Division of Finance

quick reference guide

# Creating a Customer Change/Modification (CCM)

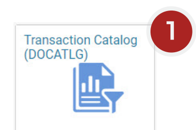
## Introduction

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:

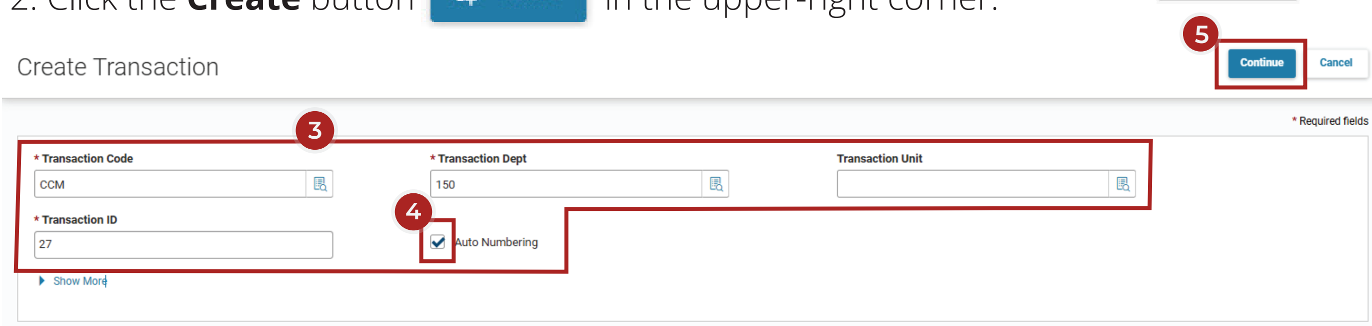
- Customer Profiles can have only one billing address, but can have multiple billing profiles.
- If the Customer status is *Active*, skip Step 1 and proceed to Step 2.
- If the Customer status is *Inactive*, complete Step 1. When the CCM has been submitted and approved by State Finance, you can add additional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






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.

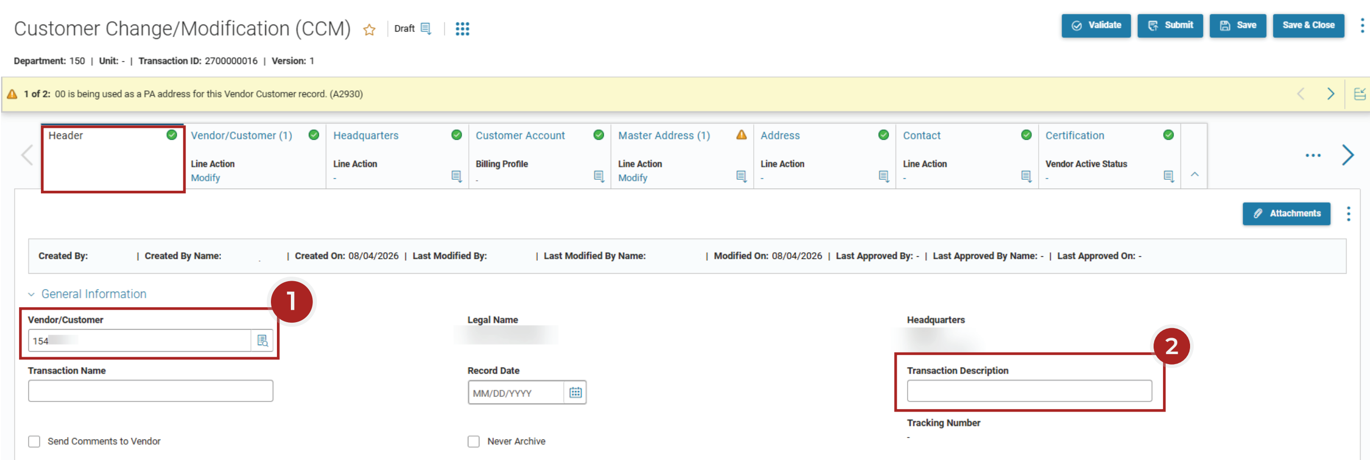
5. Click the **Continue** button in the upper-right corner.

The CCM draft is created.

