SP.020.060 – UPDATING A SUPPLIER

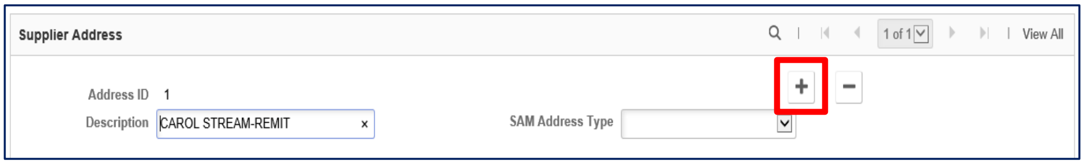
Purpose	• To update a supplier. • To understand the importance of effective dates when updating a supplier.
Description	In order to purchase goods or services or make a payment to a supplier, the supplier must exist in the system. Therefore, any time Procurement wishes to purchase goods and services but the supplier does not exist in the system, the supplier must first be added. Likewise, when Accounts Payable needs to issue payment and no purchase order was issued, a supplier must be added to the system to create a voucher. While the supplier pages contains fields for a wide variety of information about the supplier, including summary, address, contact, and location information, there are three categories of information that pertain to update a supplier – Identifying Information, Address, and Location Information. Location information is not a physical address, but a default set of rules or attributes that define how the institution conducts business with a particular supplier. However, while Location is not an address it does reference address information. Suppliers are entered by SetID. Banner suppliers are entered in the "B" SetID, and as such, you must have special security to update a Banner student supplier.
Security Role	BOR_PO_VENDORS_MAINT
Assumptions	• User was granted the Authority to Enter user preference, via the Supplier Processing Authority page (Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Supplier Processing Authority). • Address(s) already exist on the supplier.

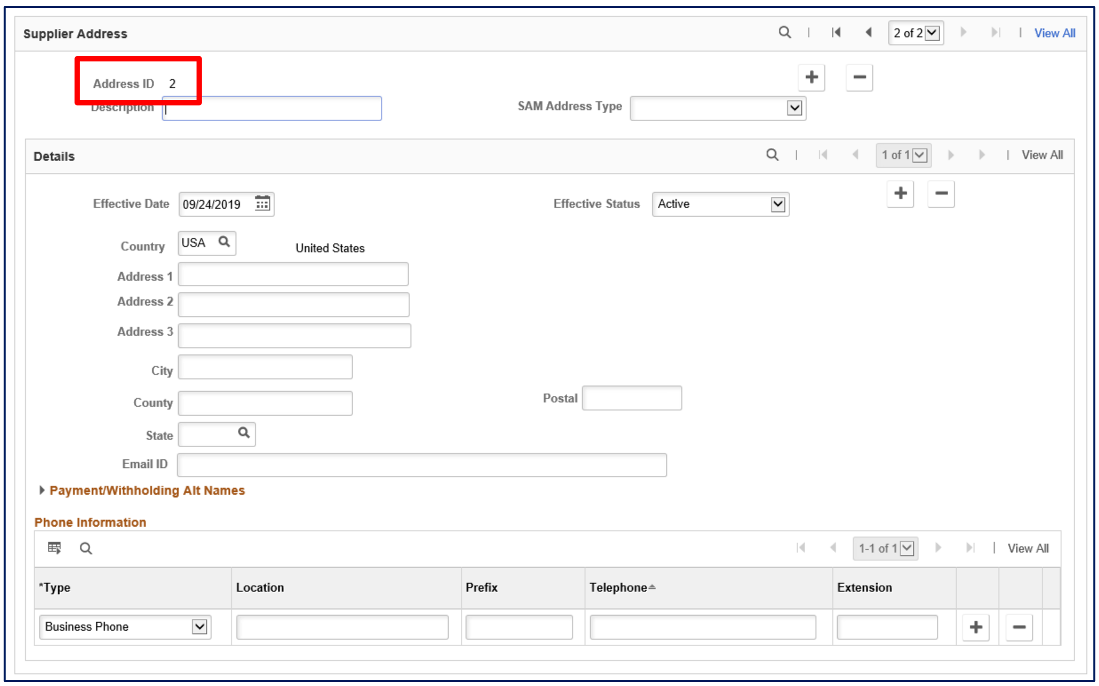
	• Location(s) already exist on the supplier.
Dependencies/ Constraints	User must verify the requested change with the supplier before making supplier changes in the system.
Additional Information	• The Address and Location information on a Supplier is controlled by effective dating. Always add a new effective dated row when updating a supplier for sections impacted by effective dating such as Address and Location. • Never delete Supplier and Location information. To update this information, add a new effective dated row and change the Effective Status to Inactive. • The Address tab includes fields other than the physical address. These are Email ID, Payment & Withholding Alternate Names, and Phone Information. When a change is made to any of these fields, users must add new effective dated rows.

