

# Changing a Vendor Name

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## Changing a Vendor Name



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

Home | Worklist | Add to Favorites | Sign out

New Window | Help | http

### 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

SetID: = [ ]

Vendor ID: begins with [ ]

Persistence: = [ ]

Short Vendor Name: begins with [ ]

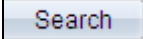
Our Customer Number: begins with [ ]

Name 1: begins 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.	<p><b>SetID</b> is a required field.</p> <p>Enter <b>STATE</b> into the <b>SetID</b> field.</p>
2.	<p>Use the Search fields on the <b>Vendor Information find an Existing Value</b> page to limit search results.</p> <p>Enter <b>000044030</b> into the <b>Vendor ID</b> field.</p>
3.	<p>Click the <b>Search</b> button.</p> <p></p>

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Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Home | Worklist | Add to Favorites | Sign out

Summary | **Identifying Information** | Address | Contacts | Location | Custom

Related Content | New Window | Help | Personalize Page | http

SetID: STATE  
 Vendor ID: 0000044030  
 Vendor Short Name: 061213359F 061213359F-001  
 Vendor Name: ACE BEGONIAS INC

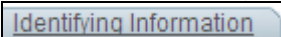
Order: 061213359F-001 231 SEYMOUR RD WOODBRIDGE, CT 06525  
 Remit To: 061213359F-001 231 SEYMOUR RD WOODBRIDGE, CT 06525

Status: Approved  
 Persistence: Regular  
 Classification: Outside Party  
 HCM Class:  
 Open for Ordering: Yes  
 Withholding: No

Last Modified By:  
 Last modified date: 01/01/1900 12:00AM  
 Created By:  
 Created Date/Time: 01/01/1900 12:00AM  
 Last Activity Date: 12/12/2011

Save | Return to Search | Notify | Add | Update/Display | Include History | Correct History

Summary | Identifying Information | Address | Contacts | Location | Custom

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

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Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Home | Worklist | Add to Favorites | Sign out

Summary | **Identifying Information** | Address | Contacts | Location | Custom

Related Content | New Window | Help | Personalize Page | http

SetID: STATE  
 Vendor ID: 0000044030  
 \*Vendor Short Name: 061213359F 061213359F-001  
 \*Classification: Outside Party  
 HCM Class:  
 \*Persistence: Regular  
 \*Vendor Status: Approved

\*Vendor Name 1: ACE BEGONIAS INC  
 Vendor Name 2:  
 Withholding  
 Open For Ordering  
 Entity Type: Corp  
 W-9 Code:  
 Offset Status: Never

Check for Duplicate

Attachments (0)  
 Expand All | Collapse All

Vendor Relationships  
 Corporate Vendor  
 InterUnit Vendor  
 Corporate SetID: STATE  
 Corporate Vendor ID: 0000044030  
 InterUnit Vendor ID:  
 ACE BEGONIAS INC

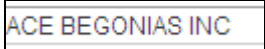
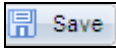
Create Bill-To Customer  
 Create Bill To Customer

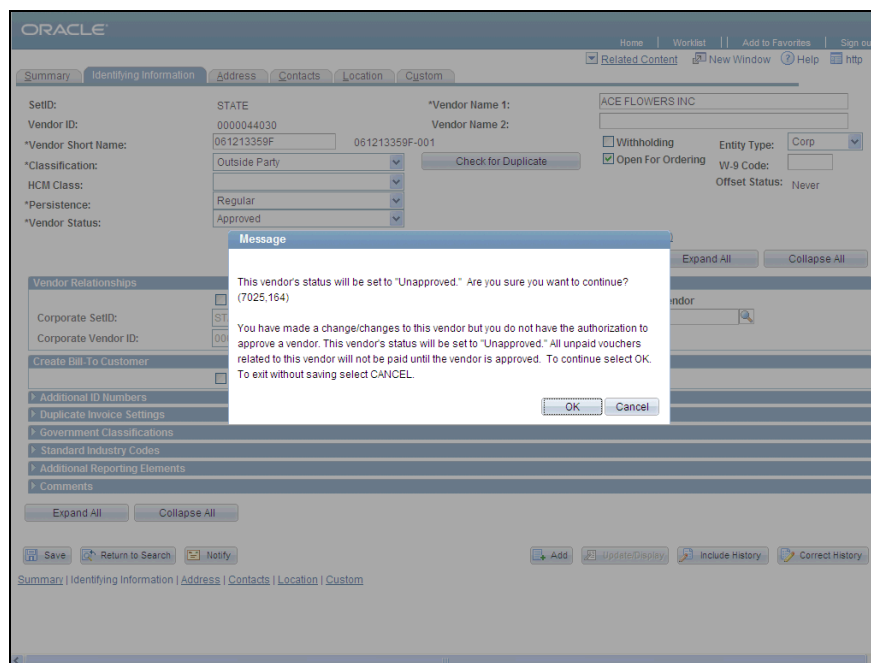
Additional ID Numbers  
 Duplicate Invoice Settings  
 Government Classifications  
 Standard Industry Codes  
 Additional Reporting Elements  
 Comments


