INTRODUCTION

This guide provides USDA Financial Management Modernization Initiative (FMMI) agencies with the steps to prepare the preapproval vendor request (PVND) for vendors.

QUICK STEPS

Login to the FMMI Web site at https://portal.fms.usda.gov/

Follow the below steps to initiate a (PVND) request:

Click: **Step 1**. Purchasing Tab

          Step 2. Vendor and Customer Master Data Request

          Step 3. Manage Requests

          Step 4. Create Vendor/Customer Master Data Request

          Step 5. Create

          Step 6. Execute

To create a (PVND) Vendor Request by Referencing an existing Vendor Number:
- Click Create by Reference and in the Existing Vendor field enter the Existing Vendor Number. Then Click Execute.

To change an existing Vendor Record by (PVND) request:
- Click Change and in the Existing Vendor field enter the Existing Vendor Number.
  Then Click Execute

PVND - Request Process for Vendors and Customers

Menu ▸ | Save as Variant... | Back | Exit | Cancel | System ▸ | Execute | Get Variant...

Vendor Requests

Create	○		
Create by Reference	○	Existing Vendor	
Change	●	Existing Vendor	1200000154

To modify an existing (PVND) Vendor Request:
- Click Modify Existing Request and in the Request Number field enter the Existing Request Number.
  Then Click Execute

PVND - Request Process for Vendors and Customers

Menu ▸ | Save as Variant... | Back | Exit | Cancel | System ▸ | Execute | Get Variant...

Vendor Requests

Create	○		
Create by Reference	○	Existing Vendor	
Change	○	Existing Vendor	
Modify Existing Request	●	Request Number	0000303577

To delete an existing (PVND) Vendor Request:
- Click Delete Existing Request and in the Request Number field enter the Existing Request Number.
  Then Click Execute

PVND - Request Process for Vendors and Customers

Menu ▸ | Save as Variant... | Back | Exit | Cancel | System ▸ | Execute | Get Variant...

Vendor Requests

Create	○		
Create by Reference	○	Existing Vendor	
Change	○	Existing Vendor	
Modify Existing Request	○	Request Number	
Delete Existing Request	●	Request Number	0000303577

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To display an existing (PVND) Vendor Request:

- Click Display Existing Request and in the Request Number field enter the Existing Request Number. Then Click Execute

PVND - Request Process for Vendors and Customers

| Menu | ▶ | Save as Variant... | Back | Exit | Cancel | System | Execute | Get Variant... |

Vendor Requests

Create	○		
Create by Reference	○	Existing Vendor	
Change	○	Existing Vendor	
Modify Existing Request	○	Request Number	
Delete Existing Request	○	Request Number	
Display Existing Request	●	Request Number	0000303577

Step 7: Enter the Agency code or select the Agency by clicking on box for the drop-down list. Once the Agency is selected, click green check mark, or enter button.

USDA United States Department of Agriculture
Financial Management Modernization Initiative

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| Welcome | Accounts Payable | Accounts Receivable | Interface Error Handling | Interface Table Maintenance | Purchasing | CRM Business Partner Maintenance | Base Role |

Vendor Master Data Maintenance   Purchasing Evaluation   Purchasing Reports   **Vendor and Customer Master Data Request**   Vendor and Customer Master Data Approval

Purchasing > Vendor and Customer Master Data Request > Manage Requests > Create Vendor/Customer Master Data Request

Manage Requests
- Create Vendor/Customer Ma...
- View Vendor/Customer ...

SAP

| Menu | ▶ | Save as Variant... | Back | Exit | Cancel | System | Execute | Get Variant... | All Select |

PVND Agency (1) ✕

Helpview for Sales Organizations

SOrg.	Name
AM00	Ag Marketing Svcs
AO00	OPPE
AP00	APHIS
AR00	Ag Research Svc
BP00	Office of Budg/Progr
CC00	Commodity Credit Cor
CF00	Office of the CFO
CM00	Office of Communica
CR00	Office of Civil Righ
DA00	Dept Administration
EC00	Office of Chief Econ
ER00	Economic Rsrch Svc
ES00	Office of Exec Secre
FA00	Farm Services

Enter Agency ✕

Agency *

✓ ✕

Step 7

Follow below Steps for 1st screen of the (PVND) Request:

Requestor information: Step 8. Auto populated with the requestor name, agency and email address.
Request information : Step 9. Auto populated depending on if it is a create or change request (PVND) request.

Additional requestor information: **Step 10.** Fill in additional requestor name, email and phone number, optional fields.

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Cod Reviewer Information: Step 11. Auto populated with the approvers name, email address and phone number when the request is processed.

Vendor Information: **Step 12.** Fill in the Vendor Name, required field.
                             Step 13. Fill in Account Group select it by clicking on magnifying glass for the drop-down list, required field.

