

Changes to vendor functionality in Core-CT 9.1 include:

- The ability to effective date vendor name changes
- The ability to view vendor name change history
- The ability to add attachments to vendors
- Enhanced duplicate vendor checking

Vendor Name Changes

Vendor name changes can be made using the **Vendor** component or the **Vendor Name History** component.

Identifying Information page

Changes made to a vendor name on the **Identifying Information** page of the **Vendor** component take effect immediately. These changes can be reviewed using the **Vendor Name History Inquiry** component.

Navigation

Vendors > Vendor Information > Add/Update > Vendor

Use the **Vendor Information Find an Existing Value** page to locate the vendor.

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:	=	STATE
Vendor ID:	begins with	0000044035
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

- Use the search fields to limit the number of vendors returned in the **Search Results** grid. The **SetID** field is required.
- Click the **Search** button.
- Select the vendor from the **Search Results** grid.

Use the **Identifying Information** tab to edit the Vendor name.

The screenshot shows the 'Identifying Information' tab of a vendor record. The 'Vendor Name 1' field is highlighted with a red box and contains the text 'GUERRA DEANGELIS TRUSTEES'. The 'Save' button at the bottom left is also highlighted with a red box. Other fields include SetID (STATE), Vendor ID (0000044035), and various classification and status dropdowns.

- Edit the value in the **Vendor Name 1** field
- Click the **Save** button

Vendor Name History

Users can employ the **Vendor Name History** component to make changes to a vendor name that will take effect in the future. Use this component to make changes to vendor names that take place immediately. Users can view any changes to a vendor name made with this component using the **Vendor Name History Inquiry** component.

Navigation

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

Use the **Vendor Name History Find an Existing Value** page to locate the vendor.

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:	=	STATE
Vendor ID:	begins with	0000044030
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

- Use the search fields to limit the number of vendors returned in the **Search Results** grid. The **SetID** field is required.
- Click the **Search** button.
- Select the vendor from the **Search Results** grid.

The **Vendor Name History** page displays.

Vendor Name History

SetID: STATE
Vendor ID: 0000044030

Vendor Name History		End View All First 1 of 1 Last
*Effective Date:	10/30/2012	+
*Name 1:	ACE FLOWERS INC	
Name 2:		
*Vendor Short Name:	061213359F 061213359F-001	
Modified By:	COREReynoldsDave	
Datetime Modified:	10/30/2012 10:20AM	

Click the **Add a New Row** button to add a new effective dated row.

Vendor Name History

SetID: STATE
 Vendor ID: 000044030

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

*Effective Date: 11/20/2012 [31]

*Name 1: ACE FLOWERS INC

Name 2:

*Vendor Short Name: 061213359F 061213359F-001

Modified By: COREReynoldsDave
 Datetime Modified: 11/20/2012 5:07PM

Save Return to Search Previous in List Next in List Notify Update/Display Include History

- To add a name change that will apply in the future, edit the value in the **Effective Date** field. Enter the future date on which the name change will take effect. To have the change take effective immediately, accept the value that defaults in the **Effective Date** field (the current date).
- Edit the information in the **Name 1** field.
- Click the **Save** button.

Vendor Name History Inquiry

Use the **Vendor Name History Inquiry** page to review a history of changes to a vendor name. This page displays all changes to a vendor name including the future dated changes and the original addition of the vendor to Core-CT.

Navigation

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

Vendor Name History Inquiry

*SetID: STATE From Effective Date: [] To Effective Date: []
 Vendor ID: 000044030
 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 Date
STATE	000044030	061213359F-001	ACE BEGONIAS INC		09/28/2012 10:01AM	COREBabbittCyn	01/01/1900
STATE	000044030	061213359F-001	ACE FLOWERS INC		10/30/2012 10:20AM	COREReynoldsDave	10/30/2012

- Use the search fields to narrow the number of rows returned in the **Search Results** grid.
- Click the **Search** button
- Search results will display in the **Search Results** grid.

Adding Attachments to a Vendor

Core-CT allows users to add attachments to a Vendor on the **Identifying Information** page in the **Vendor** component using the **Attachments (0)** link.

