



**CENTRAL****SQUARE**  
TECHNOLOGIES

# Vendor and PO Inquiry

*(PEIQ)*

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# Overview

The Person Entity Inquiry screen allows users to view information about vendors, AR Customers and internal locations for the County. Use the Vendor Inquiry screen to view the information associated with a vendor. This is a reporting (read-only) screen so you can't add or update records. You can search for particular vendor using different combinations of vendor information (name, ID, PO number, etc.). You can also check invoice information for specific vendors here.

## Basic Vendor Request Process

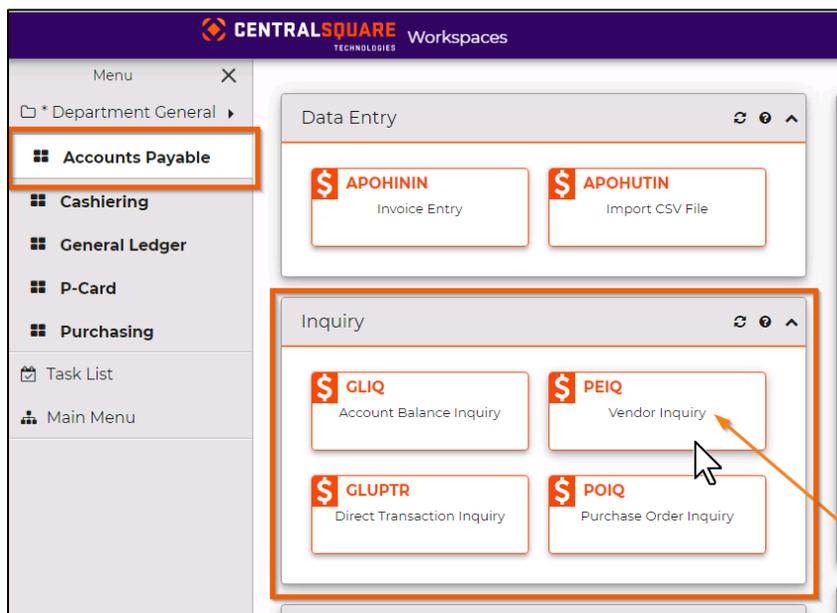
A typical vendor request from the Auditor's Office process includes: department obtains complete W-9 from vendor, sends form and request to Auditor, Auditor verifies W-9 information with IRS, vendor is created, and then Auditor will notify requestor of vendor number created.

# Accessing the (PEIQ) Screen

There are several ways that users can access this screen once logged into the ONESolution application.

## Using a Link

Select a Task Center under the Department General workspace. Most Task Centers will have an Inquiry Component available. Under the Inquiry component, select the link for **PEIQ Vendor Inquiry**.