Expand All | Collapse All

Save | Return to Search | Notify | Add | Update/Display | Include History | Correct History

Summary | Identifying Information | Address | Contacts | Location | Custom

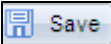
Step	Action
5.	Click in the <b>Vendor Name 1</b> field to edit the name of the Vendor. 
6.	Enter <b>ACE FLOWERS INC</b> into the <b>Vendor Name 1</b> field.
7.	The new name is effective once the change is saved.  Click the <b>Save</b> button. 

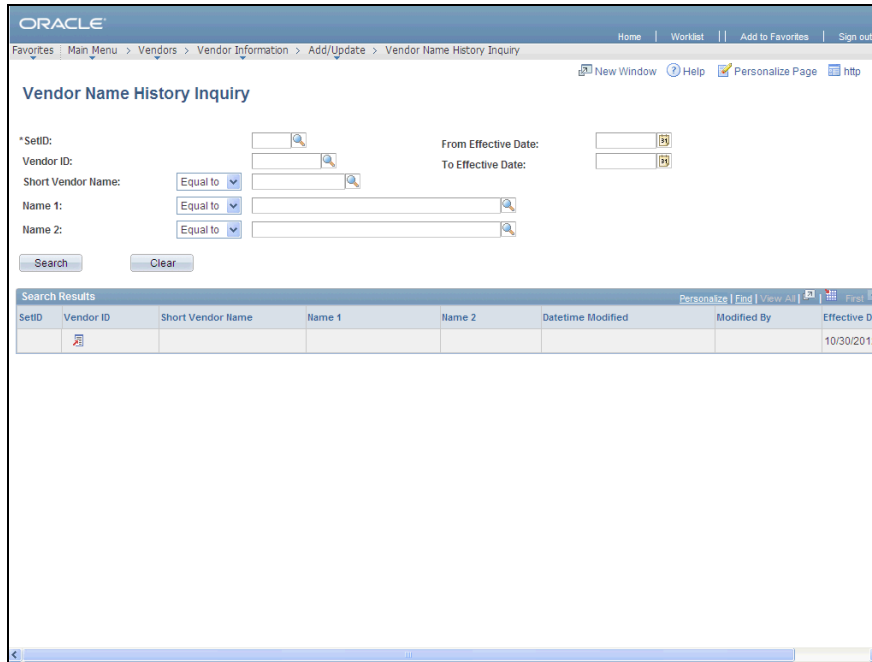


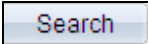
Step	Action
8.	Vendors must be in the Approved <b>Status</b> to create transactions in Core-CT. Only OSC/APD staff can approve vendors.  Click the <b>OK</b> button. 

