

9.2 Adding a Supplier

Purpose: Use this document as a reference for adding a supplier in ctcLink.

Audience: Purchasing staff.

❗ You must have at least one of these local college managed security roles:

- ZC Supplier Entry
- ZD Accounts Payable Inquiry
- ZD Purchasing Inquiry
- ZZ Supplier Entry

You must also set these User Preference Definitions:

- [User Preferences: Supplier Entry](#)

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

For more information on the standard set of data entry convention for PeopleSoft Suppliers, please see the QRG [9.2 Supplier Data Entry Style Guide](#).

Adding a Supplier

Navigation: NavBar > Navigator > Suppliers > Supplier Information > Add/Update > Supplier

1. The **Supplier Information** search page displays.
2. Select the **Add a New Value** tab.
3. When you add a new supplier, the system prompts you to enter a supplier ID, which is the primary key to the supplier tables. The supplier ID is a unique identifier that you can use to locate specific supplier information.
 - Depending on how you set up your autonumbering defaults on the **Supplier Set Control** page, you enter either you own unique supplier ID or let the system assign one for you. Each supplier belonging to a SetID must have a unique number as its supplier ID.

- If you have enabled autonumbering, the supplier ID appears as "NEXT" on the search page. The system assigns a sequential ID number after you enter the supplier information and save the page.
- Use the **Persistence** list to select a persistence level for this supplier. Values are: "One Time", "Permanent", "Regular", and "Single Payment Supplier".
- If you specify a persistence level of "Single Payment Supplier" when you add a new supplier, the first page in the **Supplier Information** component that you enter is the **Single Payment Supplier** page.
- If you are creating a "One Time", "Permanent" or "Regular" supplier, you first access the **Identifying Information** page.

4. Select **Add**.

5. The **Identifying Information** tab displays.
6. Enter identifying information for a supplier. This information includes the supplier name and short name, classification, status, persistence, withholding and VAT eligibility, relationships with other suppliers, duplicate invoice checking settings, and additional identifying elements required for reporting to governmental agencies. Use the **Supplier Short Name** field to provide an alternate search key to access supplier data. The system enables you to assign the same supplier short name to multiple suppliers, and it makes the short name unique by appending a numeric value to the end. For example, if you enter the supplier short name "SMITH", when you save, the system makes the short name "SMITH-001". If you ever have another supplier for whom you want to use "SMITH" as the short name, the system enters "SMITH-002", and so on.
7. Enter the desired information into the **Supplier Short Name** field.
8. Use the **Supplier Name** fields to enter the supplier's name. There are two lines for the supplier name in case you're dealing with divisions, subsidiaries, or other complex

organization entities that require detailed identification. Enter the desired information into the **Supplier Name** field.

9. Use the **Supplier Status** list to select the supplier's status. Values are:
 - **Approved:** If you have authority to approve suppliers as defined in your procurement user preferences, the system automatically assigns a status of "Approved" to the supplier. The system does not recognize a supplier as approved unless an authorized payables or purchasing user enters or approves it.
 - **Inactive:** You cannot enter new vouchers for this supplier.
 - **To Archive:** You cannot enter new vouchers for this supplier; the supplier is purged from the system.
 - **Unapproved:** If you do not have the authority to approve suppliers as defined in your procurement user preferences, another user needs to approve the supplier before users can enter vouchers into the system for this supplier.
10. Use the **Classification** list to select the supplier's classification. Values are:
 - **Attorney:** Indicates that the supplier is an attorney.
 - **Employee:** Assign this classification to suppliers only if they are college personnel.
 - **HRMS** (human resources management system): Indicates that the supplier is a third-party supplier from the ctcLink Human Capital Management (HCM) system, such as an insurance carrier or taxing authority. Selecting this value activates the HCM Class field.
 - **Supplier:** Most are suppliers.
11. Use the **Persistence** list to select the supplier's persistence. Values are:
 - **One-Time:** Select for suppliers you know you will use only once. You can enter only one voucher for this supplier, after which the supplier status changes to "Inactive" automatically. A one-time supplier is different from a single payment supplier in that a one-time supplier adds rows to the supplier tables. A single payment supplier does not affect supplier tables and is used as the default master supplier for single payment vouchers.
 - **Permanent:** Select for suppliers you know your organization will always use, even if not on a frequent basis. You can create an unlimited number of vouchers for this supplier. The supplier is not purged from the system unless you specifically request that they be archived in a supplier archive request.
 - **Regular:** Select for a supplier only if you don't mind that it is removed from the system after activity for the supplier stops for a designated period. You can create an unlimited number of vouchers for this supplier. However, if there is no activity for the supplier by the as-of date in a supplier archive request, the supplier is purged from the system.
12. Use the **VAT Registration** option when entering VAT-applicable suppliers, to activate the **Registration**, **VAT Default**, and **VAT Service Treatment Setup** links. This option appears only if the **Display VAT Flag** option on the **Supplier Set Control** page is selected.
13. When entering withholding or 1099 suppliers, select the **Withholding** option to enable withholding for the supplier. You specify withholding options on the **Withholding Supplier Information** page.
 - While the **Withholding** option and the **Withholding Supplier Information** page are available to you to make updates after you have defined your suppliers, the most efficient way to handle withholding suppliers is to make sure that you mark them as

