

ORACLE
NETSUITE
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SquareWorks Vendor Request Bundle

User Guide v1.1.7



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Introduction

The SquareWorks Vendor Request Bundle is designed to help NetSuite users simplify the Vendor Request and On-Boarding process by providing a form that's accessible by any NetSuite user to allow them to capture all vendor details (including attachments) and submit the request(s) for review and approval. Below are some of the features of the Bundle:

- ✓ Enables NetSuite Users to request new Vendors and/or Vendor Addresses within NetSuite
- ✓ Allows Finance to have better control of vendors created in NetSuite
- ✓ Saves time from entering data into NetSuite by pushing the Data Entry task to the Requester
- ✓ Provides real-time Email notifications to the person who requested the vendor
- ✓ Eliminates the manual process of creating vendors
- ✓ Simplifies the audit process to prove that all vendors are fully compliant
- ✓ Does not require new software or external applications (everything resides in NetSuite)

Installation

The SquareWorks Vendor Request Bundle is available as a NetSuite Bundle that can be downloaded and installed in any NetSuite environment. After you've purchased the Bundle from SquareWorks, you will be notified once the Bundle has been shared with your NetSuite Environment. Once this is confirmed, you will be able to install the Bundle and start the configuration process.

Configuration Overview

The SquareWorks Vendor Request Bundle has two configuration options that may be configured before utilizing the bundle:

1. Adjust the Vendor and Vendor Address Request Forms

The SquareWorks Vendor Request Bundle comes with a set of pre-defined fields that are available in the Vendor and Vendor Request Forms. Both forms can be modified using standard NetSuite customization form procedures to adapt the form to your company's requirements. If you have any questions, please contact SquareWorks.

2. Add Custom Mappings to the Vendor and Vendor Address Request Forms

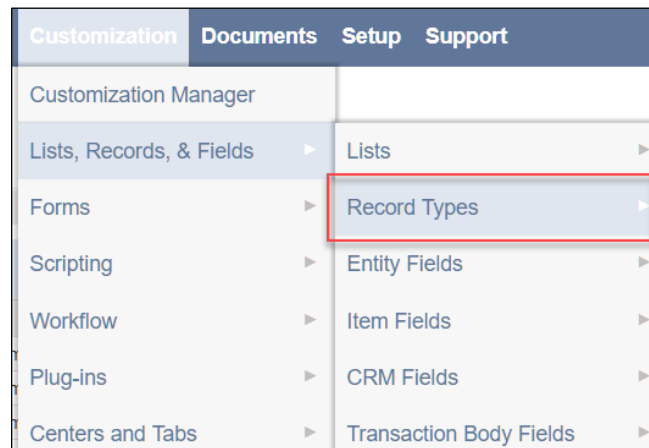
The SquareWorks Vendor Request Bundle provides the ability to have custom mappings so that existing or new fields that are not linked out of the box when approving vendors, can be added with a simple configuration setting.

Adjusting the Vendor and Vendor Address Request Forms

Important: Never edit the **custom forms** that come out of the box with the SquareWorks Vendor Request Bundle. If you need to make modifications, make a copy of the existing form and use the newly saved form to make your changes.

Don't edit any of the **custom record fields**. If you need changes, ensure you create a new field, give it a new name/ID, expose it to your custom form and then define a mapping using the Bundle's Configuration options (See **Adding Custom Mappings** section).

