



Approving a Vendor Change/Modification (VCM)

quick reference guide

Introduction

Vendor Change Modification (**VCM**) is used to modify an existing Vendor profile, located in the Vendor Customer Table (**VCUST**). Open two sessions of Vantage Financial to approve the modification, so you can verify information from the VCUST while looking at the VCM.

Approving a VCM

1. From the home page, click on the **FIN Approvals (WRKLSTC)** quick link.
2. Under **Worklist**, select 'Vendor Change/Modification' from the drop-down.
3. Click **Apply**.
4. Select the **ID** number.



Financial Worklist ☆

Filters

Worklist (Selection will update the search results immediately)

Vendor Change/Modifications

Department

Level

ID

Code

Submitter ID

Apply

Reset

Grid Actions

1 - 9 of 9 Records

Code	Dept	ID	Assigned Date	Creator ID
VCM	063	250000	01/02/2025 12:45:11 p.m.	sandyolney
VCM	710	2550	01/02/2025 10:45:54 a.m.	cowann

5. Copy the **Vendor/Customer** number.

Vendor Change/Modification (VCM) ☆ Pending

Department: 063 | Unit: - | Transaction ID: 2500000063 | Version: 1

1 of 2: AD001 is being used as a PR address for this Vendor Customer record. (A2930)

Header	Vendor/Customer	Headquarters	Master Address (2)	Address	Contact	Certification	1099 Reporting Information
Line Action	Line Action	Line Action	Line Action	Line Action	Line Action	Vendor Active Status	Line Action

Attachments (1)

Created By: sandyolney | Created By Name: Sandy Olney | Created On: 01/02/2025 | Last Modified By: sandyolney | Last Modified By Name: Sandy Olney | Modified On: 01/02/2025 | Last Approved By: - | Last Approved By Name: - | Last Approved On: -

