Instruction Manual

1. The automated vendor form is ONLY to be used for domestic DV vendors. Foreign vendors, Refund and Reimbursement vendors and Petty Cash vendors should be handled the same way you have always handled them.

2. Before sending the email invitation to the vendor you have to search the vendor database to see if the vendor already exists.

   Search tips:

   - Search by vendor name. Remember to use the asterisk (*) on either side of the vendor name.

   - When searching by name, remember “Less is more”. Use a smaller portion of the vendor name to search the database. Add more of the name to limit your search results. For example, if you want to search for SUNY Binghamton Library, start with *SUNY*, then narrow your search by using *SUNY Binghamton*.

   - The best way to search for an existing vendor is to search by Tax Number. If you have the tax number of the vendor you can enter the vendor’s tax number without using asterisks.

3. Login to the automated vendor form to send an invitation to new vendors by clicking on this link:

   https://vendor.procurement.cornell.edu/ManageVendors.aspx

   Click on the Invite Vendor/Payee button.
You will see the following page:

4. Enter the email address for the vendor’s contact person.

5. Confirm the email address of the vendor’s contact person.

6. Enter a custom message to the vendor. Be sure to add your contact information, including your phone number. (The phone number is very important as many people may think this is a phishing scam and will want to call you to verify that the email is legitimate.)

The custom message should contain the following information:

Please contact NAME at XXX123@cornell.edu or at 607-255-XXXX with any questions. Thank you.

Note: You may add additional text to the custom message, e.g. doc numbers or some other text to help you tie the vendor request to your work. Please note the field is limited to 500 characters, including spaces.

7. Select a vendor type from the drop down. Note: Your only choice will be DV vendor

8. Select a reason for vendor setup from the drop down menu, i.e. the business purpose, for example speaker fee. The two drop down menus reflect the choices in sections 201 & 203 of
the Buying Manual. Note: If you do not see the payment reason for your vendor in the drop down, then you should not be setting the vendor up as a DV vendor.

Here is an example of a completed invitation prior to sending it to the vendor:

9. Click the “Invite Vendor” button and you should see the following pop-up:

* The vendor/payee account was successfully created.

The vendor will be emailed instructions on how to login to their account.
10. To close the pop-up, click the “X” in the upper right corner of the pop-up.

11. The vendor will receive a welcome email from the EGA procurement@cornell.edu that contains their temporary login credentials. The login credentials expire after two weeks (14 calendar days).

Note: The first thing the vendor will be asked to do is change the password.

12. After the vendor completes and submits the form, he/she and the vendor initiator will receive an email to let them know we received their submission, and to allow 3-5 business days for processing. Note: They will not be able to edit their information until the vendor record is reviewed and approved by Procurement Services. The vendor and the vendor initiator will receive another email after his/her vendor record is approved. This email will include the vendor number and a link to the ACH enrollment form.

13. After the vendor submits the form, it will route to the vendor setup team in Procurement Services, where it will be reviewed and approved.

14. As soon as the vendor record has been approved in KFS by the Procurement Services vendor setup team, the system will send an email to the vendor informing them that their vendor setup is complete. Their vendor number will also be provided in the email, along with a link to the ACH registration page on our web site to allow them to register for electronic payments.

You will also receive a copy of this email so you can use the vendor number to pull the vendor into your disbursement voucher.

15. Once the vendor has received the email indicating his/her registration is complete, they may use their login credentials (with the new password they set) to edit their information.

16. After the initial setup, the only thing the vendor may not edit online is his/her Tax Identification Number.

17. In our experience, if vendors do not respond within 1-2 days, they generally will not respond unless you prompt them. Our recommendation is to send a follow up email to the vendor if you have not received the “Registration Complete” email after 3 days. (This email is outside of the automated vendor form.)

18. A second reminder email should be sent to the vendor if you have not received the “Registration Complete” email after 5 days. (This email is outside of the automated vendor form.)

