Advantage 3.11- On Demand Training

Class Title: How to Create a Vendor/Customer Maintenance Document (VCM) to Add a Taxpayer Identification Number to an existing Vendor in Advantage Financial 3.11

Creation Date: 06/11/2018
Revised Date: 06/11/2018

Goal & Objectives

Goal: After taking this class, students will know how to Create a VCM to add a TIN to an existing Vendor in Advantage 3.11.

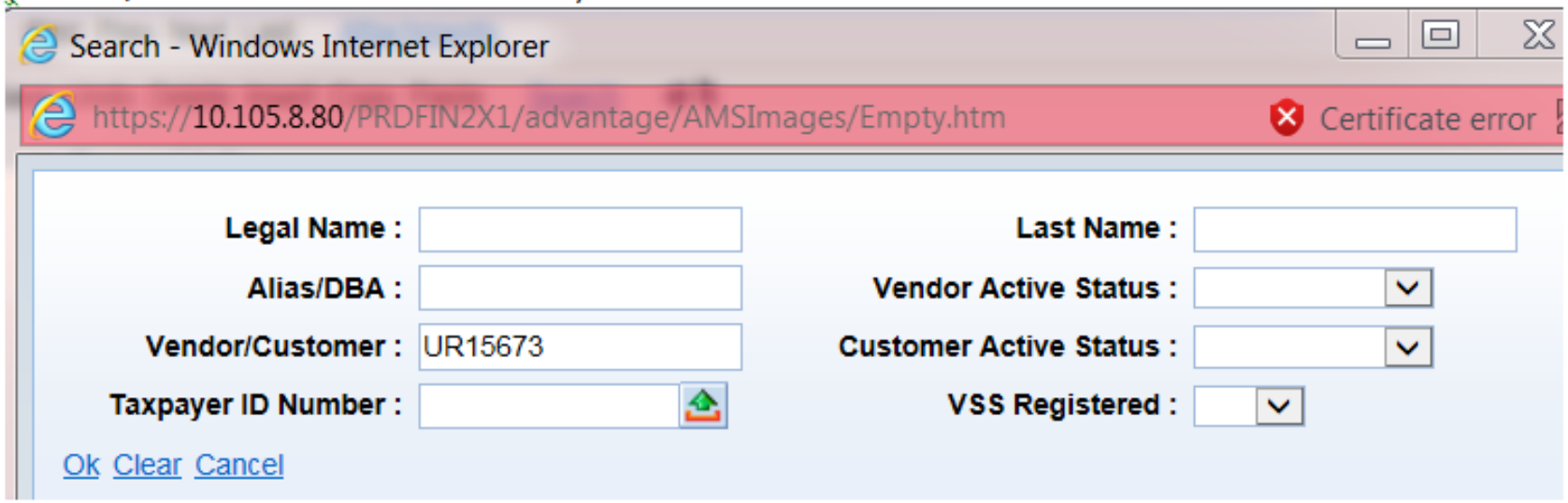
Objectives:

- Show students how to create a Vendor/Customer Maintenance (VCM) document in Advantage 3.11
- Show students how to upload back-up documentation to support the VCM in Advantage 3.11
- Show students how to add a taxpayer identification number to an existing vendor in Advantage 3.11

How to create a Vendor/Customer Maintenance (VCM) document in Advantage 3.11

Use the Jump to box to go to the VCUST table - Jump to: VCUST × Go click "Go"

A search box will pop up. Enter the information you have to search by and click on "Ok" (Vendor/Customer number is easiest)



The vendor record will come up; scroll to the bottom and click on "Modify Existing Record"

CGI Advantage

Welcome, Penny Watts

- Close
- ✓ Vendor/Customer
  - General Info
  - Headquarters
  - Organization
  - Disbursement Options
  - Prenote/EFT
  - Remittance Advice
  - Vendor Terms
  - Accounts Receivable
  - eMALL
  - Location Information
  - Executive Compensation
  - Additional Information
  - Travel
  - Change Management
- Address
- Business Type
- Service Area
- Commodity
- W-8 Form
- Authorized Dept.
- Prevent Spending
- Certification
- Vendor User Information
- Vendor Attachments

Vendor/Customer

Vendor/Customer	Legal Name	Alias/DBA	Vendor Active Status	Customer Active Status
✓ UR15673			Active	Inactive

From 1 to 1 of 1 First Prev Next Last Attachments

Save Undo Delete Insert Copy Paste Search

General Info

Vendor/Customer : UR15673
Legal Name :
Alias/DBA :
Vendor Active Status : Active
Vendor Approval Status : Complete
Customer Active Status : Inactive
Customer Approval Status : Incomplete
Location Name :
First Name :
Middle Name :
Last Name :
Company Name :
Vendor Performance Rating :
EDI Enabled : ☐

Restrict Use by Department : ☐
Miscellaneous Account : ☐
Internal Account : ☐
Third Party Only : ☐
Third Party Vendor : ☐
Third Party Customer : ☐
Inventory Customer : ☐
Healthcare Provider : ☐
Never Archive : ☐
Restrict VSS Access : No
Discontinue - No New Business : ☐
Prevent MA Reference : ☐
PunchOut Enabled : ☐
Re-PunchOut Enabled : ☐
Electronic Order Enabled : ☐
W-9 Received : ☐
W-9 Received Date :
W-8 Received : ☐
W-8 Received Date :
Accepts Credit Cards : ☐
Active From : 05/10/2018
Active To :
Last Usage Date : 05/17/2018
Department :
Unit :

- Close
- ✓ Vendor/Customer
  - General Info
  - Headquarters
  - Organization
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Active From : 05/10/2018
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Top

