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

Table of Contents

Changing a Vendor Name 1

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.

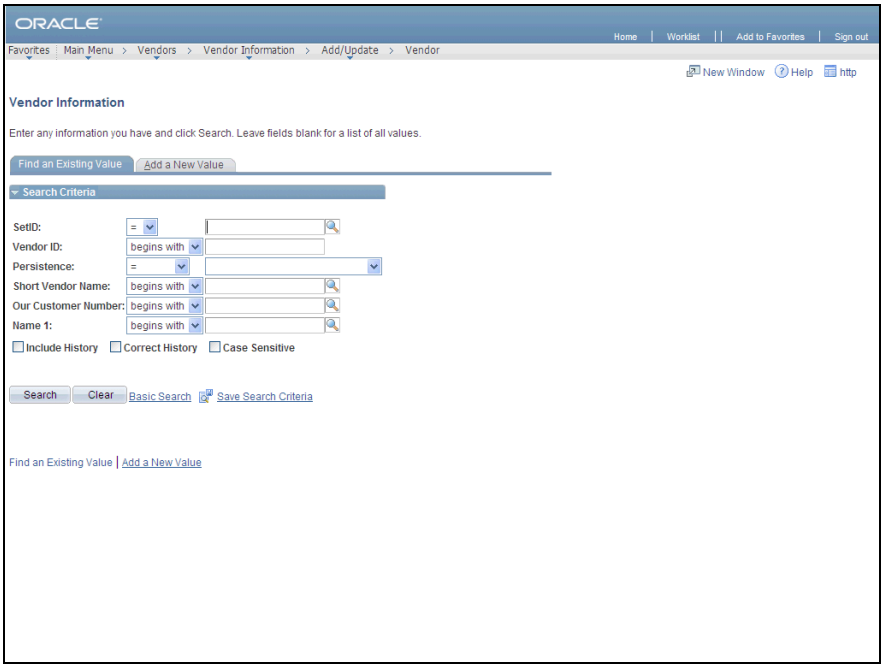
Procedure

Navigation:

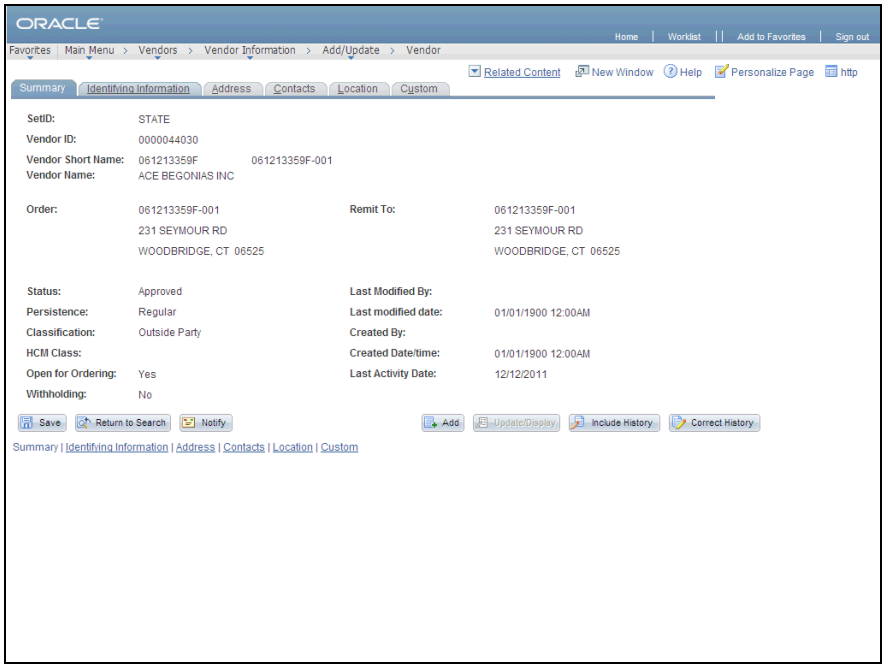
Vendors > Vendor Information > Add/Update > Vendor

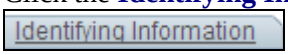
Vendors > Vendor Information > Add/Update > Vendor Name History

