

Tutorial

Request New Vendor for Approval

Jump to the **Financial Management** system

The screenshot shows the Skyward Financial Management dashboard. At the top, there is a navigation bar with the Skyward logo and menu items: Home, Account Management, Vendors, Purchasing, and Accounts Payable. Below the navigation bar, the page title is "Financial Management". On the right side of the dashboard, there are utility icons for Favorites, New Window, and My Print Queue. The main content area is divided into several widgets:

- Jump to Other Dashboards:** Contains links for *Calendar, Skyward User, Task Manager, and Reset Dashboards. A "Select Widgets" link is at the bottom right.
- Task Manager:** Displays "There are no tasks currently assigned to you."
- District News:** Displays "No news to display".
- Online Forms to be Completed:** Displays "No Online Forms to be Completed".
- Jump to Other Systems:** Contains links for Employee Access and Financial Management. A blue arrow points to the "Financial Management" link.
- Notifications:** Displays "You do not have any unread notifications."
- Favorites:** Displays "No favorites available."
- Weather:** Displays weather information for Lodi, WI at 7:52 am CDT on 7/23/2014. It includes a sun icon, current conditions (Fair, 66 F), and a 5-day forecast.

Choose the **Vendor** tab

Web Financial Management - WF - 10636 - 05.14.06.00.05 - Mozilla Firefox
https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinlodwi/sfmhom01.w

SCHOOL DISTRICT OF LODI

E Z Rock Account Preferences Exit ?

Home Account Management **Vendors** Purchasing Accounts Payable

Vendor Browse

Skyward User
Task Manager
Reset Dashboards Select Widgets

District News
No news to display

Online Forms to be Completed
No Online Forms to be Completed

Financial Management

Notifications
You do not have any unread notifications.

Favorites
No favorites available.

Weather
Displaying weather for 53555 (change).
Conditions for Lodi, WI at 1:53 pm CDT
7/28/2014
Current Conditions:
Partly Cloudy, 72 F
Forecast:
Mon - Partly Cloudy. High: 72 Low: 55
Tue - Isolated Thunderstorms. High: 79 Low: 57
Wed - Sunny. High: 78 Low: 56
Thu - Isolated Thunderstorms. High: 80 Low: 58
Fri - Scattered Thunderstorms. High: 80 Low: 57
Full Forecast at Yahoo! Weather
(provided by The Weather Channel)

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Click on **Vendor Browse**

Click on **Request New Vendor for Approval** – this will allow you to add the new vendor name, address, phone number, email address, and any additional info you have.

SCHOOL DISTRICT OF LODI E Z ROCK Account Preferences Exit

Home Account Management **Vendors** Purchasing Accounts Payable

Vendor Browse Favorites New Window My Print Queue

Views: Name Only Filters: *All Vendors

Last Name / Individual 1st Name / Business	First Name / Individuals 2nd Name / Business	Name Key	V	O	R	O	O	O	R	U	M	Zip Code	ST	City
THE REGENTS OF U.C.*		GEMS 001	B	Y			N					94720-5200	CA	BER
CONVEN		*CONVVEN000	I	Y	Y	1								
I/D/E/A/		IDEA 001	B						Y	Y		45449	OH	DAY
00% EDUCATIONAL VIDEOS		100*EDVI000	B					N	Y			95762-5701	CA	EL C
00% EDUCATIONAL VIDEOS		100*EDVI001	B	Y	Y	1						95762-4440	CA	EL C
00% PRODUCTIONS		100PR 001	B						Y	Y		95662	CA	ORA
00-220 VOLTS		110-220 001	B						Y	Y		94521	CA	CON
ST PLACE VOLLEYBALL		1ST PLAC000	B	Y	Y	1						32092	FL	ST.
006 OLYMPIC TEAM TRIALS-CURLI		2006 OLY000	B						Y	Y		53558	WI	MCF.
013 WISCONSIN FFA ALUMNI CON		WIFFACOM001	B	Y	Y	1						54935	WI	FON
04-NATIONAL SEATING & MOBILIT		HEADHOCA000	B	Y	Y	1						37402	TN	CHA
08 COOL INC.		2BCOOLIM001	B						Y	Y		53955	WI	POY
0ND WISCONSIN		2NDWISCO001	B						Y	Y		53508	WI	BELL
08 BATS IN THE BELFRY		3BATSBEL001	B	Y	Y	1						53555	WI	LOD
08 R'S		3R'S 001	B						Y	Y		61107	IL	ROC
08-STAR INSTALLATION		4-STA 001	B						Y	Y		53597	WI	WAI
08 IMPRINT		4IMPRINT000	B	Y				N				54903-0320	WI	OSH
08 IMPRINT		4IMPRINT001	B	Y	Y	2						60673-1253	IL	CHI
08 & E WEB INTERACTIVE		A&EWEB 001	B						Y	Y		10087-5970	NY	NEV
08 M S SCREEN PRINTING		AMSSCRPR001	B						Y	Y		53562	WI	MIDI

