



## Web Voucher – Requesting New Vendors & Reimbursees

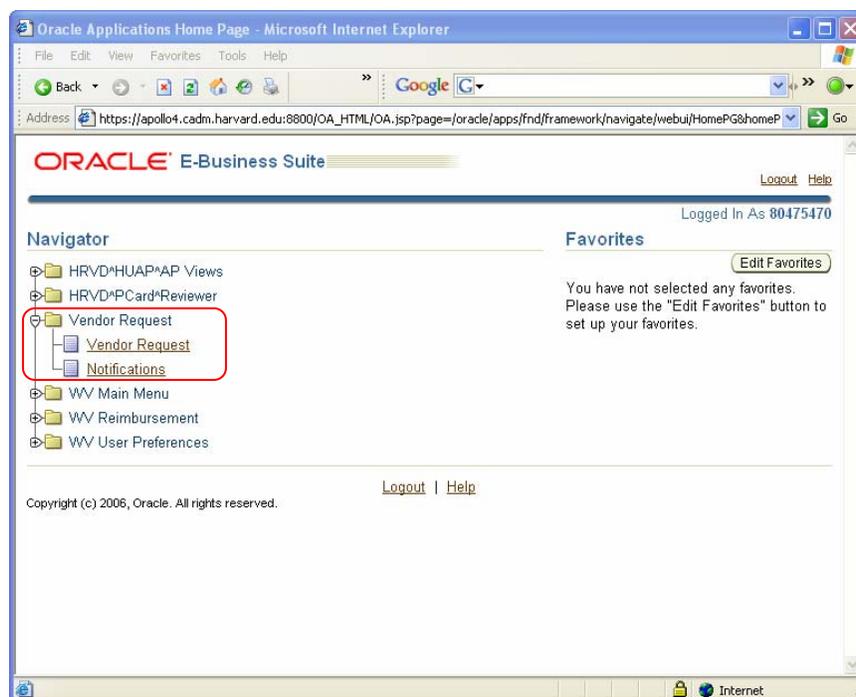
### Overview

When processing invoices or reimbursement requests in the Web Voucher (WV) system, you may occasionally need to issue payments to people or companies that are not already in the system or you may need to have a check mailed to a different address than the ones that appear in the supplier search. When this happens, you can use the “Vendor Request” option to submit a request to your approver for the creation of the new supplier or supplier site.

All requests for new vendors must be authorized by a local approver before being submitted to the Accounts Payable Vendor Hotline. The instructions on the following pages detail the steps necessary to complete the new vendor request process. Questions about setting up new vendors can be emailed to [ap\\_vendorhotline@harvard.edu](mailto:ap_vendorhotline@harvard.edu).

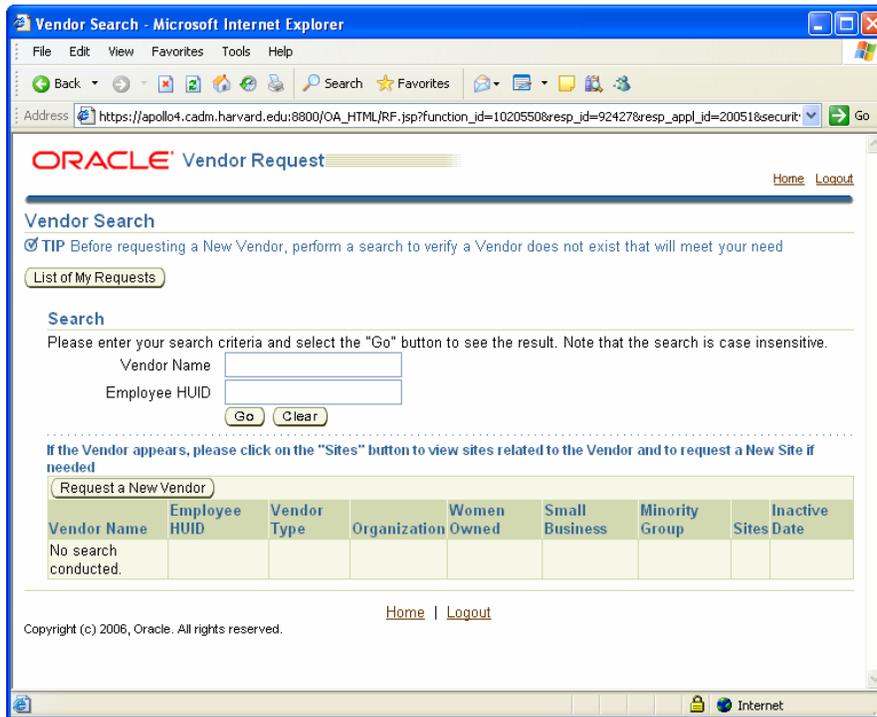
### Processing New Vendor Requests

To request a new supplier, reimbursee (employee or non-employee), or site for an existing vendor, log into Oracle and select Vendor Request. This option is available above WV Main Menu option on the Oracle Personal Homepage.