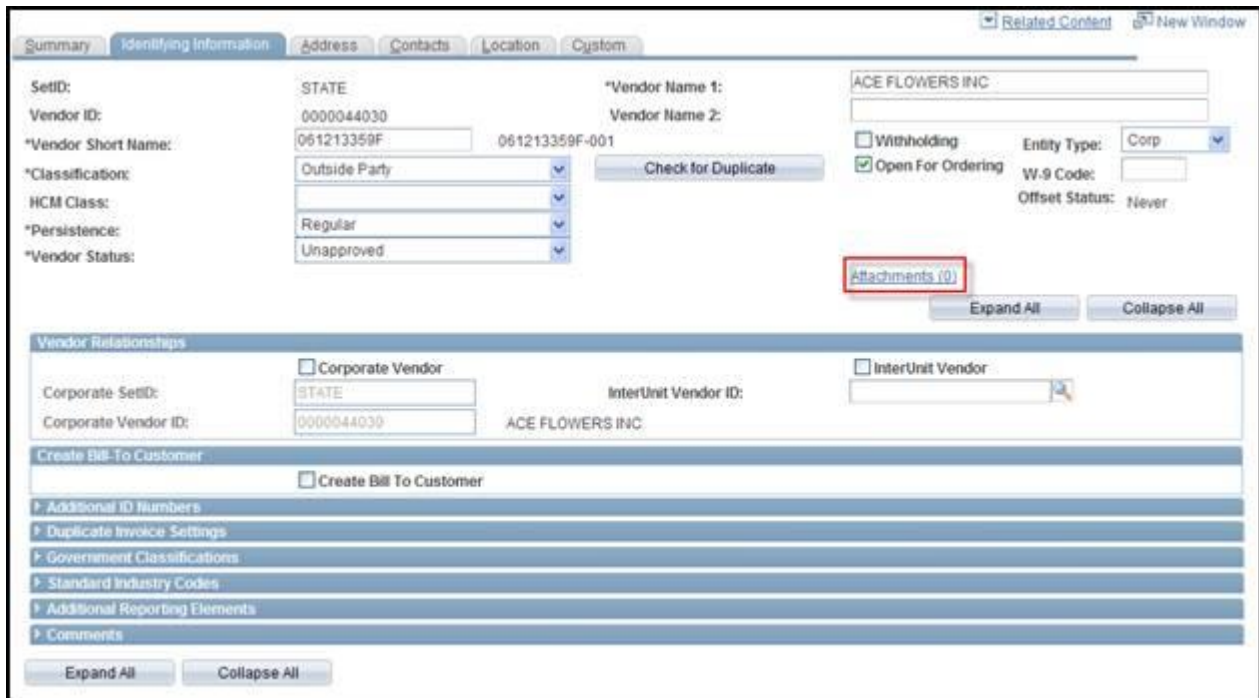
The types of files that can be attached include:

- doc & docx
- xls & xlsx
- txt
- pdf
- jpeg

The number in the parentheses () in the **Attachment** link indicates the number of attachments associated with a payment. For example **Attachments (0)** indicates that no files are attached; **Attachments (1)** indicates one file is attached.

To add a pdf from the **Identifying Information** page:

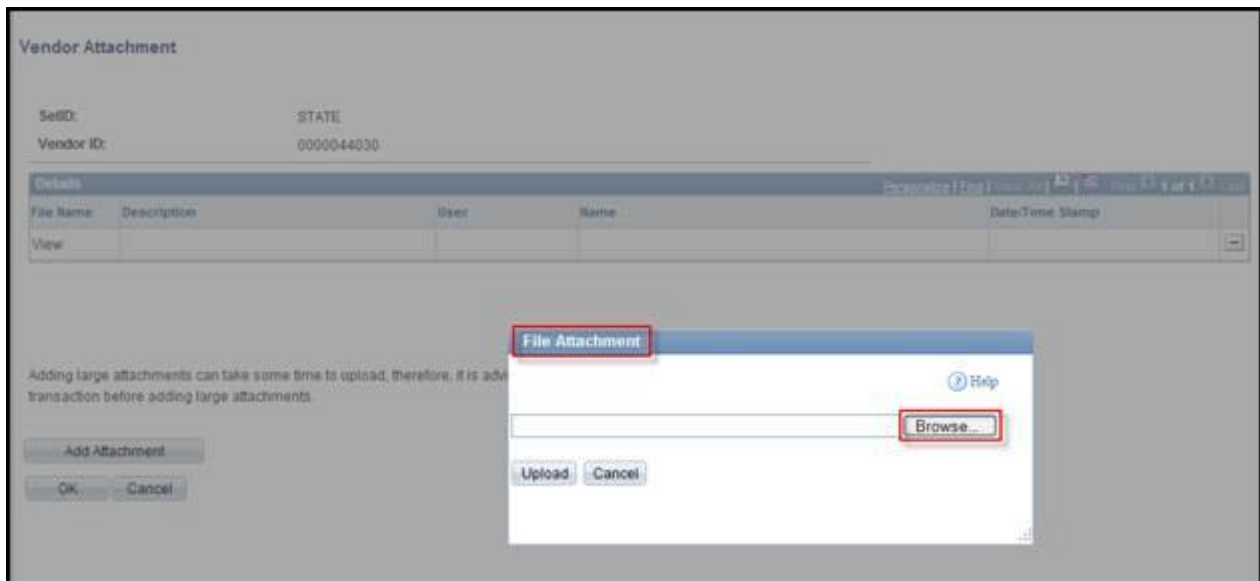
- Navigate to the Identifying Information page for a vendor and click the Attachments (0) link.