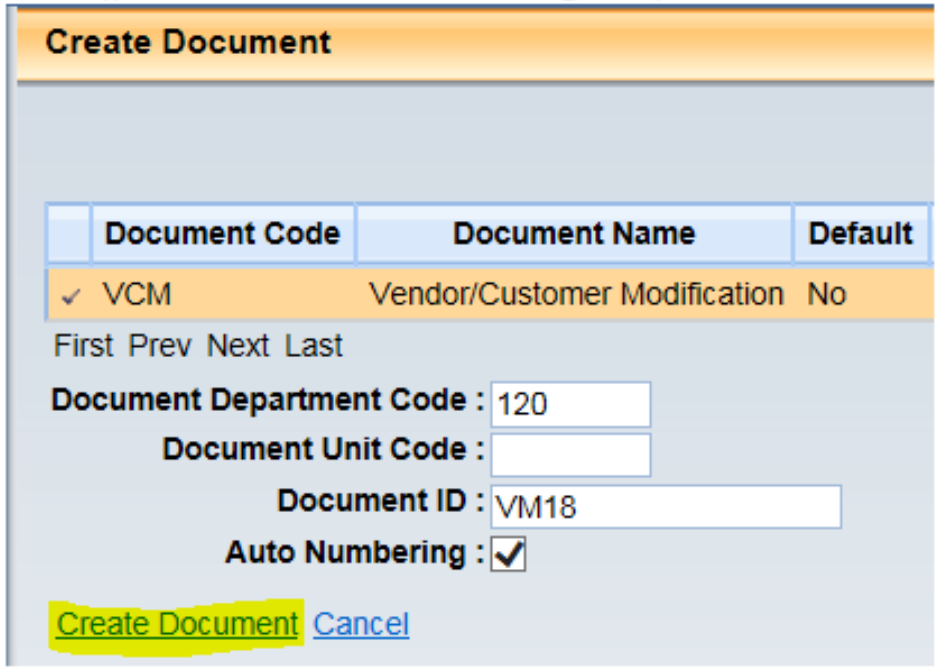
CREATE DOCUMENT> Create New Record Modify Existing Record

UPDATE> Headquarters Add 1099 Information Entry Add 1042-S Reporting Information Entry

SEARCH BY> Master Contacts Master Addresses Vendor Commodity Vendor Addresses

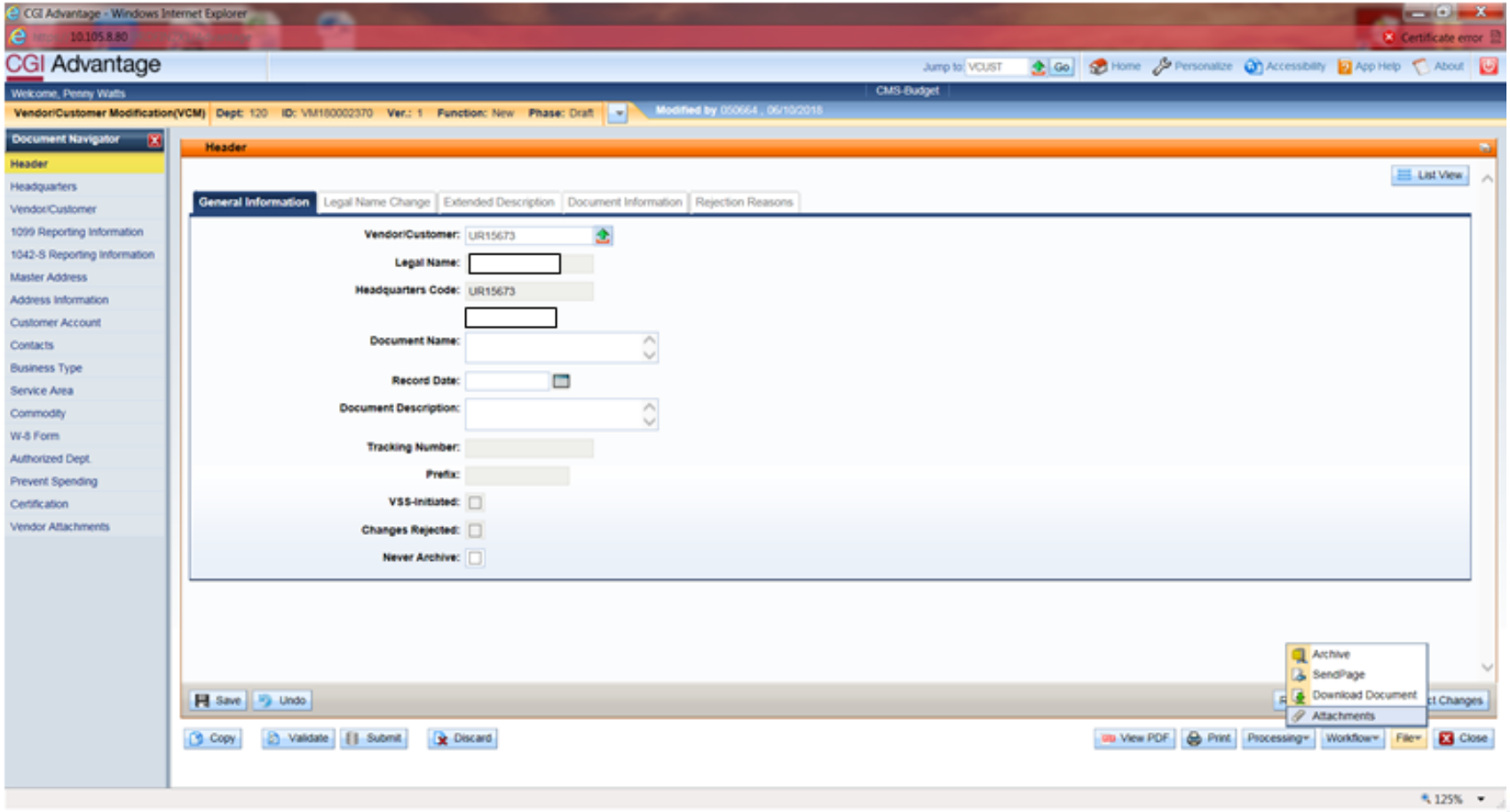
Vendor Transaction History

Enter Department Code, Document ID: VMFY (for Vendor Maintenance & Fiscal Year; for 2018, enter VM18), check the Auto Numbering box, and click "Create Document"



