

Vendor Customer Modification - Master Address Modification

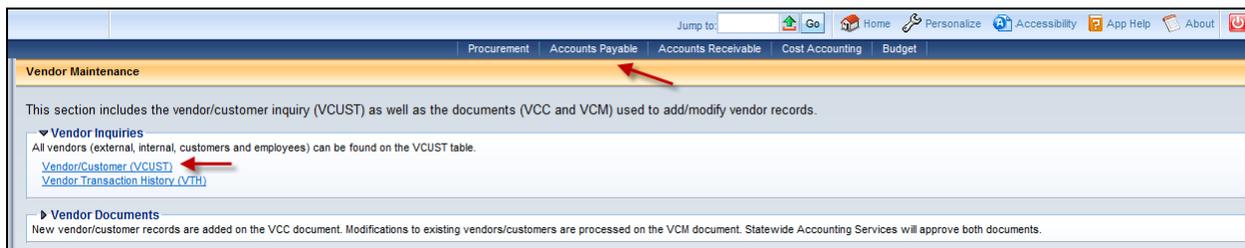
Scenario

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.

1. 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**.



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.

6. On the Create Document screen, enter your **Dept #**, no Unit is needed. Check **Auto Numbering**. Click on **Create Document**. 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.

The screenshot shows a web interface for managing Master Addresses. At the top, there is a header bar with the text "Master Address", "Total Lines: 1", "Line Action: Modify", and "Address ID:". Below this is a table with columns for "Line Action", "Address ID", "Street 1", "Street 2", and "City". The table contains one row with the value "Modify" in the "Line Action" column. Below the table, there is a navigation bar with buttons for "First", "Previous", and "Next", and a status indicator "From 1 to 1 Total: 1". The main content area has a "Line Action" dropdown menu set to "Modify", a "Headquarters" text input field, and three tabs: "Add New Master Address", "Modify Existing Master Address" (which is selected), and "Address Information". Below the tabs, there is an "Address ID" pick list dropdown menu with a green up arrow icon. Red arrows in the image point to the "Line Action" dropdown and the "Address ID" pick list.

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			
Line Action	Legal Name	Vendor Active	
Modify	JOHN SMITH	Active	

From 1 to 1 Total: 1

Line Action:

Vendor/Customer:

General Information | Headquarters | Organization | Disbursement Options | Prenote/EFT | Remittance Advice

Summary of Approval Modifications | Executive Compensation

Alias/DBA:

Location Name:

Legal Name:

Department:

Unit:

Active From:

VCUST View of the Location Field

▼ General Info

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

13. Click **Validate**. After the VCM validates successfully, it will be submitted.
14. Click **Submit**, the VCM will go to Pending Status for approval. **VCCs** 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**.

'. Below this is a tabbed interface with tabs: 'Add New Address', 'Modify Existing Address', 'Address Information', 'Other Address Information', 'Prenote/EFT', 'Remittance Advice', 'Contact Information', and 'Contact Address Information'. The 'Address Information' tab is active. At the bottom of the form, there are: 'New Address Type: Payment' (with a red arrow pointing to the dropdown), 'New Address ID:' (text input with a green up arrow icon), and 'Auto-Generate: ' (with a red arrow pointing to the checkbox)."/>

Workflow

VCC and VCM documents route to a Worklist in Finance Statewide Account for review and approval. The agency/department does not approve them.