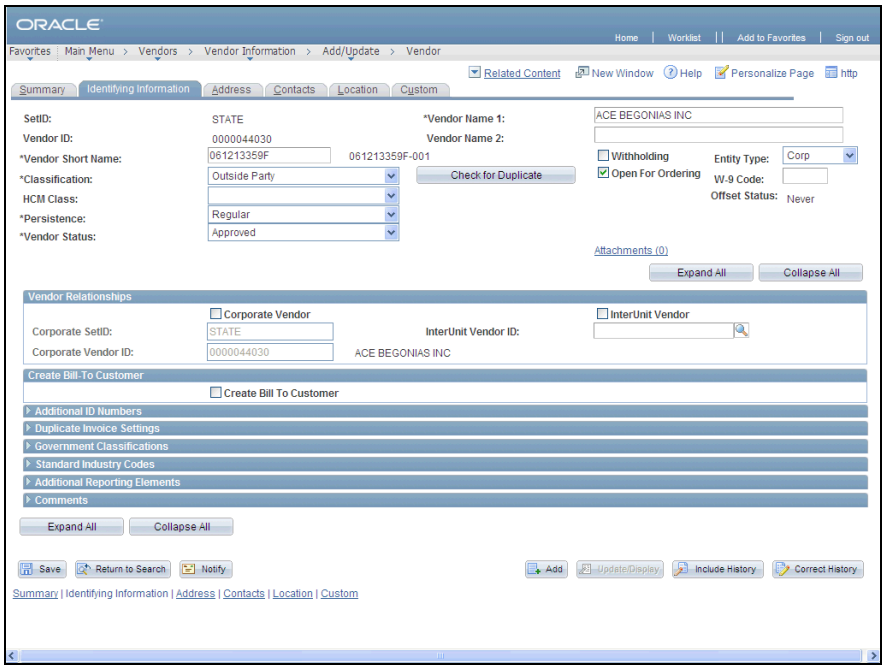
Vendors > Vendor Information > Add/Update > Vendor Name History Inquiry



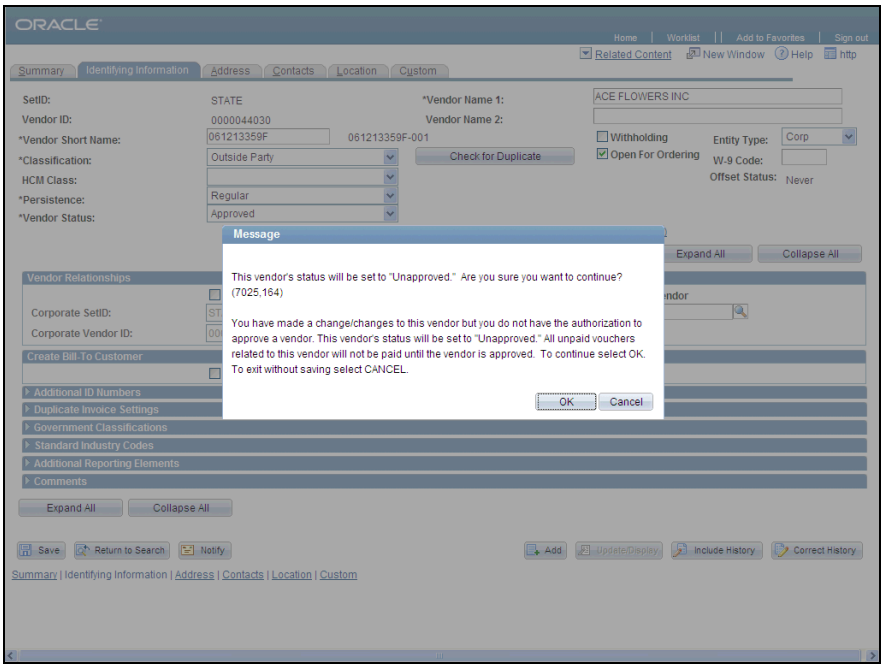
Step	Action
1.	**SetID** is a required field. Enter **STATE** into the **SetID** field.
2.	Use the Search fields on the **Vendor Information find an Existing Value** page to limit search results. Enter **0000044030** into the **Vendor ID** field.
3.	Click the **Search** button. Search



