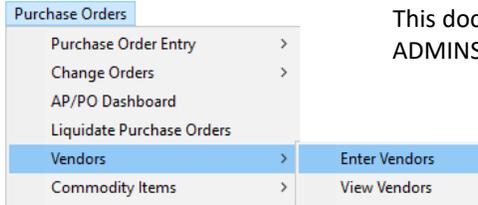




# 1 OVERVIEW



This document explains how to add new vendors, search for vendors and how the ADMINS Unified Community (AUC) manages “Town” versus “School” vendors.

It also describes attaching electronic files to a vendor record, identifying commodity items the vendor provides, and user-defined fields. In addition, the available vendor reports are illustrated.

Access the Enter Vendors screen from the menu by selecting **Vendors ▶ Enter Vendors** (from either the **Accounts Payable** or **Purchase Orders** Module). There are six tabs on the screen; click on each one to access the features of that tab. The screens are described here along with what data may be changed and what features are found on each. In addition to the Tab Buttons that access each screen, there are three buttons on each screen:

The **[5 Add Vendor]** and **[7 Reports]** buttons may be used on all the screens; the **[6 Add Address]** button may only be used on the (**[1 Name/Address]** and **[2 Addresses]** screens).

# 2 NAME/ADDRESS TAB

The numbered areas on the screen image in Figure 1 correspond to the numbers in the heading topics below. To access the screen, from the menu, select:

**Vendors ▶ Enter Vendors**

There is “hover text” available on fields that serves as a quick reminder of what to do with a given field. Place the cursor over the field to reveal the “hover text”.

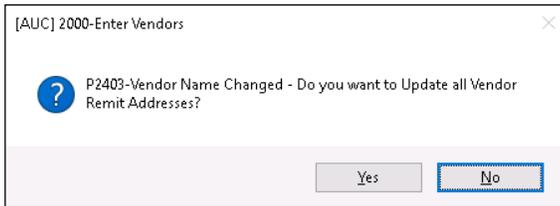
AUC allows an unlimited number of vendors and each vendor may have up to 99 remittance addresses. Vendor numbers are sequentially assigned by the system and contain only numeric values.

A limitless amount of history may be retained per vendor.

Figure 1 [1 Name/Address] Tab



## 2.1 **1** Changing the Vendor Name



If a change is made to the vendor name here, the system will prompt as to whether that name should be applied to all remittance addresses for the vendor.

If a vendor called “ABC Company” wants their PO’s issued to “ABC Company Fulfillment Center” and their checks sent to “ABC Company Payment Center” assign only one vendor number to ABC Company.

## 2.2 **2** Remittance Address

Indicates the number of the currently displayed remittance address and how many remittance addresses are on file for a vendor. A vendor can have up to 99 remittance addresses.

## 2.3 **3** Sort Name

This name will be created based on the name of the vendor. If the vendor name is changed as shown in Section 2.1, the sort name will be updated if you select **[Yes]** to the “update all remittance addresses” prompt. The sort name field consists, by default, of the first 16 characters entered in the Vendor name and may be changed by typing directly into the field. Changing the sort name will not change the vendor name.

## 2.4 **4** Zip Code

Entering the zip code will save some time. The system will look up the city and state for a zip code when entered.

## 2.5 **5** Contact Information

While this data is optional; ADMINS recommends that all available data be included when setting up a vendor for the first time.

## 2.6 **6** Notes

Notes are for each site’s internal use only. The notes do not appear on purchase orders or vouchers. The notes do appear on the entry screen and on the “**View Vendors**” screen. There are four “notes” fields of 30 characters each, allowing a maximum of 120 characters of notes for each vendor remit address.

## 2.7 **7** Web Site and Email Addresses

These fields, each 80 characters maximum, are used by the system when needed for a particular function, such as emailing a purchase order, sending ACH advice, or emailing a bid document. The General Delivery email address for the vendor will be used for any of the functions for which no specific email address is supplied. Hover text is available on each email address field explaining how it is used in the AUC system.

# 3 ADDING A VENDOR

When adding a vendor manually, the system checks to see if the vendor is already in the AUC vendor database.



**Task** **Description**

**Test For Duplicate Vendors...**

1. Before adding a new vendor, the system checks to see if it already exists.
2. Select **Vendors** ▶ **[5 Add Vendor]**
3. The system displays the **Add New Vendor** screen:

4. Type in a string to locate all existing vendor names containing that string. For example, when adding a vendor called “ABC Plumbing Inc.” search for “ABC” and/or “Plumb” to see if the vendor already exists. In this example, the search term **RUMPLESTILSKIN** was entered; as no vendor exists in the database, the enter address type field is available to add the address type.

**Add New Vendor**

The available address types are **1099, Accounts Payable, Human Resources** and **Purchase Orders**. Any of the address types may be used in the initial setup. The types are used by the system when selecting a remittance address for a particular task. For example, 1099 processing will use the remittance address with a type of 10, when available. If no type 10 address is available, the system will use the AP type; if no AP type, PO, and if no PO type will use the HR address type.

Vendor numbers are assigned sequentially by the system. In order to create and use a vendor record, the following are needed: Vendor #, Name and Address Type. While all other data is optional, some sites choose not to add a new vendor without a Federal ID or Social Security Number, or W9 in hand.