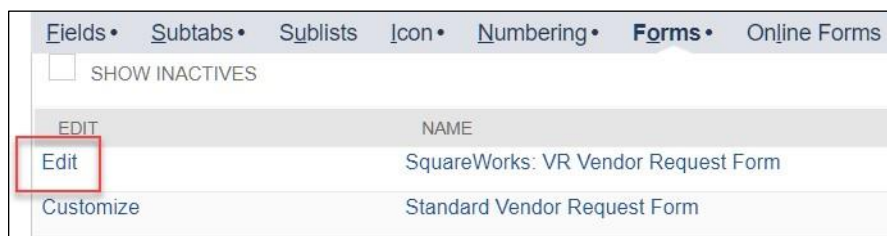
1. Navigate to Customization > Lists, Records, & Fields > Record Types



2. Locate and click on the record that you'd like to modify (either the Vendor Request or the Vendor Address Request Record)

Vendor Address Request	customrecord_sw_vr_address_request
Vendor Request	customrecord_sw_vr_vendor_request

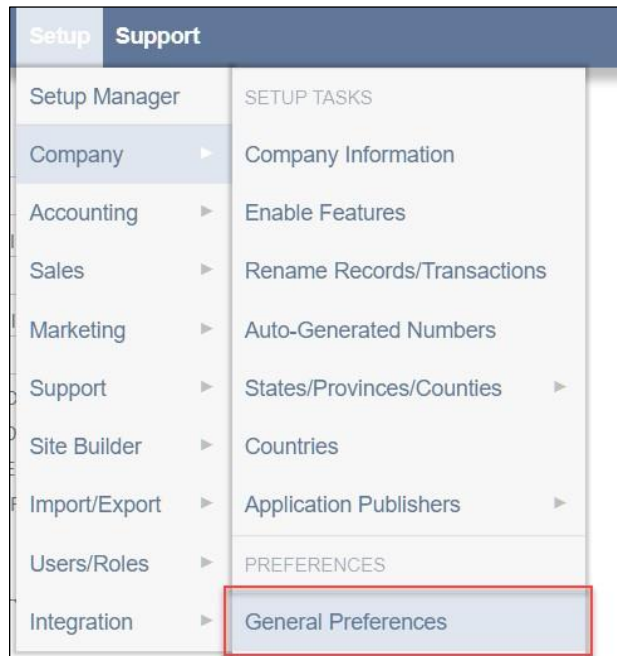
3. Go to the **Forms** tab and click on **Edit** next to the "SquareWorks..." Form listed:



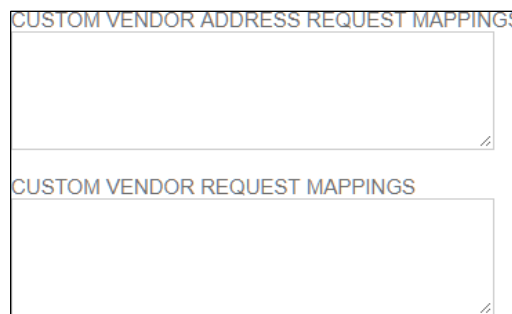
4. Make any necessary adjustments to the Form. For additional information on how to modify Forms, create or edit Fields or any other changes, please contact a SquareWorks representative.
5. Once you are done with your changes, make sure you update the name of the Form (to avoid replacing the out of the box Custom Form) and click **Save As**.

Adding Custom Mappings

1. Navigate to Setup > Company > General Preferences



2. Within the Custom Preferences tab, locate the fields [Custom Vendor Request Mappings](#) and [Custom Vendor Address Request Mappings](#):



3. Identify the field IDs on the Vendor Request/Address record type and the Vendor record type.
4. Add a new line to the [Custom Vendor Request Mappings](#) or to the [Custom Vendor Address Request Mappings](#) Fields using the format below:

<Vendor Request Filed ID>, <Vendor Field ID>

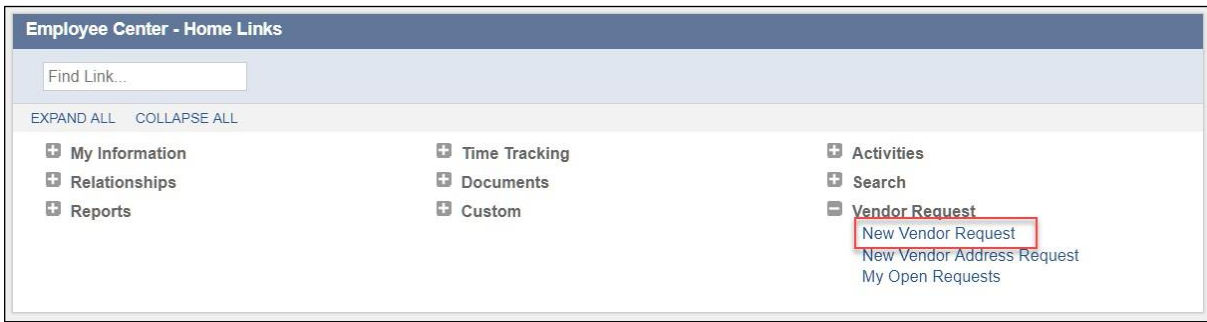
For example, if you want to map the field on the Vendor Request Form `customrecord_sw_vr_addr1` to the field `addr1` on the Vendor Record, then you would enter a new line as follows:

```
CUSTOM VENDOR REQUEST MAPPINGS
vendor_request_field_id,vendor_field_id
```

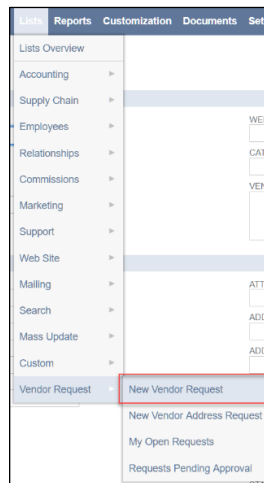
5. Once you've verified that all fields have been properly mapped and all ID's are correct, click **Save** and the bundle will use the mapping configured in this field to ensure that all fields are copied over from the Vendor Request or Vendor Address Request Forms to the Vendor Record in NetSuite.

Creating a New Vendor Request

1. If using the Employee Center Role, navigate to the Employee Center – Home Links Dashboard and click on **New Vendor Request**:



2. If using the Administrator Role, navigate to Lists > Vendor Request > New Vendor Request:



For additional navigation information related to other roles, please contact a SquareWorks representative.

3. Fill out the information on the form:

Vendor Request

Save | Cancel | Reset

Primary Information

COMPANY NAME *
PRIMARY SUBSIDIARY *
W9 DOCUMENT
WEB ADDRESS
CATEGORY
VENDOR COMMENTS

Email | Phone | Address

EMAIL
PHONE
ALT. PHONE
FAX
ATTENTION
ADDRESSEE
ADDRESS PHONE
ADDRESS 1
ADDRESS 2
CITY
STATE
ZIP
COUNTRY

The form can be modified to meet your company’s needs. This includes adding/removing fields or making some fields mandatory. For additional information on how to modify the form, please see the section **Adjusting the Vendor and Vendor Address Request Forms** or contact a SquareWorks representative.

- 4. After all information has been populated, click **Save**
- 5. Once the Vendor Request is created, please note that the record is created with a status of “Not Submitted”. This allows users to review the request prior to submitting it for approval:

Vendor Request (Not Submitted)

Edit | Back | Submit for Approval | Actions

Primary Information

ID 57	WEB ADDRESS
COMPANY NAME Apple, Inc.	CATEGORY
PRIMARY SUBSIDIARY Parent Company	VENDOR COMMENTS
W9 DOCUMENT preview Acme-W9.pdf download	

- Click the Submit for Approval button. This will change the status from “Not Submitted” to “Pending Approval”:

The screenshot shows a web interface for a Vendor Request. At the top, the title "Vendor Request (Pending Approval)" is displayed, with "(Pending Approval)" highlighted in a red box. Below the title, there is a button labeled "Cancel Approval Request" and a dropdown menu labeled "Actions" with a printer icon. The main content area is titled "Primary Information" and contains the following details:

ID 57	WEB ADDRESS
COMPANY NAME Apple, Inc.	CATEGORY
PRIMARY SUBSIDIARY Parent Company	VENDOR COMMENTS
W9 DOCUMENT preview Acme-W9.pdf download	

At this point, the request is sitting in the Approval Queue. For additional information on how to Manage and Approve requests that are Pending Approval, please see the section **Managing and Approving Vendor or Vendor Address Requests**.