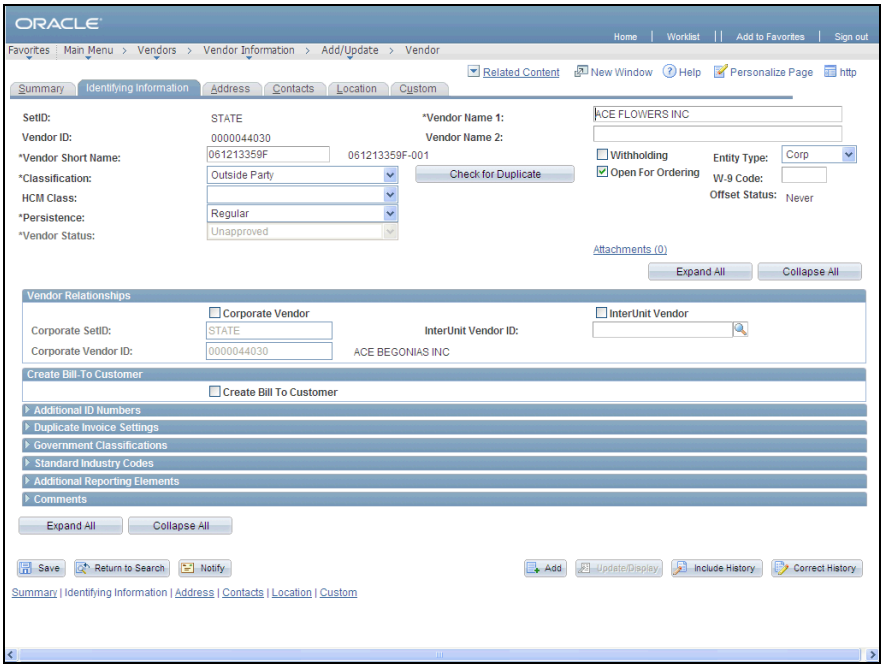
Step	Action
4.	Click the **Identifying Information** tab. 

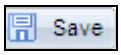


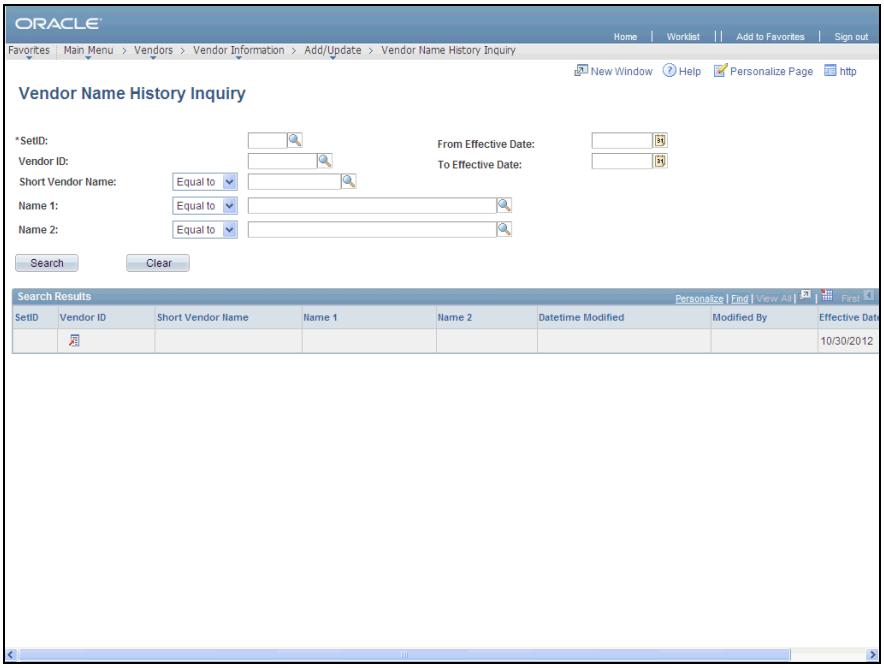
Step	Action
5.	Click in the **Vendor Name 1** field to edit the name of the Vendor. ACE BEGONIAS INC
6.	Enter **ACE FLOWERS INC** into the **Vendor Name 1** field.
7.	The new name is effective once the change is saved. Click the **Save** button. Save



