



Supplier Naming Conventions and Best Practices  
Supplier Maintenance  
GeorgiaFIRST Marketplace

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## OVERVIEW

The purpose of this document is to set forth supplier naming standards and best practices for maintaining suppliers in the supplier file. Naming standards will be used to provide a guideline for consistency and accuracy in the naming conventions for new suppliers. Improper or lax standards can cause significant degradation of the accuracy of information generated from the system, fines for improper tax reporting, and loss of control. The naming conventions discussed here make it easier for users to identify suppliers they want to use for transactions and reduce the number of duplicate suppliers.

The screenshot displays the 'Identifying Information' tab of a supplier file in PeopleSoft. The form includes the following fields and options:

- Identifying Information:**
  - SetID: SHARE
  - Supplier ID: NEXT
  - \*Supplier Short Name: [Text Field]
  - \*Supplier Name: [Text Field]
  - Additional Name: [Text Field]
  - \*Classification: Federal (Dropdown)
  - HCM Class: [Text Field]
  - \*Persistence: Regular (Dropdown)
  - \*Supplier Status: Unapproved (Dropdown)
  - Check for Duplicate: [Button]
  - Withholding:
  - Open For Ordering:
  - \*Supplier Audit: Default (Dropdown)
  - Supplier Audit:
  - Expand All: [Button]
  - Collapse All: [Button]
- Supplier Relationships:**
  - Corporate Supplier: 
    - Corporate SetID: SHARE
    - Corporate Supplier ID: NEXT
  - InterUnit Supplier: 
    - InterUnit Supplier ID: [Text Field]
  - Supplier Hierarchy: [Text]
- Create Bill-To Customer:**
  - Create Bill To Customer:
- Supplier Rating:** [Section Header]
- Supplier Logo:** [Section Header]
- Additional ID Numbers:** [Section Header]
- Duplicate Invoice Settings:** [Section Header]
- Government Classifications:** [Section Header]
- Standard Industry Codes:** [Section Header]
- Additional Reporting Elements:** [Section Header]
- Comments:** [Section Header]

At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. Navigation tabs at the bottom include 'Identifying Information', 'Address', 'Contacts', 'Location', and 'Custom'.

## SUPPLIER SHORT NAME STANDARDS

The supplier short name is entered into the system to uniquely identify a supplier for voucher and purchasing entries. Each supplier entered into the system will have its own supplier short name which cannot be identical to another supplier short name. The system utilizes a number extension to keep the short name unique.

### **General Rules**

1. Use ALL CAPS when entering the short name.
2. Do not use any spaces.
3. Enter up to the first ten (10) characters of the name. If the supplier name has 10 or more characters, the short name should have 10 characters.

<b>Examples</b>	
<u>COMPANY/INDIVIDUAL</u>	<u>SHORT NAME</u>
ExxonMobile	EXXONMOBIL
Home Depot	HOMEDEPOT
Staples	STAPLES
Sterling Consulting	STERLINGCO
Thomas Chevrolet	THOMASCHEV

4. Never include '-CAT' in the supplier short name. This is currently being used to identify GeorgiaFIRST Marketplace suppliers (i.e. STAPLE-CAT).

### **Businesses**

1. When a company name has an **ampersand (&)**, do not include the ampersand in the short name.

<b>Examples</b>	
<u>COMPANY</u>	<u>SHORT NAME</u>
A & B Construction	ABCONSTRUC
Baker & Associates	BAKERASSOC
Broadways To & Go	BROADWAYST
August Red & Blue	AUGUSTREDB

2. When a company name uses **initials**, include the initials in the short name.

<b>Examples</b>	
<u>COMPANY</u>	<u>SHORT NAME</u>
L R W Corporation	LRWCORPORA
TG Enterprises	TGENTERPRI
P G&G Medical	PGGMEDICAL

3. When a company name contains **punctuation** (see below), do not include the punctuation.

period [.]  
 colon [:]  
 semicolon [;]  
 comma [,]  
 question mark [?]  
 exclamation [!]  
 dash [-]  
 slashes [/ or \]

<b>Examples</b>	
<u>COMPANY</u>	<u>SHORT NAME</u>
M-P Association	MPASSOCIAT
C/I Mitchell & Best	CIMITCHELL
Buy.com	BUYCOM

4. When a company name contains **numbers**, include the numbers.

<b>Examples</b>	
<u>COMPANY</u>	<u>SHORT NAME</u>
WFXG Fox 54 TV	WFXGFOX54T
WGAC 780 AM	WGAC780AM
1st Source	1STSOURCE
Curtis 1000	CURTIS1000