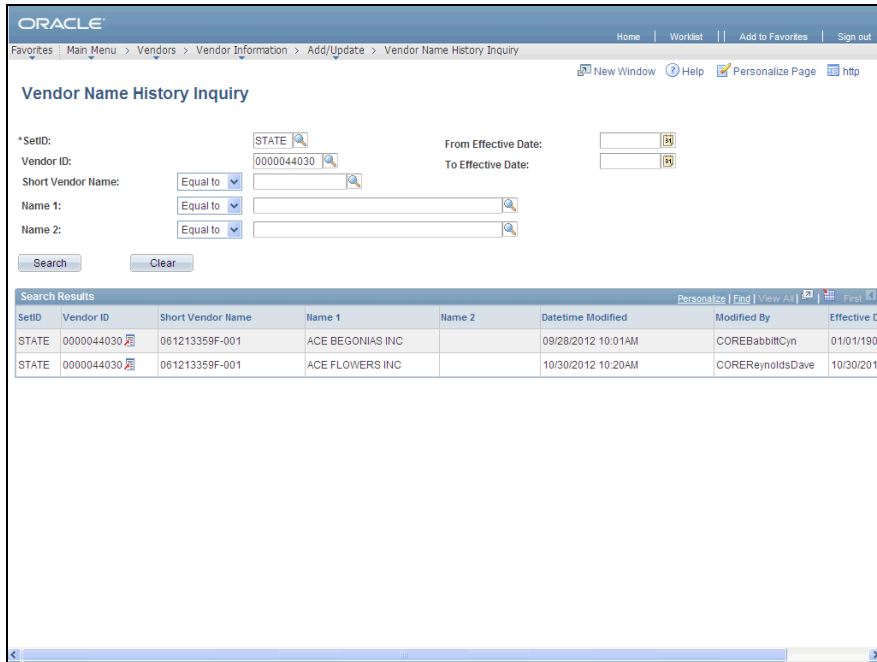
The screenshot displays the Oracle Vendor Information Add/Update interface. The main form includes the following fields and options:

- SetID:** STATE
- Vendor ID:** 000044030
- \*Vendor Short Name:** 061213359F, 061213359F-001
- \*Classification:** Outside Party
- HCM Class:** Regular
- \*Persistence:** Regular
- \*Vendor Status:** Unapproved
- \*Vendor Name 1:** ACE FLOWERS INC
- Vendor Name 2:** (empty)
- Options:**  Withholding,  Open For Ordering, Entity Type: Corp, W-9 Code: (empty), Offset Status: Never
- Buttons:** Check for Duplicate, Attachments (0), Expand All, Collapse All
- Vendor Relationships:**  Corporate Vendor,  InterUnit Vendor
- Corporate Vendor ID:** 000044030, **InterUnit Vendor ID:** ACE BEGONIAS INC
- Create Bill-To Customer:**  Create Bill To Customer
- Additional ID Numbers:** (empty)
- Duplicate Invoice Settings:** (empty)
- Government Classifications:** (empty)
- Standard Industry Codes:** (empty)
- Additional Reporting Elements:** (empty)
- Comments:** (empty)
- Bottom Buttons:** Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

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



Step	Action
11.	Use the <b>Vendor Name History Inquiry</b> 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 <b>000044030</b> into the <b>Vendor ID</b> field.
13.	Click the <b>Search</b> button. 



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

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor Name History

New Window | Help | http

### Vendor Name History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

SetID: = [ ]

Vendor ID: begins with [ ]

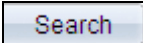
Short Vendor Name: begins with [ ]

Name 1: begins with [ ]

Name 2: begins with [ ]

Include History  Correct History  Case Sensitive

Search Clear Basic Search Save Search Criteria

Step	Action
16.	<p><b>SetID</b> is a required field. Use the search fields on the <b>Vendor Name History Find an Existing Value</b> page to limit the number of rows returned in the <b>Search Results</b>.</p> <p>Enter <b>STATE</b> into the <b>SetID</b> field.</p>
17.	Enter <b>000014144</b> into the <b>Vendor ID</b> field.
18.	<p>Click the <b>Search</b> button.</p> <p></p>



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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor Name History

New Window | Help | Personalize Page | http

### Vendor Name History

SetID: STATE  
Vendor ID: 0000014144

Vendor Name History Find | View All | First | 1 of 1 | Last

\*Effective Date: 01/01/1900 +


\*Name 1: D & K SOUND SERVICES INC

Name 2:

\*Vendor Short Name: 061026674F 061026674F-001

Modified By: COREBabbittCyn  
Datetime Modified: 09/28/2012 9:51AM

Save | Return to Search | Notify | Update/Display | Include History | Correct History

