Vendor Change/Modification (VCM)
FINET quick reference guide

division of **Finance**

Introduction

Vendor Change Modification **(VCM)** is used to modify an existing Vendor profile, located in the Vendor Customer Table **(VCUST)**

Creating a VCM

From the Search bar, under the **Page Code** [icon] search option, enter **VCUST**.

Use the 3-dot menu [icon] to view the vendor profile and determine the modifications you need to make according to your backup.

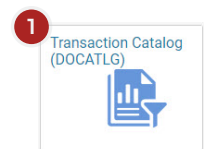You can change the following in a VCM:

- Legal Name
- 1099 Classification
- Modify or add Address
- Modify or add Contact

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

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

Transaction Catalog (DOCATLG)

3. Enter the following:

- **Transaction Code**: VCM
- **Transaction Dept**: The department number for which this VCM is being created.
- **Transaction Unit**: Optional but used for routing purposes.
- **Transaction ID**: Prefix for transaction number. It may start with the last two digits of the current fiscal year.

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4. Check **Auto Numbering** checkbox.

5. Click the **Continue** button to move to Draft phase.

**Note: All VCMs are created the same. The needed tabs will vary, depending on what you want to modify.

Different types of modifications

Legal Name Change

Enter the Name according to the W9, after verifying the last 4 digits of the EIN/SSN in VCUST match.

1. 1. Under the **Header** tab, enter the following:
   - Vendor/Customer Number
   - Organization Type
   - Company Name **(New Company Name)**
   - Enter "Legal name change" under **Transaction Description**.

1. Under the **Headquarters** tab, create the line by clicking the insert button. ➕

2. On **Line Action** field, change to "Modify."

3. Click the **3-dot menu** in top right, and select **Load Values**.

4. Expand the line ▶ to view additional options.

5. Change **Tin Updates All Locations** to "Yes."

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6. Enter **Taxpayer ID Number**.
7. Enter **Taxpayer ID Number Type**.
8. When all changes have been made, click **Validate**. Fix any errors that are noted in the top left of the page. If there are no errors, click **Submit**.

Address Modification

1. In the **Master Address** tab, create a line by clicking the insert button. ✚

2. On **Line Action** field, change to "Modify."

3. Click the **3-dot menu** in top right, and select **Load Values**.

4. Expand the line ▶ to view additional options.

5. Open **Modify Existing Master Address** subtab.

6. Enter the **Address ID** that needs to be modified or search for the address with the picklist.

Make sure to enter changes according to the FI 170 Form.

7. Enter address information:
   - Street 1
   - City
   - State/Province
   - Zip code/Postal Code
   - Default Record: No

8. The "updated address" needs to be inputted to update the address information. Click **Validate**. Fix any errors that are noted in the top left of the page. If there are no errors, click **Submit**.

Adding a New Address

This should only be done if the vendor has multiple locations. In most cases you would "Modify" an existing address. Enter changes according to the FI 170 form.

1. In the Header Tab, enter the **Vendor Number**.

2. In the **Address** tab, create the line by clicking the insert button. +

3. On **Line Address** field, change to "New."

4. Click the **3-dot menu** in top right, and select **Load Values**.

5. Expand the line ▶ to view additional options.

6. Open **New Address** subtab.

7. Under **New Address Type**, select "Payment" from the drop-down.

8. From **Generate Address ID** field, select "Yes" from the drop-down.

9. Enter new address information:

- Street 1
- City
- State/Province
- Zip code/Postal Code
- Default Record: No

1. Open **Contact Information** subtab **Contact email is required on ALL new addresses entered into FINET*

2. Select "Yes" from **Generate Contact ID** drop-down.

3. Enter the following:
   • Principal Contact
   • Email
   • Contact Phone

4. Click the **Attachments** icon, to load appropriate attachments.

5. When all changes have been made, click **Validate**. Fix any errors that are noted in the top left of the page. If there are no errors, click **Submit**.



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Adding a Contact-Part 1

This process is used to add a contact to an address that was entered without one. Using VCUST, determine what address line needs a contact ID.

