Switching a Vendor from DV Type to PO Type

Vendors must be established as PO type vendors before being used in any PO transactions. Follow the steps below to switch a KFS DV type vendor to PO type.

**NOTE: Changing a vendor to a PO type requires the completion of a new Vendor Information Packet (VIP), except in a qualified emergency or cases where the Vendor has recently completed another VIP. Details about the VIP, including requirements and exceptions, are found on the Purchasing website under Departmental Resources.**

**NOTE: Do not attach the VIP packet, the W-9, or the ACH authorization form to any KFS document including the vendor document.**

1. Navigate to the Vendor lookup in the PURAP module in KFS and select the Lookup icon.

   ![Vendor Lookup](image)

   **Be sure to use wildcards (*) before and after the partial name when performing a vendor search!**

2. Enter any information that you have and select search.
3. Select the correct vendor from the search results and click ‘edit’. This will open a Pending Vendor e-Doc (PVEN).

<table>
<thead>
<tr>
<th>Actions</th>
<th>Vendor Name</th>
<th>Search Alias</th>
<th>Vendor #</th>
<th>Active Indicator</th>
<th>Vendor Type</th>
<th>State</th>
<th>Country of Incorporation/Citizenship</th>
<th>Commodity Codes</th>
<th>Vendor Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>edit</td>
<td>Westchester Films Inc</td>
<td>234070-0</td>
<td>Yes</td>
<td>DV</td>
<td></td>
<td>NEW YORK</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. In the Document Overview section of the Pending Vendor e-Doc, enter information in the Description and Explanation fields.

5. In the Vendor section of the Pending Vendor e-Doc, you will see Old General Information and the left-hand side and New General Information on the right-hand side. Here is where you make the necessary changes.

   In the Vendor Type drop-down list, select Purchase Order. Make any other changes to the vendor’s details as needed.
6. A Purchase Order (PO) address must be established before proceeding. Click the vendor’s Addresses tab, and enter the required fields as below. Be sure to select Purchase Order as the address type.

**NOTE:** If possible, add the vendor’s fax number with the PO address. Fax is the preferred method for distributing Indiana University Purchase Orders.

**NOTE:** Do not enter a name in the attention field. That field information is not used in KFS processing.

7. Click the **add** button. This will save the new address in the pending vendor record.

8. Confirm the document details include Vendor Type: PO – Purchase Order and the PO Address has been added. Then click **Submit**.

**RESULT:** The change routes to the PO Vendor Workgroup in Procurement Services for final approval. Remember to provide supporting documentation (VIP) by fax to 812-855-7839.
**NOTE:** There is never need to switch a PO type vendor back to DV type. While Purchase Orders cannot be sent to DV type vendors, Disbursement Vouchers can be processed for vendors of either type.

9. Once the Pending Vendor record is fully approved by the PO Vendor Workgroup, the initiator will receive an FYI in their KFS Action List.