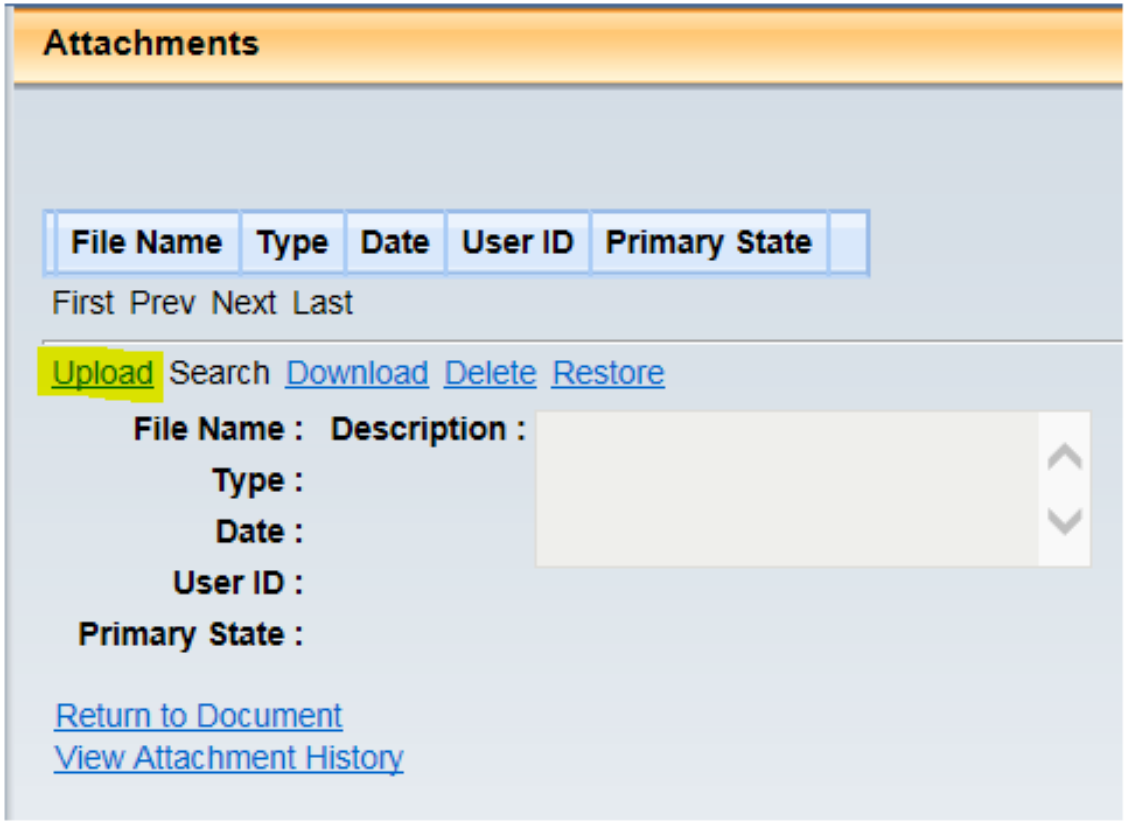
This will open the vendor/customer record.

Select "File" and "Attachments to upload the Vendor Maintenance Request back-up documentation (W-9).

