



**Texas Skyward User Group Conference**

# **Vendor Master and New Vendor Requests**

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# Vendor Master and New Vendor Requests



This session will demonstrate how to set up and Process New Vendor Requests. Users will learn to set up the option for New Vendor Requests and navigate the Vendor Master screen.

- Vendor Profile/Vendor Browse
- New Vendor Request Setup
- New Vendor Request Approval
- Vendor Change History

## Vendor Profile

Vendor - WFVE\TB\VE - 25323 - 05.17.02.00.11 - Google Chrome

Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/fvndrtabs001.w>

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Sam P Account Preferences Exit ?

Home Account Management **Vendors** Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Vendor (201)

Customize Tabs

Vendor: A & D H0001 A & d housemovers inc.sc Ranges Add Delete Notes Attach

**Vendor Information**

1st Name: A & d housemovers inc.scr Edit

2nd Name:

Address: 7402 Scramble avenue PO BOX 840129 Scramble TX 55555

Active/Inactive: Active

Comments:

Ven Type: Order From/Remit To

Individual/Business: Business

Created:

By User:

Vendor ID:

- Vendor
- Address
- General
- Purchase Orders
- AP Invoices
- Payment Information
- 1099
- ACH
- Fiscal YTD
- Calendar YTD
- Related Vendors
- Notes
- Attachments
- SBAA Usage
- Catalog
- Contracts
- Change History
- Custom Forms

# Vendor Browse

Vendor Browse - WF\VE\VB - 10022 - 05.17.02.00.11 - Google Chrome

Not secure | https://pbroker1/scripts/cgiip.exe/WService=11509web/fvndrmain001.w

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Home Account Management **Vendors** Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Vendor Browse (1363)

Views: Name Only Filters: \*All Vendors

Last Name / Individual 1st Name / Business	First Name / Individuals 2nd Name / Business	Name Key	V	O	R	O	O	O	R	U	M	Zip Code	ST	City
▶ A & d housemovers inc.scr		A & D HO001	B	Y	Y	1						55555	TX	Scrar
▶ A & e home videoscscr		A & E HO001	B	Y	Y	1						55555	TX	Scrar
▶ A & f trophy coscr		A & F TR001	B	Y	Y	1						55555	TX	Scrar
▶ A + federal credit unionscr		A + FEDE001	B	Y	Y	1						55555	TX	Scrar
▶ A big bus co incscr		A BIG BU001	B	Y	Y	1						55555	TX	Scrar
▶ A flower connectionscr		A FLOWER001	B	Y	Y	1						55555	TX	Scrar
▶ A wish come truescr		A WISH C001	B	Y	Y	1						55555	TX	Scrar
▶ A&m consolidated high schools		A&M CONS001	B	Y	Y	1						55555	TX	Scrar
▶ A+ federal credit unionscr		A+ FEDER001	B	Y	Y	1						55555	TX	Scrar
▶ A-one aluminium doorsscr		A-ONE AL001	B	Y	Y	1						55555	TX	Scrar
▶ A-star limousine servicescr		A-STAR L001	B	Y	Y	1						55555	TX	Scrar
▶ A. m. quality productsscr		A. M. QU001	B	Y	Y	2						55555	TX	Scrar
▶ A. t. tradersscr		A. T. TR001	B	Y				N				55555	TX	Scrar
▶ A.f. ferguson & co.scr		A. F. FER001	B	Y	Y	1						55555	TX	Scrar
▶ A.k.agenciesscr		A. K. AGEN001	B	Y				N				55555	TX	Scrar
▶ A.l. chaudhry & companyscr		A.L. CHA001	B	Y	Y	1						55555	TX	Scrar
▶ A1 storage incscr		A1 STORA001	B	Y	Y	1						55555	TX	Scrar
▶ Aa credit unionscr		AA CREDI001	B	Y	Y	1						55555	TX	Scrar
▶ Aaa fire & safety equip co in		AAA FIRE001	B	Y	Y	1						55555	TX	Scrar
▶ Aabidascr		AABIDASC001	B	Y	Y	2						55555	TX	Scrar

20 records displayed Last Name: ABC



## New Vendor Requests Approvers

Group Access By Person (919)

Views: General Filters: \*Skyward Default

Last Name	First/Middle	Name Key	Appr New Vend	Access all Bdg Entry	Access all Bdg Req	Appr BT	Appr JE	Access all Req/PO Groups	# Assigned of 36 Req/PO Groups	# Approver of 36 Req/PO Groups	Access all Accounts	# As
P	Sam	P SAM000	Y	Y	Y	Y	Y	Y	36	Y		