5. When a company name contains a **special character** (see below), do not include the special character.

Special Characters [ @ % \* # \$ ] include:

- Apostrophe [ ' ]
- Quotation [ " ]

<i>Examples</i>	
<u>COMPANY</u>	<u>SHORT NAME</u>
Inn @ Ellis Square	INNELLISSQ
McDonald's	MCDONALDS
AAMCO #1221	AMMCO1221
Party City #21	PARTYCITY2

6. When the **first word** of a company's name is **'The'** do not include it in the short name.

<i>Examples</i>	
<u>COMPANY</u>	<u>SHORT NAME</u>
The Citi Group	CITIGROUP
Just The Fax	JUSTTHEFAX
Pete's on the Hill	PETESONTHE
A World of Music	AWORLDOFMUS
The Supply Corp	SUPPLYCORP

7. When the **first words** of a city supplier is **'City of'** include it in the short name.

<i>Examples</i>	
<u>COMPANY</u>	<u>SHORT NAME</u>
City of Smyrna	CITYOFSMYR
City of Alpharetta	CITYOFALPH

8. When the **first word** of a supplier's name is **'University'**, use the abbreviation UNIV followed by the additional letters as the short name.

<i>Examples</i>	
<u>COMPANY</u>	<u>SHORT NAME</u>
University of Georgia	UNIVOFGEOR
University Press	UNIVPRESS
University Patrol	UNIVPATROL

- If a company name contains “**INC,**” “**LLC**” or any other **professional acronym**, do not include it in the short name.

<i>Examples</i>	
<u>COMPANY</u>	<u>SHORT NAME</u>
Xerox Inc.	XEROX
Thomas LLC	THOMAS

### **Individuals**

These individual suppliers pertain to 1099 suppliers and employees. Banner student suppliers are automatically loaded through a batch process.

- Enter the **last name** first followed by the **first name** and **middle initial(s)** as the short name.

<i>Examples</i>	
<u>INDIVIDUAL</u>	<u>SHORT NAME</u>
John B. Smith	SMITHJOHNB
John Bradford Smith	SMITHJOHNB
Stan Henry Joe Lee	LEESTANHJ
Kimberly Anderson	ANDERSONKI
William Mathews	MATHEWSWIL
Oscar DeLaHoya	DELAHOYAOS

- Do not use **parentheses**, **apostrophes**, or any other punctuation.

<i>Examples</i>	
<u>INDIVIDUAL</u>	<u>SHORT NAME</u>
Lisa O'Brien	OBRIENLISA

- Do not use **degrees**, **military rank**, **professional title**, **Roman numerals** (I, II, III, etc), or ‘**Jr**’ in the short name.

<i>Examples</i>	
<u>INDIVIDUAL</u>	<u>SHORT NAME</u>
Dr. Mary Stone	STONEMARY
Mary Stone, MD	STONEMARY
Tom Weaver, Jr	WEAVERTOM
Gary Wan II	WANGARY



4. If the supplier has **two last names** or uses a **hyphen** between the names, enter the first last name first, followed by the second. Do not include the hyphen.

<i>Examples</i>	
INDIVIDUAL	SHORT NAME
Lisa Jenkins-Hopkins	JENKINSHOP
Holly Robinson Pete	ROBINSONPE

5. If the supplier has **two first names**, enter the last name first followed by first, first name. The second first name should be treated like middle name. Use only the initial.

<i>Examples</i>	
INDIVIDUAL	SHORT NAME
Mary Jane Smith	SMITHMARYJ
Bobbi Jo Barnes	BARNESBOBB

## SUPPLIER NAME STANDARDS

The supplier name entered into the Supplier Name field is the name that is used on payments, unless an alternate payment name is specified for the supplier. Use the following rules when entering the supplier name.

### **General Rules**

1. Upper and lower case letters may be used for the supplier name.
2. 'Doing Business As' name (dba) should not be entered into this field.
3. Spaces are allowed.
4. Enter up to the first forty (40) characters of the name.

<b>Examples</b>	
<u>COMPANY/INDIVIDUAL</u>	<u>NAME</u>
ExxonMobile	ExxonMobile
Home Depot	Home Depot
Staples	Staples
Sterling Consulting	Sterling Consulting
Thomas Chevrolet	Thomas Chevrolet

### **Businesses**

1. A business name should be entered as it reads with the IRS.
2. There are no standard rules that apply for what should not be included in a business name. All characters of the business name are acceptable.