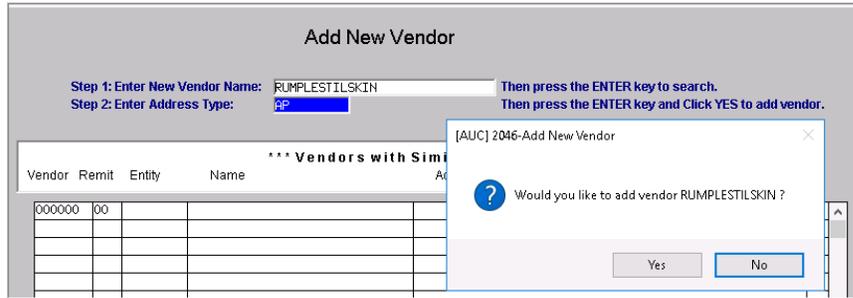
5. Enter the name of the vendor (up to 30 characters)



Task	Description
------	-------------

**Address Types**

- Enter Address Type and click OK to confirm the addition.  
 10=1099  
 AP=Accounts Payable  
 CO=Contracts  
 PO=Purchasing  
 HR=Human Resources Vendor

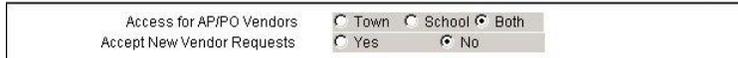


**Name/Address Tab**

- Selecting **[Yes]** will display the **[Name/Address]** tab of the Vendor Maintenance screen.
- Complete the Name/Address tab.

**Town Vs. School Vendors...**

- Each user is assigned an Entity denoting whether they have access to “Town” vendors, “School” vendors or “Both. The System Administrator manages this information:



- Each vendor is assigned an Entity on the **3 Classification** tab of the Maintain Vendors screen. Entity  Town  School  Both
- If a user is coded as a “School” user and a vendor is coded as a “Town” vendor then the user won’t have access to that vendor. If a user is coded as a “School” user and a vendor is coded as a “Both” vendor then the user will have access to that vendor.

**Addresses And How They Are Used...**

- When entering a PO, the system searches for the first vendor address coded as “PO”. If not found, it will look for the first “AP” address. If not found, it will look for the first available address to use on the PO.
- When entering a Voucher, the system searches for the first vendor address coded as “AP”. If not found, it will look for the first “PO” address. If not found, it will look for the first available address to use on the Voucher.



**Task** **Description**

**Frequently Asked Questions...**

**Q: Who has access to the vendor file?**

**A:** Any user that has been assigned access by the System Administrator may update the vendor file. There are many “read-only” screens that will allow users to view vendor data but not update that data. Those screens include:

**Purchase Orders ▶ Vendors ▶ Vendor Name Query**

**[AUC] 2816-Vendor Name Query**

Vendor Name Query

Goto...  
Actions

4 Goto Vendor

2 Sort Name	3 1 Name	4 Address	#	Typ	Status	Class	1099	FID#	Hol
.5	BELLINGHAM ASSOCIATES	P.O. BOX	01	AP	A	UNCL	Y	*****	
01MEDL	01MEDL	ONE KENDALL SQUARE BLDG 1500	01	AP	A	UNCL			
1	MHQA	P.O. BOX 87	01	AP	A	UNCL			
01604	MARY DUANE	89 BLITHEWOOD AVE.	01	AP	A	UNCL	Y	*****	
100% EDUCATIONA	100% EDUCATIONAL VIDEOS	P.O. BOX 4440	01	AP	A	UNCL		*****	
100% EDUCATIONA	100% EDUCATIONAL VIDEOS	4821 ROBERT J. MATHEWS BLVD	02	AP	A	UNCL		*****	

**Purchase Orders ▶ Vendors ▶ Vendor Name Search**

**[AUC] 2045-Search for Existing Vendors by Keyword**

Search for Existing Vendors by Keyword

Goto...  
Actions

Keyword:   Active Only  All

Enter string and press ENTER to locate possible duplicate vendors.

Vendor	Rem	Entity	Name	Address	Status
030947	02	Both	HORN, LAWRENCE J	23 WILLOW LN LINDSAY CAMBRIDGE, MA	Active
030948	01	Both	HOULDE, MARIE A	15 LAMOUREUX BLVD CAMBRIDGE, MA	Active
030949	01	Both	HOULDE, LYNN M	23 BARROWS ST CAMBRIDGE, MA	Active
030960	01	Both	HOURLY, HAROLD S.	17 BERCON ALLSTON, MA	Active
030961	01	Both	HOUSEHOLDER, LYNN B	16 DAVIS ST CAMBRIDGE, MA	Active
030962	01	Both	HOUSTON, MICHAEL	12 DRAPER RD CAMBRIDGE, MA	Active
030963	01	Both	HOWARTH, KEITH J.	49 ZACHARY LANE CAMBRIDGE, MA	Active
030964	01	Both	HOWARTH, KAREN P	98 DALTON RD. CAMBRIDGE, MA	Active
030965	01	Both	HUGHES, LAWRENCE S	59 COTTAGE ST CAMBRIDGE, MA	Active
030966	01	Both	HUIE, LYNN M	24 KILLNEY WOODS CAMBRIDGE, MA	Active

**Purchase Orders ▶ Vendors ▶ Vendors by Classification**

**Q: What if I forget to flag the vendor as a 1099 vendor and we've issued payments already?**

**A:** It is ok. As long as the vendor is flagged as a 1099 vendor prior to creating the 1099 work file then all of their payments for the year will be included.



