

COMMERCE SMALL PURCHASES SYSTEM (CSPS)
PROCUREMENT DESK PROCEDURES

28. View Existing Vendors - NOA003

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| 28.1 | Introduction | This procedure describes how to lookup vendor data for purchasing and reporting disbursement purposes. The vendor data is viewed via the CSPS “Vendor Look Up Screen” (NOA003). |
| 28.2 | Who Performs the Procedure | Designated procurement personnel, requisitioners, and finance personnel will be accessing this screen to view vendor data. |
| 28.3 | Initiating the Process | Querying a vendor begins when either the user needs to find a vendor or when Procurement or Finance personnel need to resolve discrepancies between new and existing vendor profiles. |
| 28.4 | Accessing the System | From the Main Menu, select Look Up. From the Look Up menu, select Procurement. From the Procurement menu, select “NOA003 - Vendor Look Up Screen”. Or from the Main Menu, select Transaction. From the Transaction menu, select “NOA003 - Vendor Look Up Screen”. Follow the steps below to use NOA003. |

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28.5 Querying a Vendor Profile

This procedure describes the steps necessary to query and display one or more vendor profiles. This screen can only be used to view vendor profiles but not to create or edit any vendor profiles.

Note: Because the form for viewing a vendor profile on NOA003 is the same as for viewing a profile on the "Vendor Maintenance Screen" (PM002), only the differences between the two processes are outlined below. Reference procedures "Section 16 - Set Up/Maintain Vendors" for more information on PM002's vendor creation functionality.

Note: This Look-up excludes employee data.

NOA003 - Vendor Maintenance Lookup Screen

The screenshot displays the "Vendor Maintenance Screen (PM002)" window. It contains several sections for data entry and viewing:

- VENDOR NO:** 1, **NAME:** FEDERAL EXPRESS CORPORATION
- DIVISION:** (empty), **CODE:** ESPS
- INTERFACE:** (empty), **TYPE:** C, ☐ Foreign?
- FED AGENCY:** NONE
- FOB POINT:** DESTIN, ☒ Active?, **03-FEB-1999**
- DATES:**
 - ORIGIN:** 18-JUL-1997
 - LAST ORDER:** 21-JAN-1999
 - LAST INVOICE:** 19-JAN-1999
- CLASSIFICATIONS:**
 - BUSINESS SIZE:** ☐ S ☒ L ☐ U
 - MINORITY OWNED:** ☐ Y ☒ N
 - WOMAN OWNED:** ☐ Y ☒ N
- Additional query fields:** TIN (empty), CITY (empty)
- Address Information Table:**

ID	TYPE	ADDRESS NAME	CONTACT
1	PURCH	FEDERAL EXPRESS CORPORATION	ALYCE A. SELBY
2	PAYMNT	FEDERAL EXPRESS CORPORATION	ALYCE A. SELBY
- Buttons:** ADDITIONAL INFORMATION, COM PARENT, TERMS, NOTES, ASSIGN, NEW ADDRESS
- Footer:** *** DoubleClick 'TYPE' for Address Details, CANCEL

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STEP	ACTION
1.	<p>Place the cursor in the NAME field and click on the “Enter Query” icon on the toolbar. Then, there are several options for querying:</p> <p>To retrieve all records in the system, do not enter data in any of the fields.</p> <p>To retrieve only a subset of records, enter the relevant information in the applicable fields to narrow the search. The ‘%’ character can be used in most fields as a wildcard character. For example, to query all records that include an ‘r’, type %r%.</p> <p>To retrieve records associated with a specific classification, click in all applicable CLASSIFICATIONS radio buttons.</p> <p>Two additional fields that may be queried upon are TIN and CITY. The TIN field contains the TIN number of the vendor. Note, that no two vendors will have the same TIN number. The CITY field contains the name of the city that could be found in any address. For example, if Gaithersburg is queried upon in the CITY field, all vendors that have at least one address with Gaithersburg as the city, will be retrieved.</p>
2.	<p>Click the “Execute Query” icon in the toolbar to execute the query. The system will retrieve all vendor profiles meeting the specified criteria.</p>
3.	<p>Use the “up” and “down” arrows in the toolbar or on the keyboard to view the different vendor profiles.</p>