SMART

Statewide Management, Accounting and Reporting Tool

Activity Guide –

SAP310: Vendor Processing

State of Kansas

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Activity 1 – Walkthrough: Search for Vendor by Name

Discussion Point: *Prevent duplicate entry of statewide vendor records in SMART !*

The State of Kansas expects all Agency Vendor Processors to **verify that the vendor information does NOT already exist in SMART PRIOR TO** entering any new or additional vendor information into SMART. This process involves a manual review of ALL existing vendor information in SMART BEFORE adding any new vendor information.

Note: You must use the **Search button**. The Enter key (on your keyboard) does not work on the Review Vendors screen (it will return no search results records if you use the Enter key)

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Log into SMART: Instructor Led Facilitation

Scenario
In this scenario, you are the **Agency Vendor Processor** and you need to locate the vendor, Topeka Office Supplies using the Vendor Name. Use the **Review Vendors** page to locate the vendor information in SMART.

Menu Path
Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Name	TOPEKA OFFICE SUPPLIES
Click the Search button	
Review Vendors: Search Results	
Click the **button** for TOPEKA OFFICE SUPPLIES	
Click the **Vendor Maintenance link** (opens a new window - maximize)	
Identifying Information	
Click the **Red X** (top right corner of new window – Closes new window)	
Click the **Home link** (top right corner in blue bar)	

Activity 2 – Walkthrough: Search for Vendor by Address

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor** and you need to locate the vendor, Kathy Supplies Shop using the vendor's address. Use the **Review Vendors** page to locate the vendor information in SMART.

Menu Path
Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Address drop down list	Equal to
Address	414 SOUTH AVENUE
City	GARDEN CITY
Click the Search button	
Review Vendors: Search Results	
Click the **button** for KATHY SUPPLIES SHOP	
Click the **Vendor Maintenance link** (opens a new window - maximize)	
Identifying Information	
Click the **Red X** (top right corner of new window – Closes new window)	
Click the **Home link** (top right corner in blue bar)	

Activity 3 – Walkthrough: Search for Vendor by Withholding ID

Discussion Point: *This is the best method to locate an existing vendor in SMART* !

Instructions
Follow along with the instructor to complete the Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor** and you need to locate the vendor, Thomas Tires Shop using the Withholding ID (TIN – Taxpayer Identification Number). Use the **Review Vendors** page to locate the vendor information in SMART.

Menu Path
Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Withholding Tax ID	852445604
Click the Search button	
Review Vendors: Search Results	
Click the **button** for THOMAS TIRES SHOP	
Click the **Vendor Maintenance link** (opens a new window - maximize)	
Identifying Information	
Click the **Red X** (top right corner of new window – Closes new window)	
Click the **Home link** (top right corner in blue bar)	

Activity 4 –Review: Duplicate Vendor Records in SMART

Scenario

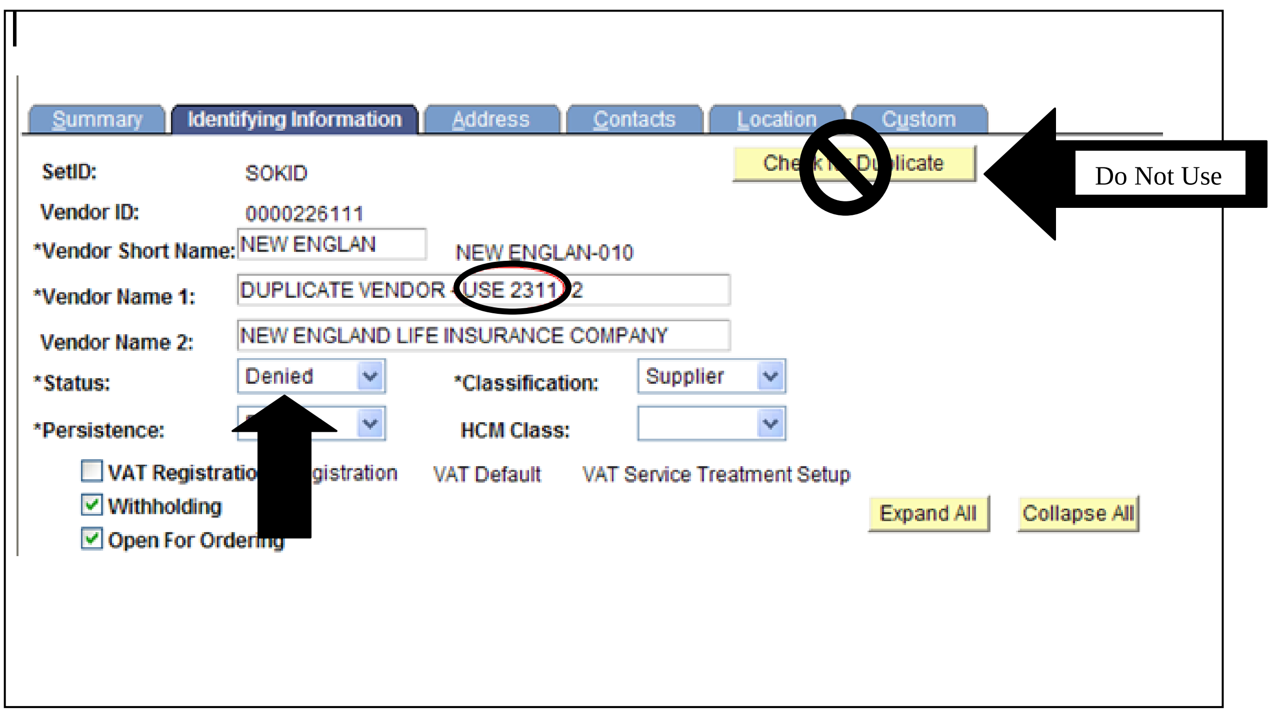
In this scenario, you are the **Agency Vendor Processor** and you need to locate a vendor record in SMART. You used the **Review Vendors** page to locate the vendor information in SMART, and now notice the ‘DUPLICATE VENDOR’ note on the **Identifying Information** page of the vendor record.

Discussion Point:

If you select a vendor that shows “DUPLICATE VENDOR” in the Vendor Name 1 field, use **only** the vendor number given to find the new vendor record.

DO NOT include the asterisk and number following it when using the vendor number. **In this example shown below**: The **Vendor Name 1** field contains: ‘DUPLICATE VENDOR – USE 2311*2’

Copy the new vendor number of 2311 (do not use the *x at the end of the vendor number). Use the new vendor ID number to locate the new vendor record, using the Review Vendors page, and find the vendor record using the search criteria option of ‘CONTAINS’ in the ‘Vendor ID’ field.