Task	Description
------	-------------

**Q:** I know there is a vendor called "ACME Hardware" in the vendor database but I cannot find it. What do I do?

**A:** First, select **Purchase Orders** ▶ **Vendors** ▶ **Vendor Name Search** and try searching for partial strings of the vendor name. If the vendor is not found, but you are certain that the vendor is in the database, ask the System Administrator or superuser to check to see if the ENTITY flag on the vendor matches the ENTITY flag on your User Profile. Chances are you do not have access to retrieve that vendor record.

**Q:** Where can I see all of the POs issued to a vendor?

**A:** In addition to reports, find the information in the following two screens:

**Purchase Orders** ▶ **Vendors** ▶ **Vendor History**

Vendor History - Purchase Orders

Vendor# 008178  
Name BOSTON REYC  
Local Vendor  Yes  No  
1099 Code  
Class UNCL Unclassified  
Entered Changed 06-Aug-2007 CONVERT

Beginning Date  
Ending Date

3 Purchase Orders    4 Vouchers    5 Disbursements

PO#	PO Date	Department	Encumbered	Liquidated	Relieved	Vouchers	Remaining Bal	Type	Status	Orig PO Date
6153	17-Mar-2000	DISTRICT	69,00		69,00	69,00		Regular	Closed	
6152	17-Mar-2000	DISTRICT	69,00		69,00	69,00		Regular	Closed	

**Purchase Orders** ▶ **Queries** ▶ **View All Purchase Orders**

(then use the vendor name sort column)

View All Purchase Orders

2 PO#	3 DeptCode	4 PODate	5 Entry	6 Vendor Name	Year	DelivAdd	InVAddr	Posted	InPrp	Chgs	Status	PO Balance
6153	DISTRICT	17-Mar-2000	DEBBIE	BOSTON REYC	2000	10	1	1			Closed	
6152	DISTRICT	17-Mar-2000	DEBBIE	BOSTON REYC	2000	10	1	1			Closed	
23560	HIGHSCHOOL	22-Aug-2007	SPIGNOLET	BOSTON AUTO TIME CLOCK CO.	2008	15	8	1			Closed	
23559	HIGHSCHOOL	21-Aug-2007	SPIGNOLET	BOSTON AUTO TIME CLOCK CO.	2008	15	8	1			Closed	
19488	DISTRICT	08-Sep-2005	BOYAN	BOSTON AUTO TIME CLOCK CO.	2006	15	1	1			Closed	



## 4 Appendix A – Comprehensive Description of Vendor Fields

The screenshot shows the 'Enter Vendors' form with the following fields and callouts:

- A:** Vendor ID (000268) and Vendor Name (NATIONAL GEOGRAPHIC SOCIETY)
- B:** 1 Name (NATIONAL GEOGRAPHIC MAPS)
- C:** Sort Name (NATIONAL GEOGRA)
- D:** Remittance # (01)
- E:** Address Type (Accounts Payable)
- F:** Address 1 (PO BOX 749406)
- G:** Address 2
- H:** Address 3
- I:** City (LOS ANGELES)
- J:** State (CA)
- K:** Zip Code (90074-9406)
- L:** Country
- M:** Contact (N/A)
- N:** Title
- O:** 1 Phone# ((800) 962-...)
- P:** Ext (0000)
- Q:** Web Site (https://www.nationalgeographic.org/society/)
- R:** General Delivery E-mail (infor@ngs.org)

### 4.1 The Vendor Fields

Each column is described in the table that follows. The columns A-R map to the image shown above.

#### Vendors ▶ Enter Vendors ▶ [1 Name/Address]

Column Label	Description
<b>1 Name</b>	Name of Vendor – a maximum of 30 characters may be entered for the vendor name
<b>2 Name</b>	Second name of vendor, optional, a maximum of 30 characters may be entered for the second vendor name
<b>Sort Name</b>	Sort Name is optional; a maximum of 16 characters may be entered; if no sort name is supplied, the system will create a sort name consisting of the first 16 characters of the 1Name field
<b>Remittance #</b>	Remit # is <b>required</b> ; generally, for a new vendor being added for first-time use, the remit # would be 1; values between 1 and 99 are permitted. For each new vendor name, the remit should start with 1. If multiple remit addresses are being uploaded for the same vendor, number the remit addresses sequentially (1, 2, 3...).
<b>Address Type</b>	Address type is <b>set when the vendor is created</b> ; allowed values are any of the values found in the <b>PO ▶ Tables ▶ Vendor Address Types</b> table. 10, AP, CO, HR, and PO are all valid. The address type can be changed using the <b>[0 Change Type]</b> button on the left side of the <b>[1_Name/Address]</b> screen.