withholding when you first enter them. If you do, all vouchers that you enter for withholding suppliers are automatically flagged for withholding reporting as you enter them into the system.

14. Select the **Open For Ordering** option to certify the supplier for purchasing goods and services. If this option is clear, you cannot enter purchase orders (POs) for this supplier in ctcLink Purchasing.
15. Select the **Corporate Supplier** option and **Corporate Supplier ID** field to associate the supplier that you are creating with a corporate supplier.
16. Select the **InterUnit Supplier** option and **InterUnit Supplier ID** field to identify this supplier as an interunit supplier.
17. Select the **Create Bill To Customer** option if you want the system automatically to create a bill-to customer upon saving the supplier. The bill-to customer is created with default information.
18. Select the **Create Bill To Customer** option.
19. Enter the desired information into the **Support Team Code** field.
20. Enter the desired information in the **Collector** field.
21. Enter the desired information into the **Credit Analyst** field.
22. After the bill-to customer is successfully created, the **Create Bill-To Customer** group box no longer appears on the page.
23. Select the **Bill-To Customer Details** link to modify the bill-to customer. This link is located under the **Additional ID Numbers** region of this page. Also use this region to enter information-only additional identifiers for the supplier. The data here is not used for processing, but may be required for reporting purposes.
24. Use the **Duplicate Invoice Settings** region to enter duplicate invoice checking parameters. The options in the Duplicate Invoice Settings region are the same as those defined in the **Payables Options** component. In the **Payables Options** component, you define these options for the business units sharing a SetID; here, you define them for the supplier.
25. Use the **Government Classifications** region to enter government classifications required for reporting by some U.S. organizations. In the U.S., companies report information about the classification of suppliers with whom they do business to the government; they are also sometimes required to report similar information to their customers. Suppliers receive certain classifications of certification, for example "Small Business - Hispanic Woman Owned" from various government sources.
26. Use the **Standard Industry Codes** region to enter standard industry classification (SIC) codes required for reporting by some governments.
 - Depending on your organization's reporting requirements, you can apply SIC codes here for the supplier or on the **Location** page for a supplier location. The information that you enter for the supplier location is informational only. The data is not used elsewhere in the system. The information you enter for the supplier, however, is used for U.S. government compliance reporting. If you are not doing government reporting, you may chose to define these numbers at the supplier location only.
 - You can supply multiple types of industry codes for the same supplier. For example, a standard USA SIC code and a North American Industrial Classification System (NAICS) code can be defined for the same supplier. You can also supply multiple SIC codes for the same SIC type.

27. Use the **Additional Reporting Elements** region to enter supplier information required for Federal Procurement Data Systems reporting.
28. Next, access the **Address** page to enter details about the supplier's address. Select the **Address** tab.

[illegible]

 Use the **Address** tab to specify one or more addresses for the supplier. You can enter multiple addresses for the different sites that a supplier might have.

