



TEAMS User Guide

Vendor Maintenance

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Section 3: Functions for Non-Purchasing Department Personnel

This section describes vendor-related functions that are used by employees who work outside the Purchasing Department.

In this section:

Request for New Vendor	3.2
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Request for New Vendor

The Request for New Vendor function gives district personnel outside the Purchasing Department the ability to search the TEAMS database to check if a company is established as a vendor for the district. If the search does not locate a vendor, the user can submit a request to the Purchasing Department that the vendor be approved and added to the system.

Request for New Vendor topics are listed below:

- Searching for Existing Vendors (below)
- Requesting New Vendors (page 3.5)

Searching for Existing Vendors

Use the Request for New Vendor function to search the TEAMS database to see if a company has been previously established as a vendor for the district. If your search does not locate the vendor, you can submit a request for a new vendor that will be reviewed by the Purchasing Department for approval.

How to Search for Vendors

1. Navigate to the TEAMS Home page and locate the Vendor Maintenance menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Request for New Vendor** link. The Search tab is displayed.

The screenshot shows a web interface with three tabs: 'Search', 'Search Results', and 'Details'. The 'Search' tab is selected. Below the tabs is a 'Search Criteria' form. It features a text input field labeled 'Vendor Name:'. Below the input field are two radio buttons: 'Exact' and 'Contains', with 'Contains' being the selected option. At the bottom of the form are two buttons: 'Search' and 'Clear'.

Figure 3.1: Search tab

3. Enter the **Vendor Name**.

Note: The *Contains* option defaults as the type of search to perform. With a *Contains* search, your search results will include any vendor with a name that contains the characters you enter in the field. For example, if you enter "off", your search might return *Office Depot*, *City Office Supplies*, and *Bob's Coffee Service*. If you are sure of the vendor name, you can use the *Exact* option. With an *Exact* search, your search will only return a vendor with a name that matches your complete entry exactly.

4. Click the **Search** button. The Search Results tab is displayed with any matching results, as shown in the following figure.

Search Results Details

Select a row in the search results table to view its details.

Official Name: Requisitioning
 Name: Categories:
 Vendor: Status:
 Remit To
 Name and Address:
 Account
 Representative:
 Order From
 Name and Address:

Search Results Based on : Active Type "Both", Vendor Name Contains "M & M"

Vendor Profile Search Results

Sort | Clear Sorted by: (default)

Vendor ID	Official Name	Approval Status
256 V,R	M & M Coffee Purveyors	Approval in Progress
505 V,R,O	M & M Garage	Approved
257 V,R	M & M Lighting and Design	Approval in Progress
255 V,R,O	M & M Office Supply	Approval in Progress
936 V,R,O	M & M Shipping Company	Approved

record count: 5 of 5

C - Searched value contained in Company
 V - Searched value contained in Vendor
 R - Searched value contained in Remit To
 A - Searched value contained in Account Representative
 O - Searched value contained in Order From

View Detail Create Request For New Vendor Return to Search

Figure 3.2: Search Results tab

How to Work With Search Results

The Search Results tab displays a listing of vendors that matched your criteria. A code is displayed next to search results to indicate what information in the vendor record matched your search. The codes are described below.

- C: Searched value contained in Company
- V: Searched value contained in Vendor
- R: Searched value contained in Remit To
- A: Search value contained in Account Representative
- O: Search value contained in Order From

Reviewing High-Level Information

To review high-level information about a company, select it in the Vendor Profile Search Results. Information is displayed in the Search Results Details panel, as shown in the following figure.

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This indicates additional information is in the vendor record. Hover your cursor over the + to display a popup box with the information.

Search Results Details

Select a row in the search results table to view its details.

Official Name: M & M Office Supply Requisitioning Categories: Office Furniture

Vendor: Status: Approval in Progress

Remit To Name and Address: M & M Office Supply : 9600 N. Mopac Expwy AUSTIN, TX 78759 : (512) 555 - 1212

Account Representati: Mopac Expwy AUSTIN, TX 78759 : (512) 555 - 1212

Order From Name and Address: M & M Office Supply : 9600 N. Mopac Expwy AUSTIN, TX 78759 : (512) 555 - 1212

Search Results Based on : Active Type "Both", Vendor Name Contains "m & m"

Vendor Profile Search Results

Sort | Clear Sorted by: (default)

Vendor ID	Official Name	Approval Status
256	M & M Coffee Purveyors	Approval in Progress
505	M & M Garage	Approved
257	M & M Lighting and Design	Approval in Progress
255	M & M Office Supply	Approval in Progress
936	M & M Shipping Company	Approved

record count: 5 of 5

C - Searched value contained in Company
V - Searched value contained in Vendor
R - Searched value contained in Remit To
A - Searched value contained in Account Representative
O - Searched value contained in Order From

View Detail Create Request For New Vendor Return to Search

Figure 3.3: Search Results tab with details for a selected company

Note: If the Search Results Details panel contains a + next to any of the information, this indicates that the company has multiple contacts saved in the record (for example, multiple Order From contacts). Hover your cursor over the + to display a popup box that contains the additional information. To close the popup box, move your cursor away from the + icon.