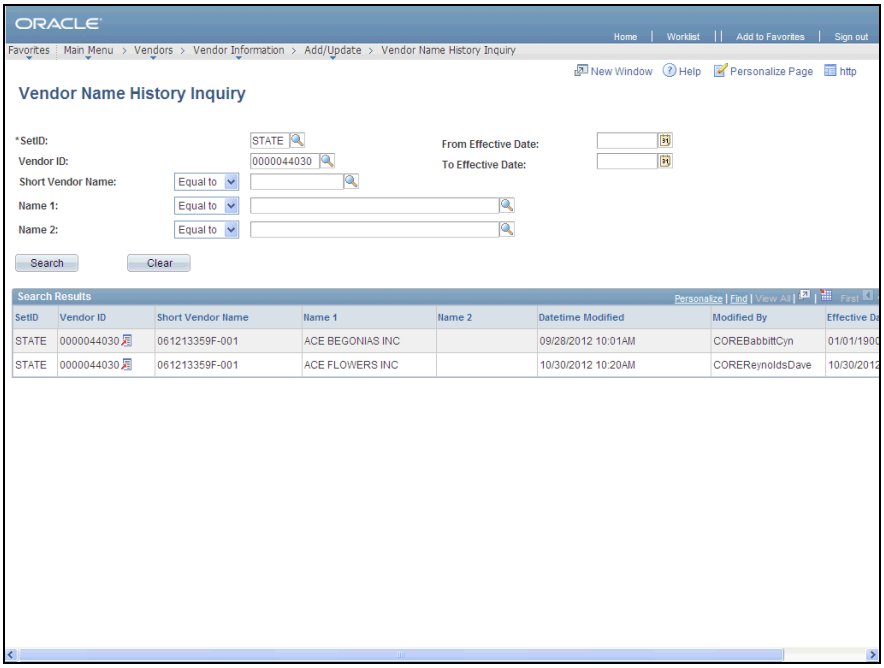
Step	Action
8.	Vendors must be in the Approved **Status** to create transactions in Core-CT. Only OSC/APD staff can approve vendors. Click the **OK** button. OK



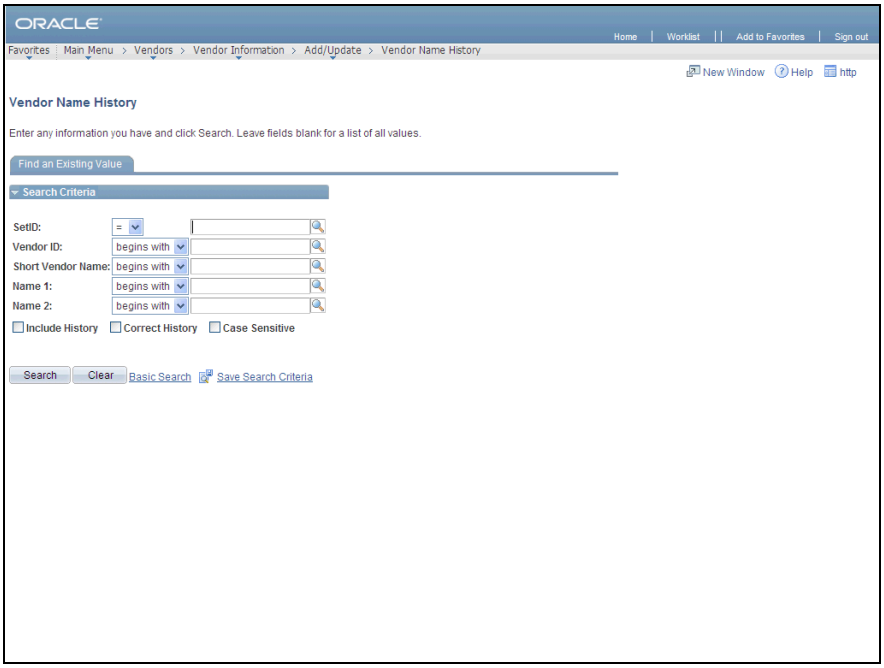
Step	Action
9.	Click the **Save** button. 
10.	The change to the vendor name can be viewed using the **Vendor Name History Inquiry** component. Navigation: Vendors > Vendor Information > Add/Update > Vendor Name History Inquiry