Vendor Record – Identifying Information Page

Activity 5 – Walkthrough: Review Existing Vendor Record

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor** and you need to locate an existing vendor record in SMART. Use the **Review Vendors** page to locate the vendor information in SMART, and review the vendor record using the vendor pages.

Menu Path
Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Withholding Tax ID	**852445698**
Click the **Search button**	
Review Vendors: Search Results	
Click the **button** for OJO FLOORING STORE	
Click the **Vendor Maintenance link** (opens new window – maximixe window)	
Identifying Information	
Click the **Summary Tab**	
Summary	
Review the information on the **Summary** page: Vendor ID, Names, Status, Withholding, Activity Dates	
Click the **Identifying Information Tab**	
Identifying Information	
Review the information on the **Identifying Information** page: Name fields, Status, HCM Class (Do not use), Withholding checkbox, Open for Ordering. Check for Duplicate button is not functional in SMART.	
Click the **Address Tab**	
Address	
Review the information on the **Address** page: View all records, Description field, Effective Date, All address information, Payment/Withholding Alt Names fields, Phone Information section (does not contain Phone information! Contains Payment Location information), + buttons, Do not use the '-' buttons	
Click the **Contacts Tab**	
Contacts	

Review the information on the **Contacts** page: View all records, Effective Date, Status, Type, Name, Title, Address (sourced from the Address Page), Internet (URL), Email ID, Phone Information – do not use Prefix field, + buttons, do not use the '-' buttons
Click the **Location Tab**
Location
Review the information on the **Location** page: View all records. Location, Description (payment type), Effective Date, Status, + buttons, do not use – buttons. Options links (navigate to additional pages)
Click the **Payables Link**
Payables Options
Expand and review the **Additional Payable Options** section. Review the Payment Method and Drop Down List in the **Additional Payment Information** section. Expand and review the **Vendor Bank Account Options** section. ***Account Type: Use 'Check Acct' or 'Time Dep' only. Do not use 'Savings' or any other options from the Account Type drop down list.*** Review the bank account information – view all records.
Click the **Cancel button** (bottom left) to close this window and to return to the original **Location** page.
Click the **Procurement Link**
Procurement Options
Expand and review the **Procurement Card Information** section. Select the **Accepts Procurement Card as payment method** checkbox Use the drop down list of ***ProCard Dispatch Option** to select: **Contact Cardholder**. Card Type – Use the drop down list to select: **Visa**
Click the **Cancel button** (bottom left) to close this window and to return to the original **Location** page.
Click the **1099 Link**
Withholding Vendor Information
Review the Withholding Information sections. (More will be covered on this in a future activity).
Click the **Cancel button** (bottom left) to close this window and to return to the original **Location** page.
Click the **Red X** (top right corner) to close the active window and return to the Review Vendors Search page
Click the **Home link** (top right corner in blue bar)

Activity 6 –Review: Vendor Statuses in SMART

Discussion Point

This activity covers each different SMART life cycle **Status(es)** that statewide vendors may experience in SMART.

The Status field displays the current status of the vendor according to the SMART vendor statuses. The Statuses available include Approved, Denied, Inactive, To Archive, and Unapproved.

- ***Approved*** – For Central Vendor Processors, SMART automatically assigns a status of *Approved* to the vendor when entering a new vendor. SMART does not recognize a vendor as being in an *Approved* Status unless an authorized Accounts Payable or Purchasing user enters or approves it. **The Central Vendor Processor is the role that approves the vendors than an Agency enters**.

  Important! *A vendor must be in an Approved status before vouchers, payments, purchase requisitions, or purchase order transactions, can be created for the vendor in SMART.*

- ***Denied*** - Central Vendor Processors may change the vendor Status to *Denied*. Once a vendor has been assigned a *Denied* Status, **SMART users are unable to enter any transactions for the vendor in SMART**. Duplicate vendors in SMART will be changed to a *Denied* Status.

- ***Inactive*** – Central Vendor Processors may inactivate a vendor. **Once a vendor has been assigned an *Inactive* Status, SMART users are unable to enter any transactions for the vendor in SMART.**

- ***To Archive*** – A Central Vendor Processor may select the To Archive Status. Once the To Archive Status has been selected, **SMART users cannot enter any new transactions for this vendor**; and the vendor is purged from SMART.

- ***Unapproved*** – Only a user with a Central Vendor Processor role may *Unapprove* a vendor. Once a vendor has been assigned an *Unapproved* Status in SMART, **users cannot use that vendor for any transactions in SMART**.

- **Important!** A new vendor record created and saved by an Agency, or an existing vendor record that has new information added is automatically saved with an *Unapproved* status by SMART. This vendor is **unavailable for use by *ANY* State Agency** until the vendor record has been reviewed and changed to an *Approved* status by a Central Vendor Processor.

Activity 7 – Review: SMART Withholding Information

Discussion Points

The IRS requires the State of Kansas to issue 1099's to reportable entities (vendors) for services, rentals, awards, certain type of grants, interest, dividends, and certain real estate purchases.

Two criteria must be met in order for 1099 reporting to occur for a vendor:

- The vendor must be subject to 1099 reporting
- The payment must be reportable

What vendors are NOT (currently) reportable?

- Corporations are NOT reportable UNLESS they provide medical or legal services
- Governments
- Tax Exempt Organizations

Guide to completing the Withholding Vendor Information page

SMART will not allow you to save a vendor record if you enter the ACH information in BEFORE entering the 1099 information. Ensure you complete the Address Tab before the Location Tab when setting up a new vendor record in SMART.

- **Withholding Vendors**
  Complete the 1099 Information section AND the 1099 Reporting Information section.
  Examples:
  - Medical Corporations
  - Attorneys
  - LLC – Limited Liability Company

- **Non-Withholding Vendors**
  Complete only the 1099 Reporting Information section.
  Examples:
  - Incorporated
  - Corporation
  - Foreign Vendors

Refer to Lesson 3, Topic 9 of the Participant Guide for additional information.

Important! *You must check the* ***Withholding checkbox*** *on the vendor* ***Identifying Information page*** *if the vendor is subject to 1099 reporting.*

1099 Types and Class Information

- Each vendor Location needs at least one 1099 set up
- The '*Type' and '*Default Class' will initially populate on a Voucher when it is created
- Each Location should only have one '*Type'
- When setting up the 1099 information for a vendor, set up all the '*Default Classes' you anticipate the vendor may use

Default Classes Information

Reportable:

- 01 Rental
- 02 Royalties
- 03 Prizes, Awards, other
- 06 Medical, including medical laboratory service
- 07 Services including legal
- 14 Gross Proceeds:
  - Payments made to an attorney as part of a legal settlement or court order.
  - Gross proceeds may be issued in the names of the attorney and the client.
  - Gross proceeds may include an amount for the attorney's services.
  -If you can determine the amount of attorney fees included in the gross proceeds, report the fee in box 7 and nothing in box 14.

