

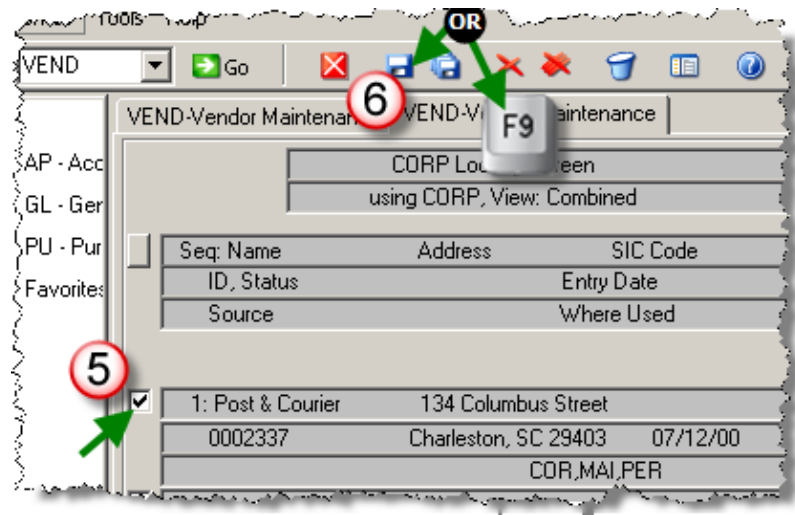
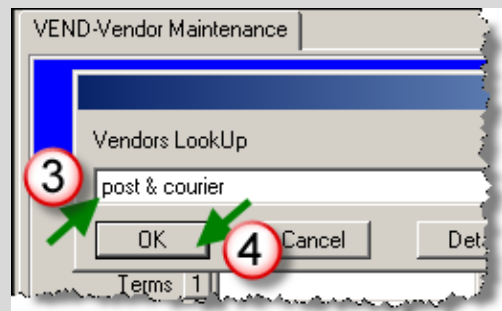
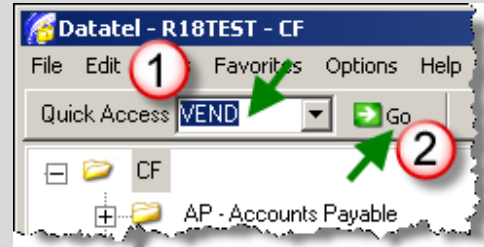
FINANCE & PROCUREMENT: VENDOR DATA-CHANGE SCENARIOS

(2) Company's Federal Tax ID Changes:

FROM DATATEL'S COLLEAGUE FINANCIALS (CF) MODULE...

FIND THE VENDOR THAT REQUIRES A FEDERAL TAX ID CHANGE.

1. Type **VEND** in the Quick Access drop-box
2. Select **GO**
3. Type the **vendor's name** in the Vendor Look-up text field
4. Select **OK**
5. Check the **checkbox** that corresponds to the correct vendor
6. Select the **SAVE** icon or the **F9** key



TIP . TIP . TIP . TIP . TIP . TIP TIP . TIP

Function Keys as Keyboard Shortcuts

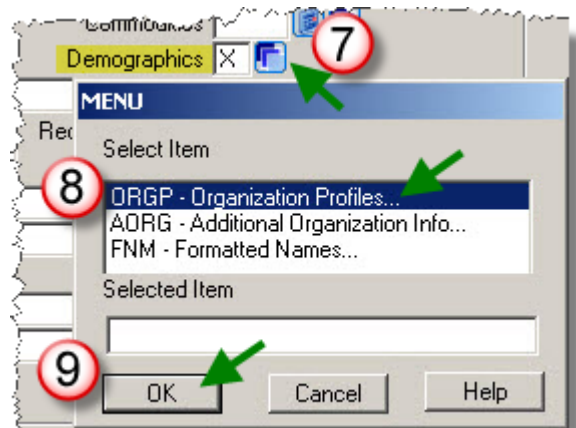
= **F9** Update AND continue working with this screen

= **F10** Save AND close this screen

TIP . TIP . TIP . TIP . TIP . TIP TIP . TIP

NAVIGATE TO THE VENDOR'S ORGP - ORGANIZATION PROFILES SCREEN.

7. Detail or Select the **blue button** to the right of the Demographics field
8. Highlight or Select the **ORGP-Organization Profiles...** MENU item
9. Select **OK**



MAINTAIN A REFERENCE TO THE OLD FEDERAL TAX ID OR EIN NUMBER.

10. Copy or make a note of the **OLD Federal Tax ID Number** on the ORGP screen

VEND-Vendor Maintenance ORGP-Organization Profiles

Post & Courier ID: 0002337
Charleston, SC 29403 SIC: Contact:

Source 1
Origin/Dt
Name 1 Post & Courier
EIN 32-5986587

10 TO COPY...

- 1** Left Click once **inside the EIN Number field** to select the **OLD number**
- 2** Right Click **and select Copy**

RETURN TO THE VEND SCREEN TO RECORD THE ORIGINAL FEDERAL TAX ID NUMBER.

