Vendor Customer Modification - Master Address Modification

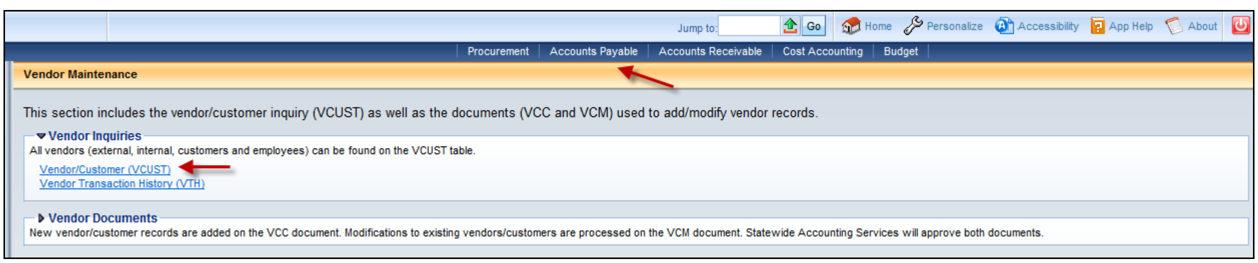
Scenario

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.

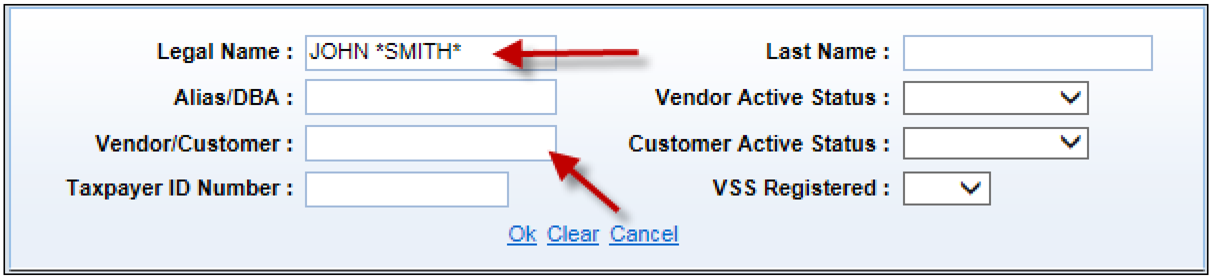
One of the most common uses of the **VCM** document is to change the Master address on a current Vendor record. The following steps will walk you through the process of changing the master address for a vendor.

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**.