If you find an error with the request, you can click on “Cancel Approval Request” and this will bring the record back to “Not Submitted”. At that point, you can make any necessary changes and re-submit for approval.

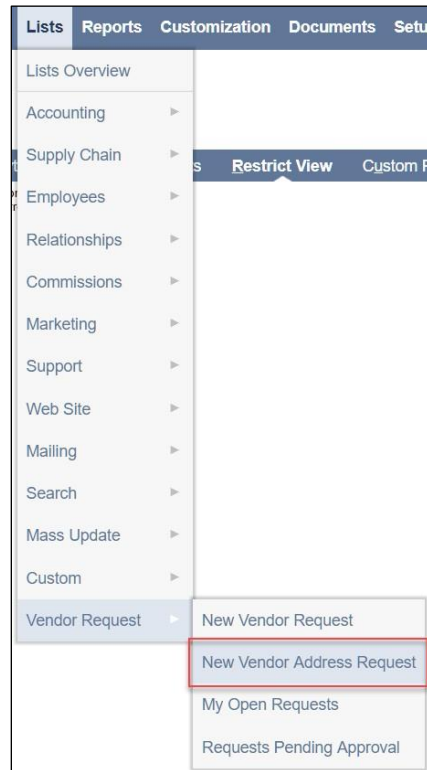
Creating a New Vendor Address Request

- If using the Employee Center Role, navigate to the Employee Center – Home Links Dashboard and click on **New Vendor Address Request**:

The screenshot shows the "Employee Center - Home Links" dashboard. It features a search bar labeled "Find Link.." and two buttons: "EXPAND ALL" and "COLLAPSE ALL". Below these are three columns of links, each with a plus icon:

- My Information
- Relationships
- Reports
- Time Tracking
- Documents
- Custom
- Activities
- Search
- Vendor Request
 - New Vendor Request
 - New Vendor Address Request** (highlighted in a red box)
 - My Open Requests

2. If using the Administrator Role, navigate to Lists > Vendor Request > New Vendor Address Request:



For additional navigation information related to other roles, please contact a SquareWorks representative.

3. Fill out the information on the form:

A screenshot of a web form titled 'Vendor Address Request'. At the top left are buttons for 'Save', 'Cancel', and 'Reset'. The form is divided into two columns of input fields. The left column contains: 'VENDOR *' (text input with a copy icon), 'COUNTRY' (dropdown menu with '<Type then tab>' and a downward arrow), 'ATTENTION' (text input), 'ADDRESSEE' (text input), and 'ADDRESS PHONE' (text input). The right column contains: 'ADDRESS 1' (text input), 'ADDRESS 2' (text input), 'CITY' (text input), 'STATE' (dropdown menu with '<Type then tab>' and a downward arrow), and 'ZIP' (text input).

The form can be modified to meet your company's needs. This includes adding/removing fields or making some fields mandatory. For additional information on how to modify the form, please see the section **Adjusting the Vendor and Vendor Address Request Forms** or contact a SquareWorks representative.

4. After all information has been populated, click **Save**

- Once the Vendor Address Request is created, please note that the record is created with a status of "Not Submitted". This allows users to review the request prior to submitting it for approval:

Vendor Address Request (Not Submitted)	
Edit	Back Submit for Approval  Actions ▾
VENDOR ABC Company, Inc.	ADDRESS PHONE
COUNTRY United States	ADDRESS 1 One Main St
ATTENTION	ADDRESS 2 Suite 100
ADDRESSEE ABC Company, Inc.	CITY Boston

- Once all the details have been reviewed, click on "Submit for Approval". The status will change to "Pending Approval":

Vendor Address Request (Pending Approval)	
Cancel Approval Request	 Actions ▾
VENDOR ABC Company, Inc.	ADDRESS PHONE
COUNTRY United States	ADDRESS 1 One Main St
ATTENTION	ADDRESS 2 Suite 100
ADDRESSEE ABC Company, Inc.	CITY Boston

At this point, the request is sitting in the Approval Queue. For additional information on how to Manage and Approve requests that are Pending Approval, please see the section ***"Managing and Approving Vendor or Vendor Address Requests"***.