Request New Vendor For Approval

Edit All Vendor Request Fields

Delete Vendor Request

Attachments

Reqs; POs Invs; Chks

Click on the correct **Vendor Format** – Individual or Business

Type in the **Name of Vendor being requested**

The screenshot shows a web form for vendor registration. At the top, there are navigation icons (camera, print, help). The main form area is titled "Vendor Name" and contains two radio buttons for "Vendor Format": "Individual" (unselected) and "Business" (selected). To the right, there are two text input fields for "Name of Vendor being requested": "* 1st Name:" and "2nd Name:". Below these fields is a button labeled "Click Here When the Name is Fully Entered". To the right of the form are two buttons: "Submit Entered Name For Vendor Approval" and "Back".

Below the main form is a section titled "Similar Names - Businesses". It has a table with columns: "1st Name / 2nd Name", "Primary Phone / Alpha Code", and "Address". The table is currently empty, with the text "There are no records to display; check your filter settings." below it. To the right of this section is a button labeled "Select Name And Submit Vendor Request For Approval".

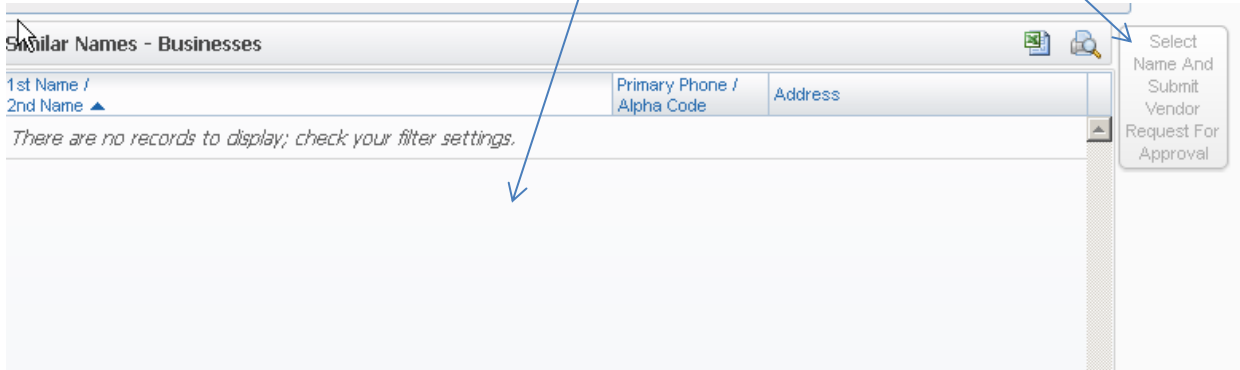
At the bottom left, there is a status bar that says "0 records displayed" and "Asterisk (*) denotes a required field".

Blue arrows point from the text above to the "Business" radio button and the "1st Name" input field.