Example:

Step 14. Fill in the Industry or select it by clicking on the magnifying glass for the drop-down list, required for some Account Groups.

Example: Account Group ZNFV has an Industry of Z001.

Step 15. Fill in SSN or TIN of Vendor**,** required field unless a Federal or ZFCR Account Group.

Step 16. Click box to add check-mark for Not CCR , required.

Step 17. Fill in Tin Verification Date. The current date autopopulates unless a change request then please add the date.

Step 18. For NRCS agency use, Click the box to add check-mark for Permitted Payee, only if an Assignment Record.

Step 19. Fill in Customer Number if you want to link an existing Customer Record**.**

Step 20. For FNS agency use, Click box to add check-mark for EZ Fed Vendor.

Step 21. Click Next Screen when all necessary areas are filled**.**

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Follow below Steps for 2nd screen of the (PVND) Request:

Supplemental Employee Name:
        Step 22. Fill in First Name, Middle Initial, Last Name- required for ZEMP and ZINT Records.
        Step 23. Fill in Psuedo Code required for ZEMP and ZINT records. The pseudo code should mirror Concur.
          The Pseudo code is 11 character long consisting of:
                Position 1: First initial of the first name
                Position 2: First initial of the middle name or 9 for no middle initial
                Position 3 to 7: First five positions of the last name
                Position 8 to 11: Last four of Social Security Number

Example: Name is Sean N Peyton, and the Social Security Number is 123456789.
      The pseudo code would be: SNPEYTO6789

Address Information: Step 24. Fill in Address, City, Country, State, Zip Code, Phone (optional) and Fax Number (optional).
Additional Information: Step 25. For NRCS agency use, Permitted Payee, Fill in Assignor's Vendor Number.
Federal Information: Step 26. Fill in EFT Waiver code or select it by clicking on the box for the drop-down list. Required for Account Groups ZNFV and ZSAL if the Vendor has no banking.

Example:

        Step 27. The Trading Partner autopopulates depending on the Account Group. If the Vendor is a Federal Vendor then fill in or select Trading Partner by clicking manifying glass for the drop- down list.

Example:

Step 28. Fill in or select the ALC if the Vendor is a Federal Vendor by clicking on the magnifying glass for the drop-down list.

Example:

Step 29. The IRS Tin Match is filled in by the approver. If a 6, 7 or 8 is entered then the Name and Tin or SSN matches IRS records. If the NAME and Tin/SSN does not Tin Match, the approver will put 2 or 3 in the field. The request will be rejected by the approver and the requestor will need to resubmit the request with the correct Name and Tin or SSN. The 2 represents that the Tin is not currently issued. The 3 represents that the Name and Tin/Social Security Number does not match IRS records.

Banking Information: Step 30. Fill in the Routing Number, Bank Account Number, Account Type- 01 for Checking or 02 for Savings, Payment Method autopopulates or you may select a method from the drop-down.

Blocking Information: Step 31. The Blocking Reason Code will appear in the box if the Vendor record is blocked. Click on box for the drop down list of blocking reasons. The Mark for deletion, Posting Block and Purchasing Block will have a check mark in the box if any of them are blocked on the Vendor Record. If you need a record unblocked, please ask to have the blocks removed in the Requestor comments section.

Example:

Puchasing Data: **Step 32.** Click box to add check-mark for Invoicing Plan. This is the evaluated receipt settlement (ERS) or the automatic generation of invoices.

PVND Vendor Request

Menu | | | ◄ | Back | Exit | Cancel | System | | Previous Screen | Save & Submit

Step 26

Supplemental Employee Name

Name	SEAN PEYTON
First Name	SEAN
Middle Initial	
Last Name	PEYTON
Pseudo-code Created	S9PEYTON6789

Step 22

Step 27

Step 23

Federal Information

EFT Waiver	
Trading Partner	COM ALC
IRS Match Type	

Step 28

Step 29

Address Information

Address Line 1	1324 SAINTS PLACE
Address Line 2	
Address Line 3	
City	NEW ORLEANS
Country	US State LA Zip Code 70126-0000
Phone Number	
Fax Number	

Step 24

Banking Information

Routing No.	256074974
Bank Number	12345678911
Account Type	01
Payment Method	AC

Step 30

Blocking Information

Blocking Reason	
☐ Mark for Deletion	☐ Purchasing Block	☐ Posting Block

Step 31

Purchasing Data

☐ Invoicing Plan

Step 32

Additional Information

Permitted Payee for		Submitting Post	

Step 25

SAP

Point of Contact (POC): Step 33. Fill in POC Name, POC Fax, POC Telephone, POC Tel Ext or POC Email, optional fields.

FNS: Step 34. FNS Agency only, Fill in FPRS/NDB ID, ASAP Recipient ID, IPAS Alternative name, and Click box to add check mark to Convert Vendor to BP.

