## Vendor Customer Modification - Master Address Modification

## <u>Scenario</u>

NOTE: If a new address is needed, Ex: add a payment (Remit To) address) and/or ordering address, create it on the Address Information section of the VCM. Instructions are at the end of master address modification instructions.

A Vendor Customer Modification (**VCM**) document is created to modify or add information on a current Vendor record. This document is used to update the Vendor Customer table information, Customer Account Options table information, and 1099 Reportable Information table information. No agency approvals are required on the **VCM**. Once submitted, the document will route to Finance Statewide Accounting for review and approval.

One of the most common uses of the **VCM** document is to change the Master address on a current Vendor record. The following steps will walk you through the process of changing the master address for a vendor.

 To go to the VCUST table and bring up the vendor record, click on the Accounts Payable Workspace at the top of the screen and select the VCUST link. Or, you can type VCUST in the Jump To box at the top of the screen, then click Go.

			Jump to:	🟦 Go	😭 Home	& Personalize	Accessibility	App Help	🐔 About	U
	Procurement	Accounts Payable	Accounts Receivable	Cost Accou	unting Bud	get				
Vendor Maintenance			-							
This section includes the vendor/customer inquiry (VCUST) as well as the d Vendor Inquiries	locuments (V	CC and VCM) used	to add/modify vendor	records.						
Vendor Transaction History (VTH)	uie.									
Vendor Documents										
New vendor/customer records are added on the VCC document. Modifications to existing	vendors/custor	mers are processed on	the VCM document. State	wide Account	ting Services	will approve both	documents.			

## 2. Click Search.

3. Enter the name or vendor code Click **OK**. The vendor record(s) will be displayed. If there are multiple records, **click to highlight and open the record to be updated**. **Review** the existing vendor record to see how it is set up before continuing with the VCM. Knowing this will help with the modification process.

Legal Name : JOHN *SMITH* Last Name :   Alias/DBA : Vendor Active Status : V	-
Alias/DBA : Vendor Active Status : V	
Vendor/Customer : Customer Active Status : V	
Taxpayer ID Number : VSS Registered : 🗸	
Ok Clear Cancel	

4. Go to the **Address Section** to see if there is only one, or if there are multiple addresses. Addresses will have Codes. (Ex: AD001, AD002, etc. If the vendor registered on the KY Vendor Self Service site, the Codes will be AR001, AR002, etc).

Address								
Address Ty	pe Street 1	City	State/Province	Zip/Postal Code	Principal Contact			
✓ Payment	10309 OAK GROVE RD	LOUISVILLE	KY	40291	NO CONTACT IDENTIFIED			
Ordering	10309 OAK GROVE RD	LOUISVILLE	KY	40291	NO CONTACT IDENTIFIED			
First Prev Next L	.ast							
Save Undo Delete Insert Copy Paste 🔿 🕏								
Vendor	/Customer: VC000007157	8			Active From : 05/06/200	6		
Ada	JOHN SMITH				Active To: 06/30/204	0		
Add	Payment	$\checkmark$			Default Record : 🔽			
Division/D	epartment :				Mail Returned :			
Additional Ad	dress Info. :				Active Address : Yes			
Prevent New	/ Spending :							
Defaul	t Currency : USD - US Dolla	ar		<b>~</b>				
Address	Information							
Address I	D: AD001	👌 Countr	y Phone Code :	1				
Street	1: 10309 OAK GROVE RD		Phone :	999-999-9999				
Street	2:	Ph	one Extension :					
Cit	Y: LOUISVILLE		County:	<u></u>				
State/Provinc	e: <sub>KY</sub>		County Name :					
Zip/Postal Cod	e: 40291		Country :	us 📤				

5. Click back on the **Vendor Customer Section** to continue with creating the VCM. At the bottom of this screen, click on <u>Modify Existing Record</u> to generate the VCM from the Create Document screen.

Тор								
CREATE DOCUMENT> Create New Record Modify Existing Record								
UPDATE> de <u>Headquarters</u>	Add 1099 Information Entry	Add 1042-S Reporting Information Entry	Vendor Business Types By Commodity					

- On the Create Document screen, enter your Dept #, no Unit is needed. Check <u>Auto</u> <u>Numbering</u>. Click on <u>Create Document</u>. A VCM is generated with the vendor code and all the information that was on the Vendor/Customer section of the vendor record.
- 7. On **Header**, in the **Document Description** field, enter the reason for the modification. (EX: Change the Master Address)
- 8. Go to the Master Address section, Insert a New Line.
- 9. From the Line Action Dropdown box, choose Modify.
- 10. Open the **Modify Existing Address** tab. From the **Pick List** DropDown Box, **select** the **Address Code** to be changed.