Agencies – Do NOT select any of the other values from the list.

Not Reportable:

Examples: Commodities and refunds

Activity 8 – Walkthrough: Add New Vendor – With Withholding

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Discussion Points:
- *Vendor information is entered in SMART using ALL CAPS.*
- *The default 'Effective Date' for a NEW vendor in SMART is 01/01/1901.*
- *Data entry in the 'County' field is not mandatory, but you may add it if you know it.*
- ***1099 Information MUST be completed BEFORE the Banking Information is added.***
- *You **must include any leading zeroes** at the beginning of a Bank Account Number when entering the Bank Account Number into SMART.*
- *The Routing Number is sourced from the voided check that you receive from the vendor. Routing numbers in SMART are updated monthly by the Federal Reserve.*

Scenario
In this scenario, you are the **Agency Vendor Processor**. *You have already checked SMART to verify that the vendor does not already exist using the Review Vendors page.* Now you need to set up the new vendor in SMART.

This new vendor requires Withholding information, agrees to accept business procurement cards as a method of payment, and requests payment using an ACH. You have gathered all the documentation you need from the vendor and you are now ready to enter the information into SMART.

Required Data

Field	Value
***Minimize** SMART window. **Open new window** and type the URL in the browser address bar (for address verification): http://zip4.usps.com/zip4/*	
Add this website to your Favorites. Favorites > Add to Favorites > Save	
Address 1	1500 SOUTHWEST 10TH AVENUE
Address 2	705
City	TOPEKA
State	KS

Click the **Submit** button	
Write down the correct address format from USPS website here:	
Click the **Red X** in the top right corner of the USPS website to close window.	
Maximize the window containing SMART (Employee Facing Registry)	
In SMART, navigate this menu path: **Vendors > Vendor Information > Add/Update > Vendor**	
Vendor Information: Add a New Value	
SetID	SOKID (Accept default)
Vendor ID	NEXT (Accept default)
Persistence	Regular (Accept default)
Click the **Add button**	
Identifying Information	
Vendor Short Name	SMITHBARRO
Vendor Name 1	IMMUNIZATION MEDIA ORG
Vendor Name 2	DBA SMITH BARROW HOLDINGS
Classification	Supplier
Withholding Checkbox	Select the checkbox (click it)
Click the **Address Tab**	
Address	
Description	MAIN
Effective Date	01/01/1901
Address 1	1500 SW 10TH AVE
Address 2	# 705
City	TOPEKA
County	SHAWNEE
Postal	66604-1301
State	KS
Email ID	info@immunizationmedia.org
Click the **Expand Section** button for the Payment/Withholding Alt Names	
Payment Alternate Name Section	
Name 1	IMMUNIZATION MEDIA ORG
Withholding Alternate Name Section	
Withholding Name 1	SMITH BARROW HOLDINGS
Phone Information Section	
Phone Information - *Type	.Pymnt Loc
Prefix	001
Telephone	785/231-4867
Click the **Contacts Tab**	
Contacts	
Description	REGIONAL MEDIA DIRECTOR

Eff Date	01/01/1901
Type	Executive Management
Name	HARLEY SMITH MD
Title	IMMUNIZATION MEDIA DIRECTOR
Internet	http://www.immunizationmedia.org
Email ID	Harley.Smith@immunizationmedia.org
Phone Information - *Type	Business
Phone Information - Telephone	785/231-4867
Click the **Location Tab**	
Location	
Location	001
Description	ACH ****5679
***Effective Date**	01/01/1901
Click the **1099 Link**	
Withholding Vendor Information: 1099 Information – Main Information	
***Entity**	IRS
***Type**	1099
***Jurisdiction**	FED
Default Jurisdiction checkbox	Select the checkbox
***Default Class**	07
***1099 Status**	RPT
Withholding Vendor Information: 1099 Reporting Information – Main Information	
***Entity**	IRS
***Address**	1
TIN Type	F
Taxpayer Identification Number	123456<your 3 digit training ID>
Click the **OK button**	
Location	
Click the **Payables Link**	
Payables Options	
Click the **Expand Section button** for the **Additional Payables Options section**	
Payables Options: Additional Payment Information	
Payment Method	Specify
Payment Method Drop Down List	Automated Clearing House
Click the **Expand Section button** for the **Vendor Bank Account Options** section	
Payables Options: Vendor Bank Accounts	
Descr	ACH ****5679

Bank Name	UMB BANK
Branch Name	TOPEKA
Bank ID Qualifier	001
Account Type drop down list	Time Dep (Use for Savings Acct)
Bank ID	101218856 (Routing number)
Bank Account Number	28285679
DFI Qualifier	01
Click the **OK button**	
Location	
Click the **Procurement Link**	
Procurement Options	
Click the **Expand Section button** for the **Procurement Card Information** section	
Select the Accepts Procurement Card as payment method checkbox	
***ProCard Dispatch Option**	Contact Cardholder
Card Type 1	Visa
Click the **OK button**	
Location	
Click the **Save button**	
Note your **Vendor ID** number here:	
Click the **Home link** (top right corner in blue bar)	

Additional Discussion Points:

- *Vendor Bank Accounts page > **Account Type** field > Drop Down List Options:*
  - **Checking** account – use the '**Check Acct**' option
  - **Savings** account – use the '**Time Dep**' option – do NOT use 'Savings' option

- ***Procurement Options** page:*
  - If you set up more than one location for a vendor, then you <u>must</u> add the Procurement card information to EVERY location you set up.

Activity 9 – Walkthrough: Add New Vendor – No Withholding

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor**. *You have already checked SMART using the Review Vendors page to verify that the vendor does not already exist.* Now you need to set up the new vendor in SMART.

This new vendor is a Non-Withholding vendor, who agrees to accept business procurement cards as a method of payment, and requests payment in the form of paper checks. You have gathered all the documentation you need from the vendor and you are now ready to enter the information into SMART.