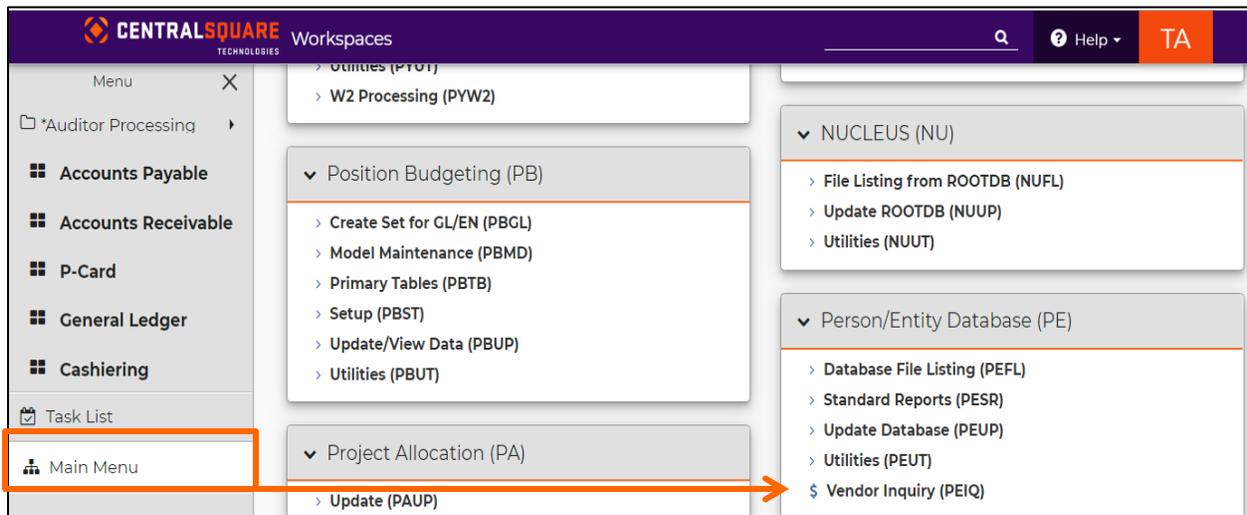
## Using a Search Bar

You may access this screen by navigating to the search bar in the top right corner of any screen and enter **PEIQ** or screen name in the search field. As you type the matching screen link will display. Select the link or press Enter to load the screen.



## Using the Main Menu

You may also access this screen by clicking the Main Menu icon and scroll down to the Person/Entity Database (PE) section. Select Vendor Inquiry at the bottom of the section



## Searching Vendor Information

When the Vendor Inquiry screen appears, search for the desired record by entering values in any of the available fields.

Vendor Inquiry							
Name:	<input type="text"/>	ID:	<input type="text"/>	Status:	<input type="text"/>	Prod ID:	<input type="text"/>
Invoice#:	<input type="text"/>	Check#:	<input type="text"/>	PR#:	<input type="text"/>	PO#:	<input type="text"/>
City:	<input type="text"/>	State:	<input type="text"/>	Zip:	<input type="text"/>		

