Outside Inc – Vendor Onboarding Form Comprehensive Developer Document

Main Vendor Information

Field Name	Field ID	Notes
Type (Select Individual or Company) *	custrecord_vr_category	List/Record
First Name	custrecord_vr_indivfirstname	Optional/hidden when Type = Company
Last Name	custrecord_vr_indivlastname	Optional/hidden when Type = Company
Company Legal Name*	custrecord_vr_companyname	Mandatory when type = Company
DBA	custrecord_vr_dba	Optional
Purchasing Contact*	custrecord_vr_primary_contact	
Purchasing Contact Email*	custrecord_vr_email	
Main Accounting Contact	custrecord_vr_mainacctcontact	Optional
Main Accounting Contact Email	custrecord_vr_mainacctcontactemail	Optional
Phone #*	custrecord_vr_phone	
Name of Outside Rep Contact	custrecord_vr_requested_by + custrecord_vr_requested_bylastname	Show this as inline edit/view only since it will be prepopulated.
Vendor Comments*	custrecord_vr_addtlveninfo	Larger Text Box/Text Area.
Reinforcement of Company Payment Terms (Net 30, Monthly payments)	custrecord_vr_payment_terms	Defaulted value, leave as inline text.
Tax ID XX-XXXXXXX*	custrecord_vr_tax_id	Mandatory if Type {custrecord_vr_category} = Company. If Country {custrecord_vr_vendorcountry} = United States require "XX-XXXXXXX" format.
SSN XXX-XX-XXXX*	custrecord_vr_ssn	Mandatory if Type {custrecord_vr_category} = Individual and Country {custrecord_vr_vendorcountry} = United States. Require "XXX-XX-XXXX" format.
Non-US Tax ID	custrecord_vr_foreigntax_id	Mandatory if Type {custrecord_vr_category} = Company and Country

		{custrecord_vr_vendorcountry} != United States.
Tax Classification*	custrecord_vr_taxclassification	List/Record

Legal Address

Field Name	Field ID	Notes
Country*	custrecord_vr_country	
Addressee*	custrecord_vr_addressee	
Address Line 1*	custrecord_vr_addr1	
Address Line 2	custrecord_vr_addr2	
City*	custrecord_vr_city	
State/Province	custrecord_vr_state	Free-Form Text
Zip Code*	custrecord_vr_zip	

Vendor Documents

Field Name	Field ID	Notes
W-9/W-8*	custrecord_vr_w9	Always Mandatory
Certificate of Insurance	custrecord_vr_certofinsurance	
SOC	custrecord_vr_soccertificate	
Data Breach Report	custrecord_vr_databreachreports	Always Optional
OFAC Check	custrecord_vr_ofaccheck	

Document Type	<100k	>100k	>200k
W-9	X	X	X
SOC			
Certificate of Insurance			X
Data Breach Reports			
OFAC check?			X

DEVELOPER NOTE: Document mandatory status dependent on Anticipated Annual Spend {custrecord_vr_anticipatedspend}. The list is text-based so will need to just map based on the below.

Anticipated Annual Spend List Name
$0 - $5,000
$1,000,000 +
$100,000 - $200,000
$200,000 - $1,000,000
$25,000 - $100,000
$5,000 - $25,000

Small Business Categories

Field Name	Field ID	Notes
Small Business?	custrecord_vr_smallbiz	Hide below unless this field is checked. Optional.
NAICS Code	custrecord_vr_naicscode	Free-Form Text
Number of Employees	custrecord_vr_numemployee	Free-Form Text.
Women-Owned Business?	custrecord_vr_womenownedbiz	Checkbox
Veteran Owned Business?	custrecord_vr_vetownedbiz	Checkbox
HUBZone Small Business?	custrecord_vr_hubzone	Checkbox

Affirmative Action Acknowledge?	custrecord_vr_affirmaction	Checkbox
Minority-Owned Small Business?	custrecord_vr_minorityosb	Checkbox
Service-Disabled Veteran-Owned Small Business?	custrecord_vr_sdvosmallbiz	Checkbox
Anti-Human Trafficking Policy?	custrecord_vr_antihtp	Checkbox
Sustainability Report Available?	custrecord_vr_sustreport	Checkbox
Anti-Bribery & Anti-Corruption Policy?	custrecord_vr_antibribcorrup	Checkbox
GHG Emissions Calculated?	custrecord_vr_ghgemission	Checkbox
GHG Emissions Audited?	custrecord_vr_ghgaudit	Checkbox
GHG Emission Amounts	custrecord_vr_ghgemissionamount	Free-Form Text

DEVELOPER NOTE: Include the same "Not sure? Please see U.S. Small Business Administration guidelines link" as done in previous implementation.

Outside Inc – Wire Information Form

Example Link to Google Form

General Notes

- ALWAYS have them select Currency {custrecord_vr_currency} first, then based off of the selection is when the respective fields are shown or hidden for each currency.
- For USA, before showing fields ask if bank is located within the United States or not. Depending on that answer show fields as shown below.
- Only other major outlier is Hong Kong Dollar (HKD) – always ask first: Do you have an FPS ID?. Then display fields depending on Yes or No answer.
- Legal Disclaimer {custrecord_vr_legaldisclaimercheckbox} is a checkbox and is on each form. We need text displayed above the checkbox that says:
  - "I (we) hererby authorize Outside Interactive Inc. or its affiliated entities (THE COMPANY) to initiate entries to my (our) checking/savings accounts at the financial institution listed below (THE FINANCIAL INSTITUTION), and, if necessary, initiate adjustments for any transactions credited/debited in error. This authority will remain in effect until THE COMPANY is notified by me (us) in writing to cancel it in such time as to afford THE COMPANY and THE FINANCIAL INSTITUTION a reasonable opportunity to act on it."
  - Checkbox Label: Do you agree?