Discussion Point: *There is no need to complete the ACH/Bank Account information as the vendor is requiring paper check payments. This is a NON-Withholding vendor. Therefore you do not need to complete the 1099 Information, only the* ***1099 Reporting Information section.*** *Do not select the* ***Withholding checkbox*** *on the* ***Identifying Information page****.*

Required Data

Field	Value
Minimize *SMART window.* ***Open new window*** *and type the URL in the browser address bar (for address verification):* **http://zip4.usps.com/zip4/**	
Add this website to your Favorites. Favorites > Add to Favorites > Save	
Address 1	301 SOUTH KANSAS AVENUE
Address 2	SUITE A
City	TOPEKA
State	KS
Click the **Submit** button	
Write down the correct address format from USPS website here:	
Click the **Red X** in the top right corner of the USPS website to close window.	
Maximize the window containing SMART (Employee Facing Registry)	
In SMART, navigate this menu path: **Vendors > Vendor Information > Add/Update > Vendor**	
Vendor Information: Add a New Value	
SetID	SOKID (Accept default)
Vendor ID	NEXT (Accept default)
Persistence	Regular (Accept default)

Click the **Add button**	
Identifying Information	
Vendor Short Name	GROSVENORF
Vendor Name 1	GROSVENOR FASTENERS
Classification	Supplier
Click the **Address Tab**	
Address	
Description	CORP
Effective Date	01/01/1901
Address 1	301 S KANSAS AVE
Address 2	STE A
City	TOPEKA
County	SHAWNEE
Postal	66603-3463
State	KS
Email ID	contact@grosvenorfasteners.com
Click the **Expand Section** button for the Payment/Withholding Alt Names	
Payment Alternate Name Section	
Name 1	GROSVENOR FASTENERS
Withholding Alternate Name Section	
Withholding Name 1	GROSVENOR FASTENERS
Phone Information Section	
Phone Information - *Type	.Pymnt Loc
Prefix	001
Telephone	785/297-1546
Click the **Contacts Tab**	
Contacts	
Description	ACCOUNTS RECEIVABLE MANAGER
Eff Date	01/01/1901
Type	General
Name	MISSY HAVENER
Title	AR MANAGER
Internet	http://grosvenorfasteners.com
Email ID	m.havener@gfasteners.com
Phone Information - *Type	Main
Phone Information - Telephone	785/297-1546
Click the **Location Tab**	
Location	
Location	001
Description	SYSTEM CHECK

***Effective Date**	01/01/1901
Click the **Procurement Link**	
Procurement Options	
Click the **Expand Section button** for the **Procurement Card Information** section	
Select the Accepts Procurement Card as payment method checkbox	
***ProCard Dispatch Option**	Contact Cardholder
Card Type 1	Visa
Click the **OK button**	
Location	
Click the **1099 Link**	
Withholding Vendor Information: 1099 Reporting Information – Main Information	
***Entity**	IRS
***Address**	1
TIN Type	F
Taxpayer Identification Number	456963<your 3 digit training ID>
Click the **OK button**	
Location	
Click the **Save button**	
Note your **Vendor ID** number here:	
Click the **Home link** (top right corner in blue bar)	

Activity 10 – Walkthrough: Add New Foreign Vendor

Instructions

Follow along with the instructor to complete this Walkthrough exercise.

Discussion Points:

- *Foreign vendors can be entered online only directly into SMART (they cannot be uploaded via an interface into SMART).*
- *You cannot use the USPS validation tool to verify international addresses. However you can use the Canada Post website to verify Canadian addresses: http://www.canadapost.ca/cpotols/apps/fpc/business/findByCity*
- *The 'Country' you select determines what data entry components are required for the address information.*

Scenario

In this scenario, you are the **Agency Vendor Processor**. *You have already checked SMART using the Review Vendors page to verify that the vendor does not already exist.* Now you need to set up the new foreign vendor in SMART.

This new foreign vendor does not require Withholding information and does not accept business procurement cards as a method of payment. You have gathered all the documentation you need from the vendor and you are now ready to enter the information into SMART.

Menu Path

Vendors > Vendor Information > Add/Update > Vendor

Required Data

Field	Value
Vendor Information: Add a New Value	
SetID	SOKID (Accept default)
Vendor ID	NEXT (Accept default)
Persistence	Regular (Accept default)
Click the **Add button**	
Identifying Information	
Vendor Short Name	STIRLINGSI
Vendor Name 1	STIRLING SILVER COMPANY
Classification	Supplier
Click the **Address Tab**	
Address	

Description	MAIN
Effective Date	01/01/1901
Country	IRL
Address 1	65 HENDERSON STREET
City	BRIDGE OF ALLAN
County	STIRLINGSHIRE
Postal	FK9 4HG
Email ID	Accounts@stirlingsilver.co.uk
Phone Information - *Type	.Pymnt Loc
Prefix	001
Telephone	01786832415
Click the **Contacts Tab**	
Contacts	
Description	RECONCILIATION MANAGER
Eff Date	01/01/1901
Type	Billing Contact
Name	DOROTHY MACKENZIE
Title	ACCOUNTS RECEIVABLE DIRECTOR
Internet	http://www.stirlingsilver.co.uk
Email ID	d.mackenzieAR@stirlingsilver.co.uk
Phone Information - *Type	Business
Phone Information - Telephone	01786832415
Click the **Location Tab**	
Location	
Location	001
Description	ACH ****7621
***Effective Date**	01/01/1901
Click the **1099 Link**	
Withholding Vendor Information: 1099 Reporting Information – Main Information	
***Entity**	IRS
***Address**	1
TIN Type	F
Taxpayer Identification Number	FOREIGN <your 3 digit training ID>
Click the **OK button**	
Location	
Click the **Payables Link**	
Payables Options	
Click the **Expand Section button** for the **Additional Payables Options section**	

Payables Options: Additional Payment Information	
Payment Method	Specify
Payment Method Drop Down List	Automated Clearing House
Click the **Expand Section button** for the **Vendor Bank Account Options** section	
Payables Options: Vendor Bank Accounts	
Descr	ACH ****7621
Bank Name	MELLON TRUST OF NEW ENGLAND
Branch Name	STIRLING
Bank ID Qualifier	001
Account Type drop down list	Check Acct
Bank ID	011001234
Bank Account Number	1654787621
DFI Qualifier	01
Click the **OK button**	
Location	
Click the **Save button**	
Note your **Vendor ID** number here:	
Click the **Home link** (top right corner in blue bar)	

Activity 11 – Walkthrough: Add New Federal Vendor

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor**. *You have already checked SMART using the Review Vendors page to verify that the vendor does not already exist.* Now you need to set up the new federal vendor in SMART.

This new federal vendor accepts business procurement cards as a method of payment, and wishes to receive paper check payments. You have gathered all the documentation you need from the vendor and you are now ready to enter the information into SMART. You do not know the TIN# for the federal vendor.