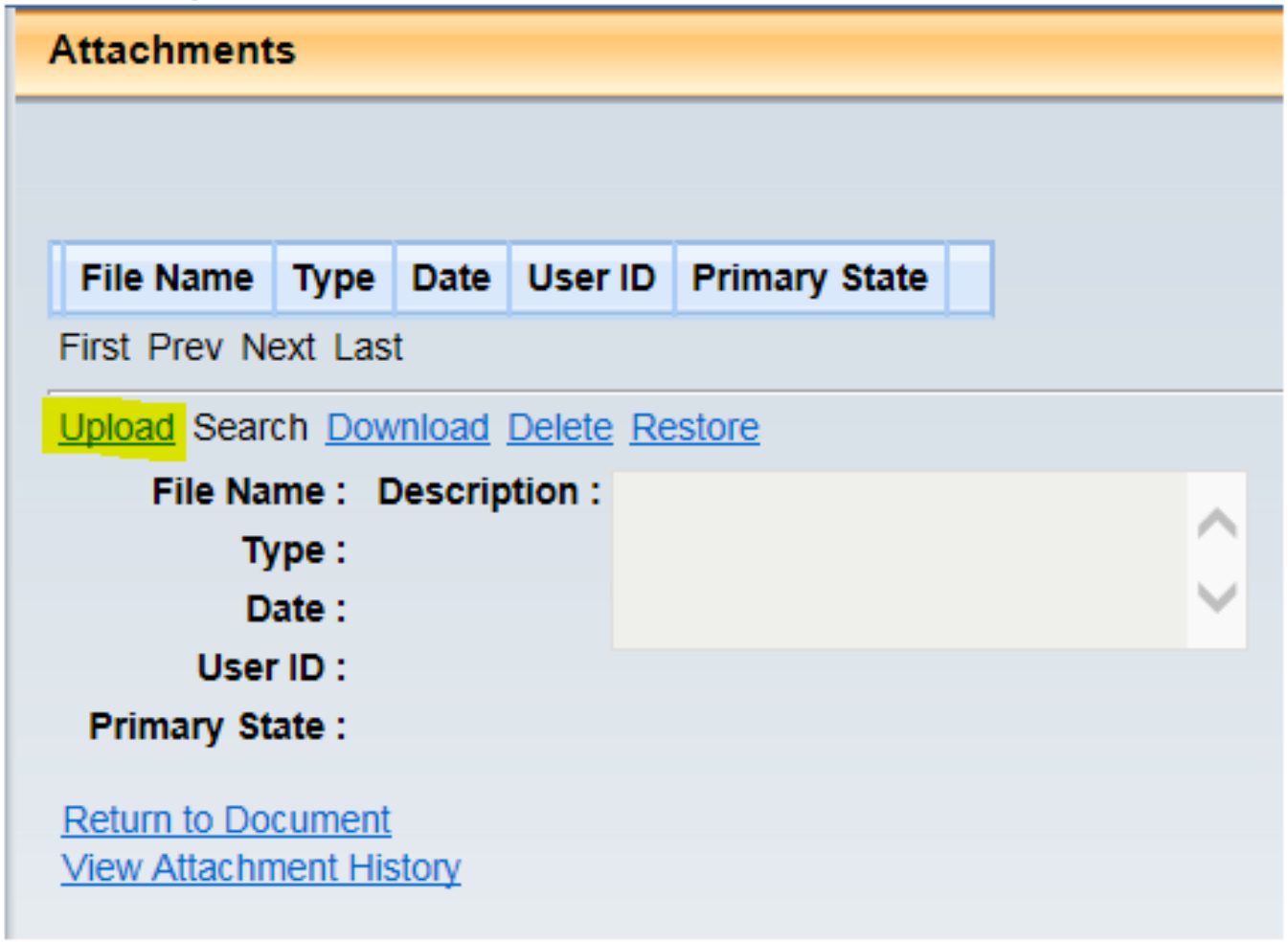


How to upload back-up documentation to support the VCM in Advantage 3.11

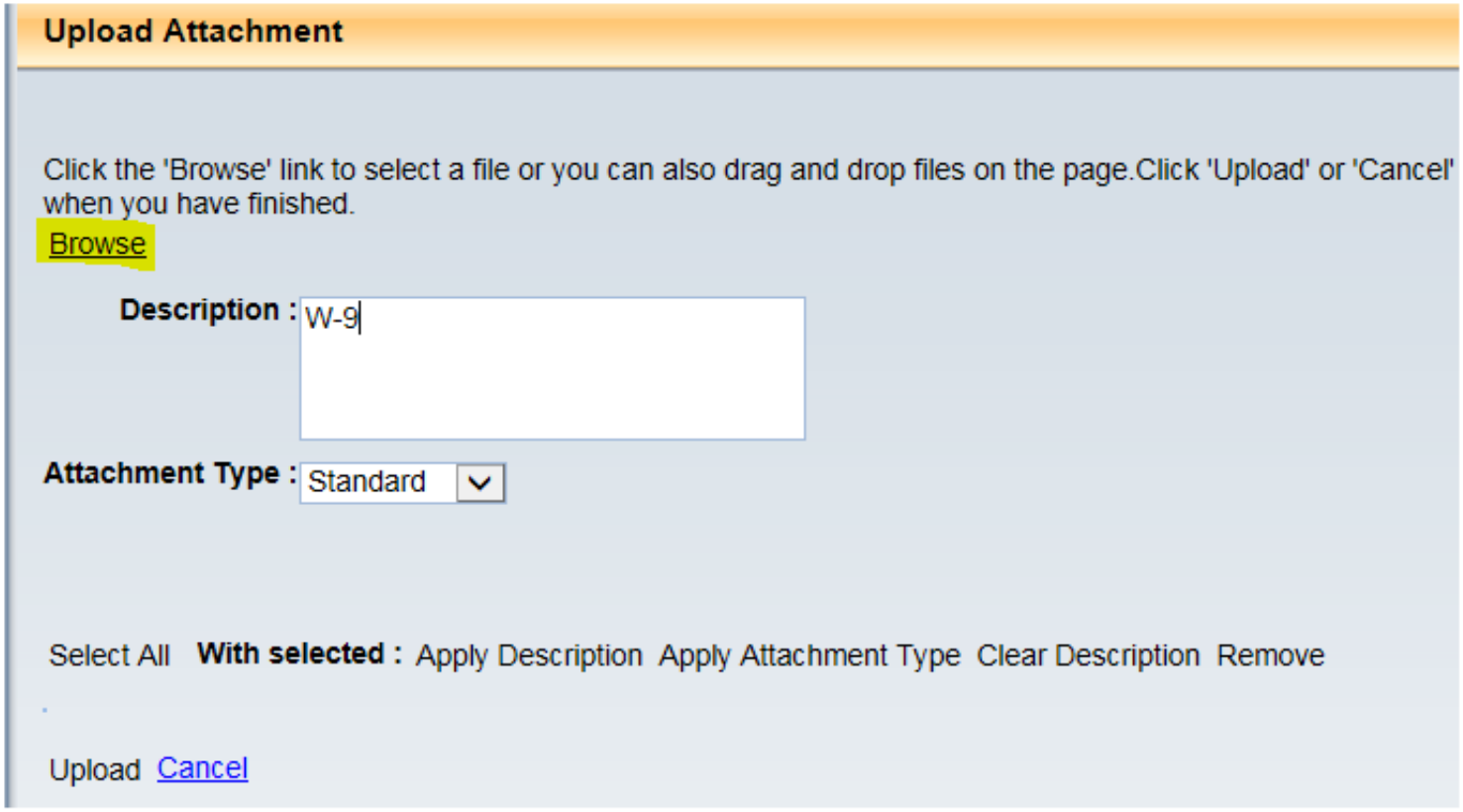
Select "Upload"



Select "Upload"



Enter Back-up documentation description and select "Browse" to select applicable document(s). Note: In 3.11 you can select multiple documents to upload and enter a unique description for each document.



Select applicable documents, enter a description for each if desired and select "Upload".