29. Enter the desired information into the **Description** field.
30. Use the **Effective Date** field to specify the date from which this address is valid. It defaults to the current system date; however, you can override this, if necessary.
31. Use the **Country** field to select the supplier's country. After you select a country, the appropriate address form appears. Depending on the country that you select, the form of the address field varies. Enter all fields that are necessary for the country that you select.
32. Enter the desired information into the **Address 1** field.
33. Enter the desired information into the **City** field.
34. Enter the desired information into the **State** field.
35. Enter the desired information into the **Postal** field.
36. Use the **Email ID** field to enter the supplier's email address. This is the address that the email application engine process uses when you select the dispatch method of email in ctcLink Purchasing. Multiple email addresses can be entered in the **Email ID** field, but they must be separated by semicolons.
37. Use the **Payment/Withholding Alt Names** (payment and withholding alternate names) section to specify alternate names for the supplier that can be used for payment and

withholding purposes. When the system generates payments for the location that uses this address, it uses the alternate name information on the payment forms. Likewise, if you specify an alternate withholding name, the system uses this name on withholding reports instead of the name that you specified on the **Identifying Information** page. This function is useful if a supplier wants to conduct business under another name. For example, Alvarez Consulting may be the supplier, but may want to receive payments or report withholdings under the name of Jose Alvarez.

38. Use the **Phone Information** group box to enter phone information for the supplier.
39. Use the **Type** list to select the type of phone number (cellular, business, fax, home, pager).
40. Enter **Type** = "Business Phone".
41. Enter **Prefix**.
42. Enter the desired information into the **Telephone** field.
43. Enter the desired information into the **Extension** field.
44. Next, access the **Contacts** tab to specify the details of the contact person. Select the **Contacts** tab.

The screenshot shows the 'Supplier Information' form with the 'Contacts' tab active. The form is for a supplier named 'Las Cafeteras Music LLC'. It includes fields for Address, Country (USA), City (Los Angeles), State (CA), and Zip Code (00000). There are sections for 'Payment/Withholding Alt Names' and 'Phone Information'. The 'Phone Information' section has a dropdown for 'Type' set to 'Business Phone'.

45. Use the **Contacts** tab to enter information about the people whom you contact on a regular basis, so that you can easily determine whom to contact if you have questions and can discern why a contact might want to talk to you, before you return the contact's call.
46. The **Contact ID** field displays the contact ID number. When you add a new supplier contact, the system automatically increments the supplier contact's number in this field.
47. Enter the desired information into the **Description** field.
48. The **Effective Date** field specifies the date from which this contact is valid. This date defaults to the current system date, but can be changed if needed.
49. Use the **Type** list to select the type of contact (such as Management or Sales) to define the contact's role.
50. Enter the desired information into the **Name** field.

51. Use the **Address** field to select an address for the contact from one of the addresses that you entered on the **Address** page. This enables you to associate different addresses with each contact.
52. After you select an address for the contact, the system displays the associated phone numbers for that address in the **Phone Information** group box. The system will copy over all of the address phone numbers when there is no existing phone number defined for the contact. If there are existing phone numbers for the contact, the system will prompt you to confirm if you want to override the existing entries and copy the new address phone numbers into this contact phone list.
53. Enter the desired information into the **Address** field.
54. Use the **View Internet Address** link to open a new browser window that shows the website.
55. Use the **Email ID** field to enter the contact's email address. Multiple email addresses can be entered in this field, but they must be separated by semicolons.
56. Enter the desired information into the **Email ID** field.
57. Finally, access the **Location** tab to specify location details for the new supplier. Select the **Location** tab.

The screenshot shows the 'Manager Self Service' interface for 'Supplier Information'. The 'Location' tab is selected and highlighted with a red box. The page displays supplier details for 'LAS CAFETE-001' (Las Cafeteras Music LLC). Below the supplier information, there are sections for 'Supplier Contact' and 'Details'. The 'Details' section includes fields for 'Effective Date' (01/15/2019), 'Effective Status' (Active), 'Type', 'Name', 'Title', and 'Address'. There is also an 'Internet' field with a 'View Internet Address' link and an 'Email ID' field. At the bottom, there is a 'Phone Information' section with fields for 'Type' (Business Phone), 'Prefix', 'Telephone', and 'Extension'. The interface includes navigation tabs at the top (Summary, Identifying Information, Address, Contacts, Location, Custom) and a bottom navigation bar with buttons like 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', 'Update/Display', and 'Include Hi'.

