



Setup An Existing Vendor as a Customer (VCM) Quick Reference Guide

Introduction

The VCM document is used to modify a Vendor Customer record that previously exists in the database. This document allows you to modify the records on the Vendor/Customer (VCUST) table, 1099 Reporting Information table, and the Customer Account Options (CACT) table. In this guide, the VCM document will be used to setup an existing Vendor as a Customer.

State of Maine Policy

The VCM document will be sent through workflow for approval and may be rejected at points in the workflow, but will require further editing or cancellation since the document does not have the "Final" status at this point. If the document is in "Final" status, all modifications made to the Vendor/Customer can be verified on VCUST. All additional changes will require a new VCM document.

For more information on this topic, please refer to the 402 VCUST training book on the OSC website.

Creating a VCM document

1. Login to Advantage.
(step not shown)
2. Navigate to the **Vendor Customer table (VCUST)** through page search. (step not shown)
NOTE: You can also navigate to VCUST through the Vendor/Customer Workspace.
3. Locate the Vendor you wish to modify. (step not shown)
4. Scroll down **VCUST** and select Modify Existing Record.

Last Name :	<input type="text"/>	Prevent MA Reference :	<input type="checkbox"/>
Company Name :	JMK AND COMPANY	Active From :	05/20/2011
		Active To :	<input type="text"/>
		Last Usage Date :	05/25/2011
		Department :	<input type="text"/>
		Unit :	<input type="text"/>

- ▶ Headquarters
- ▶ Organization
- ▶ Disbursement Options
- ▶ Prenote/EFT
- ▶ Remittance Advice
- ▶ Vendor Terms
- ▶ Accounts Receivable
- ▶ eMALL
- ▶ Location Information
- ▶ Change Management

4

CREATE DOCUMENT> [Create New Record](#) [Modify Existing Record](#)

PDATE> [Headquarters](#) [Add 1099 Information Entry](#) [Add 1042-S Reporting Information Entry](#)

SEARCH BY> [Master Contacts](#) [Master Addresses](#) [Vendor Commodity](#) [Vendor Addresses](#) [Vendor Business Types](#) [Vendor Ser](#)

[Vendor Transaction History](#)

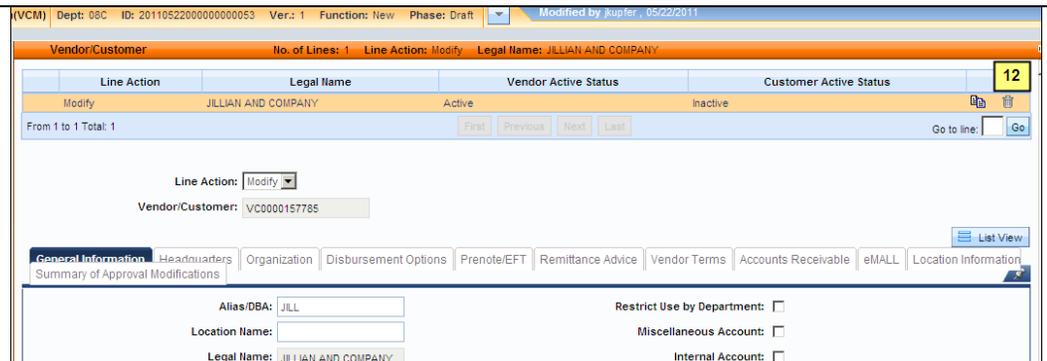


Setup An Existing Vendor as a Customer (VCM) Quick Reference Guide

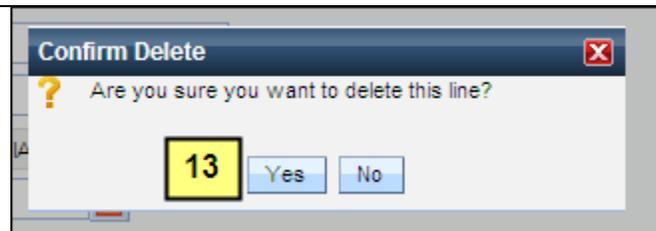
11. Navigate to the **Vendor/Customer** Section.



12. Delete the line since we are not making any changes to this section of the document. Select the **delete icon** .



13. The user will be prompted to confirm the line deletion. Click **Yes**.





Setup An Existing Vendor as a Customer (VCM) Quick Reference Guide

14. Navigate to the **Address Information** Section.

The screenshot shows a 'Document Navigator' sidebar menu. The items listed are: Header, Headquarters, Vendor/Customer, 1099 Reporting Information, 1042-S Reporting Information, Master Address, Address Information (highlighted in yellow with a callout box containing the number 14), Customer Account, Contacts, Business Type, Service Area, Commodity, Authorized Dept., Prevent Spending, and Certification.

