



File Naming Convention

Vendor Actions

Training Guide
2025

Overview of Steps – *File Naming Convention*

Purpose: File naming conventions

Steps	
1	Select “Add Attachment”
2	Enter correct naming convention as “Title”

Important Reminders

- Use all capital letters for updates.
- When making any update, attach the most recent version of your W-9 form.

(For instructions on how to fill out a W-9 form, review the W-9 form training guide)

Step 1: Select “Add Attachment”

Supplier Home

Orders

Shipments

Planning

Finance

Product

Administration

Assessments

Manage Supplier Broker

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Product & Services

Banking Details

Payment & Invoicing

Surveys

General

Organization Name

Supplier Number 7017

Alias

Parent Supplier Name

Parent Supplier Number

DUNS Number

Tax Registration Number

Taxpayer ID

Country of Tax Registration

Attachments

Search

Note that the search is case insensitive

Title

Go

Show More Search Options

Add Attachment

Previous

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Next 10

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
COMPASS UPDATE	File		From Supplier	ROBINSONSA	26-Jun-2015	One-Time			
LEGAL HOLD 114,000	File		From Supplier	RODRIGUEZGARCIAW_TASK120283	23-Oct-2015	One-Time			
REMOVE FROM LEGAL HOLD	File		From Supplier	RODRIGUEZGARCIAW_TASK120283	26-Oct-2015	One-Time			
ACH REQUEST	File	SENT BACK TO DENICE GRE...	From Supplier	RODRIGUEZGARCIAW_TASK120283	25-Apr-2018	One-Time			
W9 OCTOBER 2018 VER	File	ADD CONTACT VINCENT LE...	From Supplier	GREENBERGD	14-May-2019	One-Time			
TEMPLATE	File		From Supplier	GREENBERGD	14-May-2019	One-Time			
TEMPLATE	File	EMAIL ADDRESS CHANGE F...	From Supplier	GREENBERGD	22-May-2019	One-Time			
SDP	Short Text	VENDOR ANNUAL SELF-CER...	From Supplier	ALEXANDERMIC	14-Jan-2020	One-Time			
LEGAL HOLD	File	\$170,252	From Supplier	RODRIGUEZWE	28-May-2020	One-Time			
LEGAL HOLD RE-INSTATED	File		From Supplier	RODRIGUEZWE	11-Jun-2020	One-Time			

Add Attachment

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Step 2: Enter correct file naming convention under “Title”

The screenshot shows a web application interface for adding an attachment. The top navigation bar includes links for Supplier Home, Orders, Shipments, Planning, Finance, Product, Administration (selected), Assessments, and Manage Supplier Broker. Below the navigation bar is a 'Profile Management' section. The main content area is titled 'Add Attachment' and includes a dropdown menu for 'Add' with options 'Desktop File/ Text/ URL'. The 'Attachment Summary Information' section contains a 'Title' field (highlighted with a red box and yellow background), a 'Description' field, and a 'Category' dropdown set to 'From Supplier'. The 'Define Attachment' section includes a 'Type' dropdown with options 'File' (selected), 'URL', and 'Other', and a 'Choose File' button next to a text input field.

Step 2A: File naming convention if document has an expiration date and refers to a value

2A: File naming convention: (File Type) | (Expiration Date) Exp MM-DD-YYYY | \$# (value) | #### (supplier number)

Example highlighted

Title ^	Type ^	Description ^	Category ^	Last Updated By ^	Last Updated ^
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	15-J
LEGAL HOLD	File	124,000 - LEGAL EMAIL REQUES...	From Supplier	RODRIGUEZWE	05-F
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	11-F
SUPPLIER SITE MAINTENANCE	File		From Supplier	RODRIGUEZWE	04-A
CALL BACK PROCEDURE	File		From Supplier	RODRIGUEZWE	06-J
COI EXP 04-01-2024 \$6M 7017	File		From Supplier	SCHROEDERM	07-M

Shipments Planning Finance Product Administration Assessments Manage Supplier Broker

General

Organization Name DONOFRIO GENERAL CONTRACTORS CORP

Supplier Number 7017

Alias

Parent Supplier Name

Parent Supplier Number

*Note: You can find supplier number under “General” on your “Administration” page

Step 2B: File naming convention for documents without expiration dates or an associated dollar value

2A: File naming convention: (File Type) | #### (supplier number)

Example highlighted

Title ^	Type ^	Description ^	Category ^	Last Updated By ^	Last Updated ^
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	15-J
LEGAL HOLD	File	124,000 - LEGAL EMAIL REQUES...	From Supplier	RODRIGUEZWE	05-F
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	11-F
SUPPLIER SITE MAINTENANCE	File		From Supplier	RODRIGUEZWE	04-A
CALL BACK PROCEDURE	File		From Supplier	RODRIGUEZWE	06-J
W9 7017	File		From Supplier	SCHROEDERM	07-M

Shipments Planning Finance Product Administration Assessments Manage Supplier Broker

General

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