CREATING A SUPPLIER REQUEST

Purpose: To request a supplier not currently available in the Supplier Masterfile.

How to access: Open the **Purchases** worklet, then select **Create Supplier Request**.

Helpful hints:

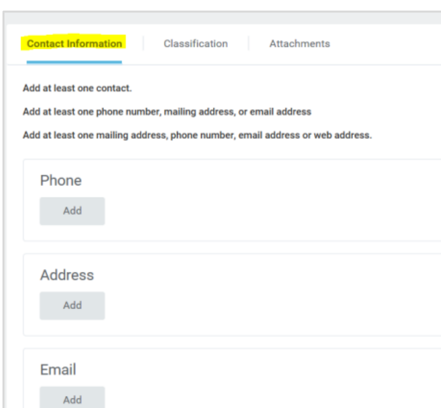
- Do not place orders directly with a new supplier until the supplier has been approved by Purchasing and added to the Masterfile. Allow 2 business days to establish a supplier. For emergencies contact the Purchasing Department at x3456.
- **You will not be able to edit your Supplier Request form after it is submitted.** Contact Purchasing to provide additional information to the request.

1. Click the **Purchases** worklet, then under **Actions,** select **Create Supplier Request**.

2. In the **Supplier Name** field, enter the Supplier's full name.

3. In the **Justification** field, provide a detailed description of the Supplier's business.

4. Complete each contact section below.
   Note: You must enter and select as PRIMARY one Address, Phone and Email.

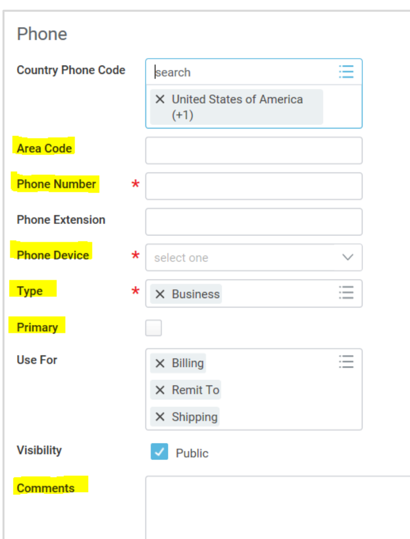


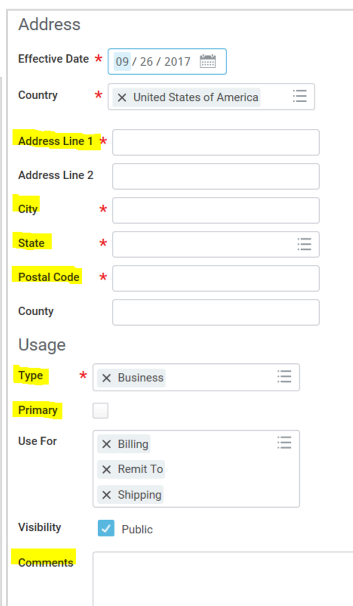
5. Click the **Add** button under **Phone.**
   - **5A.** Enter each of the following fields: **Area Code**, **Phone Number**, **Phone Device**, **Type** and check the **Primary** box where applicable.
   - **5B.** Use the **Comments** field to add any **Contact Names**.
   - **5C.** Click the **Add** button only to provide another phone number.

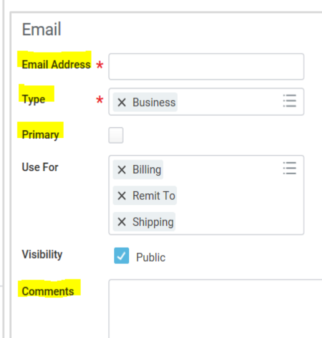
6. Click the **Add** button under **Address**.
   6A. Enter each of the following fields: **Address, City, State, Postal Code**. Then select **Usage Type** and check the **Primary** box where applicable.

   6B. Use the **Comments** field to add any **Contact Names**.

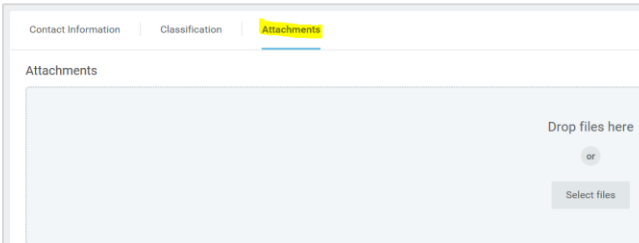
   6C. Click the **Add** button only to provide additional addresses.
7. Click the **Add** button under **Email**.
   7A. Enter a valid **Email Address** and **Type**, check the **Primary** box where applicable.
   7B. Use the **Comments** field to add any **Contact Names**.
   7C. Click the **Add** button only to provide additional email addresses.







8. Click on the **Attachments** tab and upload the Supplier completed W9 form if available.



9. After all information has been entered, click **OK** in the lower left corner, then **Done**. The Supplier Request is then sent to the Purchasing Department for approval and processing.

Note: You will not be able to edit your Supplier Request form after submission Contact Purchasing to provide additional information for the request.