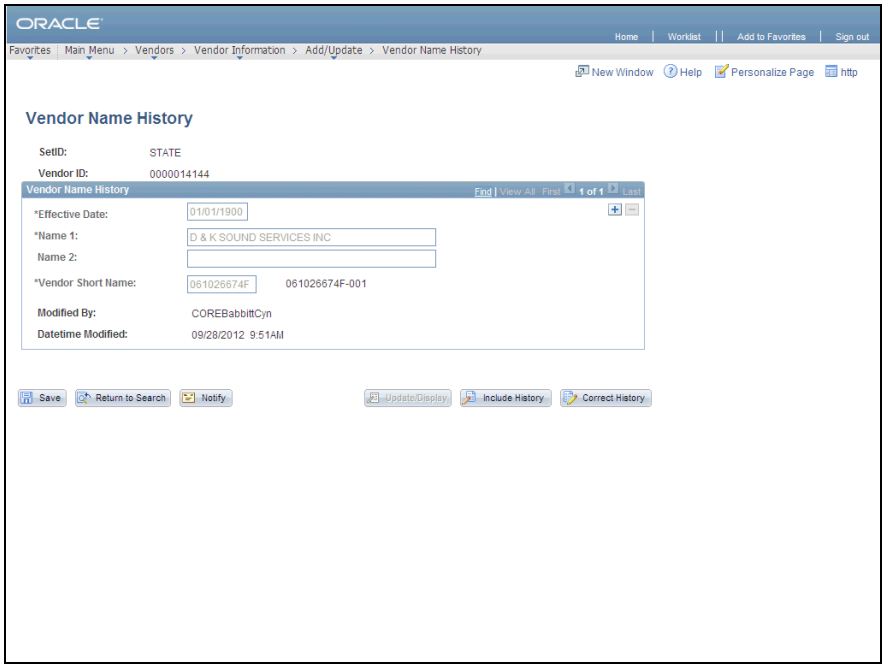
Step	Action
11.	Use the **Vendor Name History Inquiry** page to locate the vendors to view. **SetID** is a required field. All vendor information is stored in the STATE **SetID.** Enter **STATE** into the **SetID** field.
12.	Use the search fields on the **Vendor Name History Inquiry** page to limit the number of rows returned in the Search Results. Enter **0000044030** into the **Vendor ID** field.
13.	Click the **Search** button. Search



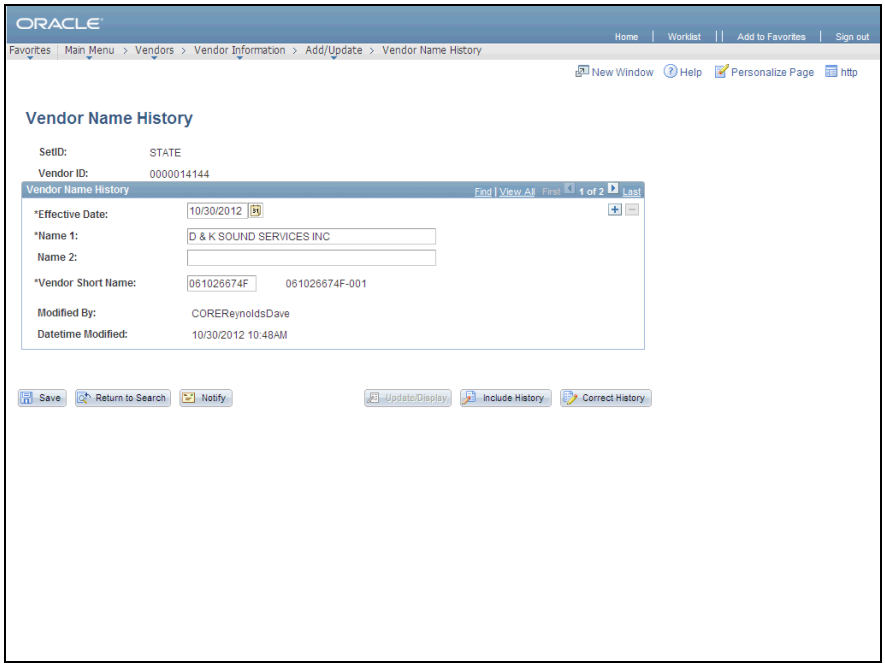
Step	Action
14.	Two rows are returned in the **Search Results**. The first row reflects the initial addition of the vendor into Core-CT. The second row reflects the name change made previously in this topic.
15.	Vendor name changes can also be made using the **Vendor Name History** component. This component 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