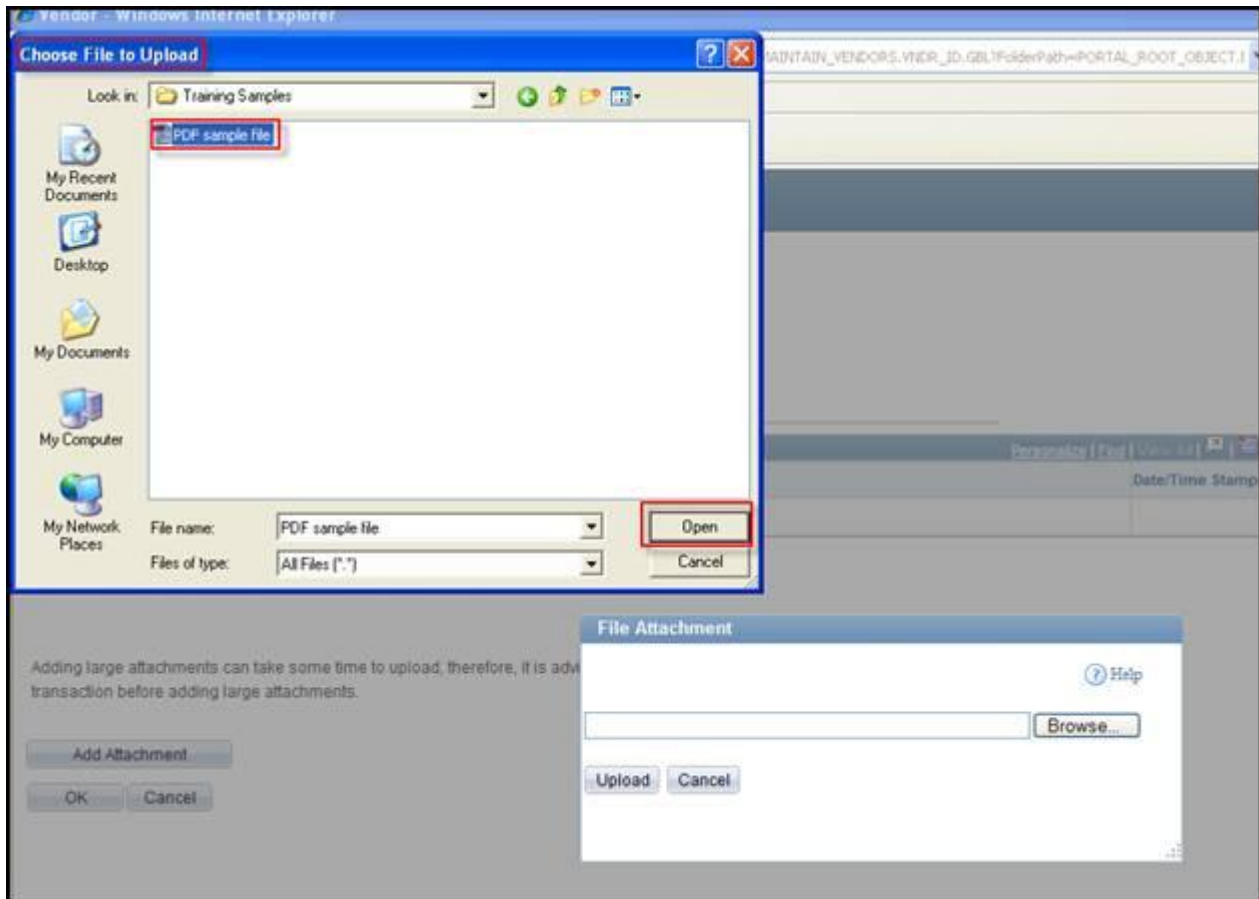
- The **Vendor Attachment** page displays. Click **Add Attachment**.