11. Select the **Cancel icon** to return to the VEND screen (*no corresponding capture*)

12. Detail or Select the **blue button** to the right of the Comments field

13. Paste or type the **OLD Federal Tax ID**

Number on the UTEC Vendor Maintenance screen

Annual Sales
Comments 1
Misc Terms 1
Tax Information

12

VEND-Vendor Maintenance UTEC-Vendor Maintenance

Vendor Comments

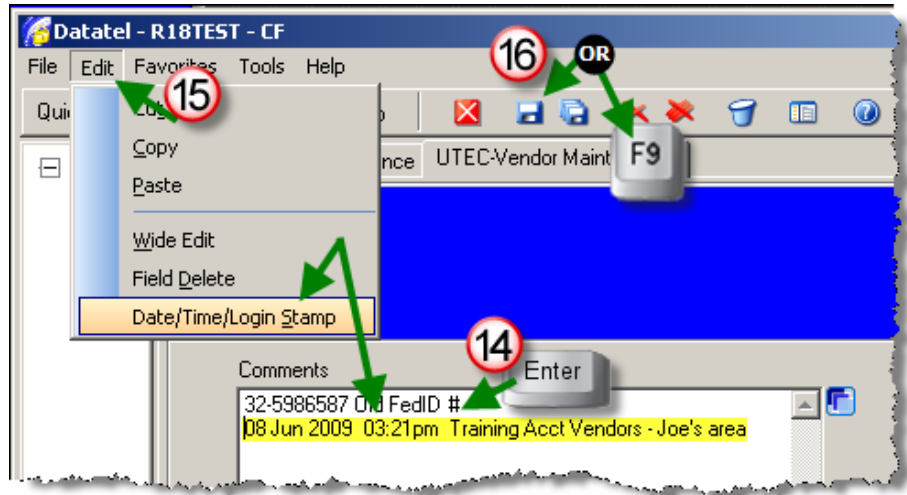
Comments

13 TO PASTE...

- 1** Right Click once **inside the Comments field**
- 2** Select **Paste**

RECORD A FEDERAL TAX ID OR EIN NUMBER CHANGE COMMENT AND ADD A DATE STAMP.

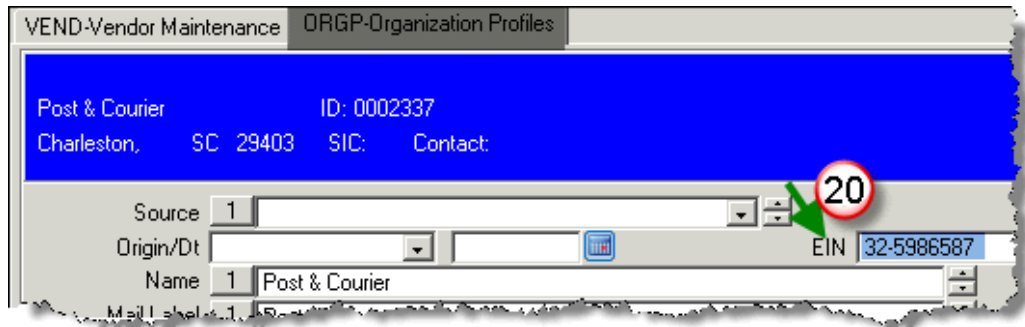
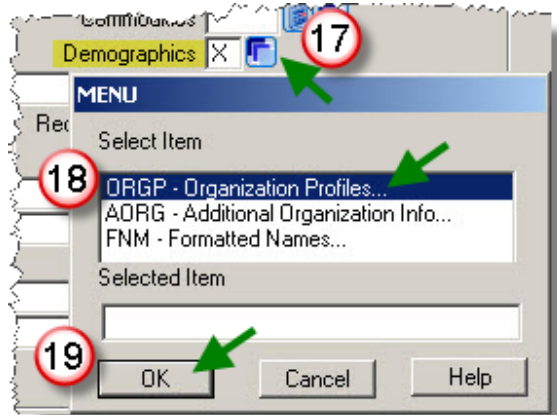
- 14. Click **behind the OLD Federal Tax ID comment** to set the cursor and **select the ENTER** key to break the line for the date text
- 15. **Dropdown the EDIT menu and select Date/Time/Login Stamp selection**
- 16. **Select the SAVE icon or the F9 key** to save your work



ADD THE NEW FEDERAL TAX ID TO THE PROFILE.

ONCE AGAIN, NAVIGATE TO THE VENDOR'S ORGP - ORGANIZATION PROFILES SCREEN.

- 17. **Detail or Select the blue button** to the right of the Demographics field
- 18. **Highlight or Select the ORGP-Organization Profiles... MENU item**
- 19. **Select OK**
- 20. **Highlight the OLD ID Number and Type the NEW ID Number** in the EIN text box



INDICATE THE REASON FOR THE FEDERAL TAX ID NUMBER CHANGE.

- 21.** Dropdown the SOURCE **droplist** that corresponds to the CHANGE section of the ORGP screen
- 22.** Highlight the most accurate **reason** for the name change
- 23.** Select **UPDATE**