Upload Attachment

Click the 'Browse' link to select a file or you can also drag and drop files on the page.Click 'Upload' or 'Cancel' when you have finished.

Browse

Description : W-9

Attachment Type : Standard

Select All **With selected :** Apply Description Apply Attachment Type Clear Description Remove

	File Name	Description	Attachment Type
☑	OFFICE SUPPLY ORDER LOG - fillable.pdf	W-9	Standard
☑	CBP Form 5106 - 7-26-17.pdf	Request from Vendor	Standard

Total Number of Files selected:2

Upload Cancel

Document(s) will load and when done select "Done"

Upload Attachment

Click the 'Browse' link to select a file or you can also drag and drop files on the page.Click 'Upload' or 'Cancel' when you have finished.

Browse

Description : W-9

Attachment Type : Standard

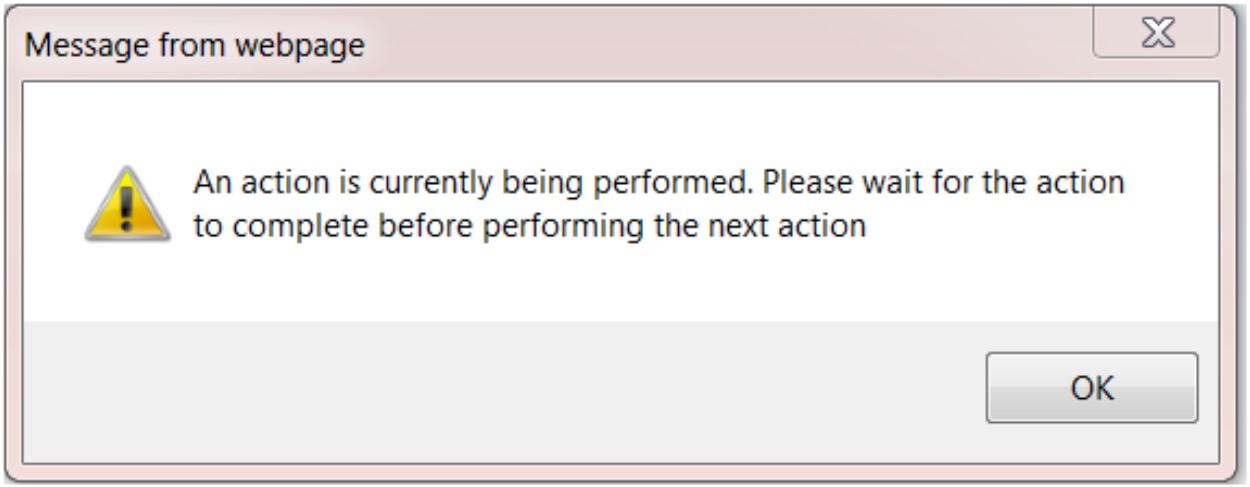
Select All **With selected :** Apply Description Apply Attachment Type Clear Description Remove

File Name	Description	Attachment Type	File Size
OFFICE SUPPLY ORDER LOG - fillable.pdf file uploaded successfully	W-9	Standard	53.96 KB
CBP Form 5106 - 7-26-17.pdf file uploaded successfully	Request from Vendor	Standard	702.81 KB

Total Number of Files selected:2
Total Files Size:756.77 KB

Upload Done

***There is currently a system issue that will present with the following message when uploading multiple documents at one time:



Just "X" out of this.

Select "Return to Document" to complete the VCM.

Attachments

	File Name	Type	Date	User ID	Primary State
✓	OFFICE SUPPLY ORDER LOG - fillable.pdf	Standard	6/11/18	050664	New
	CBP Form 5106 - 7-26-17.pdf	Standard	6/11/18	050664	New

