# NEW WORLD VENDOR ENTRY INSTRUCTIONS

In New World – Go To: Financial Management – Procurement – Vendor Change Request.



## When you are in Vendor Change Request List select Add Vendor:



	Delete	Add Vendor	Alter Vendor
Vendor			
Effective Date			

First and foremost be sure to check the Active Box prior to entering the vendor information:

wyFavorites   Financial Management   Human Resources   Mainte Vendor Change Request List Vendor Change Request Entry					
🔒 🔁 🗐 🖉 Gene	eral				
Vendor Effective Date					
Active Last Name / Business					
First Name					
Middle Name Suffix	✓				

### **Vendor Entry**

Enter vendor information using W9 supplied and signed by vendor (Sample W9 Screen Shot below). W9 must have:

- Current version date December 2014
- Physical address, we cannot accept a PO box address
- Signed by vendor with current date

#### When entering in New World:

- Only capitalize first initial, last name, and business name.
- No abreviated names or street addresses

/endor Change Request List Vendor Change Re	equest Entry		
🔒 📑 🗐 💋 Gen	eral		
Vendor Effective Date	08/14/2017	Reason Code Comment	New Vendor - New Vendor Adder
Active Last Name / Business First Name Middle Name Suffix	Doe Jan	10%	
Contact Name Address Zip Code City State	Jan Doe 123 Any Street 12345 12345 Anytown MI - Michig	Federal Tax ID State Tax ID Social Security Number	123-45-6789
Form Weinstein 2014) Department of the Treasury Internal Pavenue Senice 1 Name (as shown on Jane Doe 2 Business name/diar 9 Check appropriate 1 9 Check appropriate 1 9 Check appropriate 1 9 Check appropriate 1 9 Check appropriate 1 1 Name (as instruc- 5 Address (number, st 6 City, state, and ZIP 6 City, state, and ZIP	your income tax return). Name is required on this line; do not leave the egarded entity name, if different from above box for federal tax classification; check only <b>one</b> of the following sever opristor or C Corporation R Corporation Par C C Corporation R Corporation Par C C Corporation C Corporation, S=S corporation member LLC that is diaregarded, do not check LLC; check the appr ion of the single-member owner. tions; > reet, and apt. or suite no.)	ayer Certification is line blank. h boxes: h poxes: n, P=partnership) ► poriate box in the line above for priate box in the line above for Requester's name and	Exemptions (codes apply only to erfain entities, not individuals; see structions on page 3); xempt payee code (if any) xemption from FATCA reporting ode (if any) pples to accounts maintained outside the U.S.) I address (optional)
Anytown, MI 123.     T List account numbe     Part I Taxpaye     Enter your TIN in the appro-     backup withholding. For in     resident alien, sole propile     entities, it is your employer     T/N on page 3.     Note. If the account is in m     guidelines on whose numb     Part II Contificor	45 r Identification Number (TIN) priate box. The TIN provided must match the name given on dividuals, this is generally your social security number (SSN) ro, or disregarded entity, see the Part linstructions on page identification number (EIN). If you do not have a number, see hore than one name, see the instructions for line 1 and the ch er to enter.	line 1 to avoid However, for a 3. For other a How to get a art on page 4 for	ity number - 4 5 - 6 7 8 9 entification number
Eart II Certifica     Under penalties of perjury,     1. The number shown on 1     The number shown on 1     En envice (IRS) that I am s     no longer subject to back     Service (IRS) that I am s     no longer subject to back     Service (IRS) that I am s     Service (I	tion I certify that: his form is my correct taxpayer identification number (or I am up withholding because: (a) I am exempt from backup withhul ubject to backup withholding as a result of a failure to report kup withholding; and her U.S. person (defined below); and red on this form (if any) indicating that I am exempt from FAT You must cross out tiem 2 above if you have been notified b report all interest and dividends on your tax return. For real e abandonment of secured property, cancellation of debt, cor than interest and dividends, you are not required to sign the c	waiting for a number to be issu olding, or (b) I have not been not all interest or dividends, or (c) th CA reporting is correct. by the IRS that you are currently estate transactions, item 2 does thributions to an individual retire perification, but you must provide	ed to me); and lifled by the Internal Revenue he IRS has notified me that I am subject to backup withholding not apply. For mortgage ment arrangement (IRA), and le your correct TIN. See the