## **Header** tab

1. Enter the **Vendor Number**.

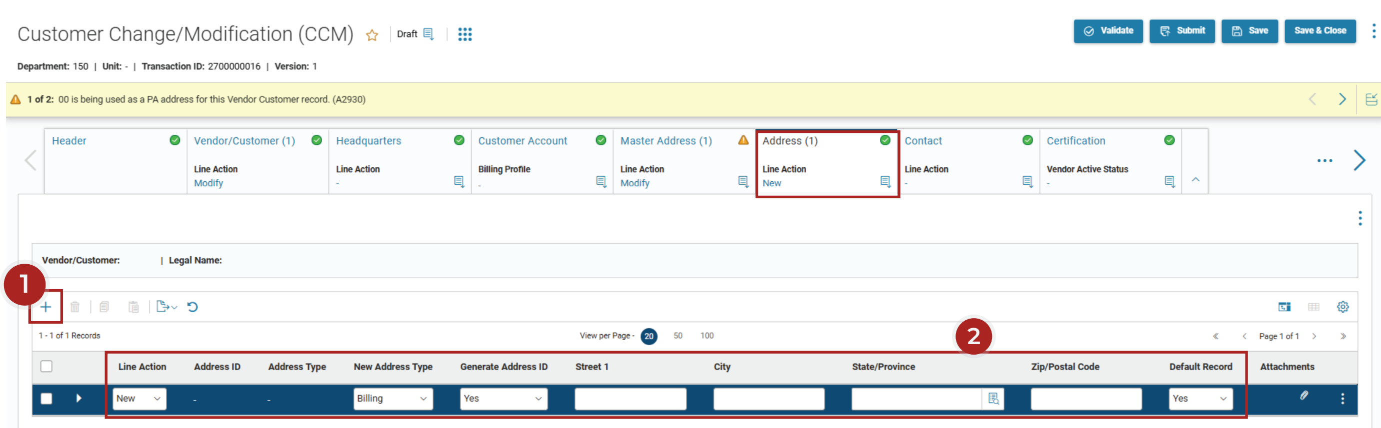
2. In the **Transaction Description** section, enter the reasoning behind the change. This helps the approver understand what you are trying to accomplish.




## **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.



**Certification** tab

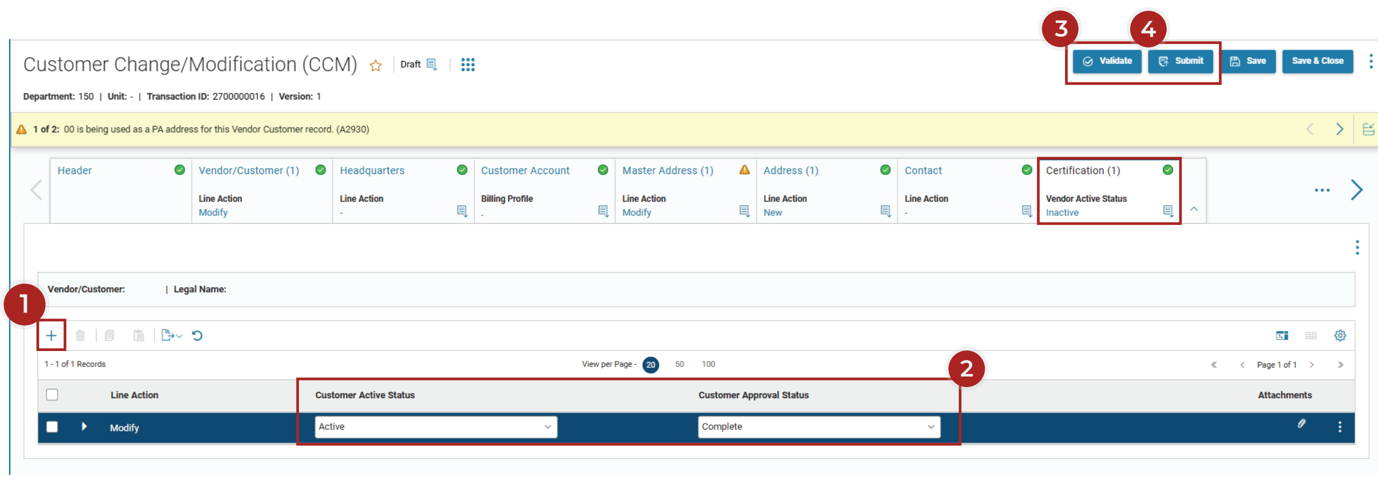
1. Create the line by clicking the insert button. +

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

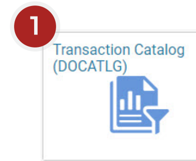
****NOTE:** If you receive an error that you need to Load Values after you validate, Load Values so that both the Vendor and Customer Active Status and Approval Status auto-populate. Then check to make sure that the Customer Active Status is set to "Active" and Customer Approval Status is set to "Complete."