Reviewing Vendor Details

To review more comprehensive information for a company, select it and click the **View Detail** button. The Details tab is displayed, as shown in the following figure.

Company Profile Details

ID: 255 Active Employee: N

Official Name: M & M Office Supply HUB: Yes No

Short Name: M & M Office Supply Payment Term: 30 day

Web Site: Can Consolidate Invoices: Yes No

Business Processes to Which the Company is Available: Check Request Procurement Has Electronic Catalog: Yes No

Exempt from Backup Withholding: Yes No Minimum Check Amount (\$): 1.00

Subject to 1099-MISC: Yes No Maximum Payable Without PO (\$): 0.00

W-9 Status: Shipping Options: UPS-2ndDay, USPS-FirstClass, USPS-Priority

W-9 Receipt Date: 11-11-2009 Created: By Prologis, Teams at 2009-09-22 02:19:46

W-9 Company Type: Modified: By Prologis, Teams at 2009-11-11 02:20:05

Return to Search Results Create Request For New Company

Figure 3.4: Details tab

If you have thoroughly searched the database and reviewed company information and did not locate the company, you can click the **Create Request For New Company** button to create a request that your Purchasing Department add to company as an approved district vendor. For more information, see "Requesting New Vendors" on page 3.5.

Requesting New Vendors

In the Request for New Vendor function, if you searched the TEAMS database for a vendor but did not locate it, you can submit a request for your Purchasing Department to approve the vendor.

Note: It is recommended that you search the database to be sure the vendor is not already established in the system. For more information, see "Searching for Existing Vendors" on page 3.2.

How to Request a New Vendor

1. On either the Search Results tab or the Details tab, click the **Create Request for New Vendor** button. The Request for New Vendor tab is displayed.

The screenshot shows a web-based form titled "Request For New Vendor". At the top, a message states: "New vendor requests may be submitted for approval by completing this screen". The form is divided into several sections:

- Vendor Information:** Includes fields for "Vendor ID:", "Vendor Official Name:" (with a red asterisk), "Vendor Short Name:", and "Justification:" (with a red asterisk). There are checkboxes for "Purchase Order" and "Check Request". A "Characters remaining: 500 (500 max)" indicator is present.
- Contact Information:** Includes fields for "First Name:", "Last Name:", "Middle Name:", "Generation:" (with a dropdown), "Email:", "Phone:" (with a red asterisk and a format mask), "Fax:", "Country:" (with a dropdown set to "United States Of America"), "Zip:" (with a red asterisk and a format mask), "Address Line 1:" (with a red asterisk), "Address Line 2:", "City:" (with a red asterisk), "State:" (with a red asterisk and a dropdown), and "Website:".
- 1099/W-9 Information:** Includes an "Order From Information" field.

At the bottom of the form, there are "Clear" and "Submit" buttons.

Figure 3.5: Request for New Vendor tab

Note: The system will generate the Vendor ID when you submit your request.

2. In the **Vendor Official Name** field, enter the complete name of the vendor.
3. The **Vendor Short Name** field defaults with your entry from the Vendor Official Name field, but you can modify the vendor short name as necessary.
4. For the **Business Processes to Which the vendor is Available** option, select at least one of the following boxes:
 - Select (checkmark) Purchase Order if the vendor will accept purchase orders.
 - Select (checkmark) Check Request if the vendor will be paid through the check request process in TEAMS.
5. In the **Justification** field, enter information about why the vendor should be an approved vendor for goods or services.
6. Enter the **First Name** for the contact person for the vendor.
7. Enter the **Last Name** for the contact person for the vendor.

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8. Enter the **Middle Name** for the contact person for the vendor, if known.
9. If a **Generation** suffix is applicable, such as Jr., select it from the drop-down list.
10. Enter the **Email** address for the contact person.
11. Enter the **Phone** number for the contact person. Include the extension in the **ext** field, if applicable.

Note: If you enter a phone number that is already in the system, a message box is displayed with the name of the vendor with the same number and asks you to check for duplicates, but you are not prevented from saving the number.

12. Enter the **Fax** number for the contact person.
13. The **Country** defaults to United States of America, but you can change this if necessary.
14. Enter the **Zip** code for the Contact information.