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

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor Name History

New Window | Help | Personalize Page | http

### Vendor Name History

SetID: STATE  
Vendor ID: 0000014144

Vendor Name History Find | View All | First | 1 of 2 | Last

\*Effective Date: 10/30/2012 +

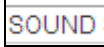
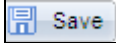
\*Name 1: D & K SOUND SERVICES INC

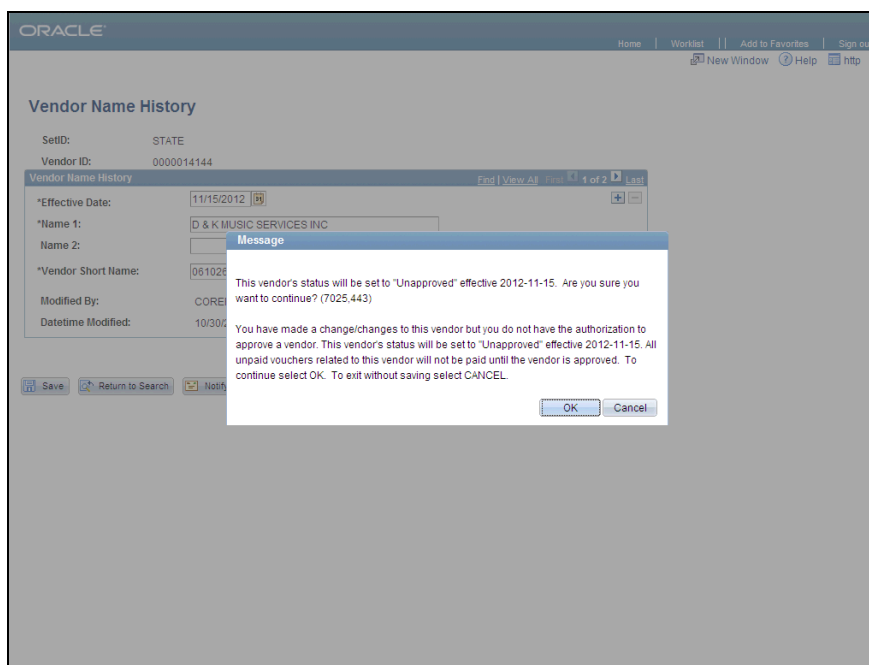
Name 2:

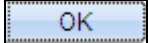
\*Vendor Short Name: 061026674F 061026674F-001

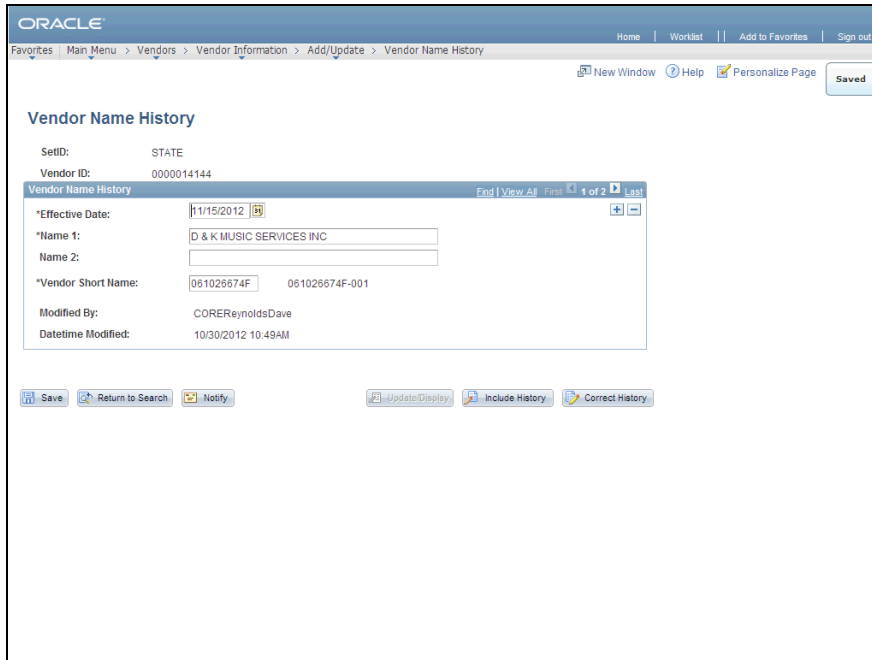
Modified By: COREReynoldsDave  
Datetime Modified: 10/30/2012 10:48AM