19. If your vendor has allowed his/her temporary login credentials to expire, you can resend an invitation by going to the Manage Vendors page:

   https://vendor.procurement.cornell.edu/ManageVendors.aspx
This is the same link you used to access the Invite Vendor link. In this case, click on the Manage Vendors button.

Note: When you go to the Manage Vendor screen you will only see the vendors to whom you have sent an email invitation. If you wish to see the email invitations sent out by someone else, enter that person’s netid in the Refine Search field and click the Search button.

You can resend the email invitation by clicking the red “Yes” link in the invitation expired column to open the following window where you can enter another custom message to the vendor:
20. If you have invited a large number of vendors, you can narrow your search by entering all or part of a vendor’s email address in the Refine Search field and clicking the Search button. For example, if you are looking for c119 at Princeton University, you can search for c119 or Princeton. Note: The Refine Search field is not case sensitive.

21. You can sort the table by Vendor Email or Create Date by clicking on the corresponding column heading.

22. If your vendor has submitted his/her form and it has been approved by Procurement Services, you will see the vendor’s vendor number in the Vendor Number column.

23. If your vendor’s temporary login credentials have expired, you will see a red “Yes” link in the Invitation Expired column.

24. If your vendor’s create date is more than 14 days old, but there is no red “Yes” in the Invitation Expired column, this means that your vendor has logged in and changed his/her password. They may have stopped there without submitting their information, or they may have submitted their information, but their record failed during the process.

If you run into either of these situations, please contact the vendor to see what happened. Generally, if the vendor’s record encountered an error during processing, Procurement Services will either handle/correct the error, or you will be contacted. The course of action will be determined by the type of type that occurred.
25. If you sent out an email invitation to a vendor and it has not expired, but the vendor has asked you to resend the invitation, either because they cannot locate the original or they want it sent to a different email address, please contact Procurement Services at procurement@cornell.edu.

26. If you want to check a vendor in someone else’s queue because they are out, you can enter your coworker’s netid in the Refine Search field to see all the vendors they have invited. Note: If a vendor’s invitation has expired and you re-invite the vendor, then that vendor will now show up in your queue.

27. The most common error we encounter occurs when an email is sent to an existing vendor. When the online form is processed, it will result in a failure with the error:

“This tax number has already been assigned to an existing vendor.”

This typically happens because the vendor initiator does not search properly for the vendor in the vendor database. If this occurs, Procurement Services will notify you that you will need to handle this vendor request manually.

28. Future phases planned to for the automated vendor form:

   I. Automated ACH enrollment
   
   II. Use for foreign vendors

   III. Use with Web Service:

      i. This will allow the system to verify the TIN prior to submission to eliminate the submission of vendor data that includes duplicate TIN’s.

      ii. This will also improve performance as there will be no waiting for the batch job to run, i.e. everything will happen in real time.)

NOTE: The AVF is still evolving. We will continue to make changes to the form as needed, based on feedback from vendors and BSC/FTC users. When we do make changes we will update this document

Below are screenshots of what the vendor will see when they log in to use the form.
The vendor will be required to change his/her password upon the first login.

NOTE: the vendor will only see the above two screens the first time he/she logs in.
Please note the comment beneath the two buttons in the center left of the screen. The vendor must click on the Supplier Information button to proceed. This is the screen that will be presented to the vendor upon subsequent logins.
Cornell Supplier Information

Tax Information

Under penalties of perjury, I certify that:
1. The Tax ID number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below), and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

- Federal Tax Classification:  
- Exempt Payee Code:
- Exemption from FATCA reporting code:
- Exempt from backup withholding:  

Taxpayer Identification Number:

- Social Security Number:
- Employer Identification Number:
Supplier Diversity

Either check the box for Does Not Apply or check all other boxes that apply.*

- Does not apply
- B(A)
- Disabled
- Disabled Veteran Owned
- Hubzone
- Minority Owned
- Small Business Owned
- Small Disadvantaged Business
- Veteran Owned
- Woman Owned Business
- NYS Certified WBE
- NYS Certified MBE

Your Contact Information

Name:*  
Email Address:*  kme44@cornell.edu
Phone Number:*  

* The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.