Column Label	Description																																																																																																						
<b>Address 1</b>	Address # 1 – optional but recommended; a maximum of 50 characters may be supplied																																																																																																						
<b>Address 2</b>	Address # 2 – optional; a maximum of 50 characters may be supplied																																																																																																						
<b>Address 3</b>	Address # 3 – optional; a maximum of 50 characters may be supplied																																																																																																						
<b>City</b>	City where the vendor address is located; a maximum of 30 characters																																																																																																						
<b>State</b>	Enter the two-letter abbreviation for the state. <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td>ALABAMA</td><td>AL</td><td>LOUISIANA</td><td>LA</td><td>OHIO</td><td>OH</td></tr> <tr> <td>ALASKA</td><td>AK</td><td>MAINE</td><td>ME</td><td>OKLAHOMA</td><td>OK</td></tr> <tr> <td>ARIZONA</td><td>AZ</td><td>MARYLAND</td><td>MD</td><td>OREGON</td><td>OR</td></tr> <tr> <td>ARKANSAS</td><td>AR</td><td>MASSACHUSETTS</td><td>MA</td><td>PENNSYLVANIA</td><td>PA</td></tr> <tr> <td>CALIFORNIA</td><td>CA</td><td>MICHIGAN</td><td>MI</td><td>RHODE ISLAND</td><td>RI</td></tr> <tr> <td>COLORADO</td><td>CO</td><td>MINNESOTA</td><td>MN</td><td>SOUTH CAROLINA</td><td>SC</td></tr> <tr> <td>CONNECTICUT</td><td>CT</td><td>MISSISSIPPI</td><td>MS</td><td>SOUTH DAKOTA</td><td>SD</td></tr> <tr> <td>DELAWARE</td><td>DE</td><td>MISSOURI</td><td>MO</td><td>TENNESSEE</td><td>TN</td></tr> <tr> <td>FLORIDA</td><td>FL</td><td>MONTANA</td><td>MT</td><td>TEXAS</td><td>TX</td></tr> <tr> <td>GEORGIA</td><td>GA</td><td>NEBRASKA</td><td>NE</td><td>UTAH</td><td>UT</td></tr> <tr> <td>HAWAII</td><td>HI</td><td>NEVADA</td><td>NV</td><td>VERMONT</td><td>VT</td></tr> <tr> <td>IDAHO</td><td>ID</td><td>NEW HAMPSHIRE</td><td>NH</td><td>VIRGINIA</td><td>VA</td></tr> <tr> <td>ILLINOIS</td><td>IL</td><td>NEW JERSEY</td><td>NJ</td><td>WASHINGTON</td><td>WA</td></tr> <tr> <td>INDIANA</td><td>IN</td><td>NEW MEXICO</td><td>NM</td><td>WEST VIRGINIA</td><td>WV</td></tr> <tr> <td>IOWA</td><td>IA</td><td>NEW YORK</td><td>NY</td><td>WISCONSIN</td><td>WI</td></tr> <tr> <td>KANSAS</td><td>KS</td><td>NORTH CAROLINA</td><td>NC</td><td>WYOMING</td><td>WY</td></tr> <tr> <td>KENTUCKY</td><td>KY</td><td>NORTH DAKOTA</td><td>ND</td><td></td><td></td></tr> </table>	ALABAMA	AL	LOUISIANA	LA	OHIO	OH	ALASKA	AK	MAINE	ME	OKLAHOMA	OK	ARIZONA	AZ	MARYLAND	MD	OREGON	OR	ARKANSAS	AR	MASSACHUSETTS	MA	PENNSYLVANIA	PA	CALIFORNIA	CA	MICHIGAN	MI	RHODE ISLAND	RI	COLORADO	CO	MINNESOTA	MN	SOUTH CAROLINA	SC	CONNECTICUT	CT	MISSISSIPPI	MS	SOUTH DAKOTA	SD	DELAWARE	DE	MISSOURI	MO	TENNESSEE	TN	FLORIDA	FL	MONTANA	MT	TEXAS	TX	GEORGIA	GA	NEBRASKA	NE	UTAH	UT	HAWAII	HI	NEVADA	NV	VERMONT	VT	IDAHO	ID	NEW HAMPSHIRE	NH	VIRGINIA	VA	ILLINOIS	IL	NEW JERSEY	NJ	WASHINGTON	WA	INDIANA	IN	NEW MEXICO	NM	WEST VIRGINIA	WV	IOWA	IA	NEW YORK	NY	WISCONSIN	WI	KANSAS	KS	NORTH CAROLINA	NC	WYOMING	WY	KENTUCKY	KY	NORTH DAKOTA	ND		
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<b>Zip Code</b>	Postal Zipcode, either 5 or 9 digits																																																																																																						
<b>Country</b>	Enter the country name, a maximum of 40 characters – if this a US vendor, leave the country name blank																																																																																																						
<b>Contact</b>	Enter the name of the primary contact, if available, up to a maximum of 30 characters																																																																																																						
<b>Title</b>	The title of the contact																																																																																																						
<b>1 PHONE#</b>	The contact phone number, entered without dashes or spaces – so 617-494-5100 for <b>ADMINS</b> would be entered as 6174945100. Maximum of 40 characters.																																																																																																						
<b>Ext</b>	An extension for the phone number may be supplied here																																																																																																						
<b>Type</b>	Choose from Business, Cell, Fax, Home, Pager [B, C, F, H, P]																																																																																																						
<b>Web Site</b>	The web address for the vendor, up to a maximum of 80 characters																																																																																																						
<b>General Delivery Email</b>	The email address for the vendor, up to a maximum of 80 characters																																																																																																						
<p><i>This section describes the fields available on the uppermost section of the classification tab</i></p>																																																																																																							
<b>Restrict Access to</b>	Restrict Access To <b>[T]</b> own <b>[S]</b> chool or <b>[B]</b> oth																																																																																																						
<b>Federal ID</b>	Federal ID as shown on the W9 provided by Accounts Payable vendors or the Social Security number for other vendors.																																																																																																						
<b>Bank Code</b>	Bank Code – the value must be found in the Bank Code Table. <b>Accounts Payable ▶ Tables ▶ Bank Codes</b>																																																																																																						
<b>Bank Account</b>	Bank Account Number–provided by the vendor when enrolling for ACH payments																																																																																																						
<b>Type</b>	Bank Account Type <b>[C]</b> for Checking, or <b>[S]</b> for Savings																																																																																																						