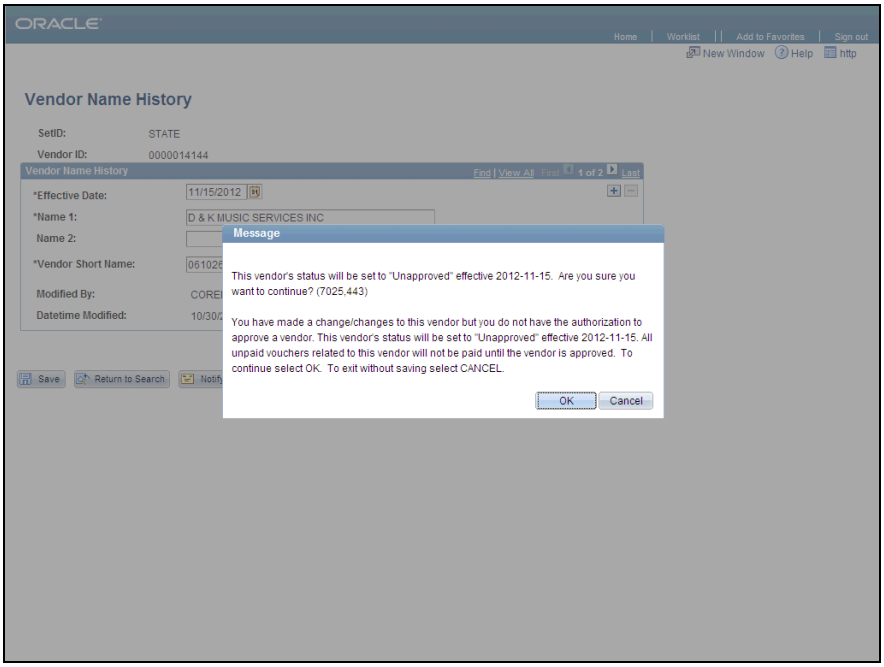
Step	Action
16.	**SetID** is a required field. Use the search fields on the **Vendor Name History Find an Existing Value** page to limit the number of rows returned in the **Search Results**. Enter **STATE** into the **SetID** field.
17.	Enter **0000014144** into the **Vendor ID** field.
18.	Click the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



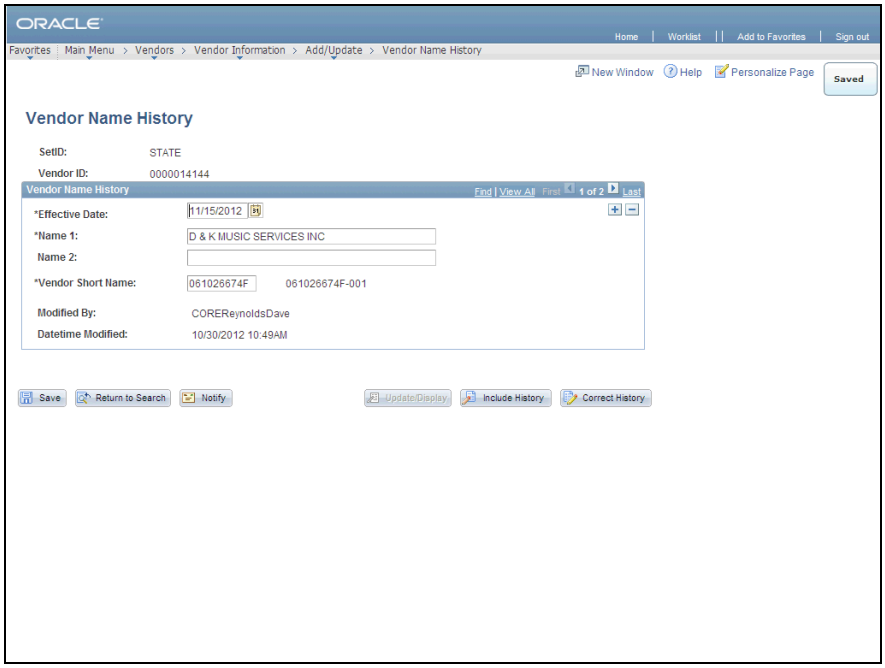
Step	Action
19.	The **Vendor Name History** page displays the current effective dated name for the selected vendor. Current effective dated rows cannot be edited unless in **Correct History** mode. Click the **Add a new row at row 1** button to add a new effective date row.