Note: If you enter a Zip Code that applies to multiple cities, a box is displayed that alerts you to this. The cities associated with the Zip Code are available for selection in a drop-down list. Choose the appropriate city for the address you are entering and click the **Select** button. The box closes and your selection populates the **City** field.

Note: If you selected a country other than the than United States, the **Postal Code** field is displayed instead of the Zip field. In this case, enter the Postal Code.

15. In the **Address 1** field, enter the street number and street name for the address. Include the suite number on this line, if applicable.
16. In the **Address 2** field, enter any additional address information.

Note: The system populates the **City** and **State** fields based on your entry in the Zip field. If you selected a country other than the United States, the **Province** field is displayed instead of the State field. In this case, enter the Province.

17. Enter the **Website** for the vendor, if applicable.
18. Some Purchasing Departments require only the basic vendor information and contact information in their requests for a new vendor. If you have completed the basic information required for your request, click the **Submit** button. The Attachments tab is displayed with a message that lets you know that your request has been submitted for approval.

Note: See "How to Add Attachments to Your Request for New Vendor" on page 3.10 for information about adding attachments to your request.

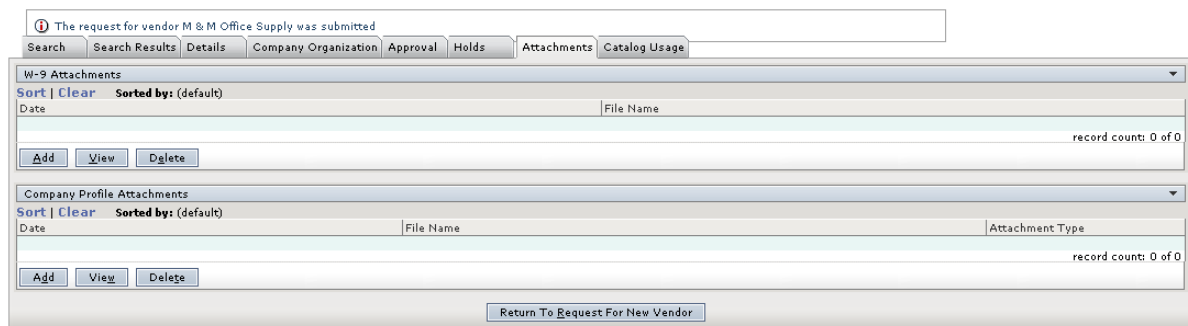


Figure 3.6: Attachments tab with message displayed when a request is submitted

Some Purchasing Departments require district personnel to provide additional information about the vendor in their requests. This additional information may include:

- 1099/W-9 information
- Order From information
- Attachments

How to Add 1099/W-9 Information


1. Click the  on the 1099/W-9 Information bar to display the fields associated a vendor's 1099 and W-9.

Figure 3.7: 1099/W-9 Information fields

2. In the **Federal Tax Identification Number** field, enter the vendor's Tax Identification Number (TIN) without dashes. When you are finished entering the number, the system checks for a match with any TINs already in the TEAMS database.
 - If it finds a match, the system populates the Tax Return Name and Tax Business name fields with information from the matching TIN.
 - If it does not find a matching TIN, the system displays a message (shown below) for you to enter the 1099/W9 information for the new Tax Identification Number, and the Tax Return Name and Tax Business Name fields are populated with the Vendor Official name for the request you are entering.


Figure 3.8: System message displayed for a new Tax Identification Number

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3. Select the **Tax ID Type** from the drop-down list.

Note: When you save the form, the system checks that the Tax ID Number entered contains the proper number of digits. For EINs, the system also checks to ensure that the first two digits are valid EIN prefixes.


Note: The **Tax Return Name** and **Tax Business Name** fields populate based on your entry in the Federal Tax Identification Number field. If the system did not find a matching TIN in the database, the fields are populated with the name you entered in the Vendor Official Name field. If the system found a matching TIN, these fields are populated with the name on file for the matching TIN. The Tax Return Name and Tax Business Name fields should what is on the W-9 form for the vendor you are entering. You can edit the fields as necessary.

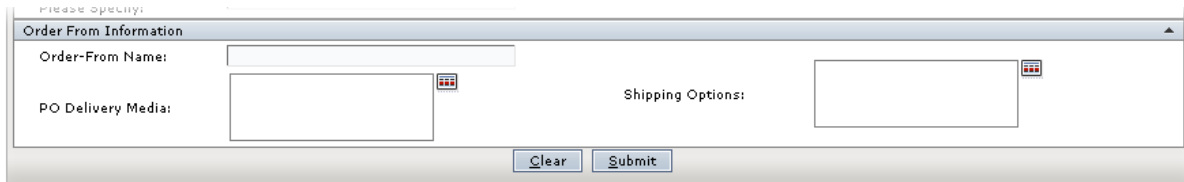
4. The **Exempt Withholding** box defaults as selected (checkmarked). If the vendor is not exempt from withholding, deselect this box (remove the checkmark).
5. In the **W-9 Status** field, select one of the following options from the drop-down list: On File, Applied For, or Not Received.
6. In the **W-9 Receipt Date** field, enter the date the district received the W-9 or click the  icon to select it from the calendar.