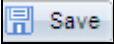
Save | Return to Search | Notify | Update/Display | Include History | Correct History

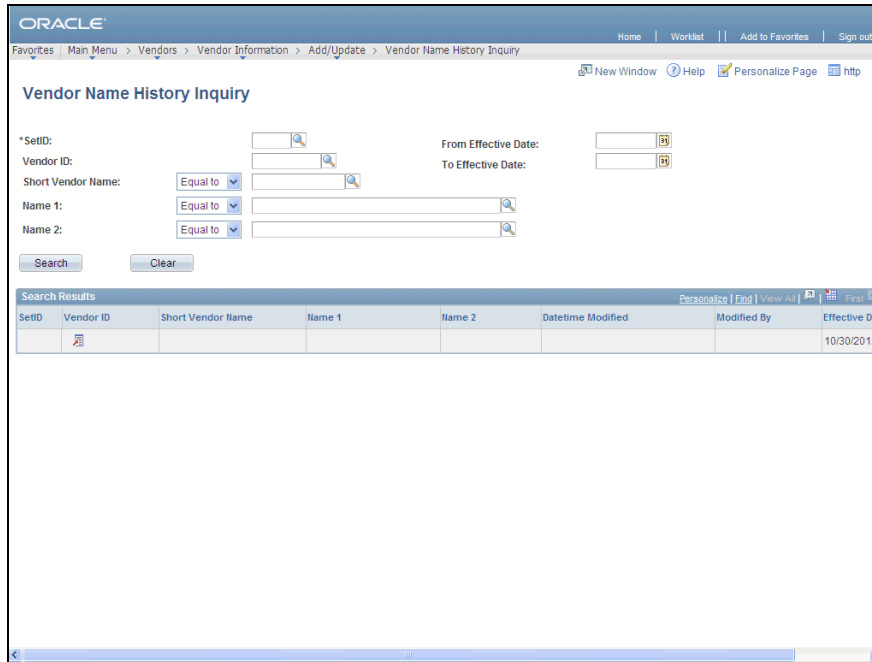
Step	Action
20.	The <b>Effective Date</b> field displays the current date.
21.	Enter <b>11/15/12</b> into the <b>Effective Date</b> field.
22.	Click in the <b>Name 1</b> field to edit the vendor's name. 
23.	Enter <b>MUSIC</b> into the <b>Name 1</b> field.
24.	Click the <b>Save</b> button. 

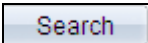


Step	Action
25.	The Vendor must be in Approved status to create transactions in Core-CT. Only OSC/APD staff can approve vendors.  Click the <b>OK</b> button. 



Step	Action
26.	The new vendor name will take effect on 11/15/2012. Until then the previous name for the vendor will be the effective name within Core-CT.
27.	Click the <b>Save</b> button. 
28.	The change to the vendor name can be viewed using the <b>Vendor Name History Inquiry</b> component.  Navigation: Vendors > Vendor Information > Add/Update > Vendor Name History Inquiry



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 <b>Search Results</b> .  Enter the <b>000014144</b> into the <b>Vendor ID</b> field.
31.	Click the <b>Search</b> button. 

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor Name History Inquiry

New Window | Help | Personalize Page | http

### Vendor Name History Inquiry

\*SetID: STATE

Vendor ID: 0000014144

From Effective Date:

To Effective Date:

Short Vendor Name: Equal to

Name 1: Equal to

Name 2: Equal to

Search Clear

SetID	Vendor ID	Short Vendor Name	Name 1	Name 2	Datetime Modified	Modified By	Effective D
STATE	0000014144	061026674F-001	D & K SOUND SERVICES INC		09/28/2012 9:51AM	COREBabbittCyn	01/01/1900
STATE	0000014144	061026674F-001	D & K MUSIC SERVICES INC		10/30/2012 10:49AM	COREReynoldsDave	11/15/2012

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.	<b>End of Procedure.</b>