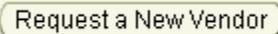
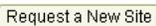




## Web Voucher Requesting New Vendors and Reimbursees



From the Vendor Search Screen, you can choose one of the following actions:

Action	Screen Detail	Notes
View submitted requests		This shows details about the current status of any requests that you have submitted within the last 90 days.
Search for an existing vendor		<p>To search for a term that is not the beginning of the vendor's name, enter "%" as a wildcard (for example, use "%Sample" to search for "Tom A Sample").</p> <p>If your search turns up a match, click  to check the addresses that are already on file for that vendor.</p>
Request a new vendor		Use the search tool first to confirm that the vendor is not already in the system.
Request a new site for an existing vendor		To request a new site, search for the vendor first, then click  to view their current addresses. The  button appears on the following screen.

Refer to the following pages for details of completing a New Vendor Request.



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To Request a New Vendor:

Task	Screen Detail	Notes
<p>1) Enter the <b>Vendor Name</b> as it should be listed.</p>	<p>* Vendor Name <input type="text"/></p>	<p>If you enter an existing vendor, the system will prompt you to request a new site instead.</p> <p>Refer to the <a href="#">Locating Vendor Records</a> job aid for details about the vendor naming conventions.</p>
<p>2) Select a <b>Vendor Type</b> from the provided drop-down list.</p>	<p>* Vendor Type <input type="text"/></p>	<p>Once you select the vendor type, additional fields will appear based on that choice.</p>
<p>3) Fill out any additional vendor details that are required for the selected <b>Vendor Type</b>.</p> <p>Some examples of additional vendor details are:</p>	<p style="text-align: center;"><b>Harvard Employee</b></p> <p>* Employee's HUID <input type="text"/> <input type="checkbox"/> Employee has Direct deposit</p> <hr/> <p style="text-align: center;"><b>Individual – US Citizen</b></p> <p>* Social Security Number <input type="text"/> Tax Reporting Name <input type="text"/></p> <p><small>Enter numbers only (no dashes or punctuation) *Will be encrypted</small></p> <hr/> <p style="text-align: center;"><b>Individual – Non US Citizen</b></p> <p>Social Security Number <input type="text"/> Country Issuing Passport <input type="text"/></p> <p><small>Enter numbers only (no dashes or punctuation) *Will be encrypted</small></p> <p>Visa Type <input type="text"/> Tax Residency <input type="text"/></p> <hr/> <p style="text-align: center;"><b>Vendor – US – Sole Proprietorship</b></p> <p>* Social Security Number <input type="text"/> Tax Reporting Name <input type="text"/></p> <p><small>Enter numbers only (no dashes) *Will be encrypted</small></p> <hr/> <p style="text-align: center;"><b>Vendor – US Corporation</b></p> <p>Federal Tax ID/EIN <input type="text"/> Tax Reporting Name <input type="text"/></p> <p><small>Enter numbers only (no dashes) *Will be encrypted</small></p>	<p><i>Required info:</i> Employee's HUID Number</p> <hr/> <p><i>Required info:</i> Social Security Number</p> <hr/> <p>A Foreign National Information Form must also be submitted to UFS Customer Service.</p> <hr/> <p><i>Required info:</i> Social Security Number</p> <hr/> <p><i>Recommended info:</i> Federal Tax ID/EIN Tax Reporting Name</p>

Required fields are marked with a \*

For many fields, you can click on the symbol to search for appropriate values.



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Task	Screen Detail	Notes
4) Optionally, enter the <b>Business Classifications</b> information.	<p><b>Business Classifications</b></p> <input type="checkbox"/> Woman Owned <input type="checkbox"/> Small Business	
5) Enter the <b>Remit Address</b> that the vendor's payment should be sent to.	<p>* Address Line1 <input type="text"/></p> <p>Address Line2 <input type="text"/></p> <p>Address Line3 <input type="text"/></p> <p>* City <input type="text"/></p> <p><small>The city name will be used to derive the site name</small></p> <p>State <input type="text"/></p> <p>Postal Code <input type="text"/></p> <p>Province <input type="text"/></p> <p>Country <input type="text"/></p>	<p>This is the address that AP should send the payment to.</p> <p>For employees, you can click on the <input type="checkbox"/> Load Office Address box to pull in their Harvard address.</p>
6) Enter the vendor's <b>Permanent Address</b> .	<p><b>Permanent Address</b></p> <p><input type="checkbox"/> Same as Remit Address</p> <p>* Address Line1 <input type="text"/></p>	<p>If this is the same as the Remit Address, click on the checkbox and the information will be copied over from those fields.</p>
7) Enter your <b>Tub</b> , <b>Org</b> , and the <b>Approver</b> you want to authorize this request.	<p><b>Approver Information</b></p> <p>Tub <input type="text"/></p> <p>Org <input type="text"/></p> <p>* Approver Name <input type="text"/></p>	<p>If you have a default Tub, Org, or Approver in Web Voucher, these will fill in automatically.</p> <p>Even if you can approve your own web vouchers, you will still need another person to approve any new vendor requests.</p>
8) Click <b>Submit Request</b> .	<p><b>Submit Request</b></p>	<p>Approvers can view requests awaiting their authorization on the Notifications screen.</p>

After submitting a request, you should use an appropriate local business process to let your approver know that a new vendor request is awaiting their authorization.