Vendor Administrator Training
Configure Vendor System Settings

### Configure Vendor System

**General**
- Allow agency role to add new vendor to master vendor list from document:
  - Vendor Administrator
  - Basic Purchasing
  - Internal Administrator
  - Agency Administrator
  - Program Administrator
  - Organization Administrator
  - Department Access
  - Inquiry
  - Accounts Payable
  - Inventory Administrator
  - Inventory User

- Force vendor tax IDs to be unique:

- Enforce vendor mini-registration upon bid acknowledgement:
- Require PO acknowledgement to view Purchase Orders:
- Require Change Order acknowledgement to view Change Orders:
- Validate Vendor Bid Amendment Acknowledgment:
- Display All Bids and Quotes to Vendors:
- Display All Contracts/Blankets to Vendors:
- Display All Invitations to Vendors:

**Vendor interface**

- Allow:
  - Electronic Quote
  - Vendor Online Informal Quote Submission
  - Vendor Online Formal Quote Submission
  - Reverse Auction
  - Vendor to update Company Name and Vendor Legal Name
  - Vendor to update Tax ID
  - Vendor Profile Attachments
  - Disk Allocation: Unlimited

- Allow Interagency Vouchers
Configure Vendor System Settings

**Registration**

- Show “Commodity Codes” section
- Show “Regions” section
- Show “Categories” section
- Allow International Tax ID Support
- Mandatory Registration

Vendor Registration File Path: `/opt/Periscope/repository/vendor_reg`

- Vendor Initial Status: **Active**
- DBA Vendor Initial Status: **Active**
- Registration Notification User: 

Vendor Disclaimer:

```
Vendor Disclaimer for Buy A&M Test environment.
```

**Address Settings**

- Maximum Allowed Number of Address Lines: **4**
- Restrict Synched Vendor Address Edits
- Require Alt IDs on Vendor Remit Address

Bottom:

- Save & Exit
- Save & Continue
- Reset
- Cancel & Exit

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Maintain Vendor Categories

<table>
<thead>
<tr>
<th>TYPE</th>
<th>Business Type</th>
<th>Inactive</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>vendorType</td>
<td>Vendor Type</td>
<td>Active</td>
<td>No</td>
</tr>
<tr>
<td>w9-date</td>
<td>W9 Date</td>
<td>Active</td>
<td>No</td>
</tr>
</tbody>
</table>

### Business Type

- **ID:** TYPE
- **Label:** Business Type
- **Status:** Inactive

- **Description:**
  - Required
  - Allow Multiple Selections
  - Restrict Registration to Vendor Administrator
  - Show Category to Seller Administrator
  - Available for Public Search
  - Hide from Pay Only Vendors

### Values

<table>
<thead>
<tr>
<th>Value</th>
<th>Label</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>CORP</td>
<td>CORPORATION</td>
<td>Active</td>
</tr>
<tr>
<td>INDIVIDUAL</td>
<td>INDIVIDUALLY OWNED</td>
<td>Active</td>
</tr>
<tr>
<td>PARTNER</td>
<td>PARTNERSHIP</td>
<td>Active</td>
</tr>
</tbody>
</table>

---

**Note:**

- **Certification Enabled** column is unchecked for all categories.
## Maintain Certification Sources

<table>
<thead>
<tr>
<th>Source #</th>
<th>Description</th>
<th>Status</th>
<th>Show On Web</th>
</tr>
</thead>
<tbody>
<tr>
<td>REG</td>
<td>Reg Test</td>
<td>Inactive</td>
<td></td>
</tr>
<tr>
<td>REG2</td>
<td>build 21 test (edit)</td>
<td>Deleted</td>
<td></td>
</tr>
<tr>
<td>SBA</td>
<td>Small Business Association</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>UAT</td>
<td>UAT Test</td>
<td>Deleted</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>
Maintain News
Maintain News Item

<table>
<thead>
<tr>
<th>News ID</th>
<th>Effective Date</th>
<th>Category</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>06/03/2015</td>
<td>Procedures</td>
<td>New PO procedure</td>
</tr>
</tbody>
</table>