1. Enter the VCM and go to the **Contact** tab.

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

3. On **Line Action** field, change to "New."

4. Click the **3-dot menu** in top right, and select **Load Values**.

5. Enter following:
   - **Contact Name**
   - **Email**
   - **Phone**
   - **Address ID:** use the pick list 🔍 to look up and select the address ID code.
   - **Contact ID**

6. From **Generate Contact ID** field, select "Yes" from the drop-down.

7. When all changes have been made, click **Validate**. Fix any errors that are noted in the top left of the page. If there are no errors, click **Submit**.

You'll need to watch for this VCM to be approved, so you can enter a second one to link the contact to the address ID.

Adding a Contact - Part 2

This process is used to add a contact to an address that was entered with one. Using VCUST, determine what address line needs a contact ID.

1. Enter the VCM and go to the **Address** tab.
2. Create the line by clicking the insert button. +
3. On **Line Action** field, change to "Modify."

4. Click the **3-dot menu** in top right, and select **Load Values**.
5. Select **Modify Existing Address** section.
6. From **Existing Address Type** field, select "Payment" from the drop-down.
7. On **Existing Address ID** field, use the pick list 🔍 to look up and select the address ID code.

1. Select **Contact Information** section.
2. On **Principal Contact ID** field, use the pick list 🔍 to look up and select the proper ID code.

3. Click on the **3-dot menu** to upload your backup from a file or drag and drop it.
4. When all changes have been made, click **Validate**. Fix any errors that are noted in the top left of the page. If there are no errors, click **Submit**.

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Modifying 1099 Classification

1. Enter the VCM and go to the **Vendor/Customer** tab.
2. Create the line by clicking the insert button. ➕
3. On **Line Action** field, change to "Modify."

4. Click the **3-dot menu** in top right, and select **Load Values**.
5. Select the **Tax Information** section.
6. From **1099 Classification** field, select chosen option from the drop-down.

This vendor is now 1099 Reportable according to our 1099 Reportable Guide, so you need to enter an address for tax documents to be sent and mark them 1099 reportable YES.

1. Select **1099 Reporting Information** tab.
2. Create the line by clicking the insert button. ➕
3. On **Line Action** field, change to "Modify."

4. Click the **3-dot menu** in top right, and select **Load Values**.
5. Search for **Existing Taxpayer ID** using the pick list 🔍 to look up and select the proper ID code.

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Search Existing Taxpayer ID Number

Search

Taxpayer ID: 123654987 | TIN Type | Name

Names | 1099 Reportable

Search   Reset

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

| Taxpayer ID	TIN Type	Name	Names	1099 Reportable
123654987	EIN	Vendor Training 2024	-	No

OK   Cancel

. 1. Select the **Taxpayer Information** subtab.

2. Please use a known address when updating the 1099 address to ensure the vendor receives their tax documents. Enter the following:
   • **Name**
   • **Address**
   • **City**
   • **State**
   • **Zip code**
   • **Contact Phone**

3. **1099 Reportable** field, select "Yes" from the drop-down.

4. Click the **Attachments** 📎 icon, to load appropriate attachments.

5. When all changes have been made, click **Validate**. Fix any errors that are noted in the top left of the page. If there are no errors, click **Submit**.

Vendor Change/Modification (VCM) ☆ Draft | Validate Submit Save Save & Close

Department: 150 | Unit: - | Transaction ID: 2400010840 | Version: 1

Header	Vendor/Customer (1)	Headquarters	Master Address	Address	Contact	Certification	1099 Reporting Information (1)
	Line Action Modify	Line Action -	Line Action -	Line Action -	Line Action -	Vendor Active Status -	Line Action Modify

Vendor/Customer: VC0000274563 | Legal Name: Vendor Training 2024

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

	Line Action	Taxpayer ID Number	Taxpayer ID Number Type	1099 Reportable	Attachments
	Modify	123654987	EIN	Yes	

Add New Taxpayer   Modify Existing Taxpayer   Taxpayer Information   1099 Backup Withholding   1099 Certification   Summary of Approval Modifications

Name: Vendor Training 2024 | Names: Fred Rogers | Address: 569 Bond Drive

City: Ogden | State: UT | ZIP Code: 84095

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