Column Label	Description																																																												
<b>Pre Note</b>	<p>Pre Note for ACH [Blank, 0,1,2]. Leave the code blank if this is not an active ACH vendor.</p> <p>Use the value "0" if your Accounts Payable Bank does not require that a prenote be sent prior to enrolling a vendor in ACH payments.</p> <p>Use "1" or "2" if the bank requires prenote testing (the ability to send a payment via ACH to a vendor). Set the value to "1" if the bank requires a single prenote test. The vendor will receive a printed check for the first payment; if the prenote is accepted, subsequent payments will be made by default as ACH payments.</p> <p>If "2" is entered, the vendor will receive a printed check for the first two payments made; the number will decrement with each payment until it reaches zero, at which time the payments will be made via ACH for the vendor.</p>																																																												
<b>Customer #</b>	Customer # This is a customer number assigned by the vendor to the municipality. This may be printed on the check advice if the check was set up to do so at installation. It can be added to the check stub at a later time by contacting <a href="mailto:support@admnis.com">support@admnis.com</a>																																																												
<b>HR ACH Tax Payment Type</b>	<p>HR ACH Tax Payment Type – valid values are [C/F/S/N] – as shown above.</p> <p>[C] is Connecticut Unemployment [F] is for Federal Tax payments [S] is for State Tax payments [N] is None</p>																																																												
<i>This section describes the fields available on the second section of the Classification tab – These fields are dependent on underlying tables.</i>																																																													
<b>Terms</b>	<p>Terms - if payment is made within a certain time frame a discount might apply. "2/10 Net 30" is one example. A term such as "Net 30" requires making a payment within 30 days. However, if payment is made within ten days, a 2% discount is applied. These terms are defined in the Vendor Terms table. From the menu, select:</p> <p style="text-align: center;"><b>Tables ▶ Vendor Terms</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <caption>Vendor Terms Listing</caption> <thead> <tr> <th>Code</th> <th>Description</th> <th>Net Days</th> <th>High Days</th> <th>High Pct</th> <th>Low Days</th> <th>Low Pct</th> <th>Pen Days</th> <th>Pen Pct</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>2_10</td> <td>2% discount if paid within 10</td> <td>30</td> <td>10</td> <td>2.00</td> <td></td> <td></td> <td></td> <td></td> <td>Active</td> </tr> <tr> <td>CR</td> <td>CONTRACT REQUIRED</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Active</td> </tr> <tr> <td>DUR</td> <td>Due Upon Receipt</td> <td>1</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Active</td> </tr> <tr> <td>IA</td> <td>INS CERT REQUIRED</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Active</td> </tr> <tr> <td>NA</td> <td>No Terms</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Active</td> </tr> </tbody> </table> <p>Only terms that exist in the Vendor Terms table can be entered.</p>	Code	Description	Net Days	High Days	High Pct	Low Days	Low Pct	Pen Days	Pen Pct	Status	2_10	2% discount if paid within 10	30	10	2.00					Active	CR	CONTRACT REQUIRED								Active	DUR	Due Upon Receipt	1							Active	IA	INS CERT REQUIRED								Active	NA	No Terms								Active
Code	Description	Net Days	High Days	High Pct	Low Days	Low Pct	Pen Days	Pen Pct	Status																																																				
2_10	2% discount if paid within 10	30	10	2.00					Active																																																				
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<b>1099 Code</b>	<p>1099 Code - 1099 Code - specify the type of 1099 vendor – valid codes are found in the 1099 Codes table, which each site maintains. Here is an <i>example</i> of the valid codes in the first column; these may be different than the codes on each site; from the menu, select:</p> <p align="center"><b>Accounts Payable ▶ 1099s ▶ 1099 Codes</b></p> <div style="border: 1px solid black; padding: 5px;"> <p align="center"><b>Maintain 1099 Codes</b></p> <table border="1"> <thead> <tr> <th rowspan="2">Code</th> <th rowspan="2">Description</th> <th rowspan="2">Form</th> <th colspan="2">Pre 2020</th> <th colspan="2">Current</th> <th rowspan="2">Status</th> </tr> <tr> <th>Box#</th> <th>Reported Minimum</th> <th>Box#</th> <th>Reported Minimum</th> </tr> </thead> <tbody> <tr> <td>A</td> <td>ATTORNEY</td> <td>MISC</td> <td>14</td> <td>600.00</td> <td>MISC</td> <td>10</td> <td>600.00</td> <td>Inactive</td> </tr> <tr> <td>AF</td> <td>Gross Proceeds Paid to an Attorn</td> <td>MISC</td> <td></td> <td></td> <td>NEC</td> <td>1</td> <td>600.00</td> <td>Active</td> </tr> <tr> <td>B</td> <td>BOAT</td> <td>MISC</td> <td>5</td> <td></td> <td>MISC</td> <td>5</td> <td></td> <td>Active</td> </tr> <tr> <td>D</td> <td>DIRECT SALES</td> <td>MISC</td> <td>9</td> <td>10.00</td> <td>MISC</td> <td>7</td> <td>10.00</td> <td>Active</td> </tr> <tr> <td>E</td> <td>EXCESS</td> <td>MISC</td> <td>13</td> <td></td> <td>MISC</td> <td>13</td> <td></td> <td>Active</td> </tr> <tr> <td>F</td> <td>FEDERAL TAX</td> <td>MISC</td> <td>4</td> <td></td> <td>MISC</td> <td>4</td> <td></td> <td>Active</td> </tr> <tr> <td>FI</td> <td>F CROP</td> <td>MISC</td> <td>10</td> <td>600.00</td> <td>MISC</td> <td>9</td> <td>600.00</td> <td>Active</td> </tr> <tr> <td>G</td> <td>TAXABLE