First Prev Next Last

Upload Search Download Delete Restore

File Name : OFFICE SUPPLY ORDER LOG - fillable.pdf **Description :** W-9

Type : Standard

Date : 6/11/18

User ID : 050664

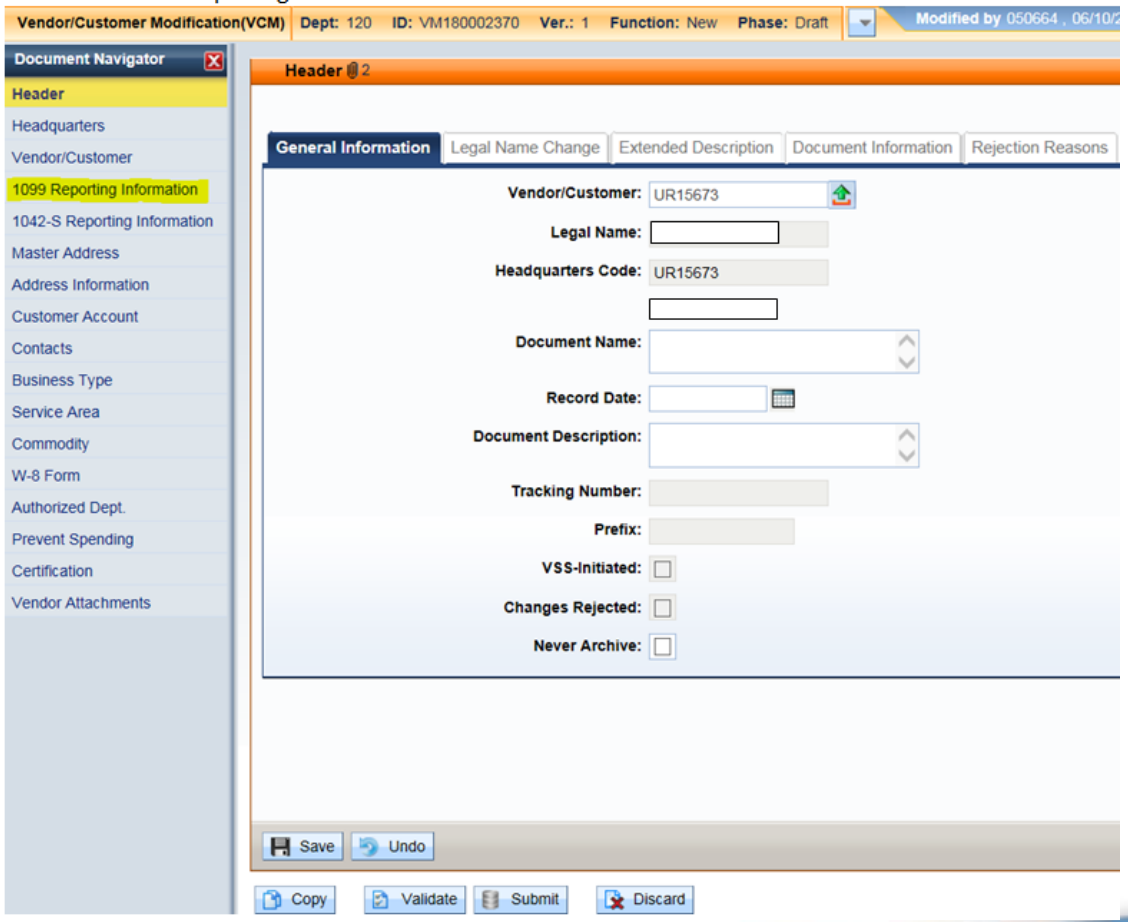
Primary State : New

Return to Document

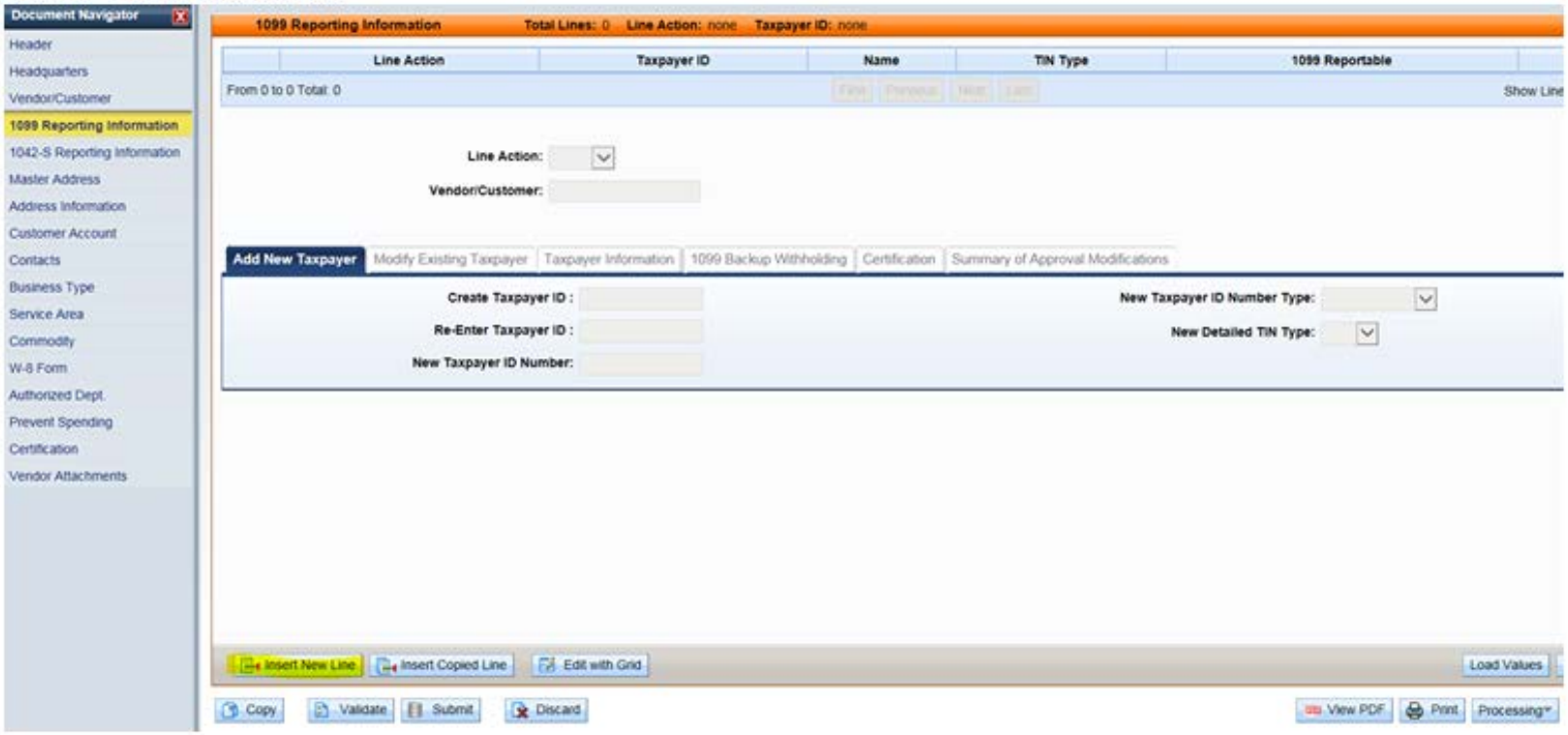
View Attachment History

How to add a taxpayer identification number (TIN) to an existing vendor in Advantage 3.11