Note: If you select Not Received or Applied For as the W-9 status, the W-9 Receipt Date field is not required.

7. In the **W-9 Vendor Type** field, select one of the following options from the drop-down list: Partnership, Other, Individual - Sole Proprietor, or Corporation.
8. If you selected Other as the Vendor Type, complete the **If "Other" Type, Please Specify** field with a description of the vendor type.
9. If the vendor is subject to 1099 reporting, select (checkmark) the **Subj To 1099** field.
10. If you selected the Subj To 1099 field, the **1099 Type** field defaults to 1099 Misc, but you can change this if necessary.
11. If you selected the Subject to 1099 field, the **1099 Box** field defaults to Nonemployee Compensation, but you can change this if necessary.
12. In the **Tax Zip** field, enter the ZIP code that is on the vendor's W-9.
13. In the **Tax Address Line 1** field, enter the street address information that is on the vendor's W-9.
14. In the **Tax Address Line 2** field, enter additional street address information, if necessary.
15. In the **City** field, enter the city from the vendor's address on the W-9.
16. In the **State** field, enter the state from the vendor's address on the W-9.
17. Enter the vendor's **Tax Account Number**, if you have that information.


How to Add Order From Information

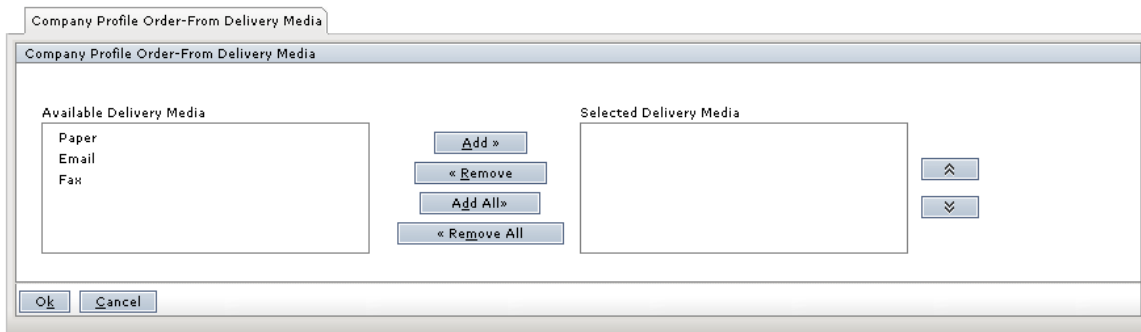
1. Click the  on the Order From Information bar to display the fields for recording the vendor's order from contact information.



The screenshot shows a dialog box titled "Order From Information". It has three main input areas: "Order-From Name" with a text field, "PO Delivery Media" with a list box and a small icon to its right, and "Shipping Options" with a list box and a small icon to its right. At the bottom of the dialog are "Clear" and "Submit" buttons.

Figure 3.9: Order From Information fields


2. In the **Order-From Name** field, enter the vendor contact for placing orders.
3. In the **PO Delivery Media** field, click the  icon to open the Company Profile Order-From Delivery Media tab, as shown in the following figure. On the Company Profile Order-From Delivery tab, select the media types from the Available Delivery Media list. When you have completed your selections, click the **OK** button to return to the Request For New Vendor tab.



The screenshot shows a dialog box titled "Company Profile Order-From Delivery Media". It is divided into two main sections: "Available Delivery Media" on the left and "Selected Delivery Media" on the right. The "Available" list contains "Paper", "Email", and "Fax". Between the two lists are four buttons: "Add", "Remove", "Add All", and "Remove All". To the right of the "Selected" list are two arrow buttons (up and down). At the bottom of the dialog are "Ok" and "Cancel" buttons.

Figure 3.10: Company Profile Order-From Delivery Media tab

Note: Use the **Add All** button to select all items in the Available list. Use the **Remove** button to remove an individual item from the Selected list. Use the **Remove All** button to remove all items from the Selected list.

4. In the **Shipping Options** field, click the  icon to open the Shipping Options tab (shown in the following figure) and select one or more shipping options from the Available Shipping Options list. When you have completed your selections, click the **OK** button to return to the Request For New Vendor tab.