GRANTS</td> <td>G</td> <td>6</td> <td></td> <td>G</td> <td>6</td> <td></td> <td>Active</td> </tr> <tr> <td>I</td> <td>INTEREST</td> <td>INT</td> <td>1</td> <td>10.00</td> <td>INT</td> <td>1</td> <td>10.00</td> <td>Active</td> </tr> <tr> <td>L</td> <td>RENT</td> <td>MISC</td> <td>1</td> <td>600.00</td> <td>MISC</td> <td>1</td> <td>600.00</td> <td>Active</td> </tr> <tr> <td>M</td> <td>MEDICAL PAYMENTS</td> <td>MISC</td> <td>6</td> <td>600.00</td> <td>MISC</td> <td>6</td> <td>600.00</td> <td>Active</td> </tr> <tr> <td>MR</td> <td>MEDICAL REIMBURSEMENT</td> <td>MISC</td> <td>7</td> <td>99999.00</td> <td>NEC</td> <td>1</td> <td>99999.00</td> <td>Active</td> </tr> <tr> <td>N</td> <td>NON-EMPLOYEE COMPENSATION</td> <td>MISC</td> <td>7</td> <td>600.00</td> <td>NEC</td> <td>1</td> <td>600.00</td> <td>Active</td> </tr> <tr> <td>D</td> <td>OTHER</td> <td>MISC</td> <td>3</td> <td>1.00</td> <td>MISC</td> <td>3</td> <td>1.00</td> <td>Active</td> </tr> <tr> <td>R</td> <td>ROYALTY</td> <td>MISC</td> <td>2</td> <td>10.00</td> <td>MISC</td> <td>2</td> <td>10.00</td> <td>Active</td> </tr> <tr> <td>S</td> <td>PROCEEDS FROM REAL ESTATE TRAN</td> <td>S</td> <td>2</td> <td>600.00</td> <td>S</td> <td>2</td> <td>600.00</td> <td>Active</td> </tr> <tr> <td>V</td> <td>VETERAN CH115 - ASSISTANCE</td> <td>MISC</td> <td>7</td> <td>99999.00</td> <td>NEC</td> <td>1</td> <td>99999.00</td> <td>Active</td> </tr> <tr> <td>Z</td> <td>NON-EMPLOYEE COMPENSATION</td> <td>MISC</td> <td>7</td> <td>600.00</td> <td>NEC</td> <td>1</td> <td>600.00</td> <td>Active</td> </tr> <tr> <td>Y</td> <td>EXEMPT (NOT REPORTABLE)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Active</td> </tr> </tbody> </table> <p align="right">Status: 1099 Inactive <span style="float: right;">Lkup</span></p> </div>	Code	Description	Form	Pre 2020		Current		Status	Box#	Reported Minimum	Box#	Reported Minimum	A	ATTORNEY	MISC	14	600.00	MISC	10	600.00	Inactive	AF	Gross Proceeds Paid to an Attorn	MISC			NEC	1	600.00	Active	B	BOAT	MISC	5		MISC	5		Active	D	DIRECT SALES	MISC	9	10.00	MISC	7	10.00	Active	E	EXCESS	MISC	13		MISC	13		Active	F	FEDERAL TAX	MISC	4		MISC	4		Active	FI	F CROP	MISC	10	600.00	MISC	9	600.00	Active	G	TAXABLE GRANTS	G	6		G	6		Active	I	INTEREST	INT	1	10.00	INT	1	10.00	Active	L	RENT	MISC	1	600.00	MISC	1	600.00	Active	M	MEDICAL PAYMENTS	MISC	6	600.00	MISC	6	600.00	Active	MR	MEDICAL REIMBURSEMENT	MISC	7	99999.00	NEC	1	99999.00	Active	N	NON-EMPLOYEE COMPENSATION	MISC	7	600.00	NEC	1	600.00	Active	D	OTHER	MISC	3	1.00	MISC	3	1.00	Active	R	ROYALTY	MISC	2	10.00	MISC	2	10.00	Active	S	PROCEEDS FROM REAL ESTATE TRAN	S	2	600.00	S	2	600.00	Active	V	VETERAN CH115 - ASSISTANCE	MISC	7	99999.00	NEC	1	99999.00	Active	Z	NON-EMPLOYEE COMPENSATION	MISC	7	600.00	NEC	1	600.00	Active	Y	EXEMPT (NOT REPORTABLE)							Active
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<i>This section describes the fields available on the third section of the Classification tab which sets defaults for the vendor</i>	
<b>Payment Type</b>	<p>Each vendor is assigned a <i>default</i> payment type.</p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> <b>Printed</b> checks are just that – a physical check will be printed for the vendor.</li> <li><input checked="" type="radio"/> <b>Wire</b> If the vendor is marked for a Wire check, no physical check will be printed. Wire checks are stamped as cleared with a cleared date as soon as the disbursement is complete.</li> <li><input checked="" type="radio"/> <b>ACH</b> is for vendors who will receive payments via ACH by default. This must be set up with the AP banking institution and other fields (T, U, V, and W described above) must be filled in.</li> <li><input checked="" type="radio"/> <b>No Check</b> is used if this vendor by default will not receive a check. Common uses are when processing PCARD or Credit Card batches, where the payment is made to a vendor with a credit card, and AUC keeps track of it with a voucher, but the actual check is issued to the Credit Card institution.</li> </ul>
<input checked="" type="radio"/> <b>Separate Check?</b>	If <input checked="" type="radio"/> Yes is selected, each voucher created for this vendor will be paid with a separate check.
<input checked="" type="radio"/> <b>1 Time Vendor</b>	If this is a one-time vendor, for example, refunds are being processed for a canceled event, mark the vendor with a “Y”. The vendor will be marked as inactive after a voucher is processed for the vendor.
<input checked="" type="radio"/> <b>State Bid List?</b>	If the vendor is an approved vendor on the “State Bid List”, mark them here.
<input checked="" type="radio"/> <b>Local Vendor?</b>	Some municipalities prefer to use local vendors; local suppliers are typically more reactive than suppliers who are farther away. They can deliver products quicker, and it is much easier for a supplier to coordinate a shipment across the neighborhood than around the world.
<b>Business Type</b>	<p>Business Type [C/I/L/N/O/S] – the spreadsheet will accept any of the above; if using the Enter Vendors screen, select from any of those in the table.</p>
<i>The next section describes the fields in the fourth section from the top of the [3_Classification] tab</i>	
<b>Certified Vendor?</b>	The certification section allows the vendor to be designated as a certified vendor by whatever criteria are established within the municipality. This is usually used to qualify vendors who can reply to bids.
<b>Certified By</b>	Certified By – this field only allows a username that exists in the AUC system.
<b>Date Certified</b>	Date Certified – enter the date the vendor was certified



