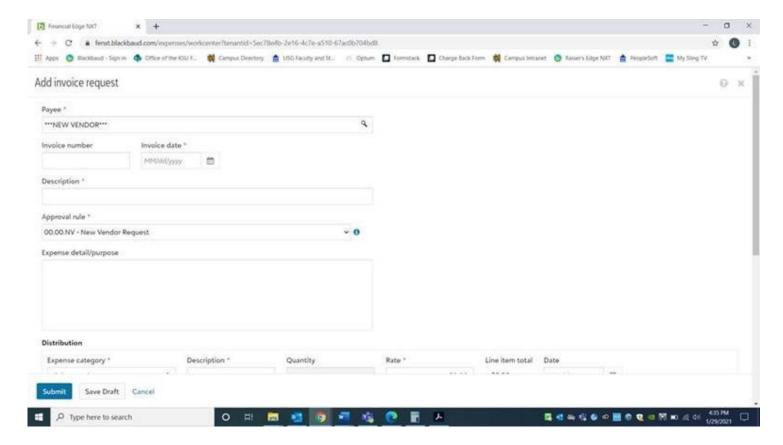
## **NEW VENDOR REQUEST**

## Fill in the Payee information



Payee: \*\*NEW VENDOR\*\*\*

Invoice number: Enter invoice/receipt number

\*\*Note: If no number is on the receipt enter the transaction date as the invoice number, ex. 20210928\*\*

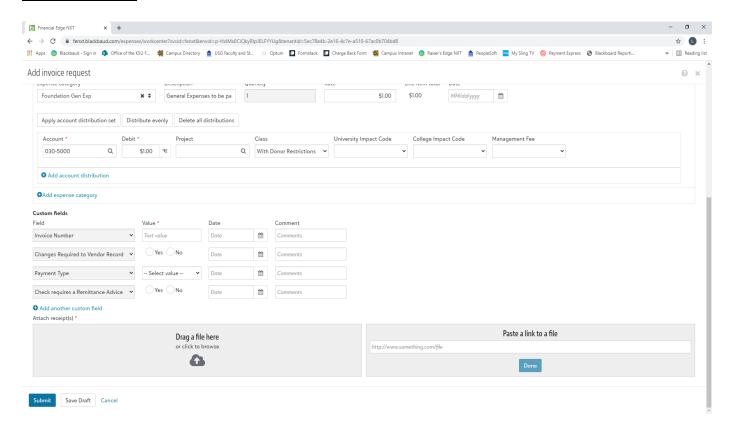
Invoice date: Enter invoice/receipt date

\*\*Note: If receipt has last month's date enter the current date\*\*

Approval rule: 00.00 NV - New Vendor Request

Expense detail/purpose: Write brief explanation of purchase and purpose of event

## Fill in Distribution



**Expense category**: Select "Foundation Gen Exp" from dropdown

Rate: Enter dollar payment/reimbursement amount (\$)

\*\*Note: Confirm tips for meal reimbursements are no more than 20%\*\*

Account: 030-5000 is your default, do not change

Project: Enter selected project ID, which will auto populate (DO NOT CLICK ON THE HOURGLASS)

Class, University Impact Code, College Impact Code, and Management Fee can be left blank

## Fill in Custom fields

Value: Re-enter invoice number, then tab over to Date and enter invoice date

Change Required to Vendor Record: Select "No"

Payment Type: Select from dropdown

Check requires a Remittance Advice: Select "No"

Upload (or drag) invoice/receipt, signed W-9, and all supporting documents needed to fulfill payment

Click Submit

\*\*\*Once the vendor has been set up, the request will be sent back to you. Change the "Payee" to XXX and approval rule to your correct department. \*\*\*

**PSST...MAKE SURE YOUR NOTIFICATIONS ARE SET UP!**