<b>Examples</b>	
<u>COMPANY/INDIVIDUAL</u>	<u>NAME</u>
A & B Construction	A & B Construction
L R W Corporation	L R W Corporation
Sterling Consulting	Sterling Consulting
Thomas Chevrolet	Thomas Chevrolet
Amazon.com	Amazon.com
AAMCO #1221	AAMCO #1221
The Citi Group	The Citi Group
Thomas LLC	Thomas LLC
University of Georgia	University of Georgia
Inn @ Ellis Square	Inn @ Ellis Square

## Individuals

1. Enter the supplier name using the format **last name, first name, middle initial**.

<i>Examples</i>	
<u>INDIVIDUAL</u>	<u>NAME</u>
John B. Smith	Smith,John B
John Bradford Smith	Smith,John B
Stan Henry Joe Lee	Lee,Stan H J
Kimberly Anderson	Anderson,Kimberly
William Mathews	Mathews,William
Oscar DeLaHoya	DeLaHoya,Oscar
Lisa Jenkins-Hopkins	Jenkins-Hopkins,Lisa
Mary Jane Smith	Smith,Mary J
Bobbi Jo Barnes	Barnes,Bobbi J

2. The use of **parentheses**, **apostrophes**, or any other punctuation is acceptable.

<i>Examples</i>	
<u>INDIVIDUAL</u>	<u>NAME</u>
Lisa O'Brien	O'Brien,Lisa

3. Do not use **degrees**, **military rank**, or **professional titles** in the Supplier Name field.

<i>Examples</i>	
<u>INDIVIDUAL</u>	<u>NAME</u>
Dr. Mary Stone	Stone,Mary
Mary Stone, MD	Stone,Mary
Tom Weaver, Jr	Weaver,Tom Jr
Gary Wan II	Wan,Gary II

## **ADDITIONAL NAME STANDARDS**

The Additional Name field may be used for recording additional name information, such as a 'Doing Business As' name. Use the following rules when entering the supplier name.

### ***General Rules***

1. Upper and lower case letters may be used.
2. Spaces are allowed.
3. This field allows up to 40 characters to be entered.

## PAYMENT ALTERNATE NAME STANDARDS

The Payment Alternate Name field, found on the Address tab, is used to specify an alternate name for the supplier which will be used for payment purposes. When the system generates a payment for the location that uses the address where the alternate name is defined, the alternate name will be listed as the Supplier Name on the payment. Use the following rules when entering the supplier name.

### General Rules

1. Upper and lower case letters may be used.
2. Spaces are allowed.
3. This field allows up to 40 characters to be entered.

The screenshot displays the 'Supplier Address' form in PeopleSoft. The form is for Supplier ID 0000016629, with a short name of 'CAROLINASE-001' and a full name of 'Carolina Sewn Products Corp.'. The 'Supplier Address' section shows 'Address ID 1' with a description of 'MAIN LOCATION'. The 'Details' section includes an effective date of 09/03/2004 and an active status. The address fields are filled with: Country USA, Address 1 Midwest College Marketing Group, Address 2 400 North Main Street, City Chelsea, State MI, and Postal 48118. A red box highlights the 'Payment/Withholding Alt Names' section, which contains a 'Payment Alternate name' field with 'Name 1' set to 'Carolina Sewing Group'. Below this is a 'Withholding Alternate name' section with two empty fields for 'Withholding Name 1' and 'Withholding Name 2'. At the bottom, there is a 'Phone Information' section with a table for adding phone numbers.