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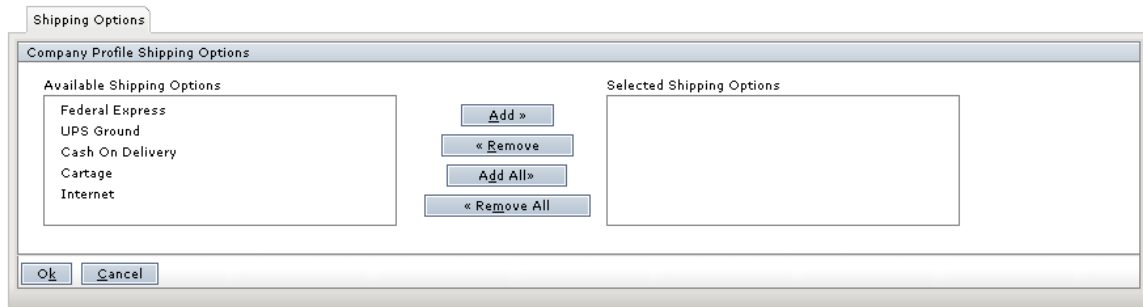


Figure 3.11: Shipping Options tab

Note: Use the **Add All** button to select all items in the Available list. Use the **Remove** button to remove an individual item from the Selected list. Use the **Remove All** button to remove all items from the Selected list.

5. When you have completed the information required by your Purchasing Department for your request for a new company, click the **Submit** button. The Attachments tab is displayed with a message is displayed that lets you know that your request has been submitted for approval.

Note: See "How to Add Attachments to Your Request for New Vendor" on page 3.10 for information about adding attachments to your request.

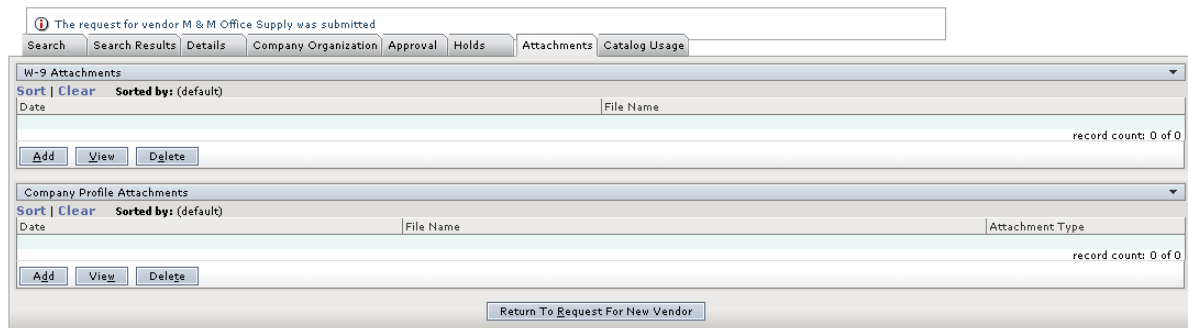


Figure 3.12: Attachments tab with message displayed when a request is submitted

How to Add Attachments to Your Request for New Vendor

You can use the Attachments tab to store electronic copies of a company's W-9 or other company documents, such as a copy of a license.

Note: The other tabs displayed are used in both the Maintain Vendor Profile and Maintain Vendor Profile Approval functions and cannot be accessed through the Request for New Vendor function.

How to Attach a File for a W-9

1. In the W-9 Attachments panel, click the **Add** button. The W-9 Attachment box is displayed, as shown in the following figure.

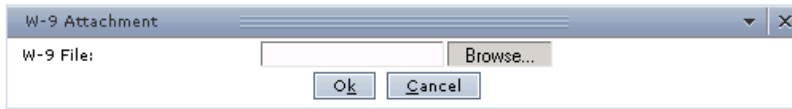


Figure 3.13: W-9 Attachment box

2. Click the **Browse** button to open a standard Choose File box.
3. Navigate to the location of the file and select the file for W-9. The file name is displayed in the W-9 File field.
4. Click the **Ok** button. The file is added to the W-9 panel.

How to Attach Other Company Files

1. In the Company Profile Attachments panel, click the **Add** button. The Attachment box is displayed.

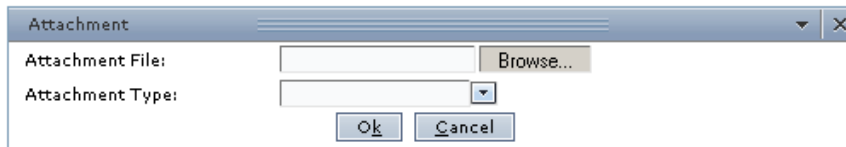


Figure 3.14: Attachment box

2. Click the **Browse** button to open a standard Choose File box.
3. Navigate to the location of the file and select the file for the attachment. The file name is displayed in the Attachment File field.
4. Select the **Attachment Type** from the drop-down.
5. Click the **Ok** button. The file is added to the Company Profile Attachments panel.

