

