15. Select **Insert New Line**.
 16. Select **New** as the **Line Action**.
 17. Select **New Address Type** of Billing.
 18. Select **Auto-Generate** box.

The screenshot shows the 'Address Information' form. Callout 15 points to the 'Insert New Line' button. Callout 16 points to the 'Line Action' dropdown menu which is set to 'New'. Callout 17 points to the 'New Address Type' dropdown menu which is set to 'Billing'. Callout 18 points to the 'Auto-Generate' checkbox which is checked. Other visible fields include 'Vendor/Customer', 'Bypass Address Validation', and various tabs at the bottom.

19. Navigate to the **Address Information** tab.
 20. Enter the **Street Address, City, State** and **Zip/Postal Code**.
 21. Select **Save**.

The screenshot shows the 'Address Information' tab selected. Callout 19 points to the 'Address Information' tab. Callout 20 points to the address input fields: Street 1 (123 MAINE STREET), Street 2, City (AUGUSTA), State/Province (ME), and Zip/Postal Code (04123). Callout 21 points to the 'Save' button at the bottom left of the form. Other fields include Country Phone Code, Phone (203-938-0412), Phone Extension, County, County Name, and Country.



Setup An Existing Vendor as a Customer (VCM) Quick Reference Guide

<p>Navigate to the Other Address Information tab.</p> <p>Check the Default Record box and save.</p>	
<p>22. Navigate back to the Add New Address tab. Notice upon saving, the New Address ID will populate since the Auto-Generate box is checked.</p>	
<p>23. Navigate to the Contact Information tab.</p> <p>24. Select Auto-Generate. Enter Principal Contact and Phone.</p> <p>NOTE: Phone Number must be entered in a XXX-XXX-XXXX format.</p>	
<p>25. Navigate to the Certification Section.</p>	



Setup An Existing Vendor as a Customer (VCM) Quick Reference Guide

26. Select **Insert New line.**

27. Select **Load Values.** The Values will be loaded onto the document.

Line Action:

Vendor/Customer:

Certification Status Summary of Approval Modifications

Vendor Active Status: Customer Active Status:

Vendor Approval Status: Customer Approval Status:

26 27

Save Undo **Insert New Line** Insert Copied Line Edit with Grid Load Values Vendor/customer Table

Copy Validate Submit Discard Print Processing Workflow File Close

28. Change **Customer Active Status** to *Active*.

29. Change **Customer Approval Status** to *Complete*.

Certification Status Summary of Approval Modifications

Vendor Active Status: Customer Active Status: 28

Vendor Approval Status: Customer Approval Status: 29



Setup An Existing Vendor as a Customer (VCM) Quick Reference Guide

30. Select **Validate** and check for errors. Select **Submit**. (step not shown)

31. The document is submitted to Pending phase; this is because the VCUST record is also setup as a vendor, as shown by the “Active” status.

Vendor/Customer Modification(VCM) Dept: OSC ID: 2011052200000000053 Ver.: 1 Function: New Phase: Pending 31 Modified by: jkufer 05/22/2011

Document Navigator

- Header
- Headquarters
- Vendor/Customer
- 1099 Reporting Information
- 1042-S Reporting Information
- Master Address
- Address Information
- Customer Account
- Contacts
- Business Type
- Service Area
- Commodity
- Authorized Dept.
- Prevent Spending
- Certification

Certification No. of Lines: 1 Legal Name: JILLIAN AND COMPANY Vendor Active Status: Active Customer Active Status: Active

Legal Name	Vendor Active Status	Customer Active Status
JILLIAN AND COMPANY	Active	Active

From 1 to 1 Total: 1

Line Action:

Vendor/Customer:

JILLIAN AND COMPANY

Certification Status Summary of Approval Modifications

Vendor Active Status: Customer Active Status:

Vendor Approval Status: Customer Approval Status:

NOTE:

- This document created the Billing Address for the Customer, but now you need to process another VCM Document to create the Customer Account. Follow the steps in the following Quick Reference Guide: Add a BPRO to an Existing Customer.
- This VCM Document needs to be approved by OSC before you can continue with the next VCM Document to create the Customer Account.

Verification Tables

- **VCUST** – Once the VCM document is finalized, the modified record will be available on the Vendor Customer table.
- **CACT** – Once the VCM document is finalized, the customer record will be available on the Customer Account Options table. The CACT table is where all of the Customer-Specific Billing Options Records are stored.
- **CUSTS** – Once the customer is used on documents, a customer's financial and credit history across all of his/her billing profiles can be viewed on the Customer Information table.