



Creating a Customer Change/Modification (CCM)

quick reference guide

Introduction

The steps in this guide are divided into two sections for ease of reference. If you need to add both a *Billing Address* and a *Billing Profile*, you can complete both on the same CCM transaction—there is no need to create separate CCMs.

Look up Vendor number in [VCUST](#):

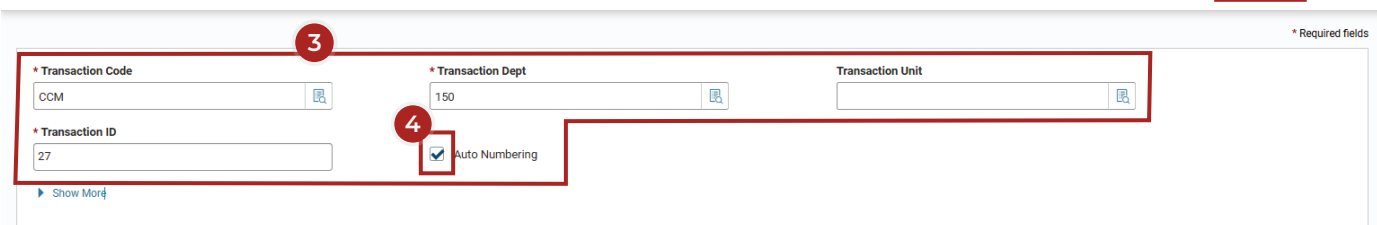
- Customer Profiles can have only one billing address, but can have multiple billing profiles.
- If the Customer status is *Active*, skip Step 1 and proceed to Step 2.
- If the Customer status is *Inactive*, complete Step 1. When the CCM has been submitted and approved by State Finance, you can add additional profiles. (Step 2)

1. CCM-Adding a Billing Address/Billing Profile

1. From the home page, click on the **Transaction Catalog** tile.

2. Click the **Create** button  **Create** in the upper-right corner.

Create Transaction



The screenshot shows the 'Create Transaction' form. Callout 1 points to the 'Transaction Catalog (DOCATLG)' tile in the top right. Callout 2 points to the 'Create' button in the top right corner of the form. Callout 3 points to the 'Transaction Code' field, which contains 'CCM'. Callout 4 points to the 'Auto Numbering' checkbox, which is checked. Callout 5 points to the 'Continue' button in the top right corner of the form. The form also includes fields for 'Transaction Dept' (150) and 'Transaction Unit'. A 'Show More' link is at the bottom left. A red asterisk indicates required fields.

3. Enter:

- **Transaction Code:** CCM
- **Transaction Department:** The department number for which this CCM is being created.
- **Transaction Unit:** Optional, but used for routing purposes.
- **Transaction ID:** Prefix should start with the last two digits of the current fiscal year (prefixes may vary as they are setup on the Auto Numbering Table **(ADNT)** by Finance per agencies request)

4. Click the **Auto Numbering** checkbox.

5. Click the **Continue** button in the upper-right corner.

The CCM draft is created.

Header tab

1. Enter the **Vendor Number**.
2. In the **Transaction Description** section, enter the reasoning behind the change. This helps the approver understand what you are trying to accomplish.

Customer Change/Modification (CCM)

Validate

Submit

Save

Save & Close

Department: 150 | Unit: - | Transaction ID: 2700000016 | Version: 1

1 of 2: 00 is being used as a PA address for this Vendor Customer record. (A2930)

Header

Vendor/Customer (1)

Headquarters

Customer Account

Master Address (1)

Address

Contact

Certification

Created By: | Created By Name: | Created On: 08/04/2026 | Last Modified By: | Last Modified By Name: | Modified On: 08/04/2026 | Last Approved By: - | Last Approved By Name: - | Last Approved On: -

General Information

Vendor/Customer

154

Transaction Name

Legal Name

Record Date

MM/DD/YYYY

Headquarters

Transaction Description

Tracking Number

-

Address tab

1. Create the line by clicking the insert button. 
2. Enter:
 - **Line Action:** enter 'New' from drop-down.
 - **New Address Type:** enter 'Billing' from drop-down.
 - **Generate Address ID:** enter 'Yes' from drop-down.
 - Enter **Address** (pull Payment address from VCUST information)
 - **Default Record:** enter 'Yes' from drop-down.

Customer Change/Modification (CCM)

Validate

Submit

Save

Save & Close

Department: 150 | Unit: - | Transaction ID: 2700000016 | Version: 1

1 of 2: 00 is being used as a PA address for this Vendor Customer record. (A2930)

Header

Vendor/Customer (1)

Headquarters

Customer Account

Master Address (1)

Address (1)

Contact

Certification

Line Action

Line Action

Line Action

Line Action

Line Action

Line Action

Line Action

Modify

-

-

Modify

New

-

-

Vendor/Customer:

Legal Name:

1

+

1 - 1 of 1 Records

View per Page: 20 50 100

2

Page 1 of 1

Line Action	Address ID	Address Type	New Address Type	Generate Address ID	Street 1	City	State/Province	Zip/Postal Code	Default Record	Attachments
New	-	-	Billing	Yes					Yes	

Certification tab

1. Create the line by clicking the insert button. +

2. Enter:

- **Customer Active Status:** enter 'Active' from drop-down.
- **Customer Approval Status:** enter 'Complete' from drop-down.

****NOTE:** If you receive an error that you need to Load Values after you validate, Load Values so that both the Vendor and Customer Active Status and Approval Status auto-populate. Then check to make sure that the Customer Active Status is set to "Active" and Customer Approval Status is set to "Complete."