58. Use the **Location** tab to enter one or more locations for the supplier. Each supplier must have one default location, but can also have multiple locations, including an invoicing from, remit to, and return to location. Enter identifying information and VAT information for each supplier location.
59. If you have more than one location, add additional locations by selecting the **Add a New Row [+]** icon in the **Location** section.
60. Use the **Add a New Row [+]** icon in the **Details** section to update information for each location. Location information is effective-dated.
61. Use the **Location** field to enter an identifier for this location. This field enables you to differentiate supplier locations, if you have more than one.

62. Enter the desired information into the **Location** field.
63. Use the **Default** option to select the default location. Only one location can be the default location. Information for the default location appears by default on all the vouchers for the supplier, but you can change the location on the voucher when necessary.
64. Enter the desired information into the **Description** field.
65. Select the **RTV Fees** link to access the **Supplier's RTV Fees** page, where you can enter RTV fee information for this supplier.
66. Use the **Effective Date** field to enter the date from which this location is valid. This field defaults to the current system date; however, you can change the effective date to a past or present date, if necessary.
67. Select the **Payables** link to access the **Payables Options** page, where you can define invoicing and remitting addresses, payment options, matching and approval options, EFT options, self-billed invoice options, supplier bank account information, supplier type options, and (USA only) HIPAA information.
68. Select the **Procurement** link to access the **Procurement Options** page, where you can define purchasing process information and return to vendor options.
69. Select the **Sales/Use Tax** link to access the **Tax Options** page, where you can define SUT options for the supplier location.
70. Select the **Global/1099 Withholding** link to access the **Withholding Supplier Information** page, where you can specify withholding options for the supplier location.
71. Use the **Additional ID Numbers** region to enter additional identifiers for the supplier location. These fields are the same as those found on the **Identifying Information** page. Enter ID numbers here to override those entered on the **Identifying Information** page for the supplier header.
72. Use the **Comments** region to enter any comments you have about the supplier.
73. Use the **Internet Address** region to enter URLs and descriptions for the supplier's websites. Select the **Open URL** link in this region to open an URL in your browser.
74. Use the **VAT** region to enter VAT options for VAT-applicable supplier locations. VAT options for the supplier location override those for the supplier.
75. Select the **Custom** tab.

Manager Self Service Supplier Information

Summary Identifying Information Address **Location** Custom

SetID WACTC
Supplier ID 000044896 Short Supplier Name LAS CAFETE-001 Supplier Las Cafeteras Music LLC

A supplier location is a default set of rules which define how you conduct business with a supplier.

Location Find | View All First 1 of 1 Last

*Location 220 ☐ Default RTV Fees Attachments (0)

Description Tacoma Community College

Details Find | View All First 1 of 1 Last

*Effective Date 10/16/2015 Effective Status Active Expand All Collapse All

Options Payables Procurement Sales/Use Tax Global1099 Withholding

Additional ID Numbers

ID Numbers Personalize | Find | View All | First 1 of 1 Last

Type	SetID	ID Number	DUNS Number
TRN		471651267	

Standard Industrial Classification Codes Personalize | Find | View All | First 1 of 1 Last

SIC Type	SIC Code	Parent SIC Code	Description
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Comments

Internet Address

URL Information Personalize | Find | View All | First 1 of 1 Last

URLID	Description	Open URL
1		Open URL

VAT

VAT Default VAT Service Treatment Setup

Physical Nature Where Service Performed Use VAT Suspension

Expand All Collapse All

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History

76. Use the **Custom** tab to create user-definable supplier fields that can be used in custom reports and queries. There are ten predefined 30-character alphanumeric customizable fields.
77. Select **Save**.

Manager Self Service Supplier Information

Summary Identifying Information Address Contacts Location **Custom**

SetID WACTC
Supplier ID 000044896 Short Supplier Name LAS CAFETE-001 Supplier Las Cafeteras Music LLC

Supplier Field C30 A	<input type="text"/>	Supplier Field C30 F	<input type="text"/>
Supplier Field C30 B	<input type="text"/>	Supplier Field C30 G	<input type="text"/>
Supplier Field C30 C	<input type="text"/>	Supplier Field C30 H	<input type="text"/>
Supplier Field C30 D	<input type="text"/>	Supplier Field C30 I	<input type="text"/>
Supplier Field C30 E	<input type="text"/>	Supplier Field C30 J	<input type="text"/>

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History

Summary | Identifying Information | Address | Contacts | Location | Custom

78. Process complete.