

**FINANCE & PROCUREMENT: VENDOR DATA-CHANGE SCENARIOS**

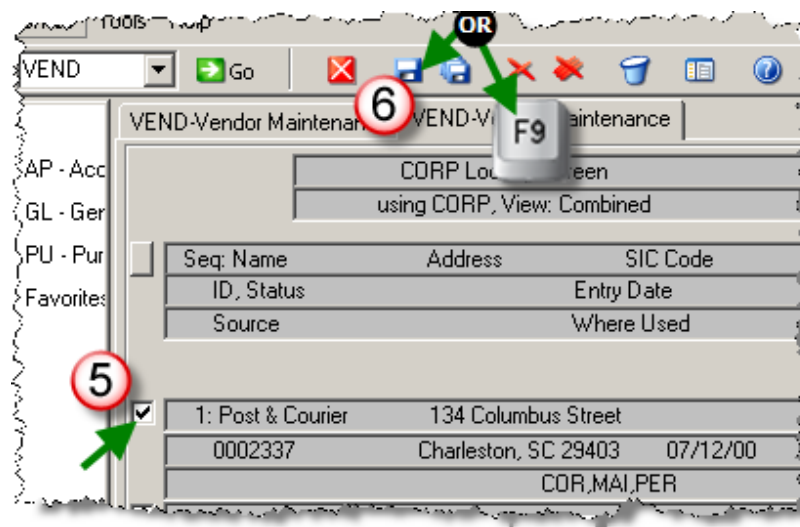
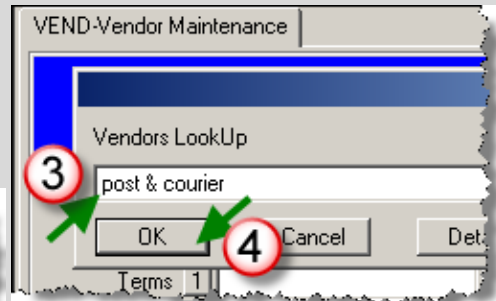
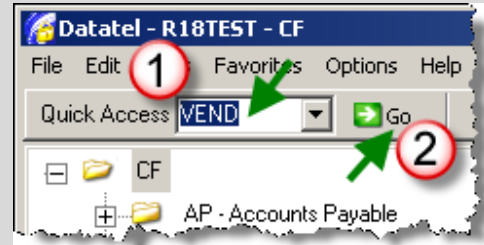
**(3) Company's Name AND Federal Tax ID Changes:**

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

**NOTE:** When a Vendor's Name and Federal Tax ID number changes, a NEW VENDOR MUST BE CREATED, AND A MESSAGE MUST BE ASSOCIATED WITH THE ORIGINAL VENDOR RECORD to "DO NOT USE" the original record's information.

**FIND THE VENDOR THAT REQUIRES A NAME AND 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

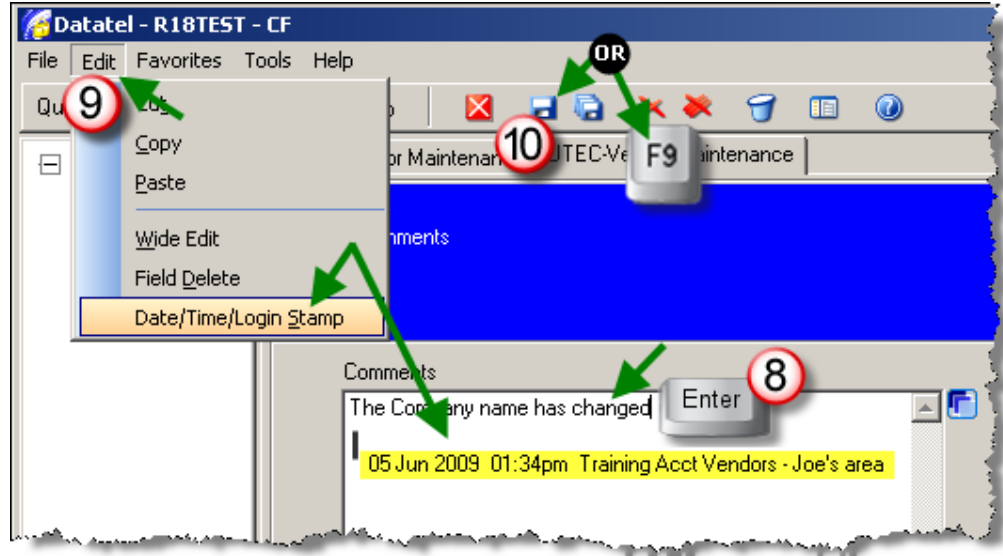
**TIP . TIP . TIP . TIP . TIP . TIP TIP . TIP**