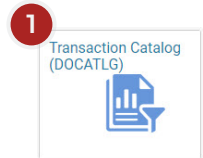
3. Click **Validate**.

4. Click **Submit** if there are no errors to adjust.

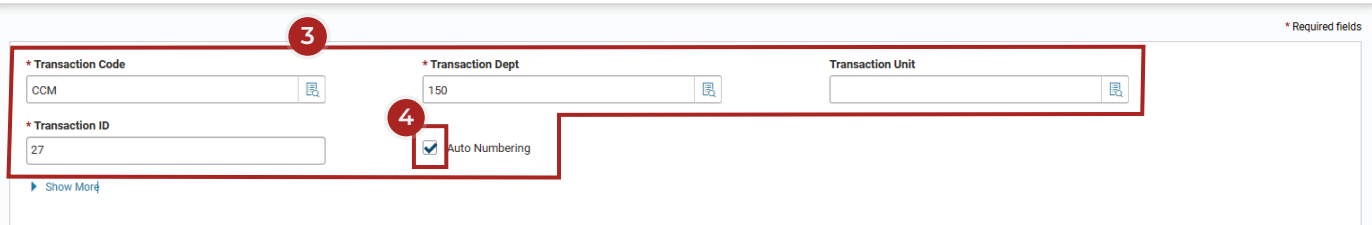
The screenshot shows the 'Customer Change/Modification (CCM)' interface. At the top right, there are buttons for 'Validate' (3), 'Submit' (4), 'Save', and 'Save & Close'. Below the header, a yellow warning banner states: '1 of 2: 00 is being used as a PA address for this Vendor Customer record. (A2930)'. The main content area has a tabbed interface with 'Certification (1)' selected. Under this tab, 'Vendor Active Status' is set to 'Inactive'. Below the tabs, there is a form with fields for 'Vendor/Customer' and 'Legal Name'. A red box with a '1' highlights the '+' button for adding a new line. Below this, a table shows the 'Customer Active Status' and 'Customer Approval Status' for the selected line. A red box with a '2' highlights these two status fields, which are currently set to 'Active' and 'Complete' respectively. The table also includes a 'Line Action' column with a 'Modify' button and an 'Attachments' column.

2. CCM-Adding a Billing Profile

1. From the home page, click on the **Transaction Catalog** tile.
2. Click the **Create** button  **Create** in the upper-right corner.



Create Transaction

A screenshot of the "Create Transaction" form. It has several input fields: "* Transaction Code" with "CCM", "* Transaction Dept" with "150", "Transaction Unit", and "* Transaction ID" with "27". There is a checkbox for "Auto Numbering" which is checked. A red box highlights the first four fields. A red circle with the number "3" is above the "Transaction Code" field, and a red circle with the number "4" is above the "Auto Numbering" checkbox. A "Show More" link is at the bottom left. A red circle with the number "5" is above the "Continue" button in the top right corner. A small asterisk and "Required fields" text are in the top right corner of the form area.

3. Enter:
 - **Transaction Code:** CCM
 - **Transaction Department:** The department number for which this CCM is being created.
 - **Transaction Unit:** Optional, but used for routing purposes.
 - **Transaction ID:** Prefix should start with the last two digits of the current fiscal year (prefixes may vary as they are setup on the Auto Numbering Table **(ADNT)** by Finance per agencies request)
4. Click the **Auto Numbering** checkbox.
5. Click the **Continue** button in the upper-right corner.

Header tab

1. Enter the **Vendor Number** OR **Customer Number**.
2. In the **Transaction Description** section, enter the reasoning behind the change. This helps the approver understand what you are trying to accomplish.

Customer Change/Modification (CCM) ☆ Draft

Department: 150 | Unit: - | Transaction ID: 2700000016 | Version: 1

1 of 2: 00 is being used as a PA address for this Vendor Customer record. (A2930)

Header Vendor/Customer (1) Headquarters Customer Account Master Address (1) Address Contact Certification

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

Modify Modify Modify Modify

Attachments

Created By: | Created By Name: | Created On: 08/04/2026 | Last Modified By: | Last Modified By Name: | Modified On: 08/04/2026 | Last Approved By: - | Last Approved By Name: - | Last Approved On: -

General Information

Vendor/Customer 154

Transaction Name

Legal Name

Record Date MM/DD/YYYY

Headquarters

Transaction Description

Tracking Number

☐ Send Comments to Vendor ☐ Never Archive

Customer Account tab

1. Create the line by clicking the insert button. +
2. Enter the **Line Action**: enter 'New' from drop-down.
3. Expand the line to view additional options.
4. Enter the **Billing Profile** - select from the pick-list to make sure all information auto-populates.
5. Enter the **Address ID** from the Address tab.
6. Click **Validate**.
7. Click **Submit** if there are no errors to adjust.

Customer Change/Modification (CCM) ☆ Draft

Department: 150 | Unit: - | Transaction ID: 2700000016 | Version: 1

1 of 2: 00 is being used as a PA address for this Vendor Customer record. (A2930)

Header Vendor/Customer (1) Headquarters Customer Account (1) Master Address (1) Address (1) Contact Certification (1)

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

Modify Modify Modify New Inactive

Attachments

Vendor/Customer: | Legal Name:

1 +

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

3 Line Action 2 Billing Profile Department Unit Billing Type Address ID 5 Attachments

New

Add New Customer Account Modify Existing Customer Account Customer Account Information Third Party Options

Billing Profile 40010 4 External Account

Department Unit