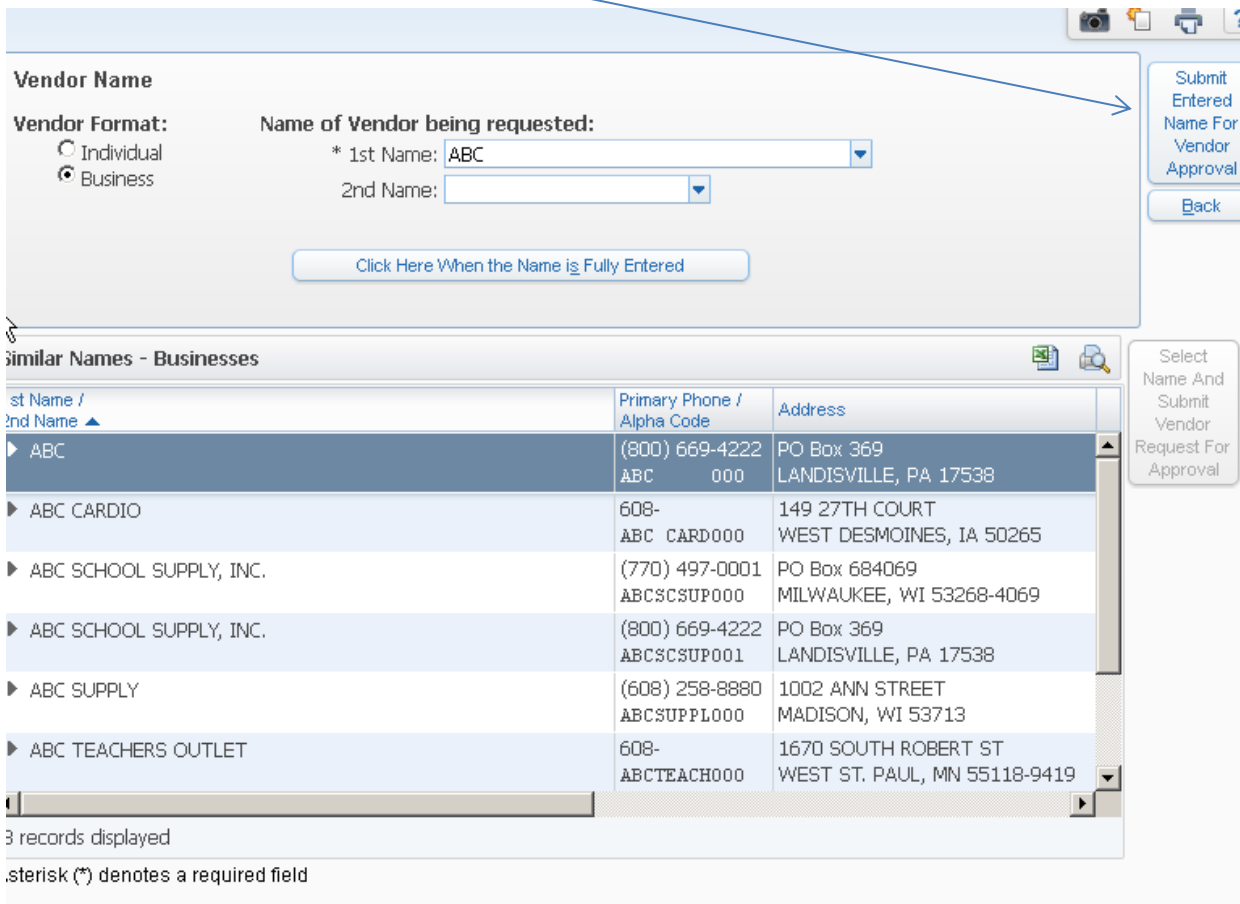
Once the name is entered you **click here**. Skyward searches the database for any company or individual with the same name to avoid duplicate vendors.

This is a close-up of the "Name of Vendor being requested" section of the form. The "1st Name" field contains the text "ABC TEST COMPANY" and is highlighted in green. The "2nd Name" field is empty and highlighted in purple. Below the fields is a button labeled "Click Here When the Name is Fully Entered". A blue arrow points from the text above to this button.

- If there are no similar names it will look like this and you may choose **Submit Entered Name for Vendor Approval.**



- If Skyward finds similar names they will appear with addresses and phone numbers for you to verify. If the vendor isn't listed then you may continue to request the new vendor by choosing **Submit Entered Name for Vendor Approval.**



Click on **Continue Request**

The screenshot shows a web browser window with the title 'Name Information - WF\VE\VB - 10022 - 05.14.06.00.05 - Mozilla Firefox'. The address bar contains the URL 'https://skyward.iscorp.com/scripts/wsisa.dll/WSservice=wsfinlodiwi/fvndredit005.w'. The page content is divided into two main sections:

- Name Information**: This section contains a sub-section titled 'Vendor Relationship and Status'. It features a table with the following data:

Vendor Name:	Key	A/I	Fmt
ABC TEST COMPANY	ABC TEST000		Bus
- Modify Remit To Vendor Information (Uppercase Names)**: This section contains several form fields:
 - Format: Business Individual
 - Created: 07/28/2014
 - By User: E Z ROCK
 - Active/Inactive: Active Inactive
 - 1st Name: ABC TEST COMPANY
 - 2nd Name: (empty field)
 - Vendor ID: 359682
 - Comments: (large empty text area)

On the right side of the page, there is a vertical stack of four buttons: 'Continue Request', 'Skip', 'Stop Request', and 'Cancel Request'. A blue arrow points from the text 'Click on Continue Request' to the 'Continue Request' button.

Add the vendor address.

1. House #
2. Street Name or PO Box
3. Zip Code (which automatically carries the City/State over)

Address

Vendor Relationship and Status

Vendor Name: ABC TEST COMPANY Key: ABC TEST000 A/I: Fmt: Bus

Address

House # Dir Street

Address: > > >

Address 2: >

SUD: > SUD #: > PO Box: >

Zip Code: > > City/State: >

County: > > Township: > >

Separate Mailing Address?

