Quick Reference Guide: Creating a New Vendor

Instructions: Use the following steps to create a new Vendor. This is necessary when you need to pay an entity not currently in the KFS Vendor file. Use the Lookup and Search feature to see if a vendor already exists before creating a new one.

Note: An asterisk (*) denotes a required field. Refer to Creating and Editing a Vendor Job Aid for more details and descriptions.

1. Select the Vendor link at the bottom of the Lookup and Maintenance box.

2. Click Create New box in upper right corner.
3. Enter the vendor’s name as the Description in the Document Overview Tab. Type in the business purpose for the document in the Explanation field.

*Note:* While Explanation is not marked with an asterisk (*), this field is required by the Controller’s Department.

4. Enter the Vendor’s name in the Vendor Name field on the Vendor Tab.

*Note:* ISU is not using the Vendor Last Name or Vendor First Name fields. See Job Aid for more information.

5. Select “Disbursement Voucher” from the Vendor Type dropdown box.

6. Select “Yes” from the Is this a foreign vendor drop-down box if this is a Foreign Vendor.

7. Select “Not Coded” from the Ownership Type drop-down box.
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8. Scroll down to the Address Tab.

*Note*: Use Address 1 for an alternate or second business name if needed. See Creating and Editing a Vendor Job Aid for more details.

9. Select Remit from the Address Type drop down box.

10. Type Vendor’s Address in the Address 1 and Address 2 spaces.

11. Type in the City, State, Postal Code and Country for all US addresses.

12. Select “Yes” from the Set as Default Address drop-down box.

13. Select Active Indicator box if address is active.

14. Click the Add button.

15. Click on the Show button on the Notes and Attachments tab.

16. Click Attach Document and attach your supporting documentation, i.e. Independent Personal Services (IPS) form, Professional Services Contractual Agreement, or other documents containing the taxpayer number.

17. Click Submit to route to the Controller’s Department.