**ADD A COMMENT TO THE ORIGINAL RECORD, ON THE VENDOR'S UTEC VENDOR MAINTENANCE SCREEN, STATING THE NAME HAS CHANGED.**

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

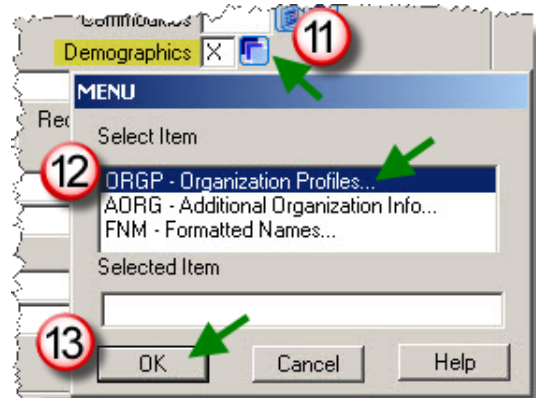


8. Type your **comment** and select the **ENTER** key to break the line for the date text
9. Dropdown the **EDIT** menu and select **Date/Time /Login Stamp** selection
10. Select the **SAVE** icon *or* the **F9** key



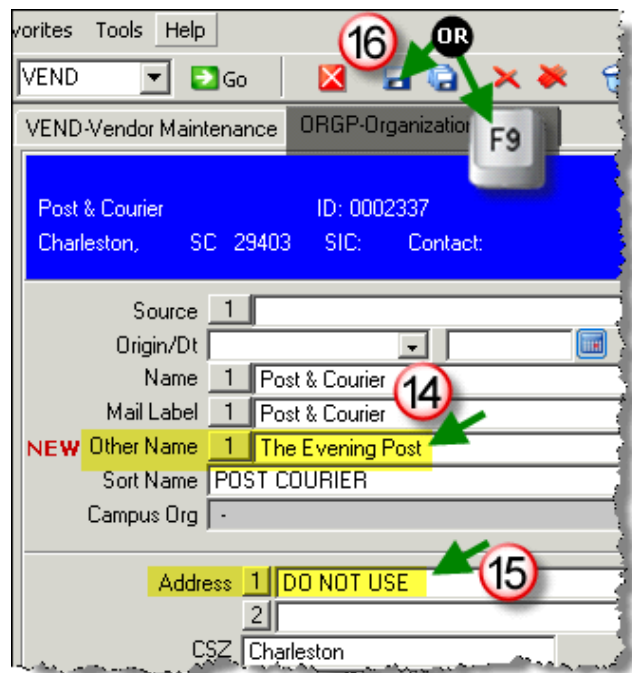
**NAVIGATE TO THE VENDOR'S ORGP - ORGANIZATION PROFILES SCREEN.**

11. Detail or Select the **blue button** to the right of the Demographics field
12. Highlight or Select the **ORGP-Organization Profiles...** MENU item
13. Select **OK**



**MAINTAIN A REFERENCE TO THE NEW NAME ON THE OLD RECORD AND ANNOTATE A MESSAGE IN THE ADDRESS FIELD.**

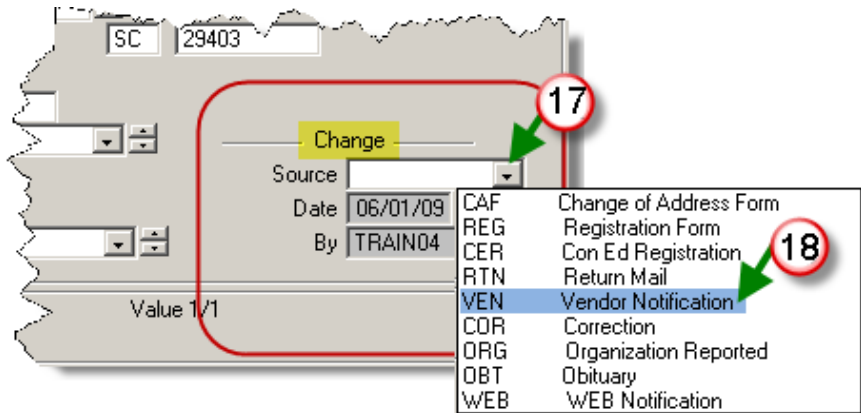
14. Type the **NEW name** in the OTHER NAME field
15. Type **DO NOT USE** in the ADDRESS field
16. Select the **SAVE** icon *or* the **F9** key



**NOTE:** When a Vendor's Name and Federal Tax ID number changes, the College will receive a letter from the vendor or a new W9 form providing the **NEW VENDOR NAME AND FEDERAL TAX ID NUMBER**.

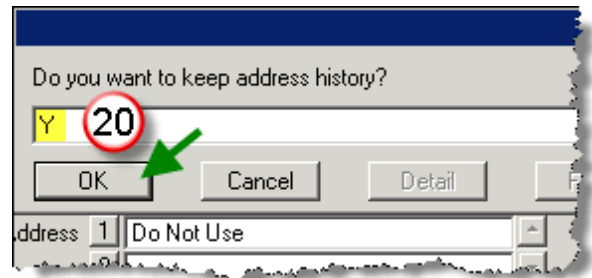
**INDICATE THE REASON FOR THE NAME CHANGE.**

- 17. Dropdown the SOURCE droplist that corresponds to the CHANGE section of the ORGP screen
- 18. Highlight the most accurate reason for the name change
- 19. Select **UPDATE**  
(no corresponding capture)



**MAINTAIN A HISTORIC RECORD FOR THE NAME CHANGE.**

- 20. When prompted to KEEP ADDRESS HISTORY, Type **"Y"** for **YES** and select **OK**



**YOU ARE NOW READY TO CREATE A NEW VENDOR RECORD FOR THIS VENDOR.**