Requestor Comments: Step 35. Fill in any comments or instructions for the approver.

Point of Contact   ← Step 33

POC Name		POC Telephone	POC Tel Ext
POC Fax			
POC E-Mail			

FNS   ← Step 34

FPRS/NDB ID		ASAP Recipient ID	
IPAS Alternative Name		Convert Vendor to BP?	☐

Requestor Comments   Step 35

Step 36. Click SAVE & SUBMIT

PVND Vendor Request

`Menu ▾` | `▾` | ◄ | `Back` | `Exit` | `Cancel` | `System ▾` | `Previous Screen` | `Save & Submit` ← Step 36

Supplemental Employee Name

Name	SEAN PEYTON
First Name	SEAN
Middle Initial	
Last Name	PEYTON
Pseudo-code Created	S9PEYTON6789

Address Information

Address Line 1	1324 SAINTS PLACE
Address Line 2	
Address Line 3	
City	NEW ORLEANS
Country	US State LA Zip Code 70126-0000
Phone Number	
Fax Number	

Federal Information

EFT Waiver	
Trading Partner	COM ALC
IRS Match Type	

Banking Information

Routing No.	256074974
Bank Number	12345678911
Account Type	01
Payment Method	AC

Blocking Information

Blocking Reason	

☐ Mark for Deletion   ☐ Purchasing Block   ☐ Posting Block

Purchasing Data

☐ Invoicing Plan

Additional Information

Permitted Payee for	
Submitting Post	

SAP

Once Saved, the Request Number will appear at the bottom of the screen as well as submitted and email sent to requestors.
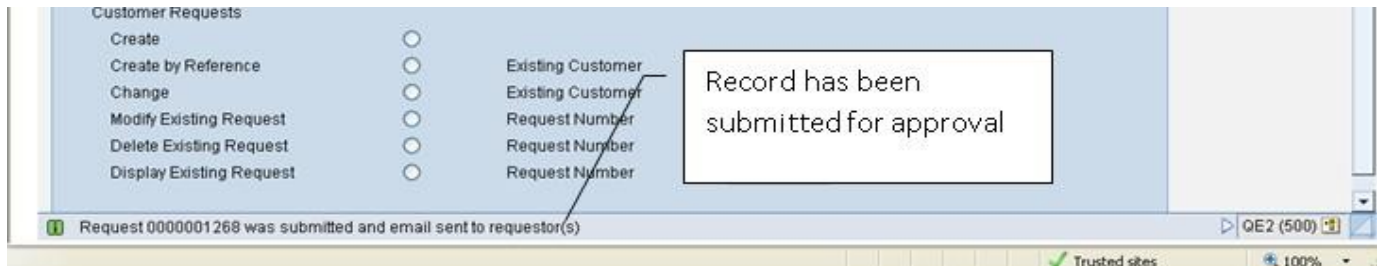
An automatically generated e-mail will be issued to the requestor and any additional requestors that are added, notifying them that the request has been submitted.

Example:
> From: THERESA DANNER <Theresa.danner@cfo.usda.gov>
> Sent: Friday, May 13, 2022, 1:50 PM
> To: Nelson, Roy - OCFO-FMS, New Orleans, LA <roy.nelson@usda.gov>; Danner, Theresa - OCFO-FMS, New Orleans, LA <theresa.danner@usda.gov>
> Subject: PVND Request 0000308505 - NEW
>
> The Subject VENDOR request is in the STATUS indicated below:
>
> Request Number: 0000308505
> Name: LABOR LODGE 0644
> Action: CREATE
> Status: NEW

When completed by the Master Data Management Branch, Vendor Customer Maintenance Section (VCM), an automatically generated e-mail will be issued to the requestor and any additional requestors added notifying that the request has been approved or rejected. If rejected the approver will provide comments.

Example:
> From: Linda Davis <linda.davis@usda.gov>
> Sent: Friday, May 13, 2022, 1:59 PM
> To: Nelson, Roy - OCFO-FMS, New Orleans, LA <roy.nelson@usda.gov>; Danner, Theresa - OCFO-FMS, New Orleans, LA <theresa.danner@usda.gov>
> Subject: PVND Request 0000308505 - APPROVED
>
> The Subject VENDOR request is in the STATUS indicated below:
>
> Request Number: 0000308505
> Name: LABOR LODGE 0644
> Action: CREATE
> Status: APPROVED
> Vendor Created: 1107275931

If you do not receive a confirmation email with the Vendor number, then please search by Request Number under Display Existing Request to obtain it.

To display an existing (PVND) Vendor Request:
- Click Display Existing Request and in the Request Number field enter the Existing Request Number. Then Click Execute.

The Vendor Number created will be in the Vendor Created field under the Request Information on the PVND request.

INQUIRIES

Please direct any questions to Vendor Customer Maintenance Section at 1-(800)-421-0323 option #3.