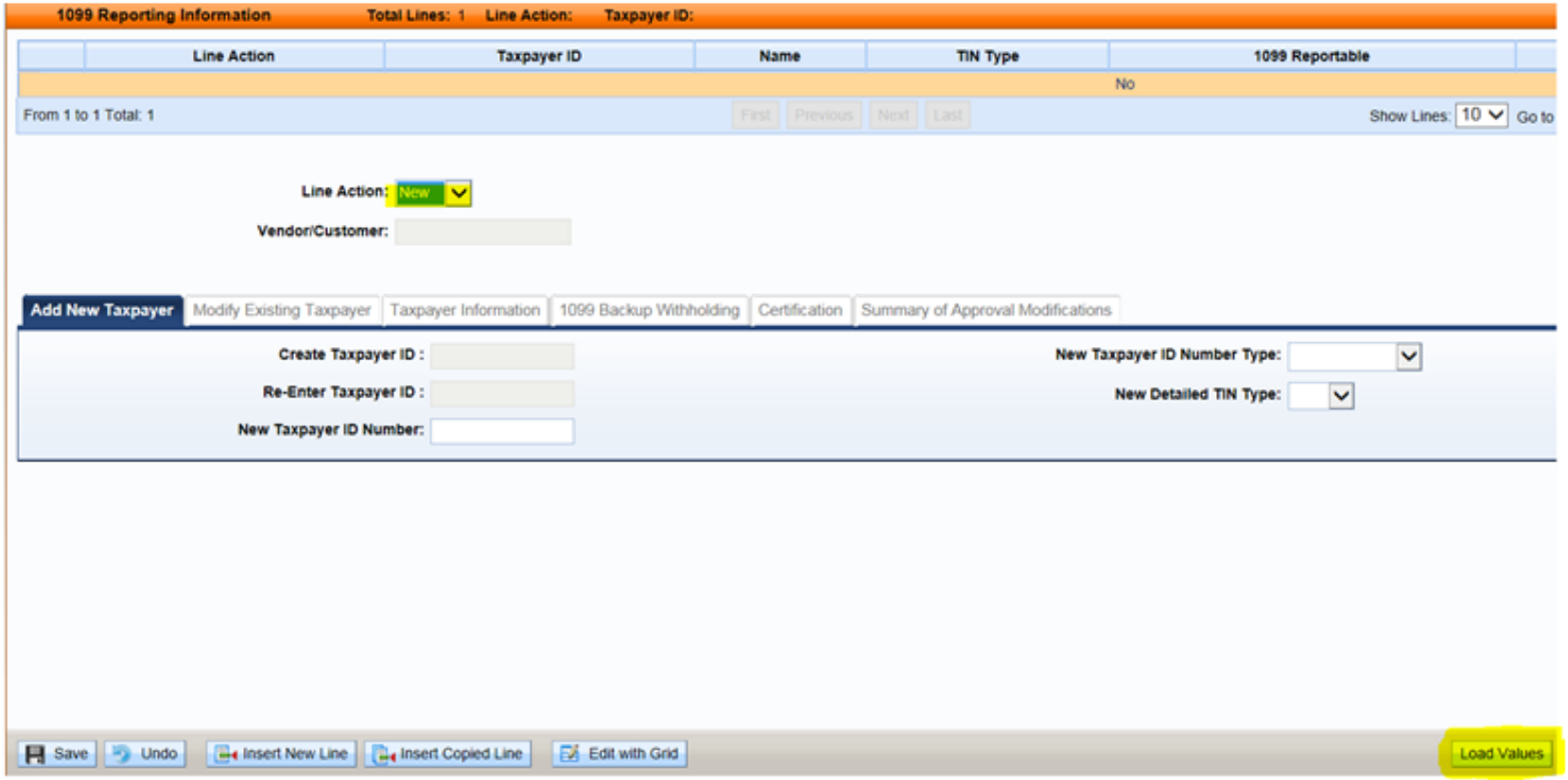
Select the "1099 Reporting Information section.



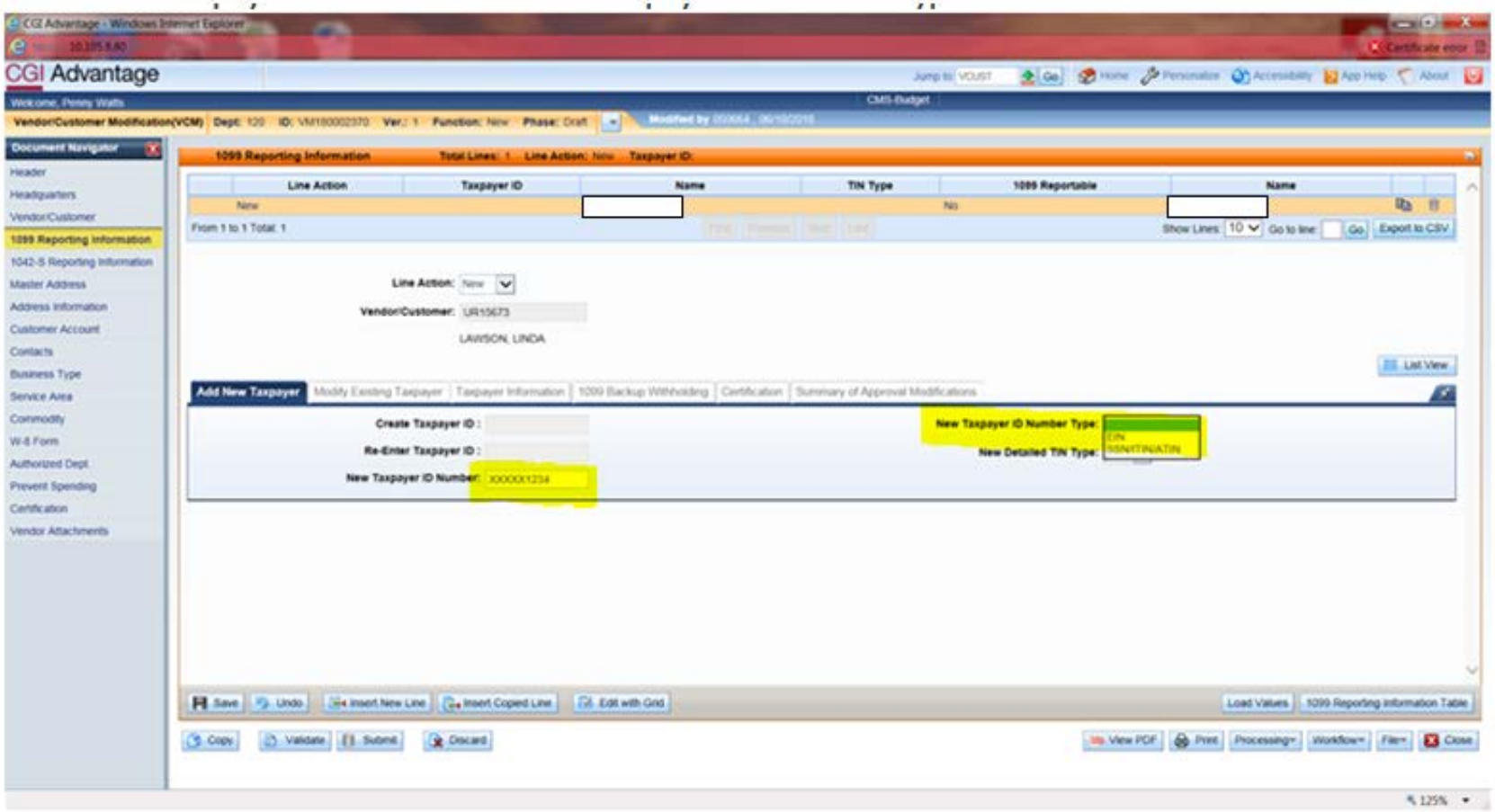
Select "Insert New Line"



