

UConn

UNIVERSITY OF CONNECTICUT

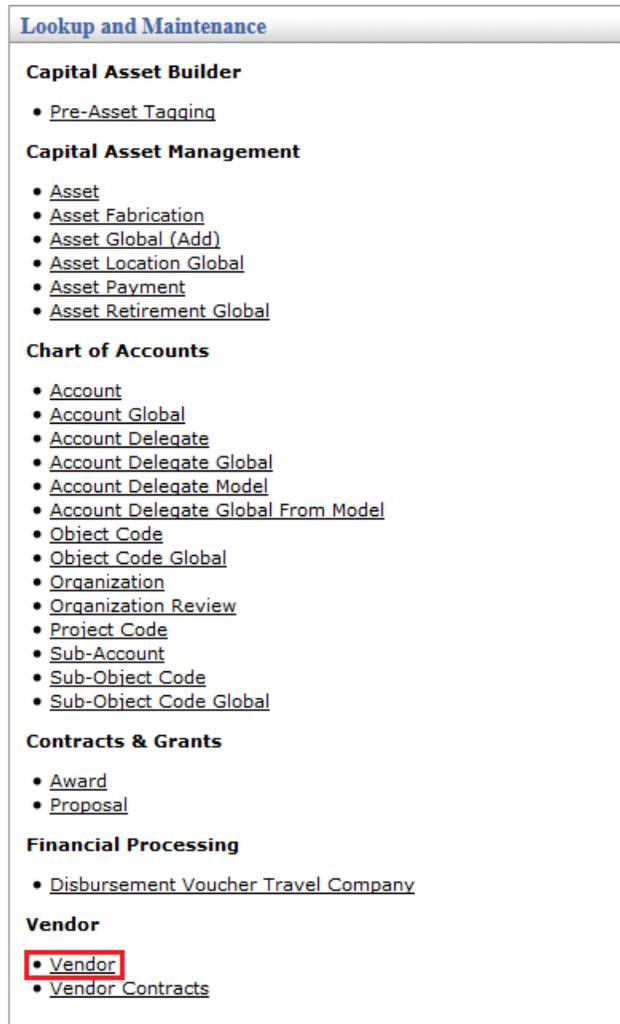


Vendor Edits Accounts Payable

2017

This is a step-by-step guide to initiating a vendor edit for the University of Connecticut. The guide begins after signing into UConn’s Kuali Financial System (KFS).

1. **Under the Main Menu Tab in KFS:** select “Vendor” to initiate a vendor edit. (Under Lookup and Maintenance, Vendor, select Vendor)



2. **Search for the vendor.** Enter the search criteria using wildcards (*) to find the vendor you need to edit.
 - a. For the most accurate search, it is best to use the vendor’s US Tax Number.

- i. Use the SSN for individuals and FEIN for companies.

Vendor Name:	*fedex*
US Tax Number:	
Foreign Tax Id:	
Vendor #:	
Active Indicator:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
Vendor Type:	
State:	
Country of Incorporation/Citizenship:	
Commodity Code:	
Supplier Diversity:	
Vendor Contract Number:	
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

3. To initiate the vendor edit:

- a. Select "Edit" for the correct vendor.
- b. The "Create Division" option is only used when one FEIN is used for multiple divisions of the same company.

Actions	Vendor Name	Search Alias
edit create division	<u>Federal Express Corporation</u>	FedEX Federal Express Corporation

4. Document Overview Tab:

- a. **Description:** Enter the vendor's name and a need by date
- b. **Explanation:** Enter a short explanation about the purpose of the vendor edit.

Document Overview required field	
<input type="button" value="hide"/>	
Document Overview	
* Description:	Federal Express Corporation 3/16/17
Organization Document Number:	
Explanation:	Edit for test purposes

5. Address tab:

- a. To change an existing address:

- i. Type over the existing address on the right side of the E-doc.
- ii. **Note:** Only change the existing address if the vendor no longer uses the old address. If you are unsure, create a new remit address.

▼ hide Address (PO - Purchase Order - Pittsburgh)	
Old	New
Address Type: <u>PO - Purchase Order</u>	* Address Type: PO - Purchase Order
Address 1: FedEx	* Address 1: 3 Discovery Drive
Address 2: PO Box 371461	Address 2:
City: Pittsburgh	* City: Storrs
State: PA	State: CT
Postal Code: 15250-7461	Postal Code:
Province:	Province:
Country: <u>United States</u>	* Country: United States
Attention:	Attention:
URL:	URL:
Vendor Fax Number: (800) 548-3020	Vendor Fax Number:
Email Address:	Email Address:
Set as Default Address: No	Set as Default Address: Yes
Active Indicator: Yes	Active Indicator: <input checked="" type="checkbox"/>

New Default Address	
* Set as campus default for:	
Active Indicator:	<input checked="" type="checkbox"/>
add	

b. To create an additional PO or Remit address:

- i. Select the correct Address Type “RM-Remit” or “PO-Purchase Order”.
- ii. Enter the Address, City, State, and Country.
- iii. If the new address will be the vendor’s primary address, select “Yes” in the Set as Default Address field.

Address ▼ hide	
New Address	
* Address Type:	RM - Remit
* Address 1:	3 Discovery Drive
Address 2:	
* City:	Storrs
State:	CT
Postal Code:	
Province:	
* Country:	United States
Attention:	
URL:	
Vendor Fax Number:	
Email Address:	
Set as Default Address:	Yes
Active Indicator:	<input checked="" type="checkbox"/>
add	

6. Notes and Attachment Tab:

- a. Enter a note in the Note Text box explaining the reason for the edit.
- b. Attach backup justification for the new/edit remit.
- c. Add the note and attachments.

Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:		Updated Remit address for test purpose	Browse... No file selected.		add

7. Submit the changes:
 - a. Submit the E-doc.

submit save close cancel

- b. Once submitted, the page will reload. If the submission was successful, a note will appear at the top of the webpage stating "Document was successfully submitted".

UCONN
FINANCE SYSTEMS My KFS Main Menu

action list doc search

Vendor ?

Document was successfully submitted.

- c. The Vendor will not be updated until it has been approved by Accounts Payable and added to KFS. The initiator will get an FYI when the vendor Request has been approved.