House # Dir Street

Address: > > >

Address 2: >

SUD: > SUD #: > PO Box: >

Zip Code: > > City/State: >

Continue Request
Skip
Stop Request
Cancel Request

If the Street name doesn't exist in Skyward it will ask you to Add Street Name Confirmation. **Yes**

Address

House # Dir Street

Address: 123 > W LANE AVE >

Address 2: >

SUD: > SUD #: > PO Box: >

Zip Code: > > City/State: >

County: > > Township: > >

Separate Mailing Address?

House # Dir Street

Address: > > >

Address 2: >

SUD: > SUD #: > PO Box: >

Zip Code: > > City/State: >

Cancel Request

Add Street Name Confirmation

W LANE AVE does not exist as a street name.

Do you want to add a new street named W LANE AVE?

Yes No

Zip Code entry

Address

House #	Dir	Street
Address: 123		W LANE AVE
Address 2:		
SUD:	SUD #:	PO Box:
Zip Code: 53555		City/State:
County: 53555 [LODI, WI]		Township:
53555L [LODI,, WI]		
53555M [LODI, WO]		

Separate mailing Address?

House #	Dir	Street
Address:		
Address 2:		
SUD:	SUD #:	PO Box:
Zip Code:		City/State:

Once address is entered, Click on **Continue Request**

https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinlodiwi/fvndredit002.w

Address

Vendor Relationship and Status

Vendor Name: ABC TEST COMPANY	Key: ABC TEST000	A/I: []	Fmt: Bus
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Address

House #	Dir	Street
Address: 123		W LANE AVE
Address 2:		
SUD:	SUD #:	PO Box:
Zip Code: 53555		City/State: LODI, WI
County:		Township:

Separate Mailing Address?

House #	Dir	Street
Address:		
Address 2:		
SUD:	SUD #:	PO Box:
Zip Code:		City/State:

Buttons: Continue Request, Skip, Stop Request, Cancel Request

Enter additional information if available. **Continue Request**

https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinlodiwi/fvndredit003.w

General Information

Vendor Relationship and Status

Vendor Name:	ABC TEST COMPANY	Key	ABC TEST000	A/I		Fmt	Bus
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Contact Information

Contact Name:

1st Phone: (608) Ext: 1st Phone Confidential 1st Phone Long Distance

2nd Phone: (608) Ext: Type:

3rd Phone: (608) Ext: Type:

Fax:

Web Site:

E-mail #1:

E-mail #1 Desc:

E-mail #2:

E-mail #2 Desc:

E-mail #3:

E-mail #3 Desc:

Submit Purchase Orders via E-mail, use E-mail Address E-mail Start Date: 07/28/2014 **Monday**

Accrual Account Information

Accrual: A/P-ACCR A/P Accrual

Account: ** L 811200

Extended Vendor Information

PO Contact:

Order From Vendor on Requisitions: Allow use on Requisitions Exclude from use on Requisitions

Insurance Certification Date: Requested Received

Ownership Certification Date: Requested Received Ownership Type:

BAYPA This Year: 0.00 BAYPA Last Year: 0.00 BAYPA Next Year: 0.00

Special Terms - Requisition/PO Discount %: 0.00

Special Terms - AP Payments - Discount %: 0.00 Discount Days Due: 0 Standard Days Due: 0

Catalog Exists: No [View/Add/Edit Catalog Items:](#) Notes Exist: No [View/Add/Edit Notes:](#)

Buttons: Continue Request, Skip, Stop Request, Cancel Request

Click on **Save**

1099 Info - WF\VE\VB - 10022 - 05.14.05.00.05 - Mozilla Firefox

https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinlodw/Fyndredit004.w

1099 Info

Vendor Relationship and Status

Vendor Name: Key: A/I: Fmt:

1099M Form Information

TIN: EIN: SSN:

1099-M Recipient Box:

1099-M Default Type:

A/P Contact:

Account Number:

UBI Number:

W9 Date: Requested Received

Type:

Sub Type: Print Account Number on AP Check Stub and PO

Separate 1099M Address?

Delivery Address:

City:

State/Province:

Zip/Postal Code:

Country:

You will get the below message. An email will be sent to you when the vendor is approved or denied.

The screenshot shows a software interface with a grey background. A white dialog box is centered on the screen, containing the text: "The New Vendor Request - ABC TEST COMPANY (ABC TEST000) - has been submitted for approval." Below the text is a single button labeled "OK". A mouse cursor is positioned over the top-left corner of the dialog box. In the background, a form titled "formation" is partially visible, with fields for TIN, recipient, default, v/P Con, int Num, and JBI Num. Below these fields are radio buttons for "Requested" (selected) and "Received", and a checkbox for "Print Account Number on AP Check Stub and PO". At the bottom of the form, the text "99M Address?" is visible.