Procedure

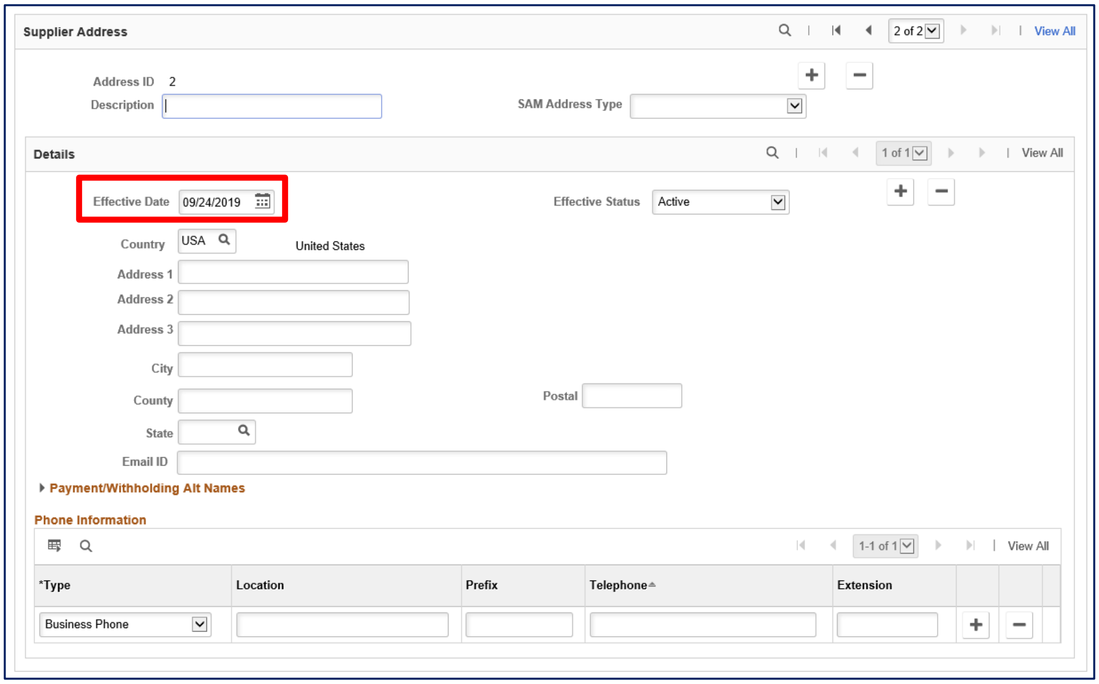
Below are step by step instructions on how to update a Supplier.