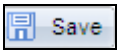


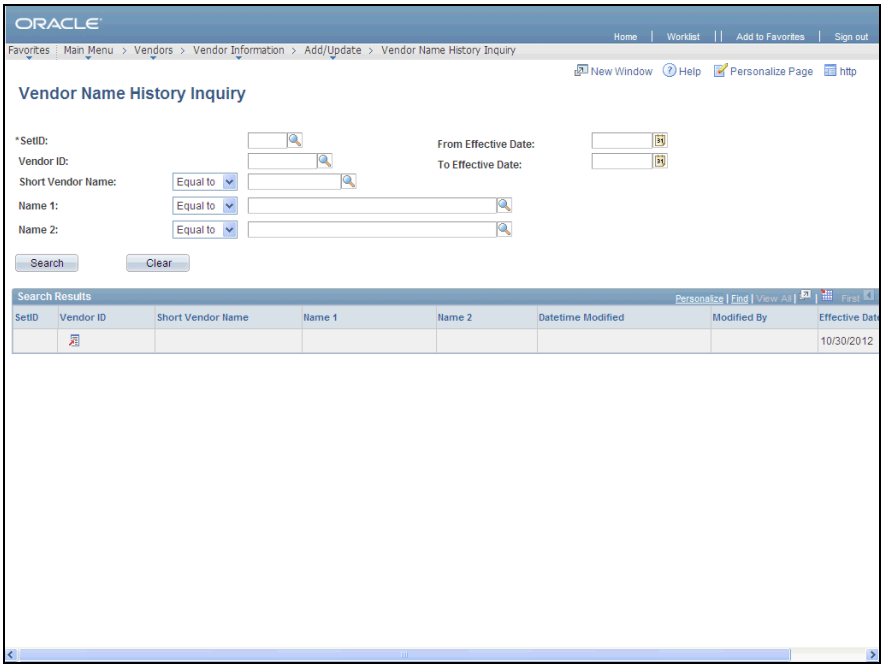
Step	Action
20.	The **Effective Date** field displays the current date.
21.	Enter **11/15/12** into the **Effective Date** field.
22.	Click in the **Name 1** field to edit the vendor's name. SOUND
23.	Enter **MUSIC** into the **Name 1** field.
24.	Click the **Save** button. Save



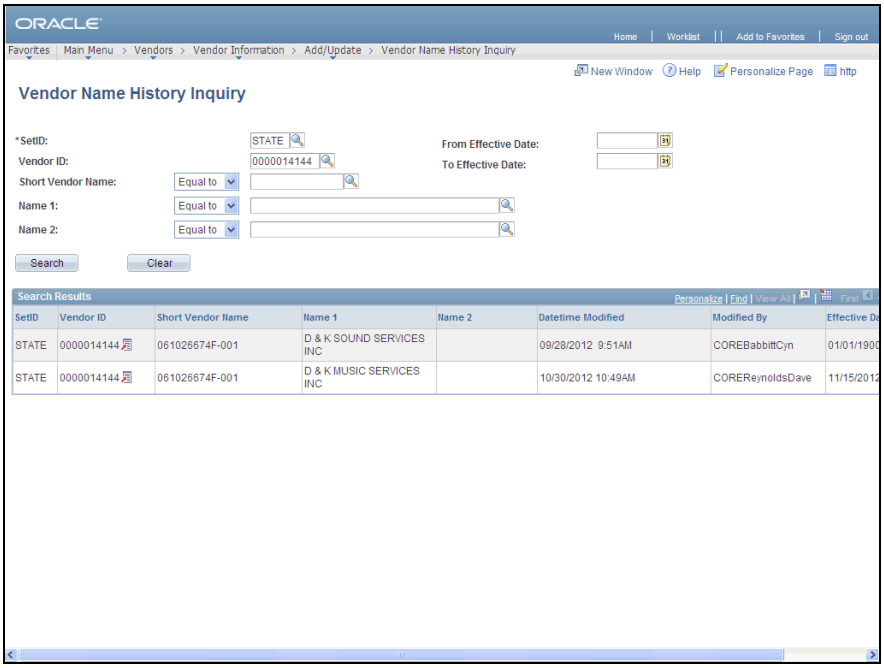
Step	Action
25.	The Vendor must be in Approved status to create transactions in Core-CT. Only OSC/APD staff can approve vendors. Click the **OK** button. OK



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 **Vendor Name History Inquiry** component. Navigation: Vendors > Vendor Information > Add/Update > Vendor Name History Inquiry



Step	Action
29.	Use the **Vendor Name History Inquiry** page to locate vendors to view. **SetID** is a required field. All vendor information is stored in the STATE **SetID.** Enter **STATE** into the **SetID** field.
30.	Use the search fields to limit the number of rows returned in the **Search Results**. Enter the **0000014144** into the **Vendor ID** field.
31.	Click the **Search** button. Search



Step	Action
32.	Two rows are returned in the **Search Results**. 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.**