Menu Path
Vendors > Vendor Information > Add/Update > Vendor

Required Data

Field	Value
Vendor Information: Add a New Value	
SetID	SOKID (Accept default)
Vendor ID	NEXT (Accept default)
Persistence	Regular (Accept default)
Click the **Add button**	
Identifying Information	
Vendor Short Name	USFOODDRUG
Vendor Name 1	US FOOD AND DRUG ADMINISTRATION
Classification	Supplier
Click the **Address Tab**	
Address	
Description	MAIN
Effective Date	01/01/1901
Address 1	10903 NEW HAMPSHIRE AVE
City	SILVER SPRING
Postal	20993
State	MD
Email ID	info@usfda.org
Phone Information - *Type	.Pymnt Loc
Prefix	001
Telephone	18884636332

Click the **Contacts Tab**	
Contacts	
Description	AR CONTACT
Eff Date	01/01/1901
Type	Billing Contact
Name	CHRIS HOLSTRUM
Title	ACCOUNTS RECEIVABLE MANAGER
Internet	http://usfda.org
Email ID	Chris.holstrum@usfda.org
Phone Information - *Type	Business
Phone Information - Telephone	18884636332
Click the **Location Tab**	
Location	
Location	001
Description	SYSTEM CHECK
***Effective Date**	01/01/1901
Click the **Procurement Link**	
Procurement Options	
Click the **Expand Section button** for the **Procurement Card Information** section	
Select the Accepts Procurement Card as payment method checkbox	
***ProCard Dispatch Option**	Contact Cardholder
Card Type 1	Visa
Click the **OK button**	
Location	
Click the **1099 Link**	
Withholding Vendor Information: 1099 Reporting Information – Main Information	
***Entity**	IRS
***Address**	1
TIN Type	F
Taxpayer Identification Number	FED
Click the **OK button**	
Location	
Click the **Save button**	
Note your **Vendor ID** number here:	
Click the **Home link** (top right corner in blue bar)	

Activity 12 – Walkthrough: Add New Regent Employee

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor** for a Regent (University) and you have a new employee (Regina Haley) which you need to set up in SMART as a vendor. *You have already checked SMART using the Review Vendors page to verify that the individual/vendor does not already exist.* Now you need to set up the new Regent employee as a vendor in SMART.

Regent employees are set up with the Classification of 'Suppliers' in SMART, and are paid via ACH. You have gathered all the documentation you need from the new employee and you are now ready to enter the information into SMART.

Discussion Points

- **When entering Individuals as vendors in SMART:** For the *Vendor Short Name* field: Enter the first 10 characters of the 'Last name, COMMA, followed by as many characters of the first name' as possible. Example: JENNOLD,BAILE.
- ***Do NOT use any spaces or special characters when entering a Vendor Short Name for an Individual in SMART.***
- You do NOT need to complete the Contacts page for a Regent employee.
- Location Page > 1099/Withholding: The *TIN Type* is indicated as an "S" – representing the employee's Social Security Number.

Required Data

Field	Value
Minimize *SMART window.* ***Open new window*** *and type the URL in the browser address bar (for address verification):* **http://zip4.usps.com/zip4/**	
Add this website to your Favorites. Favorites > Add to Favorites > Save	
Address 1	3201 NW ROCHESTER ROAD
City	TOPEKA
State	KS
Click the **Submit** button	
Write down the correct address format from USPS website here:	
Click the **Red X** in the top right corner of the USPS website to close window.	

Maximize the window containing SMART (Employee Facing Registry)	
In SMART, navigate this menu path: **Vendors > Vendor Information > Add/Update > Vendor**	
Vendor Information: Add a New Value	
SetID	SOKID (Accept default)
Vendor ID	NEXT (Accept default)
Persistence	Regular (Accept default)
Click the **Add button**	
Identifying Information	
Vendor Short Name	HALEY,REGI
Vendor Name 1	REGINA HALEY
Classification	Supplier
Withholding Checkbox	Select the checkbox (click it)
Click the **Address Tab**	
Address	
Description	HOME
Effective Date	01/01/1901
Address 1	3201 NW ROCHESTER RD
City	TOPEKA
County	SHAWNEE
Postal	66617-1233
State	KS
Email ID	rhaley@ku.edu
Phone Information - *Type	.Pymnt Loc
Prefix	001
Telephone	785/546-2133
Click the **Location Tab**	
Location	
Location	001
Description	ACH ******8542
***Effective Date**	01/01/1901
Click the **1099 Link**	
Withholding Vendor Information: 1099 Information – Main Information	
***Entity**	IRS
***Type**	1099
***Jurisdiction**	FED
Default Jurisdiction checkbox	Select the checkbox
***Default Class**	07
***1099 Status**	RPT (defaults)
Withholding Vendor Information: 1099 Reporting Information –	

Main Information	
***Entity**	IRS
***Address**	1
TIN Type	S
Taxpayer Identification Number	507394823
Click the **OK button**	
Location	
Click the **Payables Link**	
Payables Options	
Click the **Expand Section button** for the **Additional Payables Options section**	
Payables Options: Additional Payment Information	
Payment Method	Specify
Payment Method Drop Down List	Automated Clearing House
Click the **Expand Section button** for the **Vendor Bank Account Options** section	
Payables Options: Vendor Bank Accounts	
Descr	ACH ****8542
Bank Name	CITIZENS NATIONAL BANK
Branch Name	OLATHE
Bank ID Qualifier	001
Account Type drop down list	Time Dep
Bank ID	011102133
Bank Account Number	5006578542
DFI Qualifier	01
Click the **OK button**	
Location	
Click the **Save button**	
Note your **Vendor ID** number here:	
Click the **Home link** (top right corner in blue bar)	

Activity 13 – Review: How to Change Existing Vendor Info

Discussion Points

*** Do NOT make changes to existing vendor information in SMART ! ***

Complete the following form(s) and send to the Central Vendor Processor.

- **State of Kansas - DA-130 Form** - Authorization for Electronic Deposit of Vendor Payment. Use this form to submit **new vendor bank account information or changes (or cancellations) for vendor bank account information** to the Central Vendor Processor. You will also need a voided check from the vendor. To obtain a copy of the DA-130 Form please contact the Central Vendor Processor by phone: (785) 296-7917.
Submit the form and the voided check from the vendor to the Central processing office by emailing it to: mailto:Arvendor@da.ks.gov

- **State of Kansas - DA-184 Form** - Authorization For Direct Deposit of Employee Pay and or Employee Travel .
Regents - Use the DA-184 Form to submit **new Regent Employee Information, or to make changes to existing Regent Employee Information** to the Central Vendor Processor.
Locate this form: http://www.da.ks.gov/ar/pm/Forms/Default.htm
Submit the form to the Central processing office by emailing it to: mailto:Arvendor@da.ks.gov

- **State of Kansas - TM-21 Form**. Use the **TM-21 Form** to request changes to, or in-activations of, existing vendor information in SMART.
Examples: Address, Contact, or Procurement Card.
Locate this form: http://www.da.ks.gov/ar/forms/default.htm
Submit the form to the Central processing office by emailing it to: mailto:Arvendor@da.ks.gov

- ***If an existing vendor address is incorrect, DO NOT ADD A NEW ADDRESS IN SMART to correct the address in the vendor file !***

- Please submit a TM-21 form to have the Central Vendor Processor edit the EXISTING address we have on file for the vendor.