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Add News Item

News ID

Effective Date*: June ▼ 15 ▼ 2015 ▼
End Date*: June ▼ 15 ▼ 2015 ▼
Category*: ▼

Title:

News*: (max 250 characters)

Link

[Save & Exit] [Reset] [Cancel & Exit]

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# Maintain Vendor Status Change Reason

## Types of Status Changes

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incorrect Contact</td>
<td>Incorrect Contact Information (Mail/Email/Phone/Fax)</td>
<td>Active</td>
</tr>
<tr>
<td>No Activity</td>
<td>No Payments within last two years</td>
<td>Inactive</td>
</tr>
<tr>
<td>No Bid/Quote Response</td>
<td>Lack of Bid/Quote Response</td>
<td>Active</td>
</tr>
<tr>
<td>No Tax Clearance</td>
<td>No Authorized Tax Clearance</td>
<td>Active</td>
</tr>
<tr>
<td>Out of Business</td>
<td>Out of Business</td>
<td>Inactive</td>
</tr>
<tr>
<td>Vendor Request</td>
<td>Vendor Request</td>
<td>Active</td>
</tr>
</tbody>
</table>

### Add New Reason

- **Type**: Incorrect Contact
- **Description**: Incorrect Contact Information (Mail/Email/Phone/Fax)
- **Status**: Active

[Add New Reason form]
Maintain In-Progress Vendors

Search using: ALL of the criteria

Search Fields:
- Vendor Name
- Email Address
- Vendor Tax ID

Browse By: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Results

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Name</th>
<th>Tax ID</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>00061263</td>
<td>1010948830300</td>
<td>952684517</td>
<td><a href="mailto:cvelasquez@periscopeholdings.com">cvelasquez@periscopeholdings.com</a></td>
</tr>
<tr>
<td>00061260</td>
<td>CHUBBS CONSTRUCTION LLC</td>
<td>555523000</td>
<td><a href="mailto:wendy-hall@tamu.edu">wendy-hall@tamu.edu</a></td>
</tr>
<tr>
<td>00000189</td>
<td>2013 08 15 Test</td>
<td>468858585</td>
<td><a href="mailto:tmcnell@wtamu.edu">tmcnell@wtamu.edu</a></td>
</tr>
<tr>
<td>00061292</td>
<td>abc</td>
<td>677112367</td>
<td><a href="mailto:k-mcall@tamu.edu">k-mcall@tamu.edu</a></td>
</tr>
<tr>
<td>00060676</td>
<td>Big Red</td>
<td>123456789</td>
<td><a href="mailto:dheck@periscopeholdings.com">dheck@periscopeholdings.com</a></td>
</tr>
<tr>
<td>00000166</td>
<td>Dacia, Inc.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In-Progress Vendor Registration

### Company Information
- **Vendor ID:** 00009976
- **Status:** Active
- **Tax ID Type:** SSN
- **Business Description:**
  - Emergency Supplier: No
- **Alternate ID:**
  - Status Change Reason:
  - Incorporation Details - State:
  - Preferred Delivery Method:
- **Company Name:** Big Red
- **Tax ID #:** ****0567
- **Year of Incorporation:** 0
- **Vendor Email:** lmccall@tamu.edu

### Address Information
<table>
<thead>
<tr>
<th>Name</th>
<th>Address Type</th>
<th>Address Information</th>
<th>Status</th>
<th>Default for Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>General Mailing Address</td>
<td>US Email: <a href="mailto:lmccall@tamu.edu">lmccall@tamu.edu</a></td>
<td>Active</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Terms
- **Payment Terms:** N/A
- **Freight Terms:** N/A
- **Shipping Method:** N/A
- **Shipping Terms:** N/A
### Maintain Vendors

**Search using**:
- **ALL of the criteria**
- **Status**: Any

**Search Fields**:
- **Vendor Name**
- **Vendor Legal Name**
- **Vendor Tax ID**
- **Vendor ID**
- **Alternate ID**
- **Class Code**
- **Class Item Code**
- **NIGP Keyword**
- Reference Vendor
- Pay-Only Vendor

