

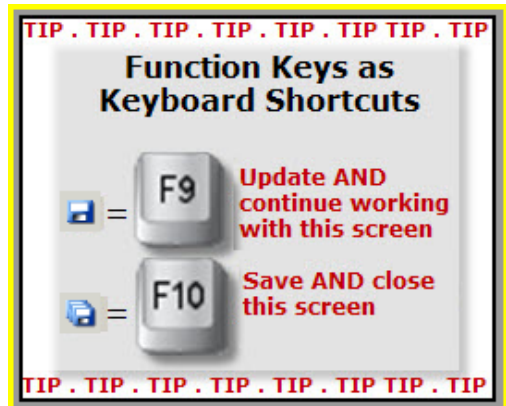
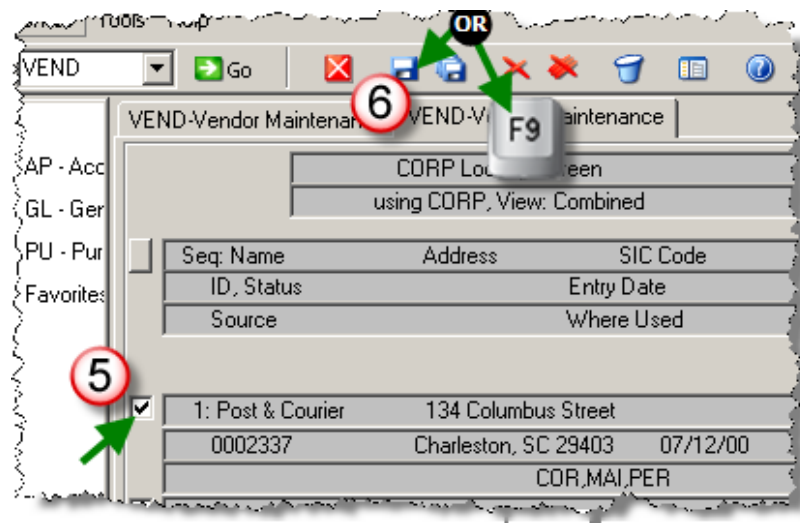
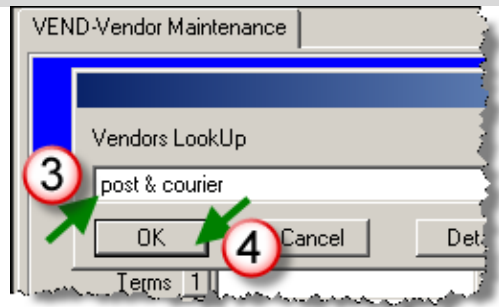
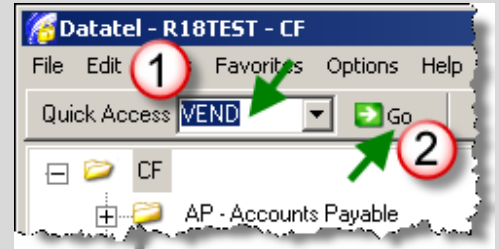
FINANCE & PROCUREMENT: VENDOR DATA-CHANGE SCENARIOS

(1) Company's Name Changes:

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

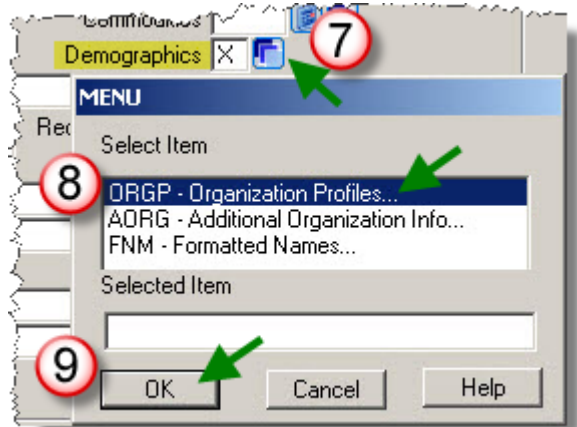
FIND THE VENDOR THAT REQUIRES A NAME CHANGE.

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



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 NAME AND ADD THE NEW NAME TO THE PROFILE.

- 10. Type the **OLD name** in the OTHER NAME field
- 11. Type the **NEW name** in the NAME field

INDICATE THE REASON FOR THE NAME CHANGE.

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

VEND-Vendor Maintenance ORGP-Organization Profiles

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

Source 1
Origin/Dt
NEW Name 1 The Evening Post
Mail Label 1 Post & Courier
OLD Other Name 1 Post & Courier
Source 1 POST COURIER

Change
Source
Date 06/01/09
By TRAIN04

Value 1/1

CAF	Change of Address Form
REG	Registration Form
CER	Con Ed Registration
RTN	Return Mail
VEN	Vendor Notification
COR	Correction
ORG	Organization Reported
OBT	Obituary
WEB	WEB Notification

Alert

14 Update record, Cancel record of

Update Cancel

RECORD A NAME CHANGE COMMENT AND ADD A DATE STAMP.

- 15. Detail or Select the **blue button** to the right of the Comments field
- 16. Type your **comment** and select the **ENTER** key to break the line for the date text
- 17. Dropdown the **EDIT** menu and select **Date/Time/Login Stamp** selection
- 18. Select the **SAVE** icon or the **F9** key to save your work

Annual Sales
Comments 1
Misc Terms 1
Tax Information

Datatel - R18TEST - CF

File Edit Favorites Tools Help

Qu Copy Paste Wide Edit Field Delete Date/Time/Login Stamp

OR

17

18

F9

Comments

The Company name has changed

Enter

05 Jun 2009 01:34pm Training Acct Vendors - Joe's area