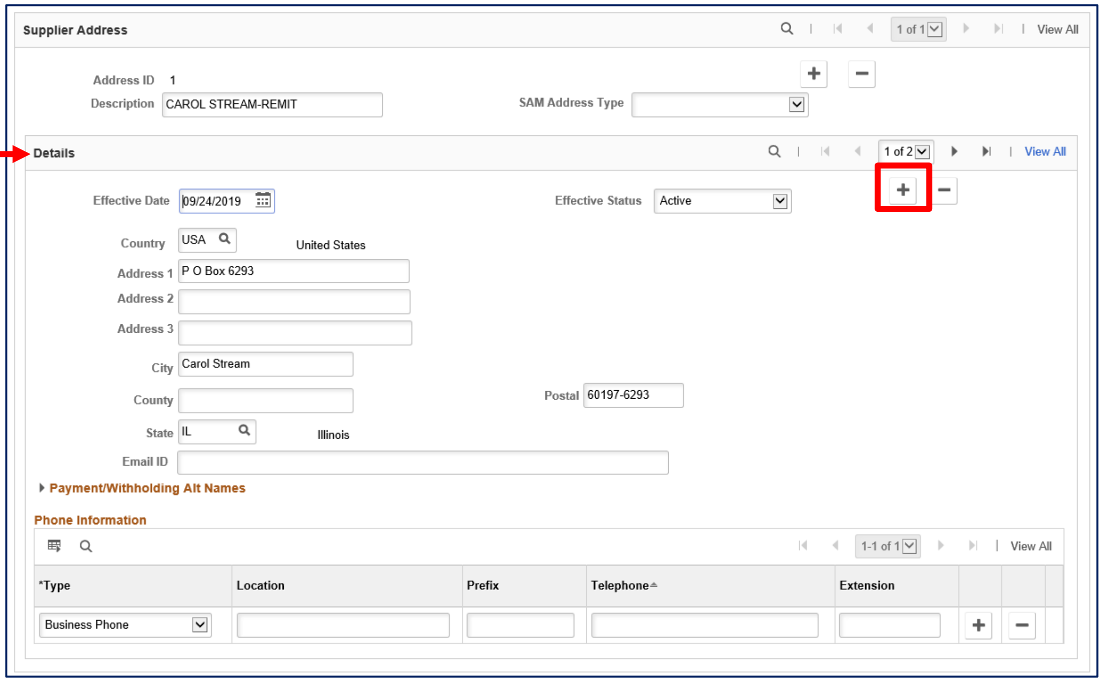
Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Suppliers** link.
4.	Click the **Supplier Information** link.
5.	Click the **Add/Update** link.
6.	Click the **Supplier** link.
7.	Click the **Find an Existing Value** tab and enter criteria to find the supplier to update.
8.	Enter the Supplier ID in the **Supplier ID** field and click the **Search** button. ***Note:*** *If you do not know the Supplier ID, users can also search by Short Supplier Name or Supplier Name.*
9.	Click on the supplier's **SetID** from the search results. The system navigates to the Summary tab.
10.	To update fields on **Identifying Information** tab, navigate to the appropriate field and make updates as needed. Fields include supplier's short name, name, classification, persistence, status, and/or TIN or SSN #.
11.	Click the **Address** tab. Users can add or update a supplier address(s), payment/withholding alt names, and/or phone information from this tab. If users make any of these changes, they must also create an effective date row so the system knows to link these changes to transactions moving forward. • To add a new Supplier address, follow Steps 12 – 20. • To update an existing Supplier address, follow Steps 21 – 25. • To add or update Supplier Payment/Withholding Alt Names, follow Steps 26 – 31. • To add or update Supplier Phone Information, follow Steps 32 – 38.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12.</td><td>Navigate to the Supplier Address section and click the add button (+) to add a new row.


The system changes the Address ID to the next sequential number based on the total number of addresses that exist in the system as shown below.


Note: Multiple addresses can be added for multiple supplier sites.</td></tr>
<tr><td>13.</td><td>Enter a unique description that easily identifies the new supplier address (Ex: ATLANTA-REMIT, Main, Corporate Office, etc.).</td></tr>
<tr><td>14.</td><td>Navigate to the Details section.</td></tr>
</table>

Step	Action
15.	Confirm effective date for this address.  ***Note**: Users can backdate or future date, if needed.*
16.	Enter the supplier’s address in the **Address 1** field.
17.	Enter the supplier’s city in the **City** field.
18.	Enter the supplier’s state or click the search icon to find the state in the **State** field.
19.	Enter the supplier’s zip code in the **Postal** field.
20.	Click the Save button. End of Adding New Address Procedure. Proceed to Step 64.
21.	To update a supplier address(s) that already exists, navigate to the Details section.