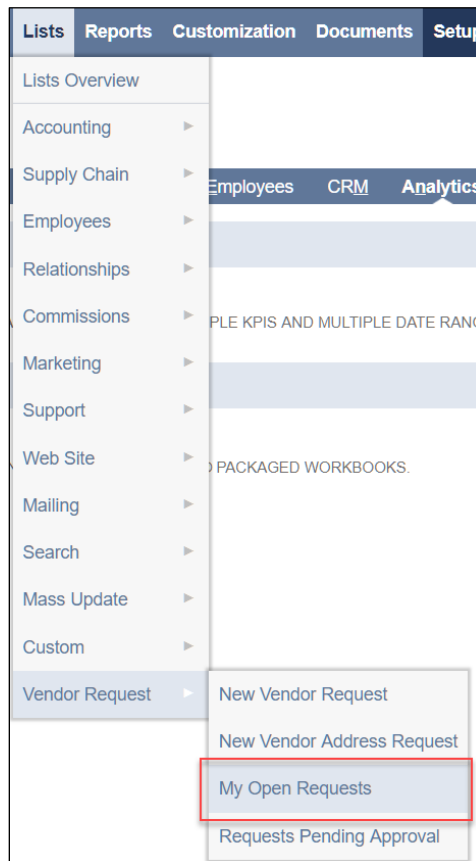
If you find an error with the request, you can click on "Cancel Approval Request" and this will bring the record back to "Not Submitted". At that point, you can make any necessary changes and re-submit for approval.

Viewing Open Vendor or Vendor Address Requests

- If using the Employee Center Role, navigate to the Employee Center – Home Links Dashboard and click on **My Open Requests**:



2. If using the Administrator Role, navigate to Lists > Vendor Request > My Open Requests:



- A list of all “Pending Approval”, “Rejected” or “Not Submitted” requests will be shown in this page. This allows users to always know where Open Requests stand:

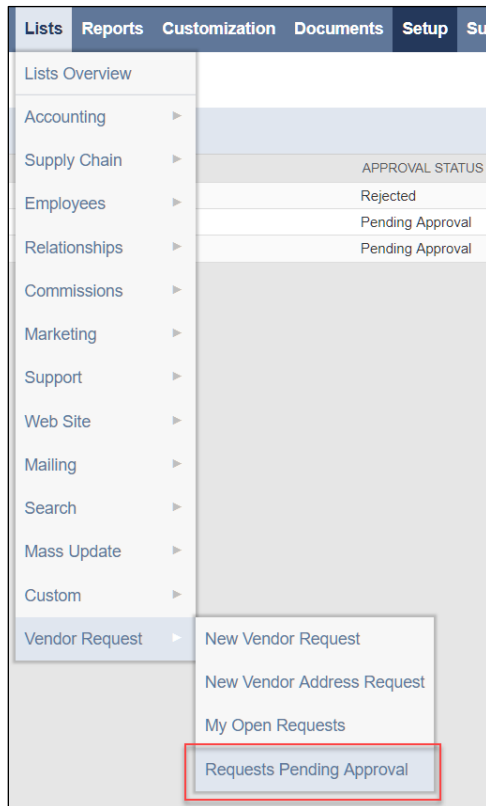
My Open Requests					
REQUEST ID	REQUEST TYPE	NAME	APPROVAL STATUS	DATE CREATED	DATE LAST MODIFIED
56	Create Vendor	Acme Packaging, Inc.	Rejected	7/11/2017 10:31 am	7/11/2017 1:35 pm
57	Create Vendor	Apple, Inc.	Pending Approval	7/11/2017 10:34 am	7/29/2017 1:21 pm
5	Create Address	One Main St	Pending Approval	7/29/2017 1:30 pm	7/29/2017 1:31 pm

