**VENDORING:  -** Please remember that KFS is not case sensitive….how you enter the information is exactly how it will look.  For vendoring please **do not use only lower case letters.  Use upper and lower case or all caps.  How you key it is how it will print on the check**.  Please note all new and edited vendors must be approved by Accounts Payable before you can use them in KFS.  Accounts Payable will approve new vendors throughout the day as time permits.  Please note new vendor submits late in the day may not be approved until the following day.  When searching for vendors be sure to use the \* as a wildcard.  Please be sure to try the wildcard before and after the name or part of the name you are searching (i.e. \*smith\*).  Please remember you will not be able to search for employees in a vendor search – only actual vendors are in the vendor search. Please do not use an apostrophe in a vendor name. An apostrophe causes problems with our check file. We will not approve a vendor with an apostrophe. **Please attach backup (i.e. invoice, quote, etc.) in the notes section when creating a new vendor.** Accounts Payable will **disapprove** any vendor request submitted without a W-9 in place.

**WHEN CREATING NEW VENDORS:**

1. Note Kuali only accepts 40 characters in the vendor fields….unfortunately it will allow you to input a few more than 40 but really only allows 40.  Please keep this is mind when you are in vendor create/edit.
2. Obtain a W-9 **before you create a new vendor in KFS** (The blank W-9 form can be found on the Business & Financial Services webpage under Forms - Accounts Payable and Travel – last one).  The tax id number will prevent duplicate vendors being created.
   1. Normally line 2 or DBA of the W-9 is what the vendor name should be listed as.
   2. A tax id can only be assigned to one vendor.  If we have two vendors with the same tax id a division will have to be created.
   3. **A/P will not approve your vendor until the W-9 has been received.**
   4. Please attach all W-9s to the vendor create edoc.  If the W-9 has a social security number, Accounts Payable will delete it prior to approving the new vendor create.  Do not shred the W-9 until you get your FYI that the vendor has been approved. If you do not have the ability to attach a scan please fax them to 970-491-3815.
   5. If you have an invoice attach a copy to the new vendor document so we can verify payee and remit address.
   6. A Division is to be used when two vendors share the same tax id but have different business names.
3. Ensure that the Vendor Self Certification form is also complete, signed, and attached to the new vendor document.
4. A PO address is the only address needed when the vendor has **not** provided a different remit address.
5. **Individual vendors -** When creating vendor numbers for individuals they need to be created under **Vendor Name** (First name space last name).  Do not add them under Vendor Last Name, Vendor First Name.
6. The ownership type for individual vendors needs to match the ownership type on the W-9.
7. When creating a new vendor to a foreign address please make sure you change the “Is this a foreign vendor:” box from no to yes. Be sure to attach a W-8BEN or a W-8BEN-E as per IRS regulations A/P cannot approve a foreign vendor without these forms.
8. When creating a vendor for “reimbursement” only please be sure to put a note in the notes and attachment field indicating this is for reimbursements only.
9. When creating a vendor for students (non-employees) be sure to put their CSU id in the notes and attachments field and also add as an alias.
10. **Be sure to include a fax number or email address so that Purchasing is able to disburse the PO to the vendor.**