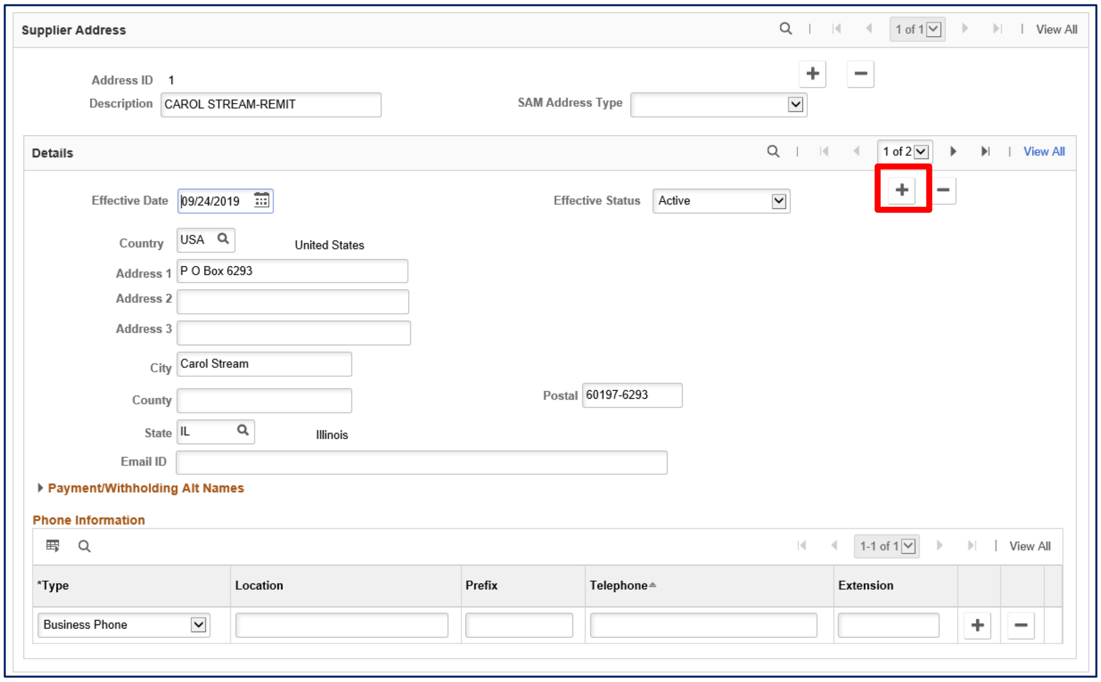
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>22.</td><td>Click the add button (+) to add a new effective dated row.

</td></tr>
<tr><td>23.</td><td>Enter an effective date for this address.

Note: Users can backdate or future date, if needed.</td></tr>
<tr><td>24.</td><td>Update the existing address information, as needed.

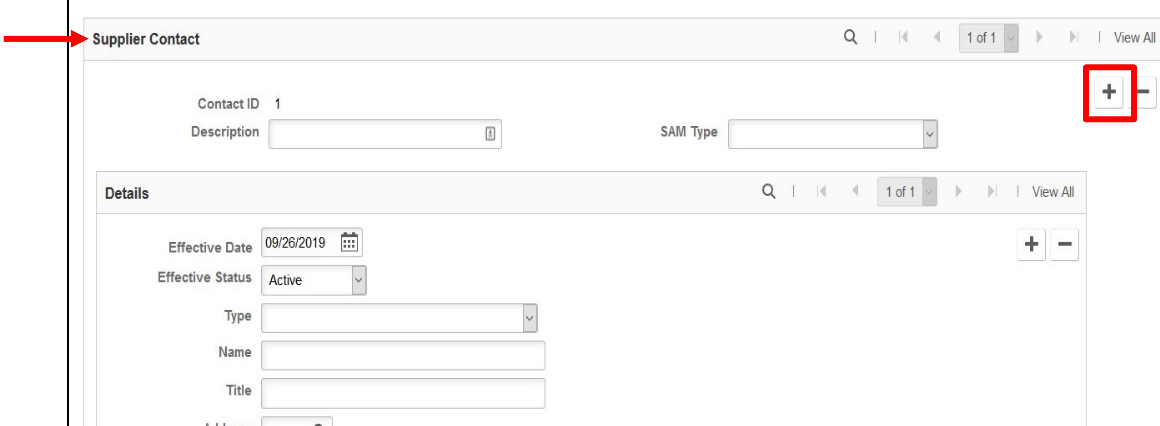
Note: If a supplier Address ID is no longer needed, add a new effective dated row and set the Effective Status to Inactive.</td></tr>
<tr><td>25.</td><td>Click the Save button.
End of Updating an Address Procedure. Proceed to Step 64</td></tr>
<tr><td>26.</td><td>To add/update Payment/Withholding Alt Names, navigate to the Details section.