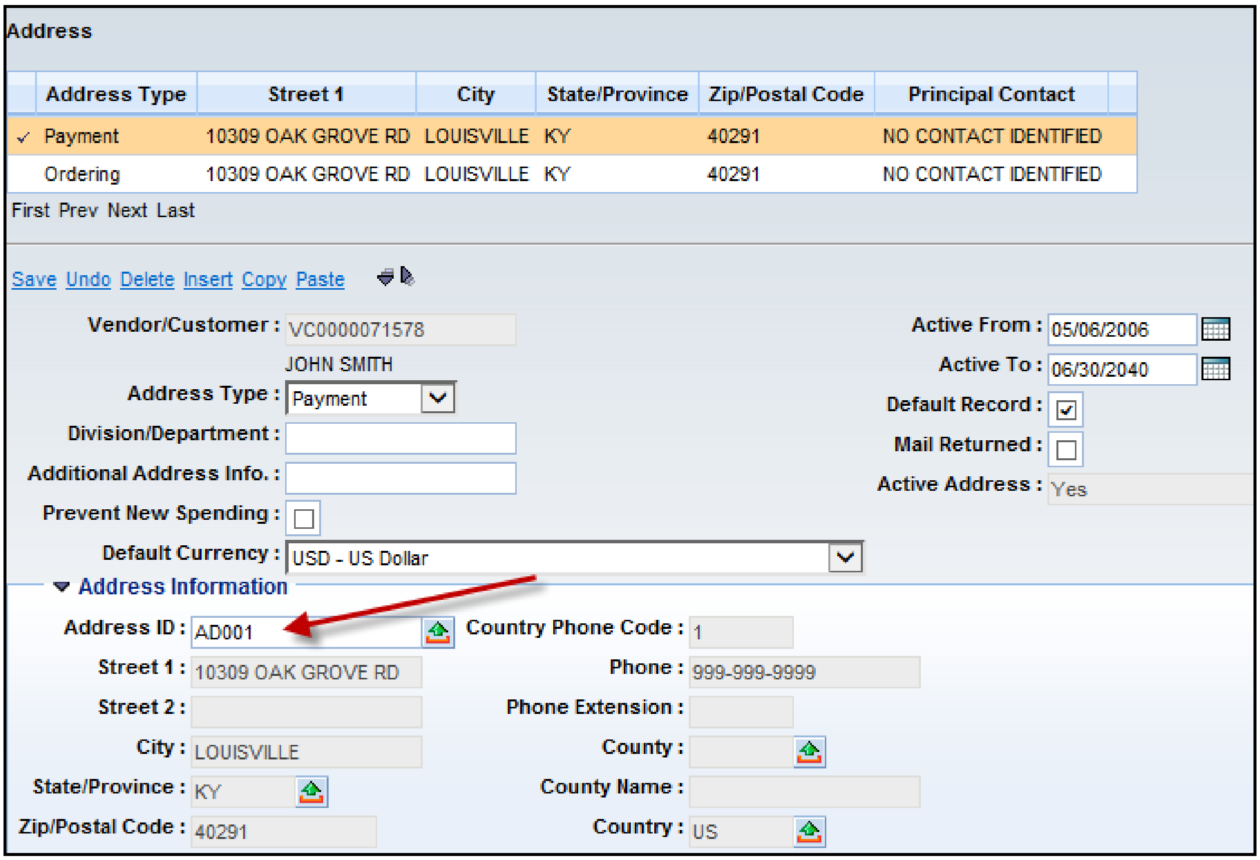


2. Click **Search**.

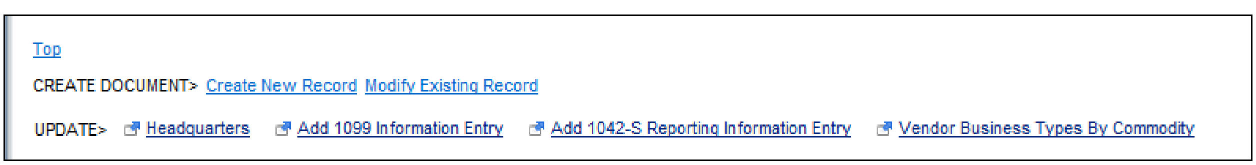
3. Enter the name or vendor code Click **OK**. The vendor record(s) will be displayed. If there are multiple records, **click to highlight and open the record to be updated**. **Review** the existing vendor record to see how it is set up before continuing with the VCM. Knowing this will help with the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



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).



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.



