

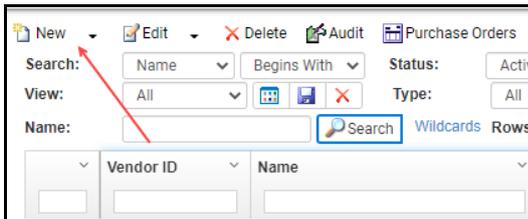
Walk-through of the New Vendor Approval process

Last Modified on 01/03/2025 2:06 pm EST

Walk-through of the New Vendor Approval Process

This is an example of adding and approving a new vendor when new vendor approval is required.

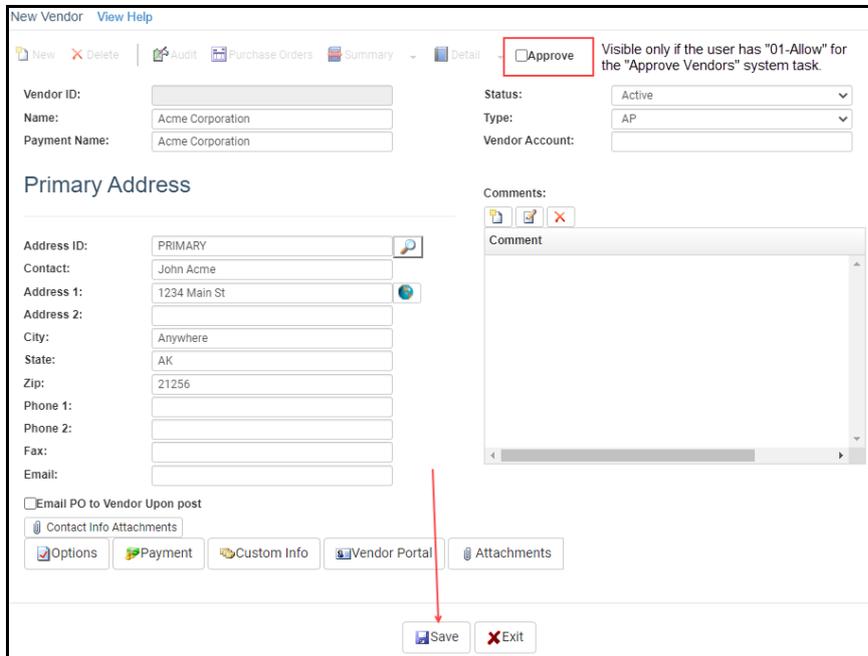
From the Vendor List screen, select **New**.



Enter all required information in the **New Vendor** screen.

If the user creating the account has the authority to approve vendors, they may check the **Approve** box when adding the vendor.

Click **Save**.

A screenshot of the 'New Vendor' form. The form includes fields for 'Vendor ID', 'Name' (filled with 'Acme Corporation'), 'Payment Name' (filled with 'Acme Corporation'), 'Status' (set to 'Active'), 'Type' (set to 'AP'), and 'Vendor Account'. There is a 'Primary Address' section with fields for 'Address ID' (set to 'PRIMARY'), 'Contact' (filled with 'John Acme'), 'Address 1' (filled with '1234 Main St'), 'Address 2', 'City' (set to 'Anywhere'), 'State' (set to 'AK'), 'Zip' (filled with '21256'), 'Phone 1', 'Phone 2', 'Fax', and 'Email'. A 'Comments' section is also present. At the bottom, there is a 'Save' button and an 'Exit' button. A red arrow points to the 'Approve' checkbox, which is currently unchecked. A tooltip next to the checkbox reads: 'Visible only if the user has "01-Allow" for the "Approve Vendors" system task.' Another red arrow points to the 'Save' button.

If system options indicate Users/groups to notify the selected Users/groups will receive the following email notification:

The vendor 4588 has been created by user SGAEWatkins and is awaiting approval.
Vendor ID: 4588
Vendor Name: Acme Corporation
Vendor Payment Name: Acme Corporation
Address: 1234 Main St Anywhere, AK 21256
Payment Method: Paper Check
Date: 4/21/2022 4:14 PM
- Click [Here](#) to review and approve the vendor.

1. Open the Vendor record, which may be accessed via the email hyperlink or directly from the Vendor List.
2. Check the **Approve** box.
3. Click **Save**.

The screenshot shows a web-based form for Vendor ID 4588. At the top, there are navigation tabs: New, Delete, Audit, Purchase Orders, Summary, Detail, and Approve. The 'Approve' tab is selected, and its checkbox is checked. Below the tabs, there are input fields for Vendor ID (4588), Name (Acme Corporation), and Payment Name (Acme Corporation). To the right, there are dropdown menus for Status (Active) and Type (AP), and an empty field for Vendor Account. Below this is the 'Primary Address' section with fields for Address ID (PRIMARY), Contact (John Acme), Address 1 (1234 Main St), Address 2, City (Anywhere), State (AK), Zip (21256), Phone 1, Phone 2, Fax, and Email. There is also a checkbox for 'Email PO to Vendor Upon post' and a 'Contact Info Attachments' section. At the bottom, there are buttons for Options, Payment, Custom Info, Vendor Portal, and Attachments. A red arrow points from the 'Approve' checkbox to the 'Save' button at the bottom center of the form.

The Vendor is now approved and may be used for Purchase Order and AP Invoice entry.