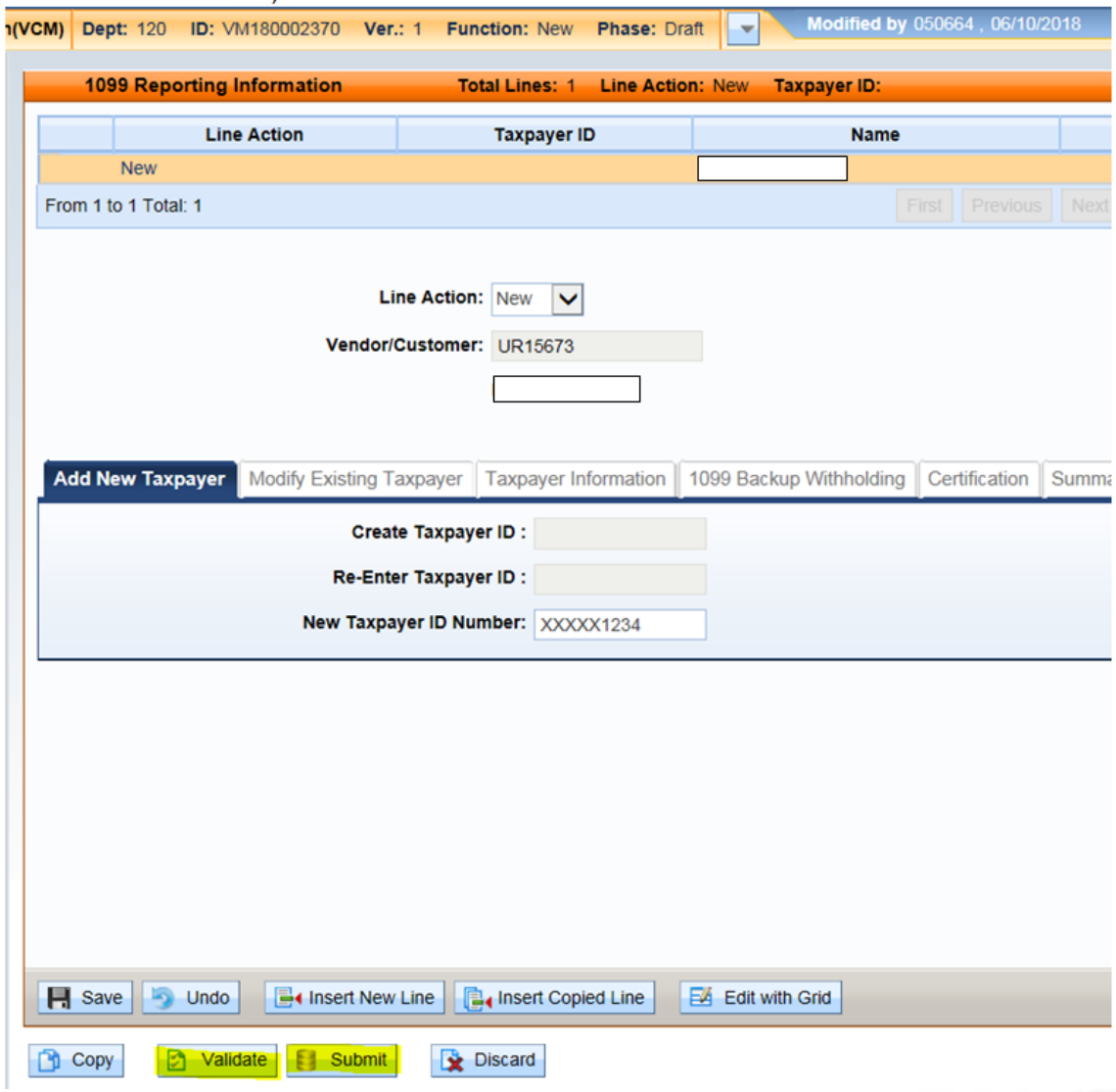
Select Line Action "New" and "Load Values"



Enter New Taxpayer ID Number and New Taxpayer ID Number Type



"Validate" and if no erros, "Submit"



Thank You!

This concludes the Vendor/Customer Maintenance to Add a TIN Training for Advantage Financial 3.11