**Browse By**: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Results**

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Name</th>
<th>Tax ID</th>
<th>Alternate ID</th>
<th>Reference Vendor</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>00020324</td>
<td>A&amp;M Test 01a</td>
<td>****1236</td>
<td>WESTTEXAS: TAMUS:X0017101</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>00000044</td>
<td>A1 Scientific Equipment IncA</td>
<td>123</td>
<td>TAMUS:X0013563 WESTTEXAS:</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>0000036</td>
<td>aaa services</td>
<td>6661</td>
<td>WESTTEXAS:0973537</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>0000008</td>
<td>ABC Supply</td>
<td>2333</td>
<td>TAMUS:X0013945 WESTTEXAS:</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>00020325</td>
<td>ABC Supply 2</td>
<td>6777</td>
<td>TAMUS:X0013954 WESTTEXAS:0973527</td>
<td>No</td>
<td>Active</td>
</tr>
<tr>
<td>00050502</td>
<td>AFP COASTAL BEND CHAPTER</td>
<td>3821</td>
<td>TAMUS:X0000503 WESTTEXAS:973523</td>
<td>No</td>
<td>Active</td>
</tr>
</tbody>
</table>
Maintain Vendors

- Maintain Organization Information:
  - This section is used for maintaining organization information.

- Maintain General Organization Information:
  - This section is used for maintaining general organization information.

- Maintain Addresses:
  - This section is used to maintain addresses.

- Maintain Commodity Code Codes & Services:
  - This section is used to maintain commodity code codes and services.

- Maintain Regions:
  - This section is used to maintain regions.

- Maintain Terms and Categories:
  - This section is used to maintain terms and categories.

- Maintain Quote Attachment Repository:
  - This section is used to maintain quotes in the quote attachment repository.

- Credit Memo List:
  - This section is used to view credit memos.

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Maintain Vendor General Information

Maintain General Organization Information

Vendor ID: 00000044
Alternate ID: TAMUS:X0013953 WESTTEXAS:
Company Name*: A1 Scientific Equipment Inc
DBA for Vendor: Vendor Legal Name*: A1 Scientific Equipment Inc
Status: Active
Status Change Reason:
Tax ID #: Show
Country Code for Tax ID*: CA - Canada

EIN  SSN

Incorporation Details:
State: TX Year of Incorporation: 2010
Business Description: Scientific Equipment Sales
Preferred Delivery Method: Email
Vendor Email: ddalpaz@wtamu.edu
Vendor Fax:
Special Vendor Type:
In Compliance
1099 Vendor
Comments:

Emergency Supplier:
Yes  No

Emergency Phone*: 12345
Emergency Contact Name*: qe13
Emergency Email*: qwewqwe123@e.com
Emergency Info Comment:
User Last Updated: Ardis Ramey
Date Last Updated: 06/15/2015 07:08:21 PM
Maintain Vendor General Information
Maintain Commodity Codes & Services
Maintain Vendor Terms & Categories

<table>
<thead>
<tr>
<th>Terms</th>
<th>Categories &amp; Certifications - A1 Scientific Equipment IncA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Terms: Net 30</td>
<td>B. HISTORICALLY BLACK COLLEGES &amp; UNIV</td>
</tr>
<tr>
<td>Freight Terms: Prepaid and Add</td>
<td>C. CERTIFIED HUB BUSINESS</td>
</tr>
<tr>
<td>Shipping Method: Best Way</td>
<td>D. SERVICE DISABLED VETERAN OWNED</td>
</tr>
<tr>
<td>Shipping Terms: P.O. B. Destination</td>
<td>H. HUBZONE (LABOR SURPLUS AREA)</td>
</tr>
<tr>
<td></td>
<td>N. NOT A HUB BUSINESS</td>
</tr>
<tr>
<td></td>
<td>S. SELF DECLARED HUB BUSINESS</td>
</tr>
<tr>
<td></td>
<td>V. VETERAN OWNED</td>
</tr>
</tbody>
</table>

