## Changing a Vendor Name Created on 2/21/2013 7:19:00 AM

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## **Changing a Vendor Name**

Core-

Users can make effective dated changes to a vendor's name in two ways in Core-CT 9.1.

Edit the vendor name on the **Identifying Information** page of the **Vendor** component. These changes take effect immediately and cannot be future dated.

Use the **Vendor Name History** component to edit a vendor's name. Changes made with this component can take place immediately or can be future dated.

The **Vendor Name History Inquiry** component enables users to view a history of vendor name changes, including any future dated changes.

In this example a user changes a vendor's naming using the **Vendor** component and views the results using the **Vendor Name History Inquiry** component. Then the user makes a future dated name change for a vendor using the **Vendor Name History** component and views the results using the **Vendor Name History Inquiry** component.

## Procedure

Navigation:

Vendors > Vendor Information > Add/Update > Vendor

Vendors > Vendor Information > Add/Update > Vendor Name History

Vendors > Vendor Information > Add/Update > Vendor Name History Inquiry

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Favorites Main Menu > Vendors > Vendor Information > Add/Update > Vendor				
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vendor information				
Enter any information you have and click Search. Leave fields blank for a list of all values.				
Find an Existing Value Add a New Value				
🛩 Search Criteria				
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Vendor ID: begins with 🗸				
Persistence:				
Short Vendor Name: begins with 🗸				
Our Customer Number: begins with 💌				
Name 1: Degins with 🛩				
Include History Correct History Case Sensitive				
Search Clear Basic Search 🖼 Save Search Criteria				
Find an Existing Value Add a New Value				

Step	Action
1.	SetID is a required field.
	Enter <b>STATE</b> into the <b>SetID</b> field.
2.	Use the Search fields on the Vendor Information find an Existing Value page to limit search results.
	Enter 0000044030 into the Vendor ID field.
3.	Click the Search button.



Step	Action
4.	Click the <b>Identifying Information</b> tab.
	Identifying Information

ORACLE			Home	Worklist    Add to F	avorites Sign out
Favorites   Main Menu > Vendors >	Vendor Information > Add/Upda	ate > Vendor			
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*Classification:	Outside Party	Check for Duplic	e Open For C	W-9 Code:	
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Government Classifications					
Standard Industry Codes					
Additional Reporting Elements					
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Summary   Identifying Information   <u>Addre</u>	iss   Contacts   Location   Custom				
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Step	Action
5.	Click in the Vendor Name 1 field to edit the name of the Vendor.
6.	Enter ACE FLOWERS INC into the Vendor Name 1 field.
7.	The new name is effective once the change is saved. Click the <b>Save</b> button.

Summary Identifying Information	Address Contacts Location C	ustom	Home   Worklist    Add to Favorites   Sign out T <u>Related Content</u> An New Window (Phelip in http:
SetID:	STATE	*Vendor Name 1:	ACE FLOWERS INC
Vendor ID:	0000044030	Vendor Name 2:	
*Vendor Short Name:	061213359F 061213359F	-001	Withholding Entity Type: Corp
*Classification:	Outside Party	Check for Duplicate	Open For Ordering W-9 Code:
HCM Class:			Offset Status: Never
*Persistence:	Regular		
*Vendor Status:	Approved 🗸		
	Message		
Vendor Relationships Corporate SetID: Corporate Vendor ID: Create Bill-To Customer > Additional ID Numbers > Duplicate Invoice Settings > Government Classifications > Standard Industry Codes	This vendor's status will be set to 'Un: (7025.164) You have made a change/changes to approve a vendor. This vendor's status related to this vendor will not be paid To exit without saving select CANCEL	approved." Are you sure you want to co this vendor but you do not have the aud will be set to "Unapproved." All unpai ntil the vendor is approved. To contin OK	nontinue? ndor thorization to d vouchers ue select OK.
Additional Reporting Elements			
Expand All Collapse A	All Notify SES   Contacts   Location   Custom	Add 2	E Updete(Display) 👔 include History

Step	Action
8.	Vendors must be in the Approved <b>Status</b> to create transactions in Core-CT. Only OSC/APD staff can approve vendors.
	Click the <b>OK</b> button.

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*Vendor Status:	Unapproved	~					
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Summary   Identifying Information   Addre	ss   Contacts   Location   Custon	<u>n</u>					

Step	Action
9.	Click the Save button.
10.	The change to the vendor name can be viewed using the <b>Vendor Name History</b> <b>Inquiry</b> component.
	Inquiry

	nu > Ven	dors > Vendor Info	ormation >	Add/Update	> Vendor Nar	me History Inquiry		Home	Worklist	Add to Favo	rites   Sign	out
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Search Results									Person	alize   Find   View A	I 🔤 🐂 Firs	t 🖪
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Step	Action
11.	Use the Vendor Name History Inquiry page to locate the vendors to view.
	<b>SetID</b> is a required field. All vendor information is stored in the STATE <b>SetID</b> .
	Enter <b>STATE</b> into the <b>SetID</b> field.
12.	Use the search fields on the <b>Vendor Name History Inquiry</b> page to limit the number of rows returned in the Search Results.
	Enter 0000044030 into the Vendor ID field.
13.	Click the Search button.