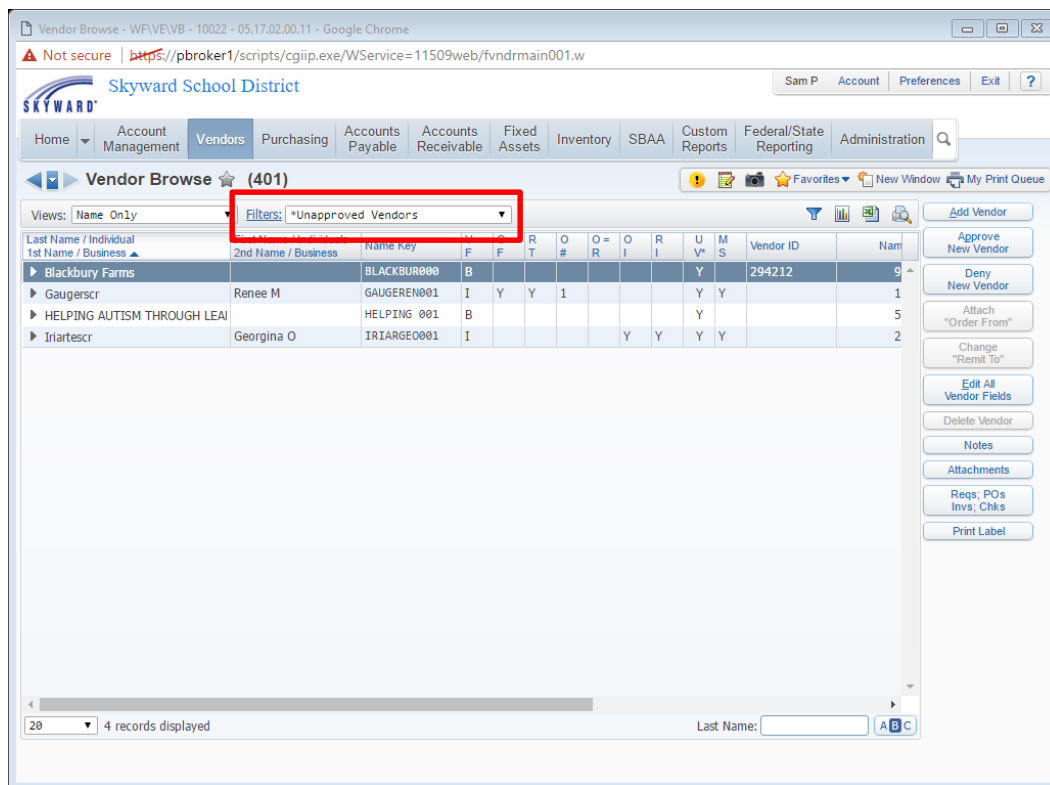
Expand All Collapse All Modify Details (displaying 10 of 10) View Printable Details

**Access By Person**

- Vendor**
  - Approve or deny new vendor requests: Yes
  - Budgetary Data Mining
  - Modify/Create Budgetary District Report Templates: Yes
- Budget Management**
  - Access to ALL Budget Entry processes: Yes
  - Modify/Create Requisition from any Budget Request: Yes
  - Approve or deny submitted Budget Transfers: Yes
- General Inputs**
  - Access to ALL Journal Entry Groups: Yes
  - # Assigned Groups of 1 Journal Entry Groups: 1
  - Approver for # of Journal Entry Groups of 1: 0
- Req/PO**
  - Access to ALL Req/PO Groups: Yes
  - # Assigned Groups of 36 Req/PO Groups: 36
  - Approver for # of Req/PO Groups of 36: 0
  - Edit/Delete any requisitions from any group user has access to via the Requisition browse: Yes

20 records displayed Last Name: ABC

## Unapproved Vendors Browse



Vendor Browse - WF\VE\VB - 10022 - 05.17.02.00.11 - Google Chrome

Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/fvndrmain001.w>

Sam P Account Preferences Exit ?

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Home Account Management **Vendors** Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Vendor Browse (401)

Views: Name Only Filters: \*Unapproved Vendors

Last Name / Individual 1st Name / Business	2nd Name / Business	Name Key	F	F	T	R	O	O	O	R	I	U	M	S	Vendor ID	Num
▶ Blackbury Farms		BLACKBUR000	B												294212	9
▶ Gaugerscr	Renee M	GAUGEREN001	I	Y	Y	1						Y	Y			1
▶ HELPING AUTISM THROUGH LEA		HELPING 001	B									Y	Y			5
▶ Inlartescr	Georgina O	IRIARGE001	I							Y	Y	Y	Y			2

20 4 records displayed Last Name: ABC

## Vendor Change History

Change History - WF\VE\TB\CH - 26260 - 05.17.02.00.11 - Google Chrome

Not secure | https://pbroker1/scripts/cgiip.exe/WService=11509web/fvndrtabs001.w

Sam P Account Preferences Exit ?

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Home Account Management **Vendors** Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Change History (210) Favorites New Window My Print Queue

Customize Tabs

Vendor Information

Vendor: A & D HO001 A & d housemovers inc.sc Ranges Add Delete Notes Attach

Address: 7402 Scramble avenue PO BOX 840129 Scramble TX 55555

Active/Inactive: Active Individual/Business: Business Ven Type: Order From/Remit To

**Change History**

Views: General Filters: "Skyward Default"

Date Changed	Time Changed	Table - Code	Process	Field - Description
08/16/2016	4:54 PM	Direct Deposit	Change	Prenote Date
08/16/2016	4:53 PM	Direct Deposit	Add	Net Pay
08/16/2016	4:53 PM	Vendor	Change	Personal/Business AP ACH Type
08/16/2016	4:53 PM	Vendor	Change	Ven Default check type
08/08/2014	3:42 PM	Name	Change	Internet Address
08/08/2014	2:33 PM	Name	Change	Internet Address

20 6 records displayed Date of process:

Note: The editing of fields may cause automatic system changes that will also be displayed in this browse.







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**THANK YOU FOR ATTENDING!**