General Information

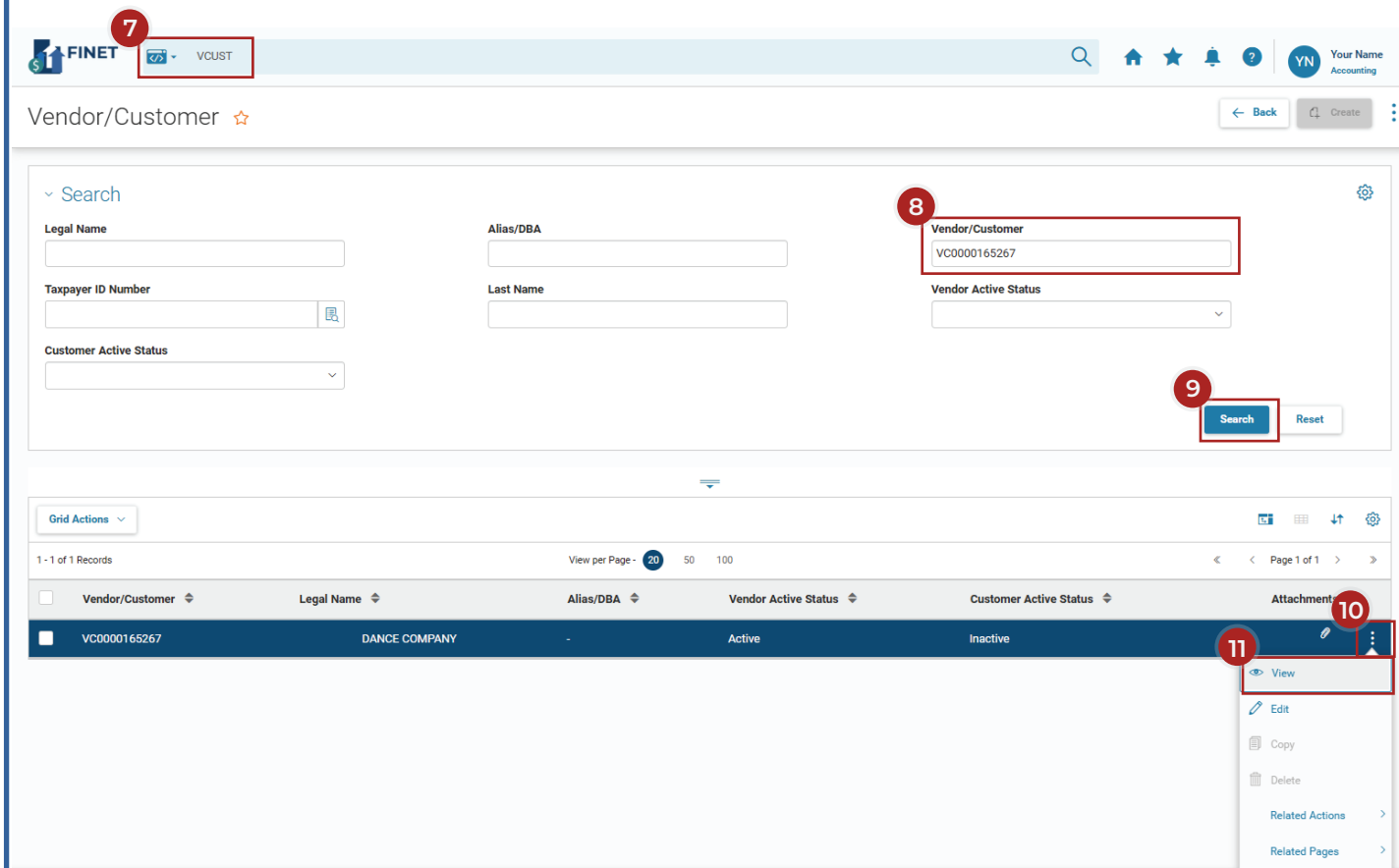
Vendor/Customer
VC0000173388

Legal Name
Kihomac, Inc

Headquarters
VC0000173388
Kihomac, Inc

6. Open another Vantage Financial tab in a new window.

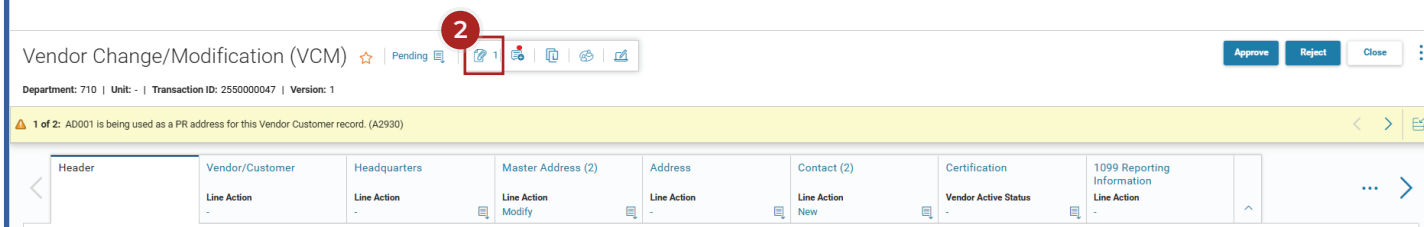
7. From the search bar, under the **Page Code**  search option, enter **VCUST**.
8. Paste the copied number in the **Vendor/Customer** field.
9. Click **Search**. The vendor line should populate.
10. Click on the row **3-dot menu**. 
11. Click **View**.



The screenshot shows the 'Vendor/Customer' search interface. At the top, a search bar contains 'VCUST' (callout 7). Below it, the 'Vendor/Customer' field is populated with 'VC0000165267' (callout 8). The 'Search' button is highlighted (callout 9). Below the search form is a table with one record: 'VC0000165267' | 'DANCE COMPANY' | 'Active' | 'Inactive'. The '3-dot menu' for this record is highlighted (callout 10), and the 'View' option in the dropdown menu is highlighted (callout 11).

VCM screen

1. Select the **Smart Menu**.  Vendor Change/Modification (VCM)  Pending 
2. From the attachment Summary pop-up, select the **Attachments**. 



The screenshot shows the 'Vendor Change/Modification (VCM)' screen. At the top, the 'Smart Menu' icon is highlighted (callout 1). Below it, the 'Attachments' icon is highlighted (callout 2). The screen displays a header section with various fields: Vendor/Customer, Headquarters, Master Address (2), Address, Contact (2), Certification, and 1099 Reporting Information. Each field has a 'Line Action' dropdown menu.

3. Open the attachment. Make sure the FI 170 and the W9 are filled out correctly. (a W9 needs a tax classification and a signature)
4. An authorized user needs to verify the legal name and TIN from <https://www.irs.gov/>

Attachment Summary

Attachments (1) History

Header (1)

VCM 255-47 01-02-24 St George Dance company FI-170.pdf 8.22 MB

Added Date: 01/02/2025 | Added By: cowann

Type: Standard

Comment

> Vendor/Customer (0)

> Headquarters (0)

> Master Address (0)

> Address (0)

Upload Close

5. Click on the **tab** that has a **Line Action** saying 'Modify.'

Vendor Change/Modification (VCM) ☆ Pending

Department: 710 | Unit: - | Transaction ID: 2550000047 | Version: 1

1 of 2: AD001 is being used as a PR address for this Vendor Customer record. (A2930)

Header Vendor/Customer Headquarters Master Address (2) Address Contact (2) Certification 1099 Reporting Information

Line Action Line Action Line Action Line Action Line Action Vendor Active Status Line Action

Headquarters: VC0000165267 | Headquarters Legal Name: ST GEORGE DANCE COMPANY

Grid Actions

1 - 2 of 2 Records View per Page: 20 50 100

Headquarters	Line Action	Address ID	Street 1	Street 2	City	State/Province	Zip/Postal Code	Attachments
VC0000165267	Modify	AD001	68 E Tabernacle St, Ste 11	-	St George	UT	84770	
VC0000165267	Modify	AD002	68 E Tabernacle St, Ste 11	-	St George	UT	84770	

VCUST screen

1. Click on the associated tab that has a change being made.
2. Verify the information is reflective of the change on the VCM screen. Remember, the modifications need to match the FI 170 information.