Banking fields that are always shown at the top.

Field Name	NetSuite Field Internal ID	Field Type
Currency*	custrecord_vr_currency	List/Record
Payment Method*	custrecord_vr_paymenttype	When Currency is USD/CAD, set to ACH/EFT.
Bank Country*	custrecord_vr_bankcountry	List/Record
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox – MANDATORY. Include above disclaimer text above this.

USD (US Dollar) – BANK IN USA - IMPORTANT

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
ACH Routing Number*	custrecord_vr_bankroutingnumber	Free-Form Text (9-digit)
Account Number*	custrecord_vr_accountnumber	Free-Form Text
Account Type*	custrecord_vr_accountype	List/Record
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email for Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

NOTES:

- Just base this off of Bank Country {custrecord_vr_bankcountry}
  - If United States, do the above.
  - If NO, do the below.
    - IBAN / Account Number is Account Number {custrecord_vr_accountnumber} field, we just need label to show like that.

United States Dollar

Is your bank located in the United States? *

○ Yes

○ No

USD (US Dollar) – BANK OUTSIDE OF USA - IMPORTANT

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
SWIFT/BIC Code*	custrecord_vr_bicswift	Free-Form Text
IBAN / Account Number*	custrecord_vr_accountnumber	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email for Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

EUR (Euro)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
IBAN*	custrecord_vr_intl_iban	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Account Type*	custrecord_vr_accounttype	List/Record
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

ARS (Argentina Peso)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
Account Number (CBU) *	custrecord_vr_cbuaccountnumber	Free-Form Text
Tax ID: CUIL / CUIT*	custrecord_vr_cuilcuit	Free-Form Text
Account Type*	custrecord_vr_accounttype	List/Record
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text

	custrecord_vr_legaldisclaimercheckbox	Checkbox
Legal Disclaimer*		

AUD (Australian Dollar)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
BSB Code*	custrecord_vr_intl_bsbcode	Free-Form Text
Account Number*	custrecord_vr_accountnumber	Free-Form Text
Account Type*	custrecord_vr_accountype	List/Record
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

CAD (Canadian Dollar) - IMPORTANT

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
Institution Number (3 digits)*	custrecord_vr_intl_fininstnum	Free-Form Text
Transit Number (5 Digits) *	custrecord_vr_intl_branchtransnum	Free-Form Text
Account Type*	custrecord_vr_accountype	List/Record
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
Account Number*	custrecord_vr_accountnumber	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

CLP (Chilean Peso)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
Account Number*	custrecord_vr_accountnumber	Free-Form Text

Recipient's RUT number (Rol Único Tributario)	custrecord_vr_rut	Free-Form Text
Account Type*	custrecord_vr_accounttypespanish	List/Record
Recipients Phone Number*	custrecord_vr_bankhpone	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

NOTES: ACCOUNT TYPE IS DIFFERENT FOR CHILE, DIFFERENT FIELD, AND LIST.

GBP (Pound Sterling)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
UK Sort Code*	custrecord_vr_intl_banksortcode	Free-Form Text
Account Number*	custrecord_vr_accountnumber	Free-Form Text
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

HKD (Hong Kong Dollar)

Field Name	NetSuite Field Internal ID	Field Type
Do you have an FPS ID? *	custrecord_vr_hkdfpdid	List/Record (Yes/No)
IF FPS ID = YES) Email, FPS ID, or Mobile Number Linked to Recipient's Account * +852-56781234 / abc@email.com / 123456789*	custrecord_vr_fpsidisyes	Free-Form Text (Mandatory if previous field is 'Yes'
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
Account Number*	custrecord_vr_accountnumber	Free-Form Text
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text

City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

NOTES:

- IF YES:
  - Full Name of Account Holder, Email/FPS ID/Mobile Number Linked to Recipient's Account, City, Recipients Address, Post Code, Email for Remittance, Name (if diff), Legal Disclaimer.
- IF NO:
  - Full name of Account Holder, Bank Name, Account Number, City Recipients Address, Post Code, Email for Remittance, Name (if diff), Legal Disclaimer.

Hong Kong Dollar

Do you have an FPS ID? *

◯ Yes

◯ No

MXN (Mexican Peso)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
CLABE*	custrecord_vr_clabe	Free-Form Text
CURP (optional)	custrecord_vr_curp	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox
Account Number*	custrecord_vr_accountnumber	Free-Form Text
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text

NZD (New Zealand Dollar)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
Account Number (00-0000-0000000-00)*	custrecord_vr_accountnumber	Free-Form Text
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

NOTES: Account Number Label should show as: Account Number (00-0000-0000000-00)

SGD (Singapore Dollar)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
Account Number*	custrecord_vr_accountnumber	Free-Form Text
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox

Other (NOT LISTED)

Field Name	NetSuite Field Internal ID	Field Type
Full Name of Account Holder*	custrecord_vr_fullnameaccountholder	Free-Form Text
SWIFT / BIC CODE*	custrecord_vr_bicswift	Free-Form Text
IBAN / Account Number	custrecord_vr_accountnumber	Free-Form Text
Bank Name*	custrecord_vr_receivingbankname	Free-Form Text
City*	custrecord_vr_intl_bankcity	Free-Form Text
Recipient Address*	custrecord_vr_intl_bankstreetaddress	Free-Form Text
Post Code*	custrecord_vr_intl_postalcode	Free-Form Text
Email For Remittance*	custrecord_vr_remittanceemail	Email
Name (if different from account holder name	custrecord_vr_differentname	Free-Form Text
Legal Disclaimer*	custrecord_vr_legaldisclaimercheckbox	Checkbox