- **Withholding Information –** Contact the vendor to get a new W-9 Form, W-8 Form, or voided check for deposit.
  You DO NOT need to send the W-9 Form or the W-8 Form to the Central Vendor Processor. Please keep this on file at your Agency.

Business Processes for making changes to EXISTING vendor information:

The Central Agency Processor reviews the changes and either completes or denies them. Please understand that there is NO formal workflow process in the Vendors module in SMART.

This means that ***you will NOT receive an email notification advising you that the vendor changes have been completed or denied as requested***. You will need to check the vendor files in SMART to determine if, and when, the changes you submitted have been processed. For vendor inactivation requests, the Central Agency Processor changes the Status of inactivated vendors from “Active” to “Denied” in SMART.

Activity 14 – Walkthrough: Add New Address to Existing Vendor

Discussion Points

- Always review ALL existing addresses for a vendor in SMART PRIOR to adding a new address to the existing vendor record (to prevent duplicate address entries in SMART). Use the '**View All**' records functionality to do this.

- Use the USPS website to verify the correct postal format for the new address PRIOR to entering the address in SMART.

- Adding a NEW address to an EXISTING vendor record in SMART (and saving the record), prompts SMART to automatically change the vendor's Status from "Approved" to "Unapproved"status. The vendor will not be able to be used by any Agency for any transaction in SMART until it has been reviewed and "Approved" by a Central Vendor Processor.

- ***NEVER make changes to a Statewide Contract vendor without contacting the Central Processing Office first!***
  For example: Never make changes to Staples (office supplies)!

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor** for your Agency. One of your vendors has contacted you to tell you that they have opened a new location. You logged into SMART and viewed all records to verify that the new address did not exist as a Location on the vendor file. You then logged into the USPS website and verified the correct address for the vendor. ***Now you need to add the NEW address to the EXISTING vendor in SMART.***

Menu Path
Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Name	**See user specific data**
Click the Search button	
Review Vendors: Search Results	

Click the **button** for the vendor	
Click the **Vendor Maintenance link** (opens a new window - maximize)	
Identifying Information	
Click the **Address Tab**	
Address	
Click the **View All** link to review all existing address(es) in the vendor’s file	
Click the **+ button** in the **Vendor Address** section to add the new address	
Description	CORP
Effective Date	<today’s date>
Address 1	900 S KANSAS AVE
Address 2	STE 100
City	TOPEKA
County	SHAWNEE
Postal	66612-1211
State	KS
Email ID	<Have fun and make one up!>
Phone Information - *Type	.Pymnt Loc
Prefix	001
Telephone	785/294-1214
Click the **Save button**	
Review the message screen – Vendor will be set to “Unapproved” status.	
Click the **OK button**	
Click the **Summary Tab**	
Summary	
Review the Status = “Unapproved”	
Click the **Home link** (top right corner in blue bar)	
Click the **Red X** in the top right corner of the active window to close it	

Classroom 1 – User Specific Data

User	Field	Value
User 1	Name	Mom Design Shop
User 2	Name	Mike Design Shop
User 3	Name	Kevin Design Shop
User 4	Name	Johnny Design Shop
User 5	Name	Michael Design Shop
User 6	Name	Karen Design Shop
User 7	Name	Beth Design Shop
User 8	Name	Andy Design Shop
User 9	Name	Gina Design Shop
User 10	Name	Robbie Design Shop

User	Field	Value
User 11	Name	Ojo Design Shop
User 12	Name	Matt Design Shop
User 13	Name	Sara Design Shop
User 14	Name	Josh Design Shop
User 15	Name	Christina Design Shop
User 16	Name	Betsy Design Shop
User 17	Name	Donna Design Shop
User 18	Name	Connie Design Shop
User 19	Name	Sarah Design Shop
User 20	Name	Bo Design Shop

Activity 15 – Walkthrough: Add New Contact to Existing Vendor

Discussion Points

- Always review ALL existing contacts records for a vendor in SMART PRIOR to adding a new contact to the existing vendor record (to prevent duplicate contact entries in SMART).

Instructions

Follow along with the instructor to complete this Walkthrough exercise.

Scenario

In this scenario, you are the **Agency Vendor Processor** for your Agency. One of your vendors has contacted you to tell you that they have a new employee that will now be your contact person at the vendor. ***You need to add the NEW contact to the EXISTING vendor in SMART.***

Menu Path

Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Name	**See user specific data**
Click the Search button	
Review Vendors: Search Results	
Click the **button** for the vendor	
Click the **Vendor Maintenance link** (opens a new window - maximize)	
Identifying Information	
Click the **Contacts Tab**	
Contacts	
Click the **View All** link to review all existing contacts in the vendor's file	
Click the **+ button** in the **Vendor Contact** section to add the new contact	
Description	AR SUPERVISOR
Eff Date	<Today's date>
Type	Billing Contact
Name	BILL BROWNVILLE
Title	AR SUPERVISOR
Address	Use the Lookup to select the address
Internet	http://www.<vendorname>.com

Email ID	billb@<vendorname>.com
Click the **+ button** to add a new record	
Phone Information - *Type	Business
Phone Information - Telephone	785/297-9497
Click the **Save button**	
Review the message screen – Vendor will be set to "Unapproved" status.	
Click the **OK button**	
Click the **Summary Tab**	
Summary	
Review the Status = "Unapproved"	
Click the **Home link** (top right corner in blue bar)	
Click the **Red X** in the top right corner of the active window to close it	

Classroom 1 – User Specific Data

User	Field	Value
User 1	Name	Mike Design Shop
User 2	Name	Mom Design Shop
User 3	Name	Johnny Design Shop
User 4	Name	Kevin Design Shop
User 5	Name	Karen Design Shop
User 6	Name	Michael Design Shop
User 7	Name	Andy Design Shop
User 8	Name	Beth Design Shop
User 9	Name	Robbie Design Shop
User 10	Name	Gina Design Shop
User 11	Name	Matt Design Shop
User 12	Name	Ojo Design Shop
User 13	Name	Josh Design Shop
User 14	Name	Sara Design Shop
User 15	Name	Betsy Design Shop
User 16	Name	Christina Design Shop
User 17	Name	Connie Design Shop
User 18	Name	Donna Design Shop
User 19	Name	Bo Design Shop
User 20	Name	Sarah Design Shop

Additional Discussion Point:

To Inactivate an existing Vendor Contact: Submit a TM-21 form to the Central Vendor Processor.

