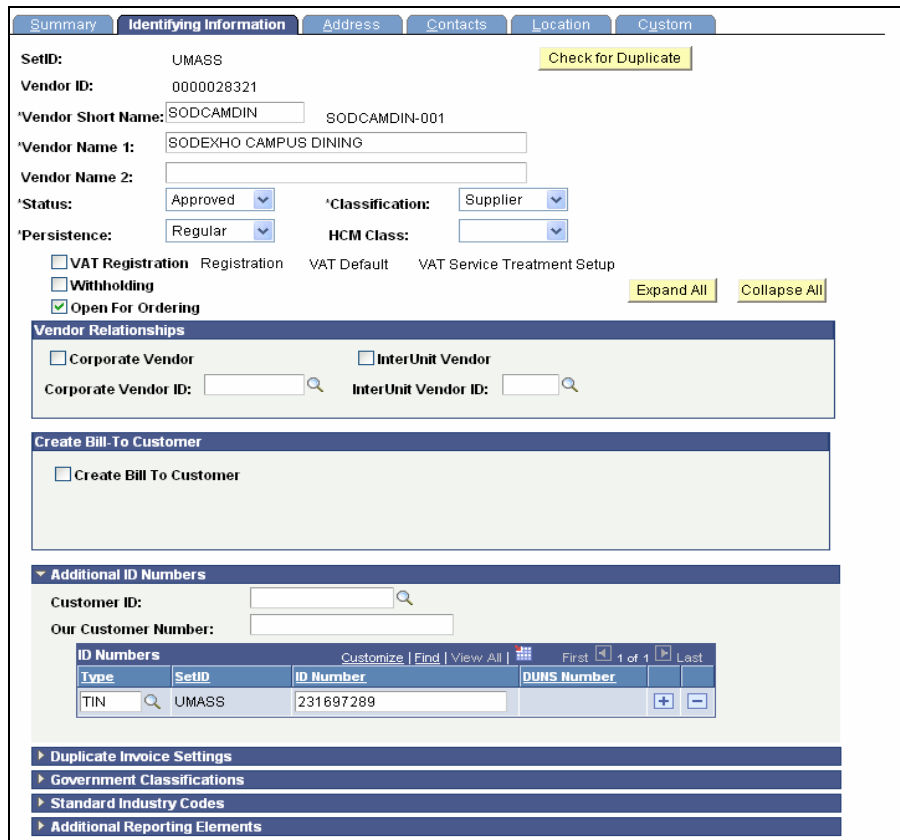
Summary	Identifying Information	Address	Contacts	Location	Custom
<b>SetID:</b>	UMASS				
<b>Vendor ID:</b>	0000028321				
<b>Vendor Short Name:</b>	SODCAMDIN	SODCAMDIN-001			
<b>Vendor Name:</b>	SODEXHO CAMPUS DINING				
<b>Order:</b>	SODCAMDIN-001	<b>Remit To:</b>	SODCAMDIN-001		
	P O BOX 320		P O BOX 320		
	BRIDGEWATER, MA 02324		BRIDGEWATER, MA 02324		
<b>Status:</b>	Approved	<b>Last Modified By:</b>	FSBATCH		
<b>Persistence:</b>	Regular	<b>Last modified date:</b>	01/16/2007 12:00AM		
<b>Classification:</b>	Supplier	<b>Created By:</b>	FSBATCH		
<b>HCM Class:</b>		<b>Created Date/time:</b>	01/16/2007 12:00AM		
<b>Open for Ordering:</b>	Yes	<b>Last Activity Date:</b>	01/16/2007		
<b>Withholding:</b>	No				
<b>VAT:</b>	No				



**Note:** The **Vendor Summary** page provides a brief summary of the vendor information.

**Step 4.** Click the **Identifying Information** tab.

The **Vendor Identifying Information** page opens.



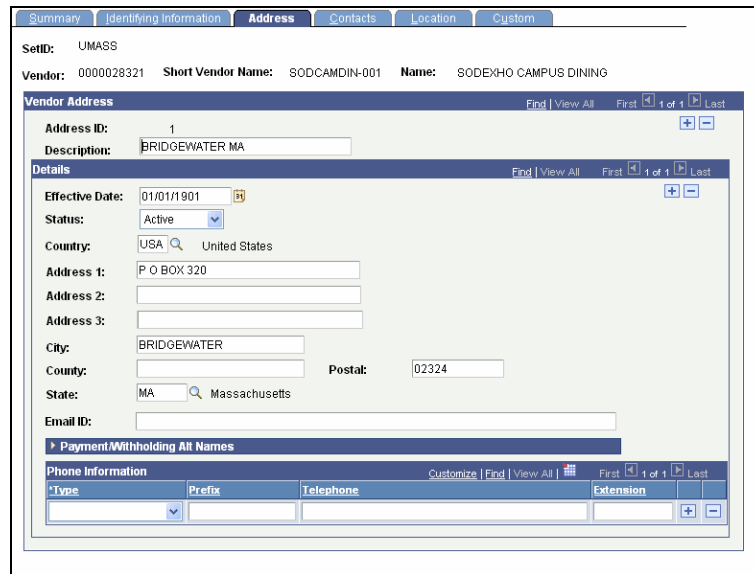

**Note:** The **Vendor Identifying Information** page displays the vendor name, tax identification number, ordering status, and withholding status.



**Note:** A vendor may have more than one vendor code. When choosing a vendor code, check to be sure that the code selected is active.