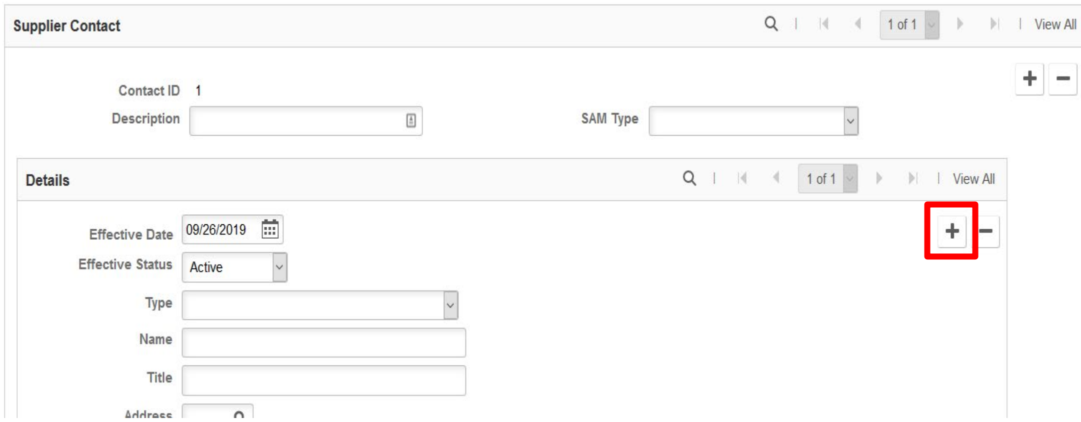
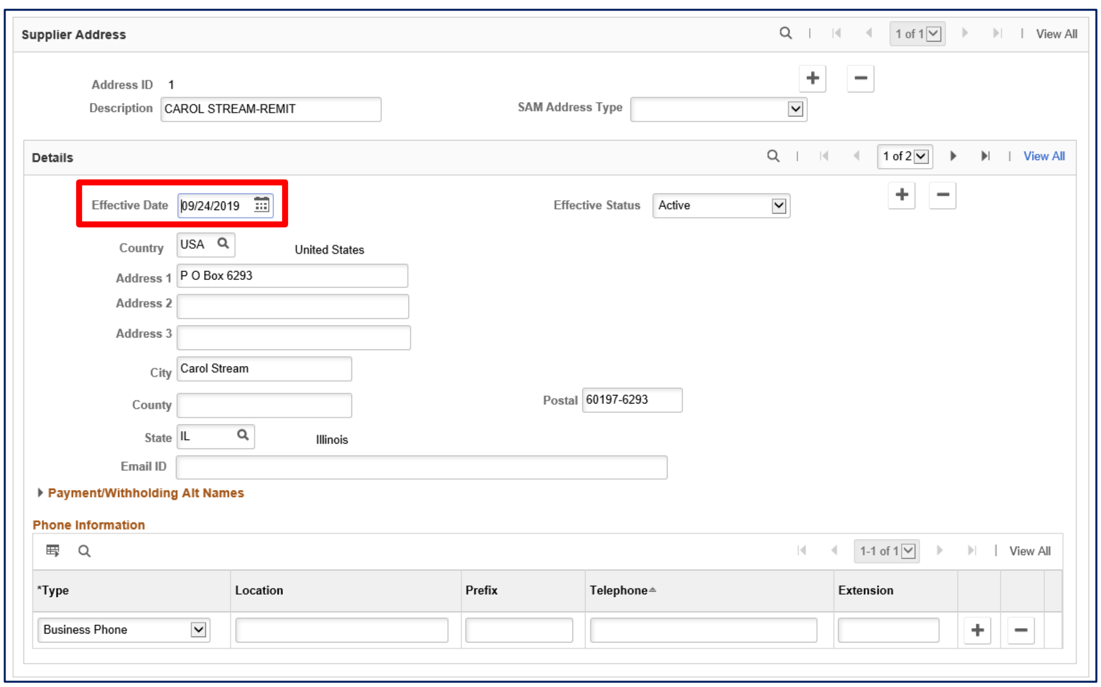
Note: The Payment/Withholding Alt Names section is used to specify alternate names for the supplier that can be used for payment and withholding purposes.</td></tr>
</table>

Step	Action
27.	Click the add button **(+)**.