- Users can click on the “Request ID” and open the Vendor Request or Vendor Address Request Forms. Once in the page, users can Cancel Approval Requests, or review Rejected Approval Requests and Re-Submit with any corrections requested by the reviewer of the request.

Managing and Approving Vendor or Vendor Address Requests

Users who have the permission to create new Vendors in NetSuite, will automatically be able to see an option called “Requests Pending Approval”, which allows users to have a queue of Vendor Requests for review and approval.

- To view all “Requests Pending Approval”, navigate to Lists > Vendor Request > Requests Pending Approval:




- From the list of Requests, select the one you’d like to review:

Requests Pending Approval			
REQUEST ID	REQUEST TYPE	NAME	APPROVAL STATUS
41	Create Vendor	Test Company	Pending Approval
57	Create Vendor	Apple, Inc.	Pending Approval
5	Create Address	One Main St	Pending Approval

- Review all Vendor or Vendor Address Details. If everything looks correct, you can approve by clicking the **Approve** button:

Vendor Request (Pending Approval)

[Edit](#) | [Back](#) | [Approve](#) | [Reject](#) |  [Actions](#) ▾


Primary Information

ID 57	WEB ADDRESS
COMPANY NAME Apple, Inc.	CATEGORY
PRIMARY SUBSIDIARY Parent Company	VENDOR COMMENTS
W9 DOCUMENT preview Acme-W9.pdf download	

When approving a Vendor Request, this will automatically create a new Vendor Record in NetSuite (or a new Address for the specified Vendor Record if it is a Vendor Address Request). An Email will be sent to the person who requested the vendor with a confirmation that the Vendor has been created in NetSuite.

- If there are any fields missing or you wish to reject a request for any reason, you can click on **Reject**:

Vendor Request (Pending Approval)

[Edit](#) | [Back](#) | [Approve](#) | [Reject](#) |  [Actions](#) ▾

Primary Information

ID 57	WEB ADDRESS
COMPANY NAME Apple, Inc.	CATEGORY
PRIMARY SUBSIDIARY Parent Company	VENDOR COMMENTS
W9 DOCUMENT preview Acme-W9.pdf download	

When rejecting a Vendor Request, NetSuite will ask for a Rejection Reason. Once provided, the Request will be updated to a "Rejected" status and an Email will be sent to the person who requested the Vendor with the reason why this was rejected.

Release Notes

Release 1.1.1

New Features:

- Added ability to CC an email address on all vendor / address request approved emails. You can define the CC address in Setup > Company > General Preferences > Custom Preferences.

Changes:

- None

Bug Fixes:

- None

Release 1.1.2

New Features:

- None

Changes:

- None

Bug Fixes:

- Prevented issue that required Company Name to be populated when creating "Individual" type vendors.

Release 1.1.3

New Features:

- None

Changes:

- None

Bug Fixes:

- Added filtering the included state fields based on the country selected. This allows NetSuite to show country-specific states in the drop down vis US-only states.

Release 1.1.4

New Features:

- Updated the bundle to automatically renew the bundle's license key.

Changes:

- None

Bug Fixes:

- None

Release 1.1.5

New Features:

- None

Changes:

- None

Bug Fixes:

- Added support for single-subsidary accounts.

Release 1.1.6

New Features:

- None

Changes:

- The rejection modal now uses the standard N/ui/dialog module.

Bug Fixes:

- None

Release 1.1.7

New Features:

- None

Changes:

- Updated the process used to validate license keys.

Bug Fixes:

- None