Activity 16 – Walkthrough: Add New Bank Account to Existing Vendor

Discussion Points

- Always **View ALL** existing bank account records for a vendor in SMART PRIOR to adding new bank account information to the existing vendor record (to prevent duplicate bank account information entries in SMART).
- In addition to completing the information in SMART, scan and email the completed ***DA-130 or DA-184 form AND the voided check from the vendor*** to the Central Vendor Processor.
- You will NOT be able to use the vendor record until the Central Vendor Processor has had time to review and "Approve" the vendor record in SMART.

Instructions

Follow along with the instructor to complete this Walkthrough exercise.

Scenario

In this scenario, you are the **Agency Vendor Processor** for your Agency. One of your vendors has contacted you to tell you that they have added a new checking account for ACH payments to their business bank accounts. ***You need to add the NEW Vendor Bank account information for the vendor's checking account (and ACH information) to the EXISTING vendor record in SMART.***

Menu Path

Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Name	**See user specific data**
Click the Search button	
Review Vendors: Search Results	
Click the **button** for the vendor	
Click the **Vendor Maintenance link** (opens a new window - maximize)	
Identifying Information	
Click the **Location Tab**	
Location	

Click the **View All** link to review all existing locations in the vendor's file	
Click the **+ button** in the **Location** section to add the new contact	
Location	002
Description	ACH ****5813
***Effective Date**	<today's date>
Click the **1099 Link**	
Withholding Vendor Information: 1099 Information – Main Information	
***Entity**	IRS
***Type**	1099
***Jurisdiction**	FED
Default Jurisdiction checkbox	Select the checkbox
***Default Class**	07
***1099 Status**	RPT
Withholding Vendor Information: 1099 Reporting Information – Main Information	
***Entity**	IRS
***Address**	1
TIN Type	F
Taxpayer Identification Number	456789<your 3 digit training ID>
Click the **OK button**	
Location	
Click the **Payables Link**	
Payables Options	
Click the **Expand Section button** for the **Additional Payables Options section**	
Additional Payables Options Section: Additional Payment Information	
Payment Method	Specify
Payment Method Drop Down List	Automated Clearing House
Click the **Expand Section button** for the **Vendor Bank Account Options** section	
Vendor Bank Account Options Section: Vendor Bank Accounts	
Descr	ACH ****5813
Bank Name	BANK OF AMERICA
Branch Name	KANSAS CITY
Bank ID Qualifier	001
Account Type drop down list	Check Acct
Bank ID	011301646
Bank Account Number	5004985813
DFI Qualifier	01
Click the **OK button**	

Click the **Save button**
Review the message screen – Vendor will be set to "Unapproved" status.
Click the **OK button**
Click the **Summary Tab**
Summary
Review the Status = "Unapproved"
Click the **Home link** (top right corner in blue bar)
Click the **Red X** in the top right corner of the active window to close it

Classroom 1 – User Specific Data

User	Field	Value
User 1	Name	Sarah Supplies Shop
User 2	Name	Bo Supplies Shop
User 3	Name	Kathy Supplies Shop
User 4	Name	Thomas Tires Shop
User 5	Name	Mike Tires Shop
User 6	Name	Kevin Tires Shop
User 7	Name	Johnny Tires Shop
User 8	Name	Michael Tires Shop
User 9	Name	Karen Tires Shop
User 10	Name	Beth Tires Shop
User 11	Name	Andy Tires Shop
User 12	Name	Gina Tires Shop
User 13	Name	Robbie Tires Shop
User 14	Name	Matt Tires Shop
User 15	Name	Sara Tires Shop
User 16	Name	Josh Tires Shop
User 17	Name	Christina Tires Shop
User 18	Name	Betsy Tires Shop
User 19	Name	Donna Tires Shop
User 20	Name	Connie Tires Shop

Activity 17 – Walkthrough: Add Procurement Card Information to Existing Vendor

Discussion Points

- If you wish to be able to pay a vendor using a business procurement card (P-card), the vendor must be set up to accept business procurement cards as a method of payment.
- You must set up P-Card information for EVERY Location in the vendor record (Location Page > Procurement Link).
- If a vendor is NOT set up to accept business procurement cards as a method of payment, then the vendor can be paid only using a paper check (system check) or an ACH (direct deposit) payment. [Vendor payments are handled in SAP311 – the SMART Vouchers training course].

Scenario

In this scenario, you are the **Agency Vendor Processor** and you discover that a vendor was not set up correctly in SMART. When the vendor was initially set up in SMART, the vendor was not set up to accept a business procurement card (P-Card) as a method of payment. ***Now, you need to add the business procurement card information to the existing vendor record in SMART.***

Discussion Points:

- The addition of business procurement card information to an existing vendor is considered an edit or modification to existing vendor information.
- An Agency can NOT edit or update business procurement card information for a vendor.
- Please submit a TM-21 form to the Central Processing Office with the vendor's updated or added business procurement card information.
- Locate this form: http://www.da.ks.gov/ar/forms/default.htm
- Submit the form to the Central processing office by emailing it to: mailto:Arvendor@da.ks.gov

Activity 18 – Walkthrough: Add New Location (Payment) Information to Existing Vendor

Discussion Points

- Agencies can NOT edit EXISTING Location information on a vendor record in SMART
- Agencies can add only NEW Location information to an existing vendor in SMART
- DO NOT update Location (Payment) information for STATEWIDE CONTRACT vendors in SMART

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor** and you have obtained new Location (payment) information for a vendor. ***Now, you need to add the NEW Location Information to the existing vendor in SMART.***

Menu Path
Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Name	**See user specific data**
Click the Search button	
Review Vendors: Search Results	
Click the **button** for the vendor	
Click the **Vendor Maintenance link** (opens a new window - maximize)	
Identifying Information	
Click the **Location Tab**	
Location	
View All existing location records (if there is more than one)	
Click the **+ button** in the Location section to add a new location record	
Location	002
Description	ACH ****1564