Step	Action
28.	Enter an effective date for this change. ***Note**: Users can backdate and future date, if needed.*
29.	Click the expand triangle next to **Payment/Withholding Alt Names**. ***Note**: When an alternate name is entered for payment/withholding, the system uses that name on the payment form and on withholding reports.* See the *Supplier Naming Conventions and Best Practices* job aid for payment alternate name standards.
30.	Enter Payment and Withholding names in corresponding fields.
31.	Click the Save button. End of Add/Update Payment/Withholding Names Procedure. Proceed to Step 64.
32.	To add/update Phone Information, navigate to the Details section.
33.	Click the add button **(+).**
34.	Enter an effective date for this change. ***Note**: users can backdate and future date, if needed.*

Step	Action
35.	Select the appropriate phone type from the **Type** dropdown menu. ***Note***: *A **Type** should only be used once. Phone information should not have two rows where the **Type** is Business Phone, etc. This will cause an issue with PO Dispatch, when the address is referenced on the Purchase Order.*
36.	Enter the supplier's area code in the **Prefix** field. (Ex: 800, 706, 404)
37.	Enter the supplier's 7 digit phone number in the **Telephone** field. (Ex: 555-1212)
38.	Click the Save button. End of Add/Update Phone Information Procedure. Proceed to Step 64.
39.	To add/update contact information such as supplier name, title, and email address click the **Contacts** tab. If users make any of these changes, they must also create an effective date row so the system knows to link these changes to transactions moving forward. • To add a new contact, follow Step 40. • To update an existing contact, follow Steps 41 - 53.
40.	Navigate to the Supplier Contact section and click the add button **(+)** to add a new row.  The system changes the Contact ID to the next sequential number based on the total number of contacts that exist in the system. ***Note***: *Multiple contacts may be added by clicking on the add button **(+)** in the Supplier Contact section. (Ex: Accounts Receivable, Sales, etc.)* End of Adding New Contact Procedure. Proceed to Step 64.
41.	Navigate to the Details section.

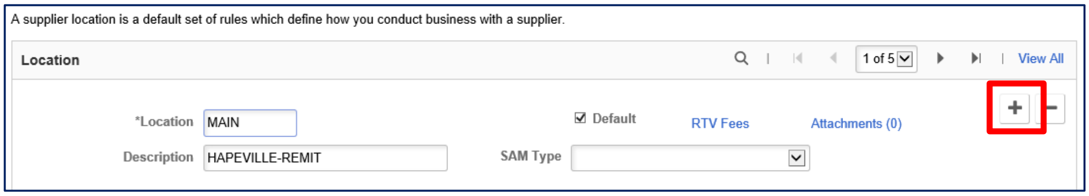
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>42.</td><td>Click the add button (+).

</td></tr>
<tr><td>43.</td><td>Enter an effective date for this contact. The new effective dated row will be added with the current date as the effective date. Initially, the information will be the same as on the original row and users can update fields where the information changed on this new effective dated row.


Note: Users can backdate or future date, if needed.</td></tr>
<tr><td>44.</td><td>Select Contact Type from the dropdown menu.</td></tr>
<tr><td>45.</td><td>Enter contact’s name in the Name field.</td></tr>
</table>