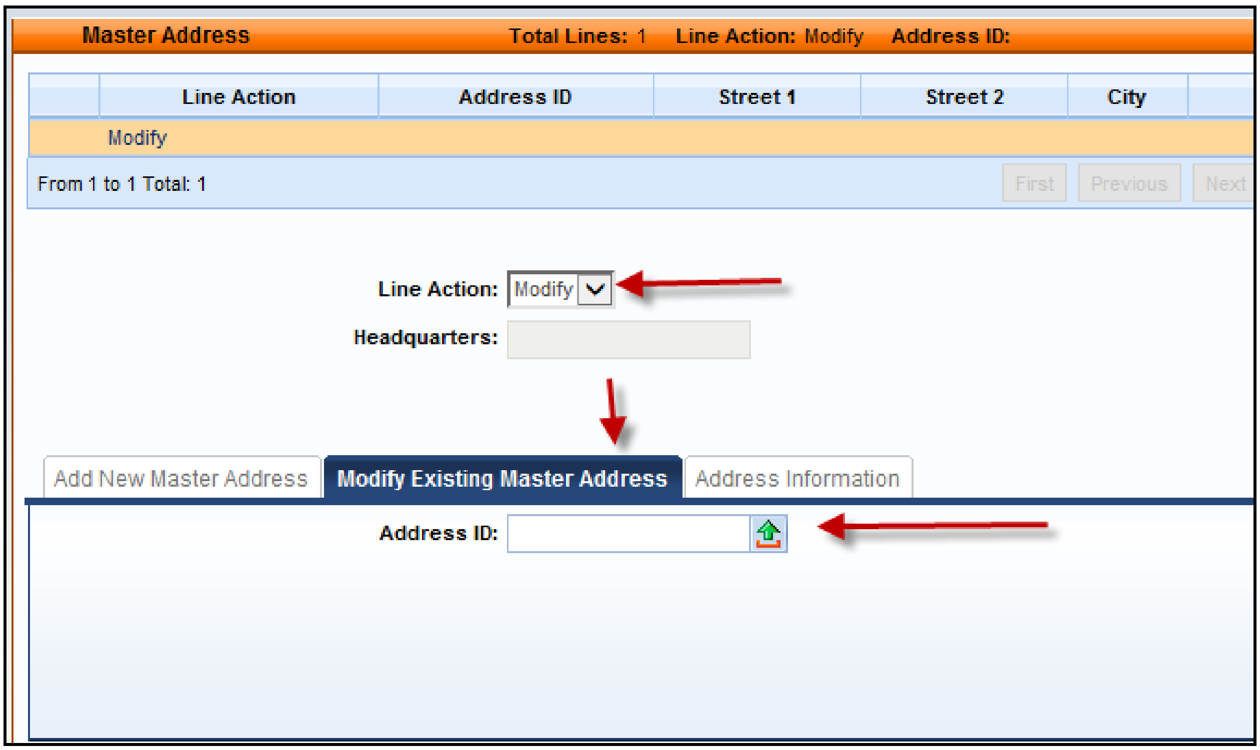
6. On the Create Document screen, enter your **Dept #**, no Unit is needed. Check **<u>Auto Numbering</u>**. Click on **<u>Create Document</u>**. A **VCM** is generated with the vendor code and all the information that was on the Vendor/Customer section of the vendor record.

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, **<u>Insert a New Line</u>**.

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.

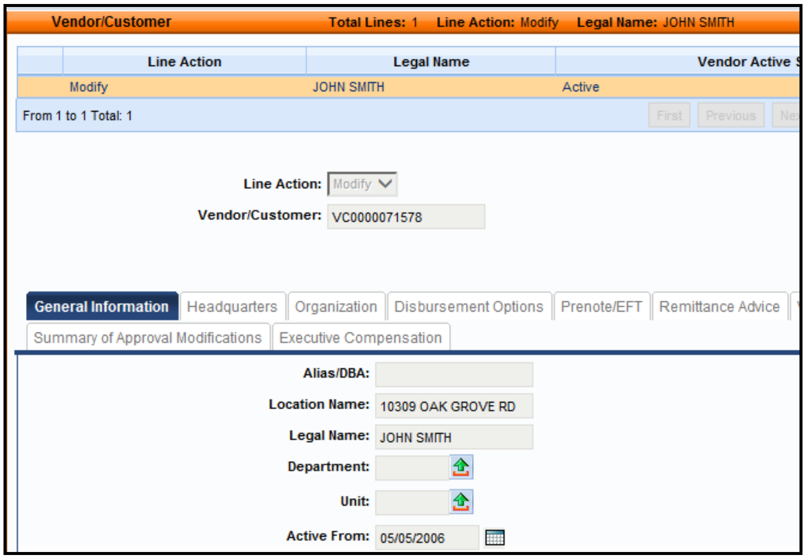


11. On the **Address Information** tab, remove the old address information and type in new address, telephone number, email etc.

