



## Job Aid: How to Look Up a Vendor



When looking up a vendor in Peoplesoft v8.9 the following instructions must be applied. These instructions pertain to vendors which already exist in Peoplesoft v8.9.



Using Internet Explorer, go to <https://inside.umassadmin.net/finance/>. Click on **Finance > Finance Applications > Finance Production**. Log in to the e\*mpac Finance Production environment using your Operator ID and password.

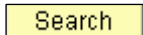
### 1. Vendors > Vendor Information > Add/Update > Vendor

The screenshot shows the 'Vendor Information' search interface. On the left is a 'Menu' pane with 'Vendor Information' expanded to 'Add/Update' and 'Vendor' selected. The main area contains a search form with the following fields and options:

- SetID:** dropdown menu set to '=', text input containing 'UMASS', and a search icon.
- Vendor ID:** dropdown menu set to 'begins with', text input, and a search icon.
- Persistence:** dropdown menu set to '=', text input, and a search icon.
- Short Vendor Name:** dropdown menu set to 'begins with', text input, and a search icon.
- Our Customer Number:** dropdown menu set to 'begins with', text input, and a search icon.
- Name 1:** dropdown menu set to 'begins with', text input containing 'SODEXHO', and a search icon.
- Name 2:** dropdown menu set to 'begins with', text input, and a search icon.
- Vendor TIN Number:** dropdown menu set to 'begins with', text input, and a search icon.

At the bottom of the form are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. Below these are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

The system will navigate to **Find an Existing Value**. **Verify that the Set ID is at UMASS when searching for supplier/commodity vendors.** Enter search criteria to locate the vendor. **Not all fields are required. Fill in the fields necessary to narrow down the results.** Click



### Using Wildcards:

The % symbol can be used to broaden your search, when providing a name as criteria.

- When searching for the vendor by vendor code, enter the vendor code into the Vendor ID field.
- When searching for the vendor code by vendor name, enter the vendor's name into the Name 1 field. Using the wildcard when searching by vendor name will provide multiple results.
- When searching for the vendor by tax ID number, enter the tax identification number into the Vendor Tax Id Number field.
- When searching for the vendor by shortname, individuals are LASTNAMEFIRSTNAME such as DOEJANE. Regular vendors use the first three characters of each word in the



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name up to 6 characters, for example such as AMERICAN STANDARD ROBOTICS INC  
will be AMESTAROB



2.

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

Upon clicking search a list of vendors to appear at the bottom of the page. Select the appropriate vendor from the list by clicking on the vendor. If only one vendor code matches the criteria entered, the Vendor Summary Page will default to that vendor code.

3. A page will appear that contains six panels.

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				

### Summary

This panel provides a brief summary of the vendor information.



4.

Summary Identifying Information Address Contacts Location Custom

SetID: UMASS [Check for Duplicate](#)

Vendor ID: 000028321

\*Vendor Short Name: SODCAMDIN SODCAMDIN-001

\*Vendor Name 1: SODEXHO CAMPUS DINING

Vendor Name 2:

\*Status: Approved \*Classification: Supplier

\*Persistence: Regular HCM Class:

VAT Registration Registration VAT Default VAT Service Treatment Setup

Withholding [Expand All](#) [Collapse All](#)

Open For Ordering

**Vendor Relationships**

Corporate Vendor  InterUnit Vendor

Corporate Vendor ID: InterUnit Vendor ID:

**Create Bill-To Customer**

Create Bill To Customer

**Additional ID Numbers**

Customer ID:

Our Customer Number:

ID Numbers			
Type	SetID	ID Number	DUNS Number
TIN	UMASS	231697289	

[Duplicate Invoice Settings](#)

[Government Classifications](#)

[Standard Industry Codes](#)

[Additional Reporting Elements](#)

### Identifying Information

This panel displays the Vendor Name, Tax Identification Number, Ordering status, and Withholding status.



5.

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:  
Postal: 02324  
State: MA Massachusetts  
Email ID:

Payment/Withholding Alt Names

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

Type	Prefix	Telephone	Extension

### Address Panel

The Address panel provides the various addresses applied to the vendor code. Click the view all link to view all the addresses applied to the vendor code. The location status states if the location is active or inactive.

6.

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

Vendor Contact

SetID: UMASS  
Vendor: 0000028321 Short Vendor Name: SODCAMDIN-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	

### Contacts Panel

The Contacts Panel provides any vendor information related to contact persons, vendor phone numbers, websites and emails.



6.

Summary Identifying Information Address Contacts **Location** Custom

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

A vendor location is a default set of rules which define how you conduct business with a vendor.

**Location** Find | View All First 1 of 1 Last  
'Location: 001  Default  
Description: BRIDGEWATER MA [RTV Fees](#)

**Details** Find | View All First 1 of 1 Last  
'Effective Date: 01/01/1901    
Status: Active   
Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) [Global Withholding](#)

▶ Additional ID Numbers  
▶ Comments  
▶ Internet Address  
▶ VAT

### Location Panel

This panel indicates which location from the Address Panel, is used for pricing, ordering, invoicing, remitting, and returning.



**Note:** A Vendor may have more than one vendor code applied to it. Ensure that when choosing a vendor code, the code selected is active.



**Tip:** When using the wildcard to search for a vendor, limit the characters provided in the search so as to get multiple & more accurate results.



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