**Name** – Vendor Name

**ID** – Vendor ID Number

**Status** – Either 'AC' Active, 'PN' Pending, or 'IN' Inactive

**PR#** – Purchase Request Number

**PO#** – Purchase Order Number

**Invoice#** – Invoice Number

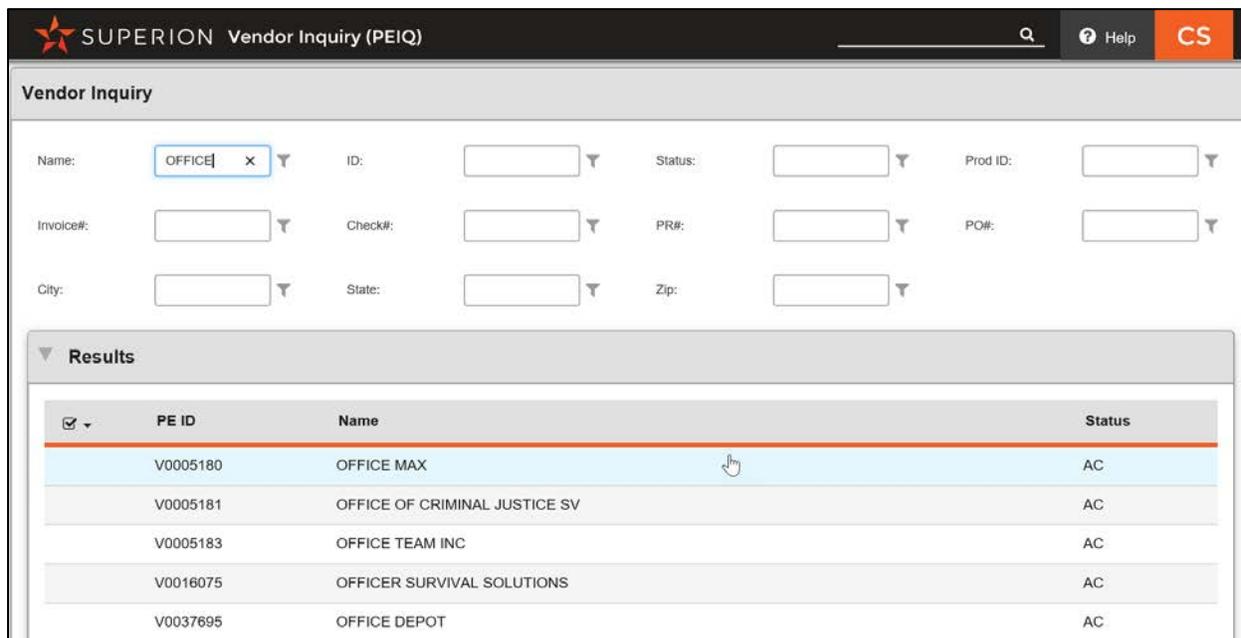
**Check#** – Check Number

**Prod ID** – Product ID Number

**City, State, Zip** – Vendor City, State, and Zip

The system applies a wildcard search in these fields. For example, if you type in the Name 'Office', the system will find all vendors that have a name that starts with 'Office'. If you put in a leading wildcard like '\*Office', the system will find all vendors with 'Office', anywhere in their name. The more fields populated when searching, the fewer matching records will be found. Searching is not case sensitive.

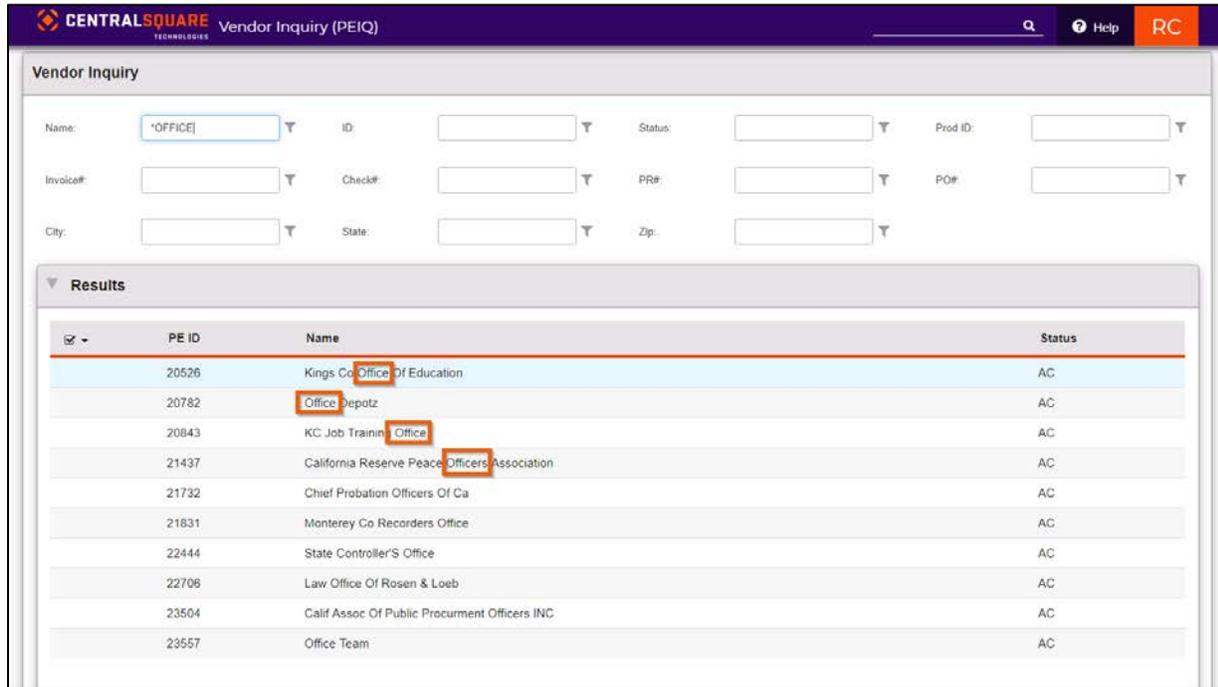
In this first example, the search results will include all records for entities whose name starts with the word "office". Here, no wildcard characters are entered, but see how it applies it automatically.



The screenshot shows the SUPERION Vendor Inquiry (PEIQ) interface. The search criteria are: Name: OFFICE, ID: (empty), Status: (empty), Prod ID: (empty), Invoice#: (empty), Check#: (empty), PR#: (empty), PO#: (empty), City: (empty), State: (empty), Zip: (empty). The results table is as follows:

PE ID	Name	Status
V0005180	OFFICE MAX	AC
V0005181	OFFICE OF CRIMINAL JUSTICE SV	AC
V0005183	OFFICE TEAM INC	AC
V0016075	OFFICER SURVIVAL SOLUTIONS	AC
V0037695	OFFICE DEPOT	AC

In this next example, records with "office" anywhere in the name will be included, because a wildcard is entered at the start of the name and the system applies the trailing wild card at the end of the name.