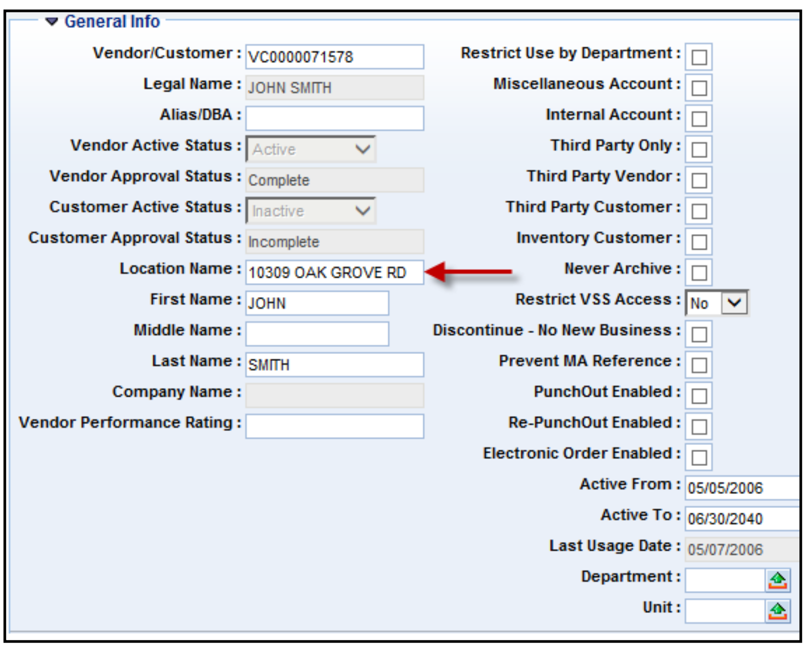
12. NOTE: If you are changing the **Master Address**, click back on the **Vendor/Customer** section. Also enter the new address in the **Location Name** field. By making the Location Name and the Master Address the same, it will make the vendor search easier to choose the vendor you need when searching 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



VCUST View of the Location Field



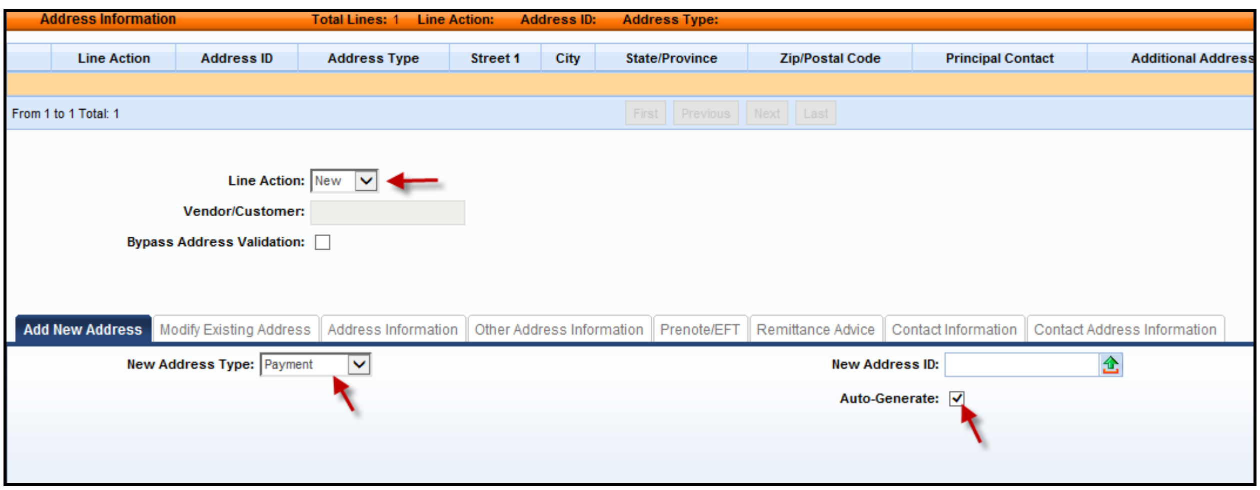
13. Click **Validate**. After the VCM validates successfully, it will be submitted.
14. Click **Submit,** the VCM will go to Pending Status for approval. **VCC**s and **VCMs** will route to a vendor worklist and are reviewed and approved by the Finance Statewide Accounting or Customer Resource Center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



Workflow

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