***Effective Date**	<today's date>
Click the **1099 Link**	
Withholding Vendor Information: 1099 Information – Main Information	
***Entity**	IRS
***Type**	1099
***Jurisdiction**	FED
Default Jurisdiction checkbox	Select the checkbox
***Default Class**	07
***1099 Status**	RPT
Withholding Vendor Information: 1099 Reporting Information – Main Information	
***Entity**	IRS
***Address**	1
TIN Type	F
Taxpayer Identification Number	456789<your 3 digit training ID>
Click the **OK button**	
Location	
Click the **Payables Link**	
Payables Options	
Click the **Expand Section button** for the **Additional Payables Options section**	
Payables Options: Additional Payment Information	
Payment Method	Specify
Payment Method Drop Down List	Automated Clearing House
Click the **Expand Section button** for the **Vendor Bank Account Options** section	
Payables Options: Vendor Bank Accounts	
Descr	ACH ****7695
Bank Name	UMB BANK
Branch Name	TOPEKA
Bank ID Qualifier	001
Account Type drop down list	Check Acct
Bank ID	101218856
Bank Account Number	604852147
DFI Qualifier	01
Click the **OK button**	
Location	
Click the **Save button**	
Review the message screen – Vendor will be set to "Unapproved" status.	
Click the **OK button**	
Click the **Summary Tab**	

Summary
Review the Status = "Unapproved"
Click the **Home link** (top right corner in blue bar)
Click the **Red X** in the top right corner of the active window to close it

Classroom 1 – User Specific Data

User	Field	Value
User 1	Name	Thomas Calendar Shop
User 2	Name	Mike Calendar Shop
User 3	Name	Kevin Calendar Shop
User 4	Name	Johnny Calendar Shop
User 5	Name	Michael Calendar Shop
User 6	Name	Karen Calendar Shop
User 7	Name	Beth Calendar Shop
User 8	Name	Andy Calendar Shop
User 9	Name	Gina Calendar Shop
User 10	Name	Robbie Calendar Shop
User 11	Name	Ojo Calendar Shop
User 12	Name	Matt Calendar Shop
User 13	Name	Sara Calendar Shop
User 14	Name	Josh Calendar Shop
User 15	Name	Christina Calendar Shop
User 16	Name	Betsy Calendar Shop
User 17	Name	Donna Calendar Shop
User 18	Name	Connie Calendar Shop
User 19	Name	Sarah Calendar Shop
User 20	Name	Bo Calendar Shop

Additional Discussion Points

- If you need to inactivate vendor Location (payment) information: Submit a TM-21 form to the Central Vendor Processor.
- Locate this form: http://www.da.ks.gov/ar/forms/default.htm
- Submit the form to the Central processing office by emailing it to: mailto:Arvendor@da.ks.gov

Activity 19 – Review: Vendor Conversation Page (Optional)

Discussion Points

- The **Vendor Conversation** page in SMART may be used to keep track of vendor conversations.
- You can view statewide internal conversation notes for an existing vendor record in SMART.
- Agency Vendor Processors are able to add conversation notes to vendor records. This is a great place to keep track of problems, issues, and more importantly, compliments on vendors. These notes will help all state agencies keep track of vendor service levels and their customer service experiences with the vendor.
- This is an *optional use* page for Agencies.

Homework Assignment: ***When you get back to your Agency, please ask your Supervisor about your Agency's business process regarding the use of the Vendor Conversation Page.***

Instructions
Follow along with the instructor to complete this Walkthrough exercise.

Scenario
In this scenario, you are the **Agency Vendor Processor** and you need to add a Vendor Conversation note to an existing vendor in SMART.

Menu Path
Vendors > Vendor Information > Maintain > Conversations
Note: You can also access this page via the Review Vendors page

Required Data

Field	Value
Conversations	
SetID	SOKID (Accept default)
Name 1	**See user specific data**
Click the Search button	
Vendor Conversation	
Review the fields and use for Vendor Conversation notes.	

Click the **Home link** (top right corner in blue bar)

Classroom 1 – User Specific Data

User	Field	Value
User 1	Name	Kathy Design Shop
User 2	Name	Johnny Design Shop
User 3	Name	Mom Design Shop
User 4	Name	Karen Design Shop
User 5	Name	Kevin Design Shop
User 6	Name	Andy Design Shop
User 7	Name	Michael Design Shop
User 8	Name	Robbie Design Shop
User 9	Name	Beth Design Shop
User 10	Name	Matt Design Shop
User 11	Name	Gina Design Shop
User 12	Name	Josh Design Shop
User 13	Name	Ojo Design Shop
User 14	Name	Betsy Design Shop
User 15	Name	Sara Design Shop
User 16	Name	Connie Design Shop
User 17	Name	Christina Design Shop
User 18	Name	Bo Design Shop
User 19	Name	Donna Design Shop
User 20	Name	Thomas Calendar Shop

Activity 20 –Review: SMART Vendor Contact Page

Discussion Points

- The **Vendor Contact** page contains a summary of all the contacts for the vendor.

Instructions

Follow along with the instructor to complete this Walkthrough exercise.

Scenario

In this scenario, you are the **Agency Vendor Processor** and you want to view a comprehensive list of the contacts at a vendor. ***You decide to navigate to the Vendor Contact Page to review all the contacts for the existing vendor in SMART.***

Menu Path

Vendors > Vendor Information > Add/Update > Review Vendors

Required Data

Field	Value
Review Vendors	
SetID	SOKID (Accept default)
Name	**See user specific data**
Click the Search button	
Review Vendors: Search Results	
Click the **button** for the vendor	
Click the **Vendor Contact link** (opens a new window - maximize)	
Vendor Contact	
View All contact records (information sourced from the Contacts page)	
Click the **Home link** (top right corner in blue bar)	
Click the **Red X** in the top right corner to close the active window	
Click the **Home link** (top right corner in blue bar)	
Click the Sign Out link (top right corner in blue bar)	

Classroom 1 – User Specific Data

User	Field	Value
User 1	Name	Mike Design Shop
User 2	Name	Mom Design Shop
User 3	Name	Johnny Design Shop
User 4	Name	Kevin Design Shop
User 5	Name	Karen Design Shop

User	Field	Value
User 6	Name	Michael Design Shop
User 7	Name	Andy Design Shop
User 8	Name	Beth Design Shop
User 9	Name	Robbie Design Shop
User 10	Name	Gina Design Shop
User 11	Name	Matt Design Shop
User 12	Name	Ojo Design Shop
User 13	Name	Josh Design Shop
User 14	Name	Sara Design Shop
User 15	Name	Betsy Design Shop
User 16	Name	Christina Design Shop
User 17	Name	Connie Design Shop
User 18	Name	Donna Design Shop
User 19	Name	Bo Design Shop
User 20	Name	Sarah Design Shop

CONGRATULATIONS! You have completed your training! ☺
Please complete your class evaluation (AP310). Found on your desktop: Yellow folder: “SMART Deployment > Course Evaluations > AP310”. Double click the icon to open the evaluation. Thanks for your participation in class today – we sincerely appreciate it! ☺ Best wishes, SMART Training Team