Column Label	Description										
<b>Insurance Certificate Expires</b>	A certificate of insurance can be part of the vendor certification process; enter the expiration date here.										
<b>Note</b>	Up to 80 characters can be entered to further describe the certification for the vendor										
<i>The lowest portion of the [3 Classification] tab has two fields</i>	<div style="border: 1px solid black; padding: 5px;"> Merge To Vendor 000000 <span style="float: right;">Addresses on File: 3</span> </div>										
<b>Merge To Vendor</b>	Enter a vendor number in this field if the current vendor is a duplicate or the vendor history should be merged with another vendor for any reason (companies can acquire other companies outright and this allows consolidating the vouchers, purchase orders, and disbursements for multiple vendors.)										
<b>Addresses on File</b>	This is an information field and cannot be changed here. To add a remit address, go to the <b>[2 Addresses]</b> tab as described in section 2.2 above.										
<i>Enter information on Authorized Representatives on the rightmost section of the classification tab</i>	<div style="border: 1px solid gray; padding: 5px;"> <p>Authorized Representatives</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Title</th> </tr> </thead> <tbody> <tr> <td>Phone# [(000) 000-0000] 0000</td> <td></td> </tr> </tbody> </table> <p>Send Bids Via</p> <input type="checkbox"/> US Mail    <input type="checkbox"/> Call for Pick Up  <input type="checkbox"/> EMail        <input type="checkbox"/> Other  <input type="checkbox"/> Fax </div>	Name	Title	Phone# [(000) 000-0000] 0000							
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<b>Name</b>	Authorize Rep 1 Name – Up to 30 characters										
<b>Title</b>	Title of the 1 <sup>st</sup> Authorized Representative										
<b>Phone #</b>	Phone number of the 1 <sup>st</sup> Authorized Representative										
<i>The remaining fields are available to input information for up to three more company contacts.</i>											
<p>Use the <b>[4 Attachments]</b> tab to view documents and attach documents. Some sites attach a W9 for each vendor here.</p> <p>Attachments may be Viewed, Emailed, or Removed using the corresponding buttons.</p>	<div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Select the desired attachment from the file explorer window and click on Open </div>										



