Accounts Payable Vendor Request Instructions (2 Pages)

Log into the Employee Portal
Select AP Vendor Request

1) New Vendor Set-up Tab (select this for vendors that are not in Lawson or are in Lawson, but do not have a purchase from location)

- Click on New Vendor Setup tab
- Fill out vendor information – all fields required
- Fill out contact information – must have a contact name for the vendor, a contact phone for the vendor and a valid email address for the vendor. If the vendor doesn't have a fax number, put in 999-999-9999. A contact mobile number is not required
- Select payment method – PO, CAF, SAF, (routes to Executive Director of Procurement). In order to get a purchasing location when creating a requisition, the vendor request must route to the Executive Director of Procurement. So you must select payment method as PO if you think that a PO will need to be created for the vendor now or at any time in the future.
- Purchase detail – provide information as to why you are needing this vendor set up in Lawson. If the vendor is on bid, include the bid number to assist the Executive Director of Procurement.
- Attach documents **–required.** Documents can include order forms, website pages, business cards, etc. Anything that will assist the Executive Director of Procurement in the approval process and assist AP Compliance Technician in contacting/setting up the vendor. The max file size is 4MB. Supported file types are '*.doc, *.docx, *.xls, *.xlsx, *.pdf, *.tif, *.tiff, *.txt, *.rtf'
- Submit request (submits request for approval), Save & Return (saves the request so you can come back and submit at a later time. Does NOT submit the request for approval), or Return without saving (this deletes the request)

2) Existing Vendor Change Tab (this routes directly to AP Compliance Technician. Select this for vendors already in Lawson, but have a change of address. In the notes field, please indicate if you need a remittance address updated or a purchase from address updated)

- Type in vendor number, click Enter
- Vendor name from Lawson will populate
- Reason for change – enter reason for change. For example: "Vendor has a new purchasing location. Please see attached order form" or "Vendor has a new remit location. Please see attached invoice"
- Attach documents –**required.** This would include an order form or invoice. The max file size is 4MB. Supported file types are '*.doc, *.docx, *.xls, *.xlsx, *.pdf, *.tif, *.tiff, *.txt, *.rtf'
- Submit request (submits request for approval), Save & Return (saves the request so you can come back and submit at a later time. Does NOT submit the request for approval), or Return without saving (this deletes the request)

3) Filters (this helps you search for AP Vendor Requests you have input)
- Filters are available to filter by Request ID, Status, and Vendor name
- Click on filter option (Request ID, Status, Requester, Vendor Name), then a filter field will open to key in the filter information
- Click on Apply Filter button

- Listed are the ID's that have been submitted. The status appears on the listed request. If it's waiting for approval from Purchasing the status will read "In Progress (Procurement)". If it's waiting for approval from AP Compliance Technician the status will read "In Progress (Accounts Payable)". If you've saved it, but haven't yet submitted it for approval it will read "Not Submitted" and give you the option to Edit or Cancel. If you want to edit the request, click Edit and make sure to select submit to send it on for approval.
- Click on "review" to see additional notes.

For Attaching Documents, please refer to the instructions on "Upload Documentation"