Add Vendor Certification - American Express Corporate Services

| Vendor ID         | 000000001       |
| Category          | MBJ             |
| Category Type     | Small, Woman Owned Business |
| Certification Source | Bureau of Contracts Administration |
| Certification ID * |                  |
| Effective Date (MM/DD/YYYY) * |                  |
| Expiration Date (MM/DD/YYYY) |                  |
| Certification Status | Active        |
| Certification Description |               |

*Required fields
Maintain Quote Attachment Repository
Credit Memo List

Maintain Organization Information for: A1 Scientific Equipment IncA

- Maintain General Organization Information
  - This section is used for maintaining general organization information.
- Maintain Addresses
  - This section is used to maintain addresses.
- Maintain Commodity Codes & Services
  - This section is used to maintain commodity code codes and services.
- Maintain Regions
  - This section is used to maintain regions.
- Maintain Terms and Categories
  - This section is used to maintain terms and categories.
- Maintain Quote Attachment Repository
  - This section is used to maintain files in the quote attachment repository.
- Credit Memo List
  - This section is used to view credit memos.

Current Credit Memos

<table>
<thead>
<tr>
<th>Credit Number</th>
<th>Description</th>
<th>DEPT/LOC</th>
<th>Status</th>
<th>Credit Amount</th>
<th>Memo Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No credit memos were found.
Maintain Users on this Account

User Maintenance for: A1 Scientific Equipment IncA

Search Using: ALL of the criteria

Search Fields:
- First Name
- Last Name
- Login ID
- User Role
- Status

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10

Find It Clear Add User

<table>
<thead>
<tr>
<th>Login ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Status</th>
<th>Role(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PURCHASING</td>
<td>Chris</td>
<td>Chamberlain</td>
<td>Active</td>
<td>Seller, Seller Administrator</td>
</tr>
</tbody>
</table>

Add User Exit

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Maintain Vendor Users

User Maintenance: Chris Chamberlain - A1 Scientific Equipment IncA

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salutation</td>
<td>Mr.</td>
</tr>
<tr>
<td>First Name*</td>
<td>Chris</td>
</tr>
<tr>
<td>Job Title*</td>
<td>President</td>
</tr>
<tr>
<td>Phone*</td>
<td>99999999999</td>
</tr>
<tr>
<td>Login ID</td>
<td>PURCHASING</td>
</tr>
<tr>
<td>Last Name*</td>
<td>Chamberlain</td>
</tr>
<tr>
<td>Department</td>
<td>Sales</td>
</tr>
<tr>
<td>Email*</td>
<td><a href="mailto:cchamberlain@tamu.edu">cchamberlain@tamu.edu</a></td>
</tr>
<tr>
<td>Status:</td>
<td>Active</td>
</tr>
<tr>
<td>New Password*</td>
<td>**********</td>
</tr>
<tr>
<td>Confirm Password*</td>
<td>**********</td>
</tr>
<tr>
<td>Login Question*</td>
<td>What is your mother’s middle name?</td>
</tr>
<tr>
<td>Login Answer*</td>
<td>Lynn</td>
</tr>
</tbody>
</table>

Roles

- Seller
- Administrator
- Can Create Blanket Change Orders
- Can Upload Contract

Save & Exit  Save & Continue  Reset  Cancel & Exit
Add Users on this Account

New Vendor User for A1 Scientific Equipment IncA

Salutation ▼
First Name*: 
Job Title*: 
Phone*: 
Login ID*: 
New Password*: 
Login Question*: ▼

Last Name*: 
Department 
Email* 
Status*: Active ▼
Confirm Password* 
Login Answer* 

Roles

- Seller
- Seller Administrator
- Can Create Blanket Change Orders
- Can Upload Contract

Save & Exit  Reset  Cancel & Exit

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Add Associated Organization

Send Mail

Use the email form below to request that the associated organizations register in BSO. The link provided below must be used in order to register with the same tax ID.

To: 
CC: 
Send confirmation email to: aramey@periscopeholdings.com

From: aramey@periscopeholdings.com
Subject: A1 Scientific Equipment Inc.

Requests you register with the 000 - The Texas A&M University System’s eProcurement.

Text:

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