



## Business Office: Credit Application

**General Information:** Credit application defines the terms and conditions of sales between vendor and Illinois State University. Purchasing Office will need to review and approve the terms and conditions of sales in order to complete the credit application process. (The credit application is not typically submitted for a single purchase – use credit card)

**Main Contact**

- Credit Card Application – Ernie Olson
- Lauri Joynt (Account Tech)
- Nick Mullins (Procurement Officer)
- [ISUPurchasing@ilstu.edu](mailto:ISUPurchasing@ilstu.edu)

**Procedure:**

1. Before starting the process of credit application, Business Manager will need to discuss the credit application purpose with the Facilities employee.
  - If it is a single purchase, Business Manager will recommend employee to use a credit card to make that purchase.
  - If it is **not** a single purchase, Business Manager will proceed with the credit application.
2. FM contact will forward potential product and vendor information to Business Manager.
3. Business Manager will collaborate with the vendor to complete the credit application.
4. Business Manager will send the original credit application to Purchasing Office for possible revision and signature.
5. After the application is approved by Purchasing, Business Manager will have to send the original credit application and additional documents including Tax Exempt Certificate and Application for Credit Form to vendor. Be sure to make a copy of the credit application.
6. If the vendor is not in Datatel, fill out the Vendor Registration form on Purchasing website and send to Lauri Joynt. Once the Vendor is added in Datatel, make sure to add the Vendor to TMA.
  - Path: Material > Vendors > Add > check the Vendor box.
  - On the *Identity* tab, input the Code (Datatel Vendor Number), Name, and Type (first letter of the company name).

Vendor: <input checked="" type="checkbox"/>	Manufacturer: <input type="checkbox"/>	Contractor: <input type="checkbox"/>	Active: <input checked="" type="checkbox"/>	Block P Card: <input type="checkbox"/>
Code: 0000001	Name: Vendor			
Type: V	Subtype: [dropdown]			

- Click the *Address* tab and click *Add Item*.
  - Input the address and input “Unknown” for the *Address Category* field.
  - Click *Save & Close*.
- Click the *Repair Center* tab and select 1 – *Facilities*. Then, click *Save*.



\*The Agreement for Services form is updated periodically by Purchasing, so always download the form from Purchasing’s website to ensure you are using the most recent form.

\*W-9 Form is not included but provided upon request.

**Supporting Document**

- Tax Exempt Certificate 2015 (See *Appendix*)
- Application for Credit Form (See *Appendix*) and Credit Application Sample (See *Appendix*)