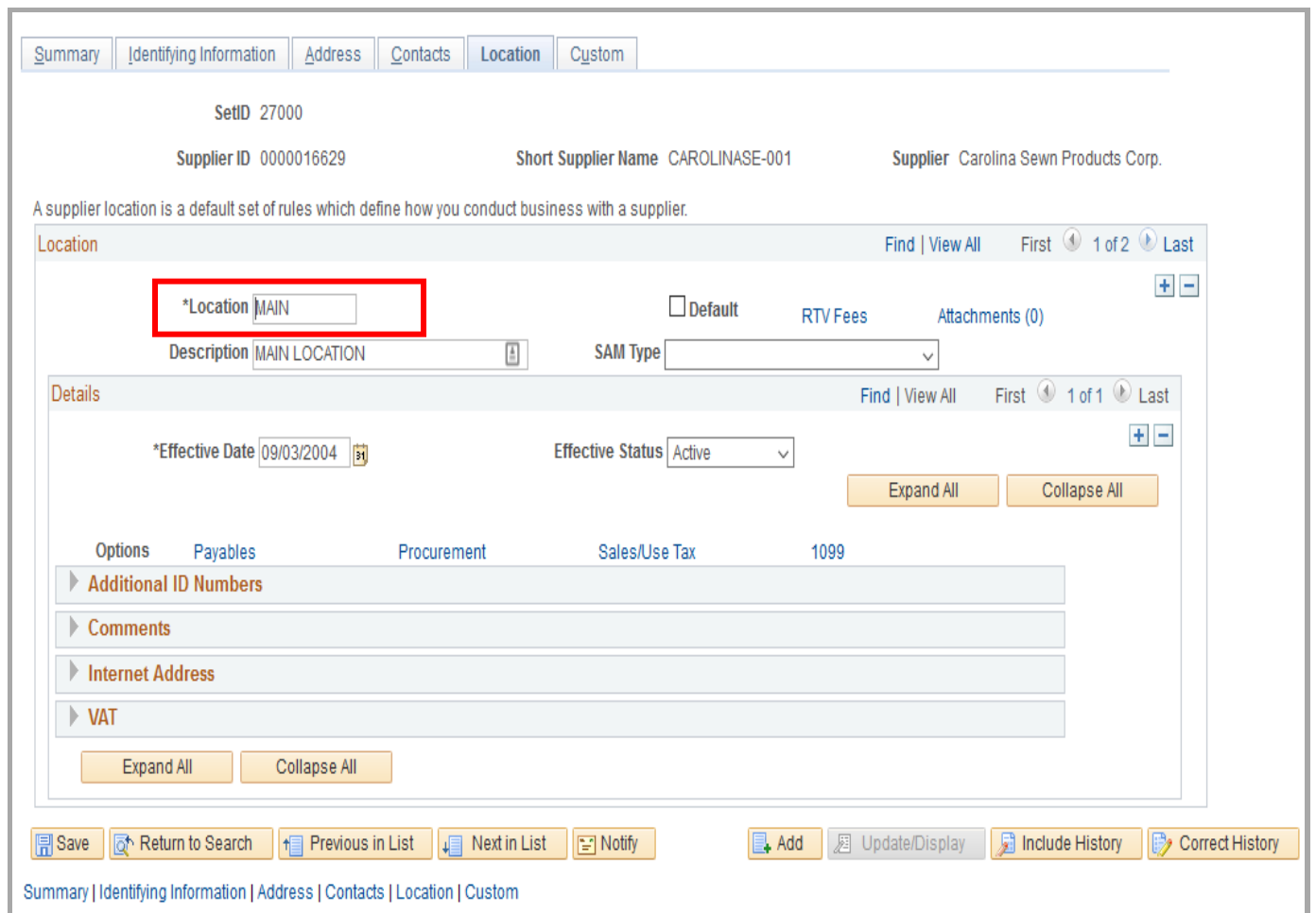
*Type	Location	Prefix	Telephone	Extension
Business Phone				

## LOCATION STANDARDS

The location is used to establish default processing rules for suppliers which includes payables, purchasing, and 1099 rules. Each non-Banner supplier will have a MAIN location with alternate locations established when necessary.

### General Rules

1. The first location should always have a name of MAIN.



The screenshot shows the 'Location' tab for a supplier. The supplier information includes SetID 27000, Supplier ID 0000016629, Short Supplier Name CAROLINASE-001, and Supplier Carolina Sewn Products Corp. A note states: 'A supplier location is a default set of rules which define how you conduct business with a supplier.'

The 'Location' section contains the following fields:

- \*Location: MAIN (highlighted with a red box)
- Description: MAIN LOCATION
- SAM Type: (dropdown menu)
- Default:
- RTV Fees: (checkbox)
- Attachments (0): (checkbox)

The 'Details' section includes:

- \*Effective Date: 09/03/2004
- Effective Status: Active
- Buttons: Expand All, Collapse All

Options are listed below:

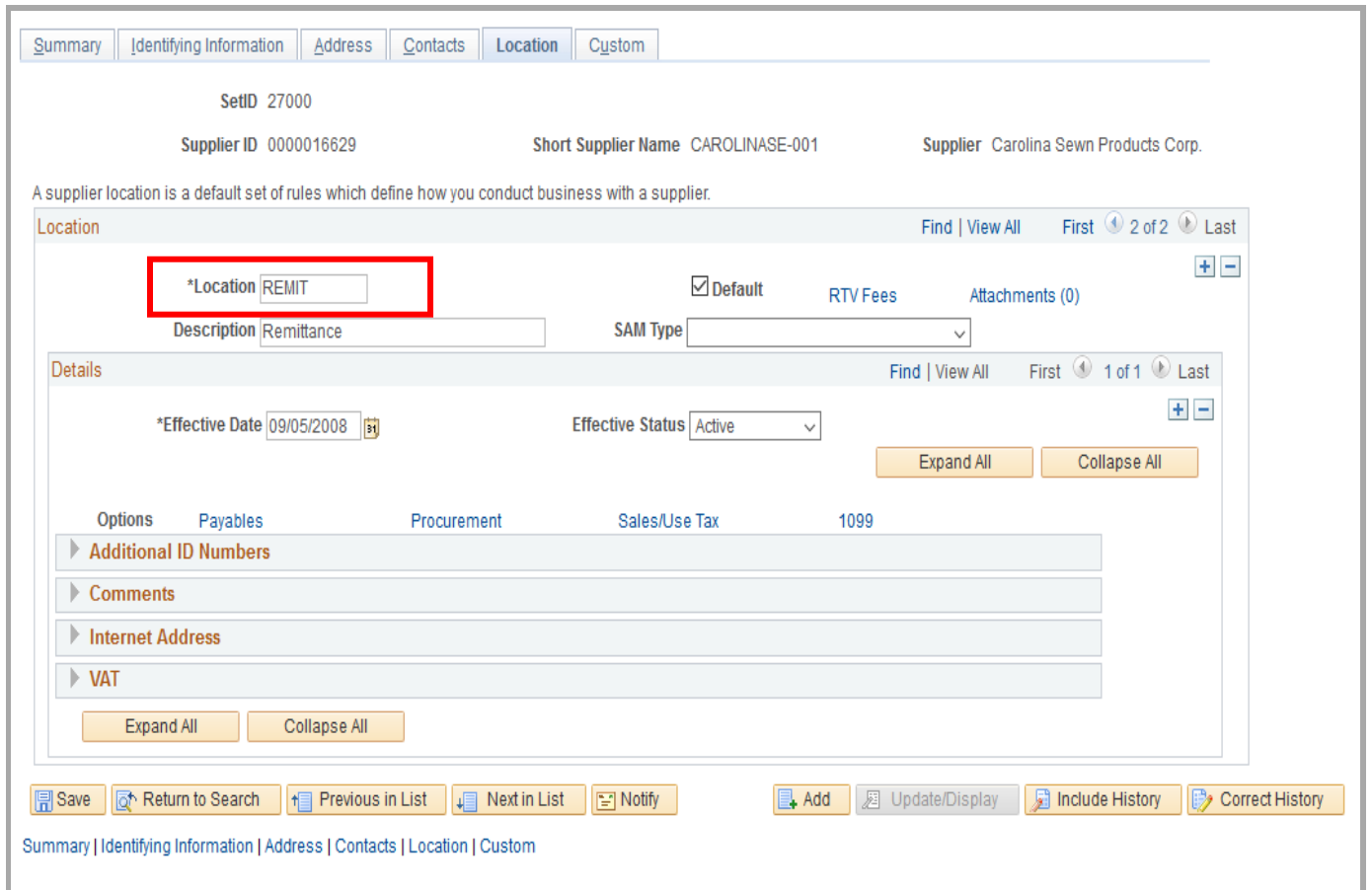
- Payables
- Procurement
- Sales/Use Tax
- 1099

Expandable sections include:

- Additional ID Numbers
- Comments
- Internet Address
- VAT

At the bottom, there are navigation buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display, Include History, and Correct History. The breadcrumb trail at the bottom reads: Summary | Identifying Information | Address | Contacts | Location | Custom.

2. Additional locations should be added if there is a need to have different processing rules.



The screenshot shows the 'Location' tab of a supplier record in PeopleSoft. The supplier is 'Carolina Sewn Products Corp.' with SetID 27000 and Supplier ID 0000016629. The location name is 'REMIT' (highlighted with a red box), with a description of 'Remittance'. It is marked as the 'Default' location. The effective date is 09/05/2008 and the status is 'Active'. The form includes sections for 'Details' and 'Options' (Payables, Procurement, Sales/Use Tax) with expandable sub-sections like 'Additional ID Numbers', 'Comments', 'Internet Address', and 'VAT'. Navigation buttons like 'Save', 'Add', and 'Update/Display' are visible at the bottom.

**NOTE:** You can only have one DEFAULT location if you establish multiple locations.

3. The location name 'TRAVEL' should not be used when adding Supplier Locations. This location is reserved for use by the Concur T&E interface that creates employee travel suppliers.