**Step 5.** Click the **Address** tab.

The **Vendor Address** page opens.



Summary | Identifying Information | **Address** | Contacts | Location | Custom

SetID: UMASS  
Vendor: 0000028321 Short Vendor Name: SODCAMDIN-001 Name: SODEXHO CAMPUS DINING

**Vendor Address** Find | View All First 1 of 1 Last

Address ID: 1  
Description: BRIDGEWATER MA

**Details** Find | View All First 1 of 1 Last

Effective Date: 01/01/1901  
Status: Active  
Country: USA United States  
Address 1: P O BOX 320  
Address 2:  
Address 3:  
City: BRIDGEWATER  
County:  
State: MA Massachusetts  
Postal: 02324  
Email ID:

Payment/Withholding All Names

**Phone Information** Customize | Find | View All First 1 of 1 Last

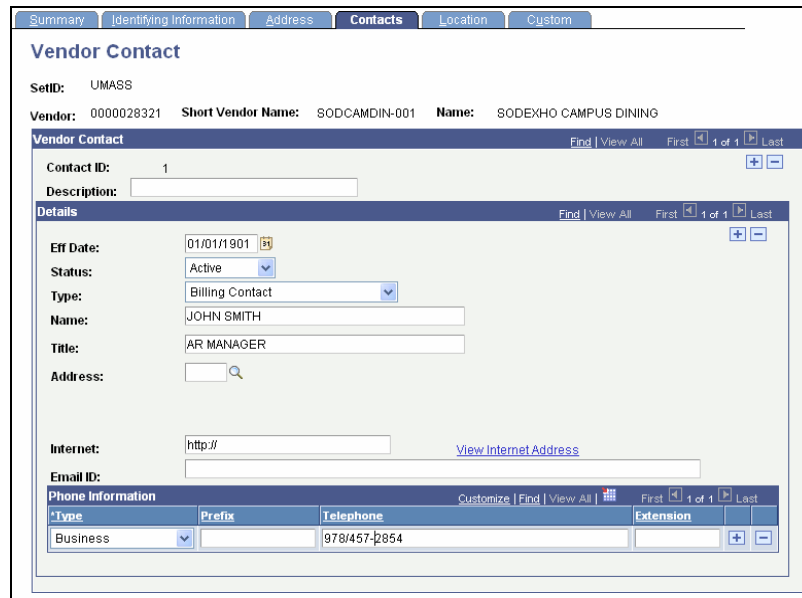
Type	Prefix	Telephone	Extension



**Note:** The **Vendor Address** page provides the various addresses related to the vendor code. Click the [View All](#) link to view all the addresses related to the vendor code. The **Address Status** indicates if the address is active or inactive.

**Step 6.** Click the **Contacts** tab.

The **Vendor Contacts** page opens.



**Vendor Contact**

SetID: UMASS  
Vendor: 0000028321 Short Vendor Name: SODCAMPDIN-001 Name: SODEXHO CAMPUS DINING

**Vendor Contact** Find | View All First 1 of 1 Last

Contact ID: 1  
Description:

**Details** Find | View All First 1 of 1 Last

Eff Date: 01/01/1901  
Status: Active  
Type: Billing Contact  
Name: JOHN SMITH  
Title: AR MANAGER  
Address:  
Internet: http:// View Internet Address  
Email ID:

**Phone Information** Customize | Find | View All First 1 of 1 Last

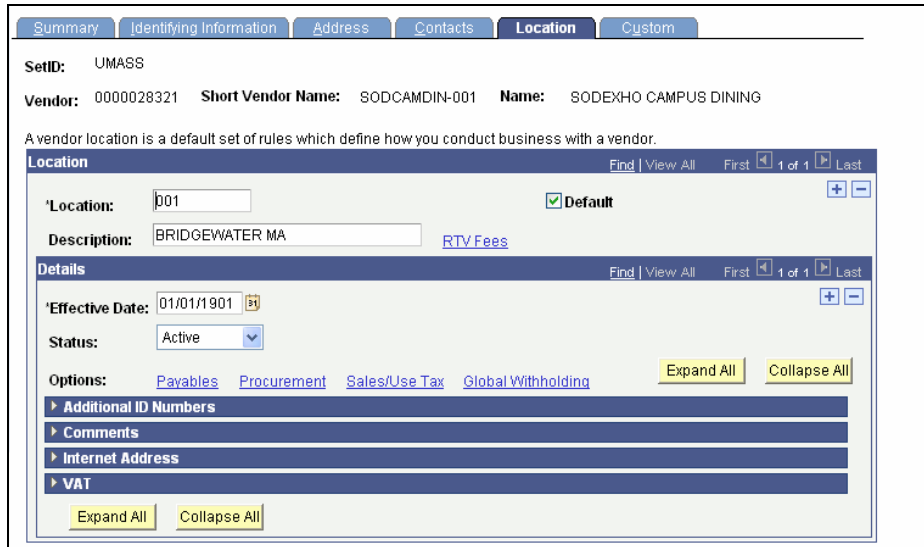
Type	Prefix	Telephone	Extension
Business		978/457-2854	



**Note:** The **Vendor Contacts** page provides any vendor contact information, such as contact persons, phone numbers, websites, and email addresses.

Step 7. Click the **Location** tab.

The **Vendor Location** page opens.



**Note:** The **Vendor Location** page indicates which location from the **Vendor Address** page is used for pricing, ordering, invoicing, remitting, and returning.