Master A	Address	Total Lines: 1	Line Action: Modify	Address ID:		
	Line Action	Address ID	Street 1	Street 2	City	
Modify						
From 1 to 1 Tot	tal: 1					
Add New M	He aster Address Mo	Line Action: Modify 🗹 🗲 eadquarters:	s Address Informa	tion		
		Address ID:	<u></u>			

- 11. On the **Address Information** tab, remove the old address information and type in new address, telephone number, email etc.
- 12. NOTE: If you are changing the Master Address, click back on the Vendor/Customer section. Also enter the new address in the Location Name field. By making the Location Name and the Master Address the same, it will make the vendor search easier to choose the vendor you need when searching on the VCUST table. IF the Location Name has an Agency name in it, such as for Revenue Use Only, KIA Use Only, etc, do not change it. There may be EFT banking information that is specific to that agency's payments on this particular vendor record.

These screenshots are for information only, no action to be taken.

VCM View of Location Name

Vendor/Customer	Total Lines: 1	Line Action: Modify	/ Legal Name	: JOHN SMITH
Line Action	Lega	l Name		Vendor Active
Modify	JOHN SMITH		Active	
From 1 to 1 Total: 1				First Previous Ne:
Line Acti Vendor/Custom General Information Headquarters C Summary of Approval Modifications Exe	on: Modify V Her: VC0000071578 Organization Disb	ursement Options	Prenote/EFT	Remittance Advice
	Alias/DBA:			
Local	tion Name: 10309 0	AK GROVE RD		
Le	egal Name: JOHN S	мптн		
De	epartment:	<b>1</b>		
	Unit:	<b>2</b>		
Ac	tive From: 05/05/2	006		

## VCUST View of the Location Field

General Info			
Vendor/Customer :	VC0000071578	Restrict Use by Department :	
Legal Name :	JOHN SMITH	Miscellaneous Account :	
Alias/DBA :		Internal Account :	
Vendor Active Status :	Active 🗸	Third Party Only :	
Vendor Approval Status :	Complete	Third Party Vendor :	
Customer Active Status :	Inactive 🗸	Third Party Customer :	
Customer Approval Status :	Incomplete	Inventory Customer :	
Location Name :	10309 OAK GROVE	RD Never Archive :	
First Name :	JOHN	Restrict VSS Access :	No 🗸
Middle Name :		Discontinue - No New Business :	
Last Name :	SMITH	Prevent MA Reference :	
Company Name :		PunchOut Enabled :	
Vendor Performance Rating :		Re-PunchOut Enabled :	
		Electronic Order Enabled :	
		Active From :	05/05/2006
		Active To :	06/30/2040
		Last Usage Date :	05/07/2006
		Department :	2
		Unit :	2

- 13. Click **Validate**. After the VCM validates successfully, it will be submitted.
- 14. Click **Submit**, the VCM will go to Pending Status for approval. **VCC**s and **VCMs** will route to a vendor worklist and are reviewed and approved by the Finance Statewide Accounting or Customer Resource Center office.

NOTE: To add an additional address, use the **Address Information** section, not the Master Address.

- 1. Insert a New Line.
- 2. Line Action will be New.
- 3. Choose the new Address Type from the Drop Down box and check the Auto-Generate box.
- 4. Go to the Address Information tab, type in the new address and phone number, etc.
- 5. Go to the **Contact Section below the address** and **choose a contact** from the **Pick List** for this address.

If a new Payment and Ordering address are both needed, copy this line by clicking on the double pages icon on the far right. Then click on Insert Copied Line at the bottom of the screen. You will see 2 lines and both will have the Payment Address Type. On the second line, change the Address Type to Ordering.

- 6. Click Validate
- 7. Click **Submit**.

Ac	Idress Informatior	ı	Total Lines: 1 Line Ac	tion: Ad	dress ID:	Add	ress Type:			
	Line Action	Address ID	Address Type	Street 1	City	State	e/Province	Zip/Postal Code	Principal Co	ntact Additional Addre
From 1	to 1 Total: 1									
		Line Actions	New							
		Line Action:	New V							
		Vendor/Customer:								
	Bypass	Address Validation:								
		- diffe Theorem Andrews	Addes a lafe and for	Others Andre			Describe (EEE	Densillen er Artier		Our test & data and later and the
Add	New Address	odily Existing Address	Address mormation	Other Add	ress mor	mauon	Prenole/EFT	Remillance Advice	Contact mormation	Contact Address Information
	New Ac	dress Type: Paymen	nt 🔽					New Ad	dress ID:	仓
	Auto-Generate:									
			<b>`</b>							
									· · ·	