**Vendor Inquiry**

Name:  ID:  Status:  Prod ID:

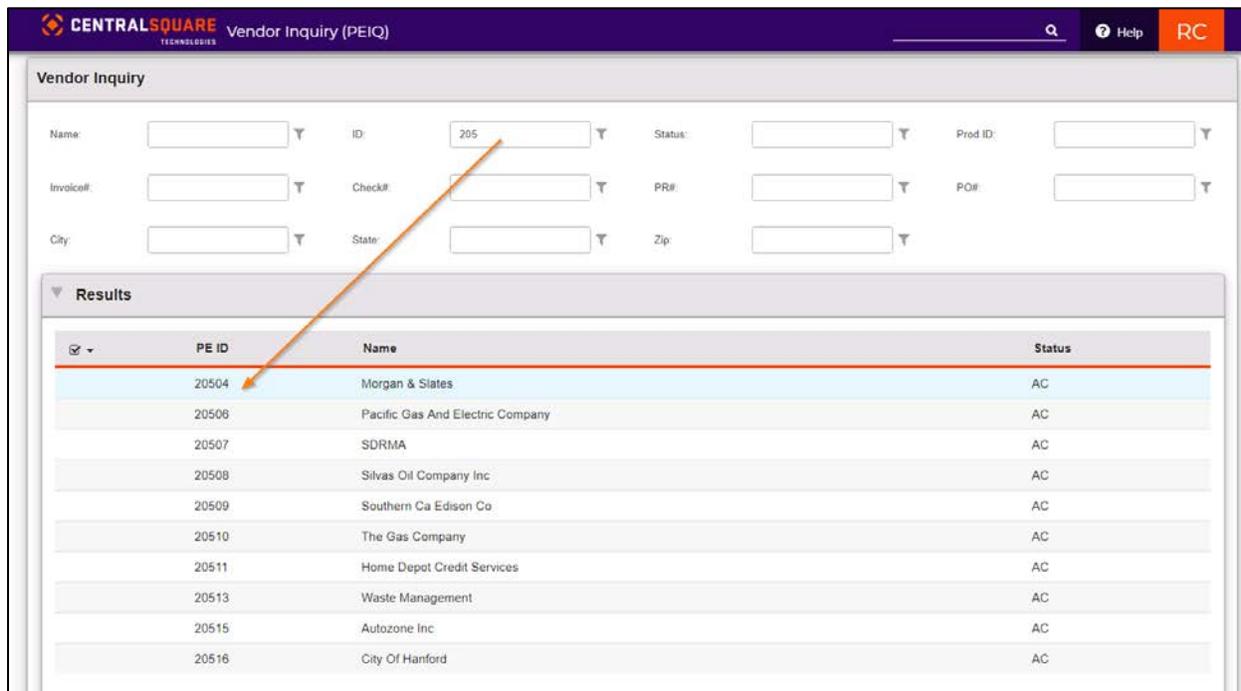
Invoice#:  Check#:  PR#:  PO#:

City:  State:  Zip:

**Results**

PE ID	Name	Status
20526	Kings Co Office Of Education	AC
20782	Office Depotz	AC
20843	KC Job Training Office	AC
21437	California Reserve Peace Officers Association	AC
21732	Chief Probation Officers Of Ca	AC
21831	Monterey Co Recorders Office	AC
22444	State Controller'S Office	AC
22708	Law Office Of Rosen & Loeb	AC
23504	Calif Assoc Of Public Procurment Officers INC	AC
23557	Office Team	AC

A Vendor ID number may be searched for as well. If you know what the Vendor ID number starts with, you can put in the starting characters. For example, if you know your PE vendor number starts with '205', you could put that in. The search results will include Vendor IDs that start with '205'.



