|  |
| --- |
|  |

University of North Carolina at Chapel Hill

**Campus Vendors**

**Exercise Workbook**

PeopleSoft Human Resources and Finance Implementation

# Table of Contents

Exercise #1 3

Reviewing Vendors 3

Exercise #2 5

Requesting a New Campus Vendor 5

Exercise #3 7

Requesting a Vendor Change 7

Exercise/Demonstration #4 8

Completing Independent Contractor Predetermination Process 8

Exercise #1

Reviewing Vendors

Scenario

Your department has received an invoice from a company that is to be paid via the campus voucher process. Before you start creating the campus voucher you want to first see if the vendor exists in the system. And if it does exist, does it have the correct remit-to address on the vendor record?

Reference

Refer tothe following for assistance in completing the exercise:

* Reviewing Vendors  
  Finance Menu > Vendors > Vendor Information > Add/Update > Review Vendors  
  (this is the easiest way for the campus user to see if a vendor already exists in the system)

Required Data

This section provides the data required to complete this exercise.

* Vendor name and Vendor remit-to address for payment:
  + Communications Supply Corp  
    2205 Westinghouse Blvd Suite 105  
    Raleigh, NC 27604

Tasks and Questions

Use the appropriate procedure and data provided to complete the following tasks and answer the following questions:

1. Use the Review Vendors transaction to see if the vendor above exists in the system.

|  |  |  |
| --- | --- | --- |
|  | What search criteria are the best to use? | Vendor name: Select **Contains** and a portion of the vendor name. |
|  | How can you tell if there is more than one page of search results? | Check the upper right of the search results |
|  | Does the vendor exist? If so, how many addresses are maintained on its vendor record? | Yes. o Communications Supply Corp exists for both UNCCH and UNCGA. |
|  | Is your vendor’s remit-to address available on the vendor’s record? | Yes. |

1. What if …

|  |  |  |
| --- | --- | --- |
|  | The vendor you need to pay doesn’t exist in the system at all. What are your next steps? | Requesting a New Campus Vendor |
|  | The vendor exists, but the address is wrong or not available. What are your next steps? | Requesting Campus Vendor Changes |

Exercise #2

Requesting a New Campus Vendor

Scenario

Your department has received an invoice from a company that is to be paid via the campus voucher process. You’ve already verified the vendor doesn’t already exist in the system. Request a new vendor in the system.

Reference

Refer tothe following for assistance in completing the exercise:

* Requesting a New Campus Vendor  
  Main Menu > Finance Menu > UNC Campus > Campus Vendor

Required Data

This section provides the field data required to complete this exercise. Refer to the unique data sheet (if applicable) as necessary while performing the exercise.

| Field | Value |
| --- | --- |
| Corporate Tax ID | *<Make up a nine-digit number you can remember for the purposes of this exercise>* |
| Name | Uniquely Unique Corporation |
| Pay-To Address | 1234 Special Way Suite 100 Carrboro NC 27510 |
| Contact Person and Info | John Smith [john.smith@unique.com](mailto:john.smith@unique.com) Desk: 919-999-9999 Mobile: 919-888-8888 |
| ImageNow Attachments | Attach the scanned invoice  *<for the purposes of this exercise you can attach any document>* |
| Bank Payment Info | To be paid by check. |

Tasks and Questions

Use the appropriate procedure and data provided to complete the following tasks and answer the following questions:

1. Create the request for the new vendor.

|  |  |  |
| --- | --- | --- |
|  | Did you choose to mark the “Order From” or “Remit To” checkboxes? Why? What do they do? | Order From : if this vendor address is valid for use in ePro requisitions or purchase orders.  Remit-to: f the address is valid for remitting payments. |
|  | How could you add more than one address? | Click the + add row buttons in the appropriate section. |
|  | What did you do for the Payment Method field? Why? | They should have left blank for check. |
|  | Once you’ve submitted your request, what happens? | Goes to vendor coordinator for approval. The vendor wont get a vendor ID until the Vendor Coordinator approves. |

1. After you’ve submitted your request, use the Find an Existing Value tab of the Campus Vendor transaction to view your record.

|  |  |  |
| --- | --- | --- |
|  | What’s is a request ID? What is a vendor ID? | Request is ID is not the same as Vendor ID. |

Exercise #3

Requesting a Vendor Change

Scenario

One of the employees in your department got married, changed her name and moved. She recently travelled for University related business. Upon creating a reimbursement request in the Web Travel system, she discovered her vendor information isn’t up to date. Put in a vendor change request so she can get reimbursed as soon as possible.

Reference

Refer tothe following for assistance in completing the exercise:

* Requesting a Vendor Change  
  Main Menu > Finance Menu > UNC Campus > Campus Vendor

Required Data

This section provides the field data required to complete this exercise. Refer to the unique data sheet (if applicable) as necessary while performing the exercise.

| Field | Value |
| --- | --- |
| PID | 701989938 |
| New Address | 888 8th St Carrboro NC 27510 |
| New Name | Jane Clooney |

Tasks and Questions

Use the appropriate procedure and data provided to complete the following tasks and answer the following questions:

1. Create a request to change the vendor record.

|  |  |  |
| --- | --- | --- |
|  | How do you request a change to a vendor name? | The Vendor Coordinator has to make the change directly to the record and can’t be requested with this transaction. Contact the VC directly with backup documentation of the name change. Or attach info to request. |
|  | What field determines whether you are requesting change to an existing address, or requesting a new one be added? What did you select for that field? |  |
|  | For this employee, would there be a point to maintaining the Contact details? | Not really. The vendor record for employees is primarily to get them paid. |

Exercise/Demonstration #4

Completing Independent Contractor Predetermination Process

Scenario

Your department has selected a consultant you need for a project. After a clean background check you need to complete the independent contractor predetermination process.

Reference

Refer tothe following reference:

* Completing the Independent Contractor Predetermination Process.  
  Main Menu > Finance Menu > UNC Campus > Independent Contractor