Column Label	Description
<p>Use the [ 8 Items] tab to add items from the Items table – this identifies commodity items that are available from the vendor.</p>	

To access the commodity items table, from the menu, select:

**Commodity Items ▶ Item Setup**

User-defined fields are fields set up by each site to hold information relevant to that municipality.

Each field can be named for a specific function.

Click on [9\_User Defined] to enter data on this table.

User Defined #	Value
User Defined #2	MORE
User Defined #3	MORE
User Defined #4	TEN
User Defined #5	59.50
User Defined #6	000
User Defined #7	
User Defined #8	
User Defined #9	
User Defined #10	
User Defined #11	
User Defined #12	
User Defined #13	
User Defined #14	



Column Label	Description																																																							
	<p>The labels are defined on the <b>System Profile</b> ▶ <b>[2 PO/AP]</b> table.</p> <div style="border: 1px solid gray; padding: 5px;"> <p style="text-align: center;"><b>System Profile</b></p> <p>Goto... Actions</p> <p>1 General Ledger   <b>2 PO / AP</b>   3 Human Resources   4 Budget   5 Collections   6 RE/PP   7 System</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>Purchase Order Defaults</b></p> <p>PO Type: <input checked="" type="checkbox"/> Regular            Approval Path: <input type="text" value="DEFAULT"/> Default Approvals Path</p> <p>Invoice Address: <input type="text" value="B"/> TOWN OF ADMINS TAX COLLECTOR            Delivery Address: <input type="text" value="B"/> TOWN OF ADMINS COUNCIL AGING</p> <p>User Defined: <input type="text" value="Contract # (MBT)"/></p> </div> <div style="width: 45%;"> <p><b>Bids/Quotes/Contracts</b></p> <p>Contracts User Defined: 20 Characters</p> <table border="1"> <tr> <td>User Defined #1</td> <td>Special Dept Code</td> <td>Effective on</td> </tr> <tr> <td>User Defined #2</td> <td>Location Code</td> <td>Expires on</td> </tr> <tr> <td>User Defined #3</td> <td>Notes</td> <td></td> </tr> </table> </div> </div> <div style="border: 2px solid black; padding: 5px; margin-top: 10px;"> <p><b>Vendor User Defined</b></p> <table border="1"> <tr> <td>User Defined #1</td> <td>abc</td> <td>#8</td> <td>User Defined #8</td> </tr> <tr> <td>User Defined #2</td> <td>User Defined #2</td> <td>#9</td> <td>User Defined #9</td> </tr> <tr> <td>User Defined #3</td> <td>User Defined #3</td> <td>#10</td> <td>User Defined #10</td> </tr> <tr> <td>User Defined #4</td> <td>User Defined #4</td> <td>#11</td> <td>User Defined #11</td> </tr> <tr> <td>User Defined #5</td> <td>User Defined #5</td> <td>#12</td> <td>User Defined #12</td> </tr> <tr> <td>User Defined #6</td> <td>User Defined #6</td> <td>#13</td> <td>User Defined #13</td> </tr> <tr> <td>User Defined #7</td> <td>User Defined #7</td> <td>#14</td> <td>User Defined #14</td> </tr> </table> </div> <div style="margin-top: 10px;"> <p><b>Accounts Payable Defaults</b></p> <p>AP Type: <input type="checkbox"/> Payment Voucher            Approval Path: <input type="text" value="DEFAULT"/> Default            CCard Approval: <input type="text" value="DEFAULT"/> Default</p> </div> <div style="margin-top: 10px;"> <p><b>Approval Levels</b></p> <table border="1"> <thead> <tr> <th>Level</th> <th>Select</th> <th>Level Des</th> </tr> </thead> <tbody> <tr> <td>Level 1</td> <td><input checked="" type="checkbox"/></td> <td>Supervis</td> </tr> <tr> <td>Level 2</td> <td><input checked="" type="checkbox"/></td> <td>Departme</td> </tr> <tr> <td>Level 3</td> <td><input checked="" type="checkbox"/></td> <td>PCARD Ap</td> </tr> <tr> <td>Level 4</td> <td><input checked="" type="checkbox"/></td> <td>Finance</td> </tr> <tr> <td>Level 5</td> <td><input checked="" type="checkbox"/></td> <td>Town Man</td> </tr> </tbody> </table> </div> </div>	User Defined #1	Special Dept Code	Effective on	User Defined #2	Location Code	Expires on	User Defined #3	Notes		User Defined #1	abc	#8	User Defined #8	User Defined #2	User Defined #2	#9	User Defined #9	User Defined #3	User Defined #3	#10	User Defined #10	User Defined #4	User Defined #4	#11	User Defined #11	User Defined #5	User Defined #5	#12	User Defined #12	User Defined #6	User Defined #6	#13	User Defined #13	User Defined #7	User Defined #7	#14	User Defined #14	Level	Select	Level Des	Level 1	<input checked="" type="checkbox"/>	Supervis	Level 2	<input checked="" type="checkbox"/>	Departme	Level 3	<input checked="" type="checkbox"/>	PCARD Ap	Level 4	<input checked="" type="checkbox"/>	Finance	Level 5	<input checked="" type="checkbox"/>	Town Man
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