



Add a Contact to a NYS Vendor Record

To successfully transact in the Statewide Financial System (SFS), it is important to **first** refer to the related SFS Handbook. Job aids should be referred to as quick reminders on how to process transactions. SFS Handbooks provide more context and include screenshots.

Job Aid Number	JAA-VEN101-006
Purpose	This quick guide describes the steps to add a contact to a NYS Vendor Record.
User Roles	Login Access, Base Access, Delegated Admin
Date Modified	6/6/2024
Related SFS Handbook	SFS Training for Vendors

Concept

Using the SFS Vendor Portal, vendors can maintain information pertaining to their addresses and contacts.

Predecessor(s)

Transactions that should occur before this task.

N/A

Successor(s)

Transactions that should occur after this task.

N/A

Procedure

Step	Action
1.	From My Homepage select the Supplier Change Request tile. Alternative navigation: From the NavBar , navigate to: Menu > Maintain Supplier Information > Supplier Change Request > Initiate Supplier Change.
2.	If you have a Supplier Change Request pending approval, click the Create New Request button to initiate a new Supplier Change Request.
3.	Click the Contacts link.
4.	Click the Add New Contact button.
5.	Enter the applicable value into the Description field.
6.	Enter the applicable value into the First Name field.

Step	Action
7.	Enter the applicable value into the Last Name field.
8.	Enter the applicable value into the Email Address field.
9.	Click the Contact Address field drop-down list and select the applicable list item.
10.	Click the Contact Type field drop-down list and select the applicable list item.
11.	Enter the Phone information associated with the contact.
12.	Click the OK button.
13.	Click the Submit link.
14.	Click the Audit Reason Code field drop-down list.
15.	Select the Contact Update list item
16.	Enter the applicable value into the Comments field.
17.	Select the Confirm Changes checkbox.
18.	To review the changes before you submit the Supplier Change Request, click the Review button to review the changes. This is an optional step.
19.	After the information is reviewed, click the Return button. You may need to scroll to the bottom of the page to find the Return button.
20.	Click the Submit button to submit your request for review and approval.
21.	End of Procedure.