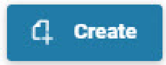
3. Click **Validate**.

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

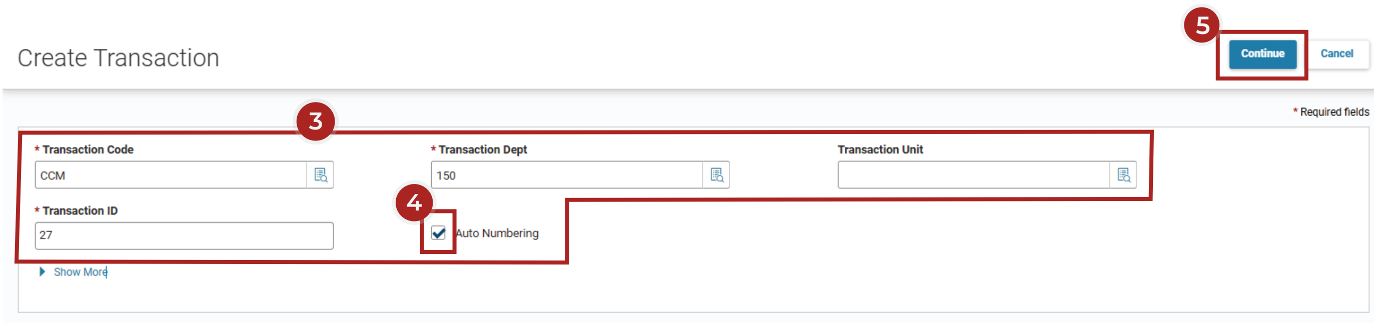


## 2. CCM-Adding a Billing Profile




1. From the home page, click on the **Transaction Catalog** tile.
2. Click the **Create** button 

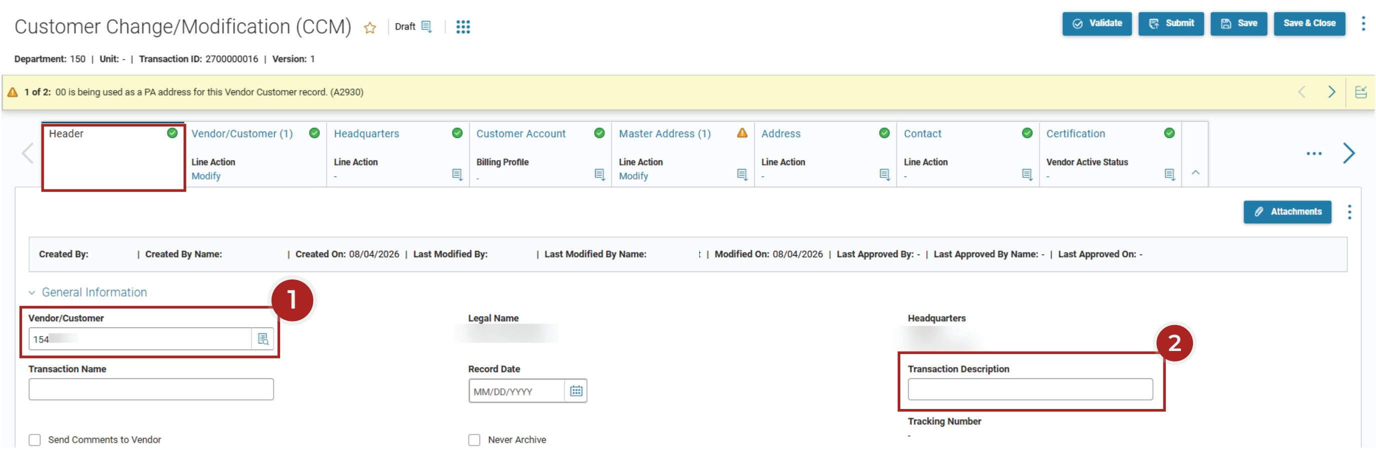
in the upper-right corner.




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 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.