Vendor/Customer ♥ Edit Cancel

Vendor/Customer: VC0000165267 | Legal Name: ST GEORGE DANCE COMPANY | Alias/DBA: -

Vendor/Customer 1 Address (2) Certification (1) Authorized Department Prevent Spending Prevent Orders Commodity ... >

Add New Address

Grid Actions ▾

1 - 2 of 2 Records View per Page ▾ 20 50 100 Page 1 of 1 < >

Address ID	Address Type	Street 1	Street 2	City	State/Province	Zip/Postal Code	Principal Contact ID	Principal Contact	Default Record	Contact Phone	Email
AD001	Ordering	68 EAST TABERNACLE STREET, STE #10	-	ST GEORGE	UT	84770	-	-	Yes	-	-
AD002	Payment	68 EAST TABERNACLE STREET, STE #10	-	ST GEORGE	UT	84770	-	-	Yes	-	-

VCM screen

1. Click on the **Approve** button if all the information looks accurate.
2. Click **Close** to exit.

Vendor Change/Modification (VCM) ☆ Pending ⌵ ⌵

Department: 710 | Unit: - | Transaction ID: 2550000047 | Version: 1

1 of 2: AD001 is being used as a PR address for this Vendor Customer record. (A2930)

Header Vendor/Customer Headquarters Master Address (2) Address Contact (2) Certification 1099 Reporting Information

Line Action Line Action Line Action Modify Line Action New Vendor Active Status Line Action

Headquarters: VC0000165267 | Headquarters Legal Name: ST GEORGE DANCE COMPANY

Grid Actions ▾

1 - 2 of 2 Records View per Page ▾ 20 50 100 Page 1 of 1 < >

Headquarters	Line Action	Address ID	Street 1	Street 2	City	State/Province	Zip/Postal Code	Attachments
VC0000165267	Modify	AD001	68 E Tabernacle St, Ste 11	-	St George	UT	84770	
VC0000165267	Modify	AD002	68 E Tabernacle St, Ste 11	-	St George	UT	84770	

1 Approve Reject 2 Close

Rejecting a VCM

1. If you find errors, select the **3-dot menu**  in the upper-right corner.
2. Select **Comments** from the **Primary Actions** section.

Vendor Change/Modification (VCM)  Pending  

Department: 710 | Unit: - | Transaction ID: 255000047 | Version: 1

1 of 2: AD001 is being used as a PR address for this Vendor Customer record. (A2930)

Header	Vendor/Customer	Headquarters	Master Address (2)	Address	Contact (2)	Certification
	Line Action	Line Action	Line Action	Line Action	Line Action	Vendor Active Status
	-	-	Modify	-	New	-
Headquarters: VC0000165267 Headquarters Legal Name: ST GEORGE DANCE COMPANY						
Grid Actions 						
1 - 2 of 2 Records View per Page: 20 50 100						
Headquarters	Line Action	Address ID	Street 1	Street 2	City	State/Province
 VC0000165267	Modify	AD001	68 E Tabernacle St, Ste 11	-	St George	UT
 VC0000165267	Modify	AD002	68 E Tabernacle St, Ste 11	-	St George	UT

Approve

Reject

Close



Primary Actions

Unapprove

Reject All

Take Task

Return Task

Bypass Approvals

Change Priority

Manual Route

Recall from Workflow

Override

Remove Override

Collaborate

Comments

Copy

Reassign

Other Actions

Additional Transaction Information

Future Transaction Triggering

Schedule

Send Page

Print

View PDF

Download Transaction

Research

Track Work In Progress

Transaction History

Forms

Posting Line Inquiry

3. Click on the **plus** icon. 
4. Enter the **Subject**.
5. Expand the line. 
6. Enter the reason why you're rejecting the VCM in the **Comments** box.
7. Click **Save** when complete.

Transaction Comments

Code: VCM | Transaction Dept: 3 | Transaction ID: 25 | Transaction Unit: | Version: 1

Search

User

Subject

Phase

Date

MM/DD/YYYY

Search

Reset









1 - 1 of 1 Records View per Page: 20 50 100

Version

Date/Time

User

Phase

Subject

Attachments

1

01/02/2025 05:33 PM EST

mitchell

Pending

Transaction Code

VCM

Standard Comment Code

Transaction Dept. Code

* Comment

Transaction ID: 25

8. Click the **Reject** button.
9. Click the **Close** to exit.

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