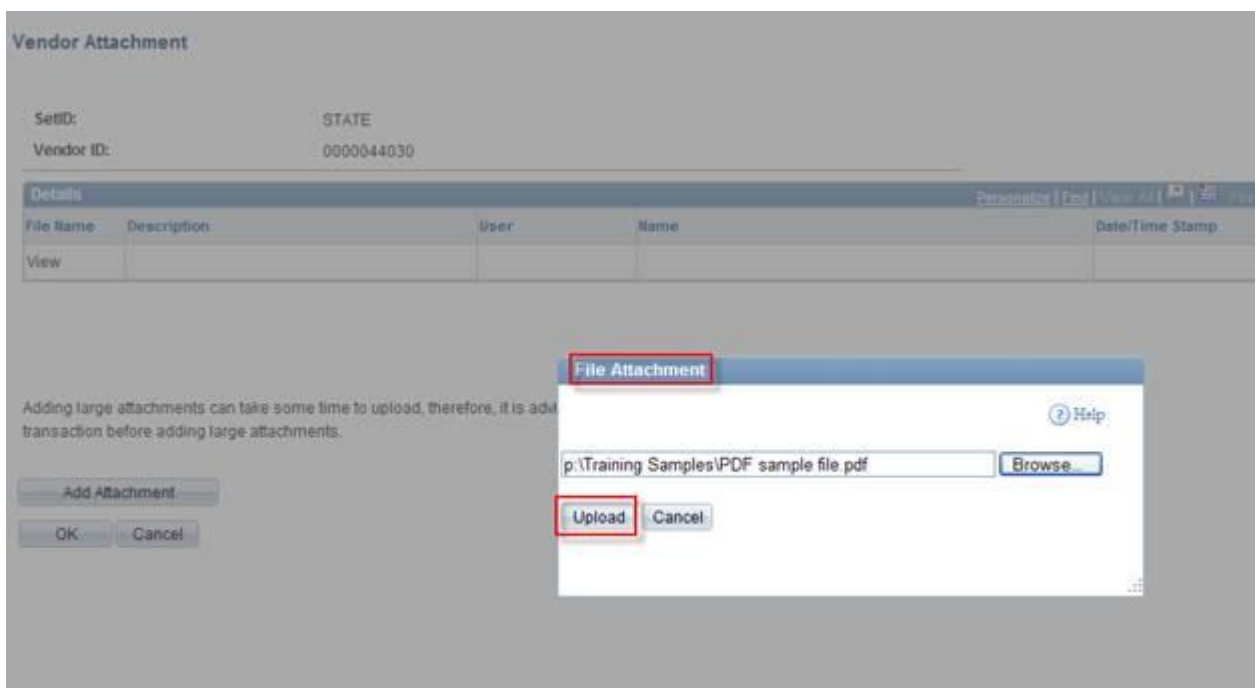
- The **File Attachment** dialog box displays. Click the **Browse...** button.



- The **Choose File to Upload** dialog box displays. Select the file to upload and click **Open**.



- The name of the selected file displays in the **File Attachment** dialog box. Click **Upload** to attach the file.



- The **Vendor Attachments** page displays. The name of the uploaded file displays in the **File Name** field. Enter a brief description of the uploaded file in the **Description** field.

Vendor Attachment

SetID: STATE
Vendor ID: 0000044030

File Name	Description	User	Name	Date/Time Stamp
PDF_sample_file.pdf	Sample File			

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment
OK Cancel

- Use the **Add Attachment** button to add another attachment. Use the **OK** button to return to the **Identifying Information** page and save the attachment. Use the **Cancel** button to return to the **Identifying Information** page without saving the attachment.

Summary **Identifying Information** Address Contacts Location Custom

SetID: STATE
Vendor ID: 0000044030
*Vendor Short Name: 061213359F
*Classification: Outside Party
HCM Class: Regular
*Persistence: Regular
*Vendor Status: Unapproved

*Vendor Name 1: ACE FLOWERS INC
Vendor Name 2:
Check for Duplicate
 Withholding
 Open For Ordering
Entity Type: Corp
W-9 Code:
Offset Status: Never

Attachments (1)
Expand All Collapse All

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

Create Bill-To Customer
 Create Bill To Customer

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

- The **Attachments (1)** link now indicates that one attachment has been added to the vendor.

Duplicate Vendor Checking

The following fields are used by Core-CT 9.1 to check for duplicate vendors—for active and inactive vendors.

- **Vendor Name**—generates a warning message
- **Vendor Short Name**—generates a warning message

- **Vendor Withholding TIN**—duplicate is rejected

These options are set on the **Vendor Set Control** page.

Navigation

Set Up Financials/Supply Chain > Product Related > Procurement Options > Vendors > Set-Controls Vendor

Vendor Set Control

SetID: STATE State of Connecticut

Autonumbering **Duplicate Vendor Checking**

Use Autonumbering
 Last Vendor ID Assigned: 0000146992

Vendor Information Control

*Display Withholding Option: 1099
 *Display VAT Flag: Hide
 Country: USA

EFT/ACH Prenote Confirmation

Wait Days: 3

Approvals

Workflow Approval Enabled?

Vendor Name History

Vendor Name History
 day(s) ahead of time: 0

	Active	Inactive
*ID Type:	Do Not Check	Do Not Check
*Vendor Name:	Warning	Warning
*Vendor Short Name:	Warning	Warning
*Address:	Do Not Check	Do Not Check
*Vendor Withholding TIN:	Reject	Reject
*Withholding Name:	Do Not Check	Do Not Check
*VAT Registration:	Do Not Check	Do Not Check

Processing Options

*Vendor CI Load: Do Not Check
 Check for duplicates at save

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