Date =

# Doing Business as "DBA" Vendor

# Vendor Entry for a Company that operates as a DBA: (See Sample W9 Following Screen).

Vendor Change Request List	equest Entry		
🔒 🔁 🗐 🖉 Gen	eral		
Vendor Effective Date	08/17/2017	Reason Code Comment	New Vendor - New Vendor Adde
Active Last Name / Business First Name Middle Name Suffix Contact Contact Name Address	Jim's Local Hardware Store  Jim's Local Hardware Store  Smith Building Products  123 Any Street	D's Federal Tax ID State Tax ID Social Security Number	123-45-6789
Zip Code City State	12345 v Anytown MI - Michic		
Form W-9 Rev. December 2014) Department of the Treasury Internal Revenue Service 1 Name (as shown on yoo <u>Smith Building Pro</u> 2 Builgnang name/filterage	Request for Tax Identification Number an ur income tax return). Name is required on this line; do not leav ducts (DBA = Doing Business As) (Parent com	payer d Certification <sup>e this line blank.</sup> pany)	Give Form to the requester. Do not send to the IRS.
<ul> <li>Dim's Local Hardwa</li> <li>Check appropriate box</li> <li>Individual/sole proprisingle-member LLC</li> <li>Individual/sole proprisingle-member LLC</li> <li>Limited liability comp Note. For a single-mether the tax classification</li> <li>Cher (see instruction</li> <li>Address (number, street</li> <li>Address (number, street</li> <li>Address (number, street</li> <li>Anytown, MI 12345</li> <li>T List account number(s)</li> </ul>	are Store (DBA Name will go on the Last Name, for federal tax classification; check only one of the following se ietor or □ C Corporation □ S Corporation □ boany. Enter the tax classification (C=C corporation, S=S corpora hember LLC that is disregarded, do not check LLC; check the ap of the single-member owner. ns) ► at, and apt. or suite no.) de	/Business entry field in NW wen boxes: Partnership ☐ Trust/estate ation, P=partnership) ► opropriate box in the line above for Requester's name a	A Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):     Exempt payee code (if any)     Exemption from FATCA reporting     code (if any)     (Applies to accounts maintained outside the U.S.) and address (optional)
Part I Taxpayer I Enter your TIN in the appropri aackup withholding. For indiv resident alien, sole proprietor, entities, it is your employer Id <i>TIN</i> on page 3. Note. If the account is in mor yuidelines on whose number	dentification Number (TIN) late box. The TIN provided must match the name given iduals, this is generally your social security number (SSI , or disregarded entity, see the Part I instructions on pag entification number (EIN). If you do not have a number, is e than one name, see the instructions for line 1 and the to enter.	on line 1 to avoid N. However, for a Je 3. For other see How to get a Or Employer	identification number
Part II Certification Under penalties of perjury, I of 1. The number shown on this 2. I am not subject to backup Service (IRS) that I am sub no longer subject to backu 3. I am a U.S. citizen or other 4. The FATCA code(s) entered Certification instructions. Yi because you have failed to re interest paid, acquisition or at penerally payments other than	on ertify that: is form is my correct taxpayer identification number (or I by withholding because: (a) I am exempt from backup with ject to backup withholding as a result of a failure to rep up withholding; and r U.S. person (defined below); and d on this form (if any) indicating that I am exempt from F our must cross out item 2 above if you have been notifie port all interest and dividends on your tax return. For re- bandonment of secured property, cancellation of debt, (a in interest and dividends you are part required to eight for the port and dividends you are part required to eight for the property of the part of the	am waiting for a number to be is hholding, or (b) I have not been ort all interest or dividends, or (c ATCA reporting is correct. d by the IRS that you are curren al estate transactions, item 2 do contributions to an individual ret in certification. but you must per	- sued to me); and notified by the Internal Revenue the IRS has notified me that I am ty subject to backup withholding es not apply. For mortgage irement arrangement (IRA), and wide your correct TIN See the
Instructions on page 3. Sign Signature of U.S. person ►		Date ►	

To add Vendor W9.

To add the W9 to your vendor request. Click on the document button circled below. In order to attach the W9 it will need to be scanned to yourself.



Once you have scanned and saved the W9:

- 1. Drag and drop file
- 2. After PDF is attached (green check mark) then click x in upper right corner to close.



Once screen is closed, the file will appear as below.

Vendor Change Request Entry - (Documents)							₽ (			
Status	٠	File	1 #	File Type		Changed User	*	Changed Date		
		♥ Contains		Contains		∇ Contains		∇  On	-	
		A2 W9		pdf		ba1newtl				

1 - 1 of 1 records		. I <del>c</del>	→ prev 1	next 🕨 →	Show 25	<ul> <li>records</li> </ul>
Back Upload	Add Link					

The vendor file document icon should have an asterisk once W9 is attached.



## Additional Contacts:

To add an additional contact address you can click on the contact button circled below:



In the Contract Name field select new from drop down list. Check active and fill in the blank fields (name & address). Be sure to check which address option this is for, i.e. – Remittance for mailing, Purchasing for PO selection.

Vendor Effective Date		Reason Code Comment	New Vendor - New Vendor Adder				
Contact Name	I New>	Options					
Active Primary Name Description Address Zip Code		Contact Remittance Purchasing Primary 1099 Additional 1099 ACH Payment Fax P.O. Email P.O. Bank Information					
City State Email Address Phone Number Extension Fax		Routing Number Account Number Account Type Notice Sent					

Once you have entered all your information be sure to click Save and Submit. After Purchasing approves the vendor you will be able to enter a purchase order for them.

Note: If you have entered a vendor and purchasing has approved it and you cannot pull it up when entering a PO, the active button was not selected. Call Purchasing to correct.

Any questions, contact: Linda Newton: Internal Number 5-1248, <u>newtonl@aaps.k12.mi.us</u> or Kayleen Krahn: Internal Number 5-1282, <u>krahnk@aaps.k12.mi.us</u>