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	STATE	0000044030 🐙	061213359F-001	ACE FLOWERS INC		10/30/2012 10:20AM	COREReynoldsDave	10/30/20

Step	Action
14.	Two rows are returned in the <b>Search Results</b> . The first row reflects the initial addition of the vendor into Core-CT. The second row reflects the name change made previously in this topic.
15.	Vendor name changes can also be made using the <b>Vendor Name History</b> component. This component is useful for making future effective dated name changes. It can also be used to change a vendor name with the current date as the effective date. Navigation: Vendors > Vendor Information > Add/Update > Vendor Name History

ORACLE	Home   Worklist    Add to Favorites   Sign out
Favorites Main Menu > Vendors > Vendor Information > Add/Update > Vendor Name History	
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Vendor Name History	
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Enter any mormation you have and click Search. Leave lields brank for a list of an values.	
Find an Existing Value	
✓ Search Criteria	
SetID: = V	
Vendor ID: Legins with Vendor ID:	
Short Vendor Name: begins with V	
Name 1: Degins with w	
Include History	
Search Clear Basic Search & Save Search Criteria	

Step	Action
16.	<ul><li>SetID is a required field. Use the search fields on the Vendor Name History Find an Existing Value page to limit the number of rows returned in the Search Results.</li><li>Enter STATE into the SetID field.</li></ul>
17.	Enter 0000014144 into the Vendor ID field.
18.	Click the Search button.

endor Name	History						
SetID:	STATE						
Vendor ID:	0000014144						
ndor Name History				Find View All Fin	st 🗹 1 of 1 🖸 Last		
Effective Date:	01/01/1900				+		
Name 1:	D & K SOUND SE	₹VICES INC					
Name 2:							
Vendor Short Name:	061026674F	061026674F-001					
Modified By:	COREBabbittCyn						
Datetime Modified:	09/28/2012 9:514	м					
Save Return to	Search 💽 Notify	æ	Update/Display	Include History	Correct History		

Step	Action
19.	The <b>Vendor Name History</b> page displays the current effective dated name for the selected vendor.
	Current effective dated rows cannot be edited unless in Correct History mode.
	Click the <b>Add a new row at row 1</b> button to add a new effective date row.

endor Name Hi	story						
SetID:	STATE						
Vendor ID: (	0000014144						
endor Name History				Find View All Fin	st 🗹 1 of 2 본 Last		
Effective Date:	10/30/2012				+ -		
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Name 2:							
Vendor Short Name:	061026674F	061026674F-001					
Modified By:	COREReynoldsD	ave					
-							
Datetime Modified:	10/30/2012 10:48	AM					
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Step	Action
20.	The <b>Effective Date</b> field displays the current date.
21.	Enter 11/15/12 into the Effective Date field.
22.	Click in the Name 1 field to edit the vendor's name.
23.	Enter MUSIC into the Name 1 field.
24.	Click the Save button.

ORACLE	Home	Worklist    Add to Favorites   Sign out B New Window ⑦ Help 📰 http
Vendor Name Histo	ory	
SetID: STAT Vendor ID: 0000 Vendor Jame History	TE 0014144 Soul Views All Soul Cases 2 Parata	
*Effective Date: *Name 1: Name 2: *Vendor Short Name: Modified By: Datetime Modified: Save C* Return to Search		

Step	Action
25.	The Vendor must be in Approved status to create transactions in Core-CT. Only OSC/APD staff can approve vendors.

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Vendor ID:	0000014144						
endor Name History	h 1/15/20 12 [13]		Find View All	First = 1 of 2 Last			
*Effective Date:	11/15/2012 🛐						
*Name 1:	D & K MUSIC SERVIC	ES INC					
Name 2:							
*Vendor Short Name:	061026674F	61026674F-001					
Modified By:	00050-014-0-0						
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Save Return to S	earch Notify	John Upda	ate Display] (2 Include Hatory	Correct History			

Step	Action
26.	The new vendor name will take effect on $11/15/202$ . Until then the previous name for the vendor will be the effective name within Core-CT.
27.	Click the Save button.
28.	The change to the vendor name can be viewed using the <b>Vendor Name History</b> <b>Inquiry</b> component. Navigation: Vendors > Vendor Information > Add/Update > Vendor Name History Inquiry

	nu > Ven	dors > Vendor Info	ormation >	Add/Update	> Vendor Nar	me History Inquiry		Home	Worklist	Add to Favo	rites   Sign	out
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Step	Action
29.	Use the <b>Vendor Name History Inquiry</b> page to locate vendors to view. <b>SetID</b> is a required field. All vendor information is stored in the STATE <b>SetID</b> .
	Enter <b>STATE</b> into the <b>SetID</b> field.
30.	Use the search fields to limit the number of rows returned in the Search Results.
	Enter the <b>0000014144</b> into the <b>Vendor ID</b> field.
31.	Click the Search button.

OR /	ACLE <sup>®</sup> Main Menu → Ven	dors > Vendor Information >	Add/Update > Vendor Nar	me History Inquiry	Home   Worklist	Add to Favorites	Sign out
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Search	Results				Persona	alize   Find   View All   🗖	First K
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STATE	0000014144 💻	061026674F-001	D & K MUSIC SERVICES INC		10/30/2012 10:49AM	COREReynoldsDave	11/15/2013

Step	Action
32.	Two rows are returned in the <b>Search Results</b> . The first row reflects the initial addition of the vendor into Core-CT. The second row reflects the future dated name change made previously in this topic.
33.	
	End of Procedure.