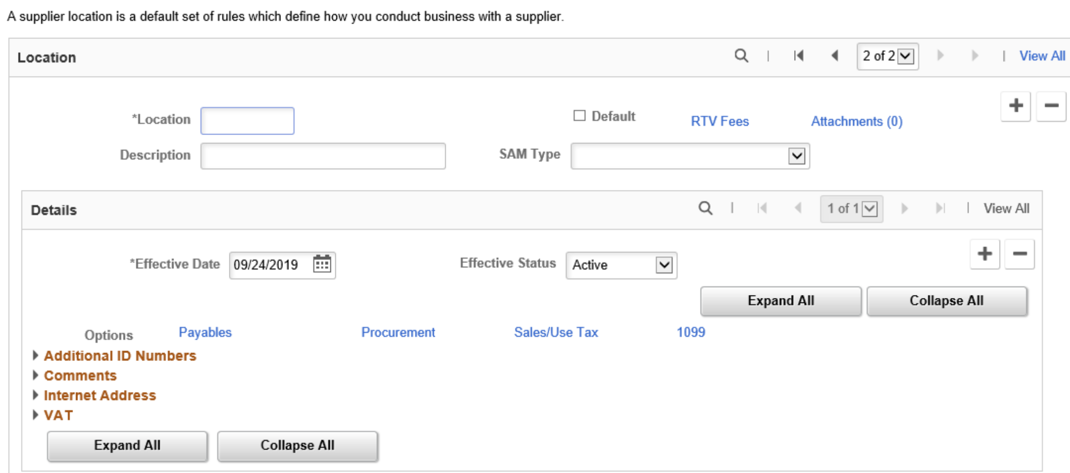
Step	Action
46.	Enter contact's title in the **Title** field.
47.	Click the search icon and search for the contact's address.
48.	Enter contact's email address in the **Email ID** field.
49.	Navigate to the **Phone Information** section.
50.	Select the contact's phone type from the **Type** dropdown menu.
51.	Enter the contact's area code in the **Prefix** field. (Ex: 800, 706, 404)
52.	Enter the contact's 7 digit phone number in the **Telephone** field. (Ex: 555-1212)
53.	Click the **Save** button. End of Update Contact Information Procedure. Proceed to Step 64.
54.	To add/update supplier location, click the **Location** tab. Each supplier must have one default location, but can have multiple locations. If entering more than one location, enter a unique name for each one. (Ex: Main, Remit To, Return). If users make any of these changes, they must also create an effective date row so the system knows to link these changes to transactions moving forward. • To add a new location, follow Steps 55 – 59. • To update an existing location, follow Steps 60 – 63. ***Note:*** *A supplier location is not a physical address, but a default set of rules, or attributes, that define how the institution conducts business with a particular supplier. Additionally, supplier location does refer to physical addresses within the Payables and Procurement links.* *For more information on supplier short name specifications, see the "Supplier Naming Conventions and Best Practices" job aid.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>55.</td><td>

Navigate to the Locations section and click the **Plus (+) button.**



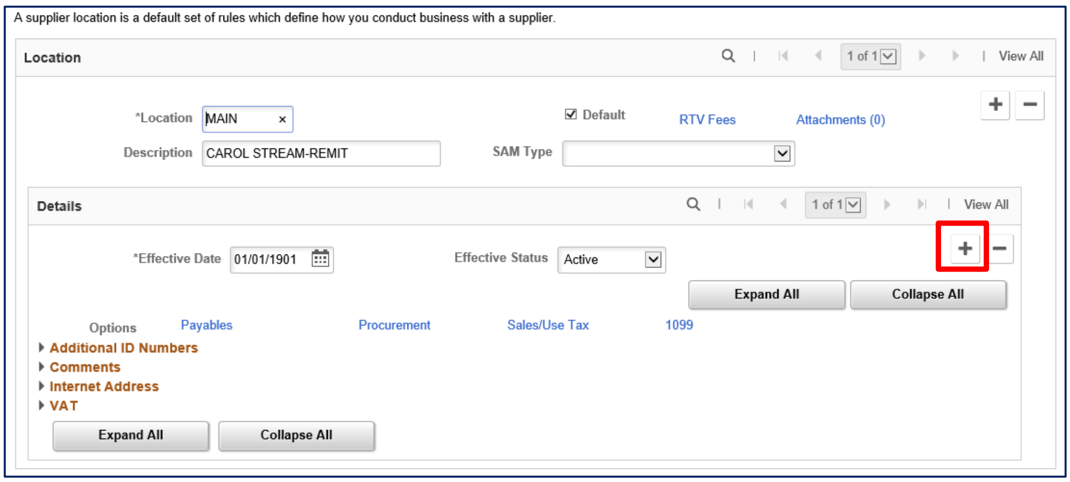
The system adds a new Location row as seen below:

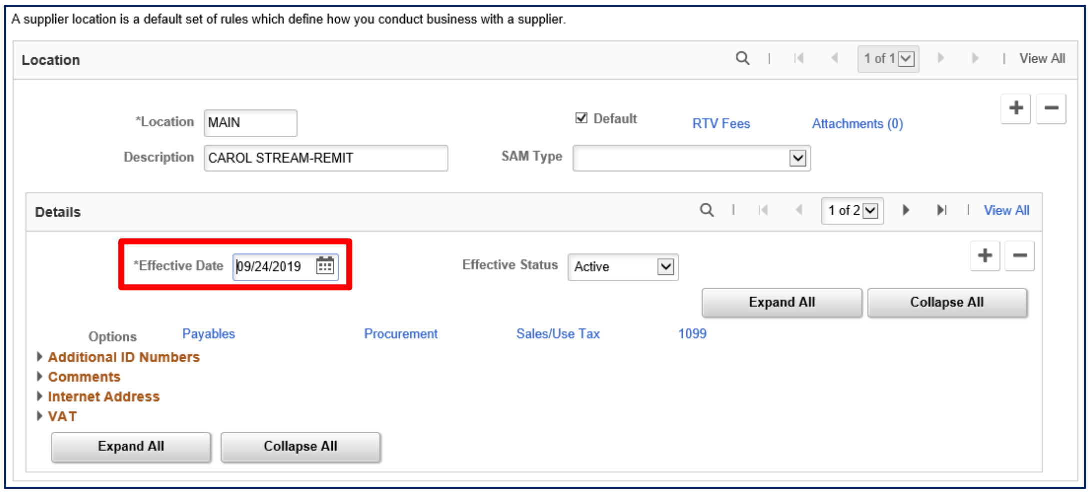


***Note**: Multiple locations may be added by clicking on the add button **(+)** in the Location section.*

</td></tr>
<tr><td>56.</td><td>Enter a unique name for the location in the Location field. (Ex: Main, City Name - REMIT, Corporate Office)</td></tr>
<tr><td>57.</td><td>Enter the description of the supplier’s location in the Description field. (Ex: Main, City Name - REMIT, Corporate Office)</td></tr>
<tr><td>58.</td><td>Check the Default box if this location will now become the default location that should be used on transactions.

Note: The Default box will be automatically selected for the first location entered, but can be changed if more than one location exists.</td></tr>
</table>

Step	Action
59.	Navigate to the Details section and enter **Payables, Procurement,** and **1099** information via the links. If users update address information in these links, the effective date of the address must be equal to or prior the effective date on the location. ***Note***: *See SP.020.010 - Adding a Supplier for more information on these links.* End of Adding New Location Procedure. Proceed to Step 64.
60.	Click the **Plus (+) button** in the Details section of the Location to add a new effective dated row for an existing location. 

Step	Action
61.	The new effective dated row will be added with the current date as the effective date. Initially, the information will be the same as on the original row and you will make updates to the fields where the information has changed on this new effective dated row  ***Note**: Users can backdate or future date, if needed.*
62.	If a supplier Location is no longer needed, add a new effective dated row and set the Effective Status to Inactive.
63.	Click the **Save** button. End of Update Location Procedure. Proceed to Step 64.
64.	The Preview Supplier Audit page displays, listing each field that was updated. Bank Account Number, Bank ID and DFI ID fields require a Reason Code and comment. Enter "VERIFY" as the reason code.
65.	Enter a comment in the open field next to each change. The comment must include how the user verified the banking change made is legitimate. Examples of comments are below: "Spoke with Hailey Masterson at Staples and she confirmed banking info is correct," "Called LaTasha Jones at Caterpillar and she confirmed banking account number is correct."

Step	Action
66.	Click the **OK** button. A pop window appears with three options: Select Yes to Submit Approval after saving (Yes button), No to Submit Approval later (No button), or Cancel to Cancel saving (Cancel). Definitions for each option are below: • Yes to Submit Approval after saving: opens an Approval Comments box where users can add notes to notify Approvers about details with which they would be concerned (Ex: Banking information). Select OK. Workflow routes the supplier approval request to the appropriate Approvers • No to Submit Approval later: saves the supplier, creates the Supplier ID, and saves the supplier as Unapproved. When ready to approve user must click on the Submit for Approval box found on the Identifying Information tab, next to the Supplier Status. • Selecting Cancel will not save the supplier
67.	Once saved, the supplier status will be Unapproved. The supplier must route through all approvals before it is available for ordering or payment.