**Vendor Inquiry**

Name:  ID:  Status:  Prod ID:

Invoice#:  Check#:  PR#:  PO#:

City:  State:  Zip:

**Results**

PE ID	Name	Status
20504	Morgan & Slates	AC
20506	Pacific Gas And Electric Company	AC
20507	SDRMA	AC
20508	Silvas Oil Company Inc	AC
20509	Southern Ca Edison Co	AC
20510	The Gas Company	AC
20511	Home Depot Credit Services	AC
20513	Waste Management	AC
20515	Autozone Inc	AC
20516	City Of Hanford	AC

To view the information for a matching vendor, select the vendor from the entries in the Results panel and the information displays in the following panels down below:

## Vendor Information

**▼ Vendor Information**

📎 0 Attachment(s)

PE ID:  SecurityCD:  ExpireDate:  Status:

Name:

Doing Business As:

First Name:  Select 1:  Select 2:

Middle Name:  Affiliation:

Last Name:  Salute CD:  Suffix:

Nickname:

Web URL:

The informational panel displays the information associated with the selected vendor. This information includes the name, security code, SSN, and other information specific to this vendor.

This panel also includes the PO and AP graph from PEUPPE that displays year, fiscal year, and life to date values as well as the AR balance for this vendor.

	YTD	FYTD	LTD	AR Balance:
<b>PO</b>	0.00	0.00	0.00	<input type="text" value="0.00"/>
<b>AP</b>	0.00	0.00	0.00	

Additional information is displayed on the tabs below this panel. Click on the tab to view the information found on that tab.

Address Phone Email Vendor Customer Price Calcs Relations Associations Text Commodities Compliance

Address Type: R1 Status:

Address Line 1: 7774 E BOWLING GREEN LANE

Address Line 2:

Address Line 3:

Address Line 4:

Zip: 43130 City: LANCASTER St/Prov: OH

Country Code:  Contact ID:  Attention:

Latitude: 0.000000 Longitude: 0.000000

## Purchase Requisitions/Orders

This panel displays the requisition and order information associated with the selected vendor. The **Detail** column includes a link button that launches POIQ with PR search criteria carried over for you.

Purchase Requisitions/Orders								
<input checked="" type="checkbox"/>	Attachments	Detail	PR	PO	Status	Print Date	Request Date	PR Total
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	PR000029	P000020	PP	09/11/2018	09/11/2018	500.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR145963	HP	PR		07/18/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR145757	HP206284	PO	07/03/2018	07/03/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR145697	HP206216	PO	06/29/2018	06/29/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR145577	HP206097	PO	06/27/2018	06/27/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR145466	HP206003	PO	06/20/2018	06/20/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR145417	HP205986	PO	06/19/2018	06/19/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR144664	HP205203	PO	05/14/2018	05/14/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR144665	HP205204	PO	05/14/2018	05/14/2018	0.00
<a href="#">🔗</a>	<a href="#">🔗</a>	<a href="#">🔗</a>	HR144668	HP205205	PO	05/14/2018	05/14/2018	0.00

## Invoices

This panel displays the invoice information associated with the selected vendor. The columns display results for vendor records that match by vendor ID or vendor name.

**Invoices**

Attachments	Vendor ID	Vendor Name	Vendor of Rec ID	Vendor of Rec Name	Invoice	Invoice Date	Description	Di
	V0000127	AEP AMERICAN ELECTRIC POWER	V0000127	AEP AMERICAN ELECTRIC POWER	TESTFACILITY01	09/11/2018	Electric costs for GIS	

## Payments

This panel displays the payment information associated with the selected vendor.

**Payments**

Bank ID	Document Type	Number	Amount	Status	Date	Name
AP	CHK	00036370	25.00	IS	09/11/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	596792	388.52	IS	03/26/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	612588	114.00	IS	09/10/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	613254	903.06	IS	09/14/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	613370	1,612.27	IS	09/17/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	613518	733.07	IS	09/18/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	613519	32,490.78	IS	09/18/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	613611	569.38	IS	09/19/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	613612	659.38	IS	09/19/2018	AEP AMERICAN ELECTRIC POWER
AP	CHK	613784	861.42	IS	09/20/2018	AEP AMERICAN ELECTRIC POWER

«« « 1 2 »» Total Count: 12