How to View an Attachment

1. In either the W-9 Attachments or Company Profile Attachments panel, highlight to select the attachment.
2. Click the **View** button. The attachment is displayed in a file viewer browser window on top of the TEAMS browser window.
3. When you are finished viewing the attachment, click the x in the file viewer browser window to close it and return to the Attachments tab.

How to Delete Attachments

1. In either the W-9 Attachments or Company Profile Attachments panels, highlight to select the file to be deleted.
2. Click the **Delete** button. A confirmation box is displayed asking you to confirm the deletion action.
3. Click the **Yes** button to proceed with the deletion.

Vendor Lookup

Use the Vendor Lookup function to search the TEAMS database for companies approved as vendors for the district. This is a read-only function that allows you to view basic vendor information, such as address and account representative information.

How to Search for Vendors

1. Navigate to the TEAMS Home page and locate the Vendor Maintenance menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Vendor Lookup** link. The Search tab is displayed.

Figure 3.15: Search tab

3. Enter the **Vendor Name**.

Note: The *Contains* option defaults as the type of search to perform. With a *Contains* search, your search results will include any vendor with a name that contains the characters you enter in the field. For example, if you enter "off", your search might return Office Depot, City Office Supplies, and Bob's Coffee Service. If you are sure of the vendor name, you can use the *Exact* option. With an *Exact* search, your search will only return a vendor with a name that matches your complete entry exactly.

4. Click the **Search** button. The Search Results tab is displayed with any matching results, as shown in the following figure

Vendor ID	Official Name	Approval Status
54540	AAA Art Supply, Inc.	Approved

Figure 3.16: Search Results tab

How to Work With Search Results

The Search Results tab displays a listing of vendors that matched your criteria. A code is displayed next to search results to indicate what information in the vendor record matched your search. The codes are described below.

- C: Searched value contained in Company
- V: Searched value contained in Vendor
- R: Searched value contained in Remit To
- A: Search value contained in Account Representative
- O: Search value contained in Order From

Reviewing High-Level Information

To review high-level information about a company, select it in the Vendor Profile Search Results. Information is displayed in the Search Results Details panel, as shown in the following figure.

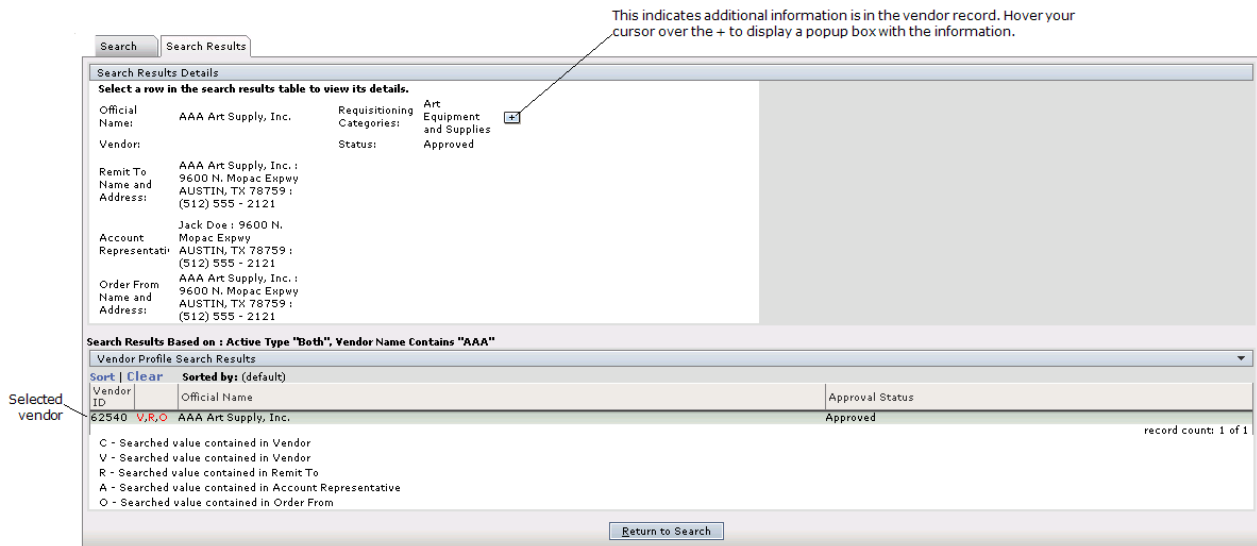


Figure 3.17: Search Results tab with details for a selected company

Note: If the Search Results Details panel contains a + next to any of the information, this indicates that the company has multiple contacts saved in the record (for example, multiple Order From contacts). Hover your cursor over the + to display a popup box that contains the additional information. To close the popup box, move your cursor away from the + icon.

Vendor Lookup/Accounting

Use the Vendor Lookup/Activity function to search the TEAMS database for companies approved as vendors for the district. This is a read-only function that allows you to view basic vendor information, such as address and account representative information, and to review all financial activity.

How to Search for Vendors

1. Navigate to the TEAMS Home page and locate the Vendor Maintenance menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Vendor Lookup/Accounting** link. The Search tab is displayed.

Figure 3.18: Search tab

3. Enter the **Vendor Name**.

Note: The *Contains* option defaults as the type of search to perform. With a *Contains* search, your search results will include any vendor with a name that contains the characters you enter in the field. For example, if you enter "off", your search might return Office Depot, City Office Supplies, and Bob's Coffee Service. If you are sure of the vendor name, you can use the *Exact* option. With an *Exact* search, your search will only return a vendor with a name that matches your complete entry exactly.

4. Click the **Search** button. The Search Results tab is displayed with any matching results, as shown in the following figure.

Figure 3.19: Search Results tab

How to Work With Search Results

The Search Results tab displays a listing of vendors that matched your criteria. A code is displayed next to search results to indicate what information in the vendor record matched your search. The codes are described below.

- C: Searched value contained in Company
- V: Searched value contained in Vendor
- R: Searched value contained in Remit To
- A: Search value contained in Account Representative
- O: Search value contained in Order From

Reviewing High-Level Information

To review high-level information about a company, select it in the Vendor Profile Search Results panel. Information is displayed in the Search Results Details panel, as shown in the following figure.

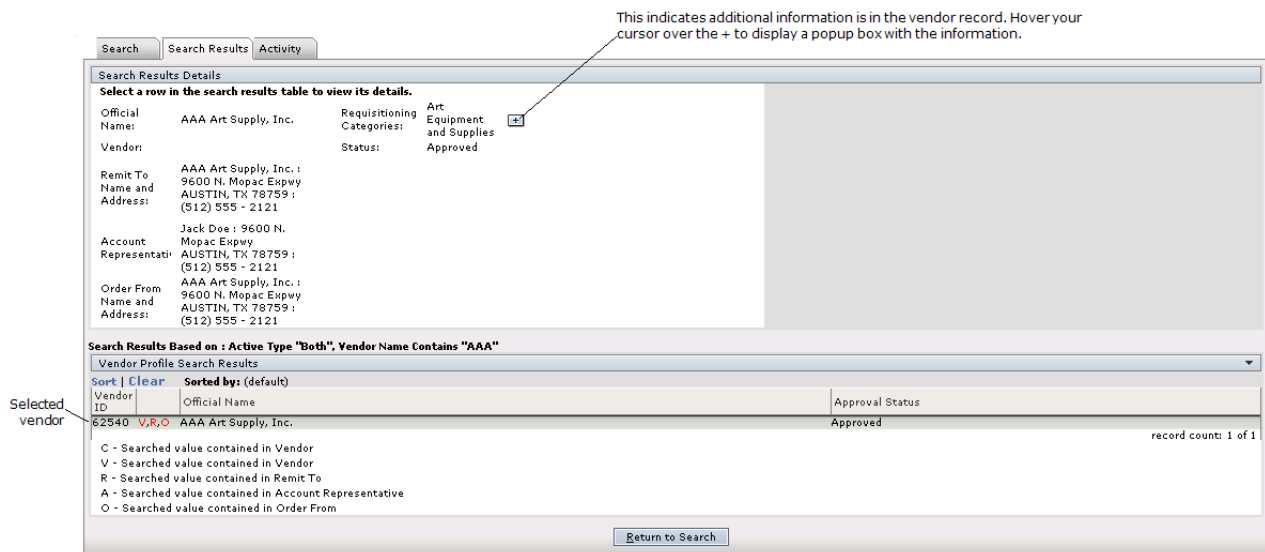


Figure 3.20: Search Results tab with details for a selected company

Note: If the Search Results Details panel contains a + next to any of the information, this indicates that the company has multiple contacts saved in the record (for example, multiple Order From contacts). Hover your cursor over the + to display a popup box that contains the additional information. To close the popup box, move your cursor away from the + icon.

How to Work With the Activity Tab

Use the Activity tab to view totals for the goods and services acquired from the selected company during a selected period. Requisition, Purchase Order, Encumbrance, and Invoice information is displayed on the tab. Information on the Activity tab can be viewed at the Company level or at the Vendor level.

To access the Activity tab for a selected company, either click the tab to bring it forward, or double-click on the company name in the Vendor Profile Search Results panel. A sample Activity tab is shown in the following figure.

The screenshot shows the 'Activity' tab interface. At the top, there are three callouts: 'The total for all types of requisitions' pointing to the Requisitions column, 'The total for the encumbrances information' pointing to the Encumbrances column, and 'The total for the invoice information' pointing to the Invoices column. The interface includes a search bar, a 'Company/Vendor Activity' header, and two main sections: 'Company Details' and 'Vendor Details'. The 'Company Details' section shows 'Acme Office Supply:22014' with a total of 451,647.33 for Requisitions, 459,015.15 for Purchase Orders, 451,647.33 for Encumbrances, and 38,030.30 for Invoices. The 'Vendor Details' section shows the same company name and totals, along with a 'Remit To's' address: '9699 N. Sample St,AUSTIN,T'. A 'Return to Search Results' button is located at the bottom.

Company/Vendor Activity		Requisitions	Purchase Orders	Encumbrances	Invoices
Id:	Acme Office Supply:22014	451,647.33	459,015.15	451,647.33	38,030.30
Company:	Acme Office Supply:22014	163,276.11 Trad 287,871.22 Blank/Proj 500.00 NTE		451,647.33 Requisitions .00 Check Request .00 P Card	504.15 Entered 298.43 Validation .00 Posted 37,227.72 Paid
Vendor:	Acme Office Supply:22014	451,647.33	459,015.15	451,647.33	38,030.30
Remit To's	9699 N. Sample St,AUSTIN,T				504.15 Entered 298.43 Validation .00 Posted 37,227.72 Paid

Figure 3.21: Sample Activity tab

Note: If the balances in the Company Details panel are zero, then there has been no activity for the company.

How to Work With the Company/Vendor Activity Panel

Note: The ID field displays the Company name and ID number.

In the Company/Vendor Activity panel, the **Period** field defaults to Calendar Year, which shows activity from January 1 through the current date. You can change the selection to view totals for other periods. The date fields display the begin date and end date for the range you select in the Period field. You have the following options in the Period field: Fiscal Year, 12 Month, and Other. If you select Other, use the date fields to set the Begin Date and the End Date for the period.

How to Work With the Company Details Panel


The Company Details panel shows Requisitions, Purchase Orders, Encumbrances, and Invoices information at the company level for all the vendors in the company profile.

Requisitions


The total amount for all requisitions from the company is displayed. Sub-totals are shown for traditional, project/blanket, and not-to-exceed requisition types.

Note: For more information about working with Requisitions, see the *TEAMS Requisitions User Guide* or *TEAMS Online Help*.


Trad (Traditional)

If desired, you can click the  icon to open the Display Requisitions tab and view information about each requisition. View the information on the Display Requisitions tab. When you are finished viewing Traditional requisitions, click the **Return** button to go back to the Activity tab.


Blan/Proj (Blanket/Project)

If desired, you can click the  icon to open the Project Requisitions tab and view information about each requisition. View the information on the Project Requisitions tab. When you are finished viewing Blanket/Project requisitions, click the **Return** button to go back to the Activity tab.

NTE (Not-To-Exceed)

If desired, you can click the  icon to open the Not-To-Exceed Requisitions tab view information about each requisition. View the information on the Not-To-Exceed Requisition tab. When you are finished viewing Not-To-Exceed requisitions information, click the Return button to go back to the Activity tab.

Purchase Orders


If desired, you can click the  icon to open the Purchase Order Search Results tab and view information about each purchase order. View the information on the Purchase Order Search Results tab. When you are finished viewing purchase order information, click the **Return** button to go back to the Activity tab.

Encumbrances

The system displays the totals for all encumbrances for the company. Sub-totals are shown for requisitions, check requests, and Procurement Card transactions.



Invoices

The total amount for all invoices is displayed. Sub-totals are displayed by invoice status:

Entered, Validation, Posted, and Paid. If desired, you can click the  icon next to a status type to open the Results tab for the selected invoice status. View the information on the Results tab. When you are finished viewing invoice information, click the **Return** button to go back to the Activity tab.

How to Work With the Vendor Details Panel

With the Vendor Details panel, you can view totals at the vendor level for **Requisitions**, **Purchase Orders**, **Encumbrances**, and **Invoices**.

If the company has multiple vendors, you can use the **Vendor** field to select another vendor for which to view activity totals. For any amount that has the  icon next to it, you can drill down to view specific items that are included in the total. Refer to "How to Work With the Company Details Panel" on page 3.17 for information about the tabs displayed when you click the  icon.

Note: The selections in the **Remit-To** field are dependent on your selection in the **Vendor** field. If a vendor has multiple **Remit-To**'s, you can use the **Remit-To** field to view activity totals for another **Remit-to**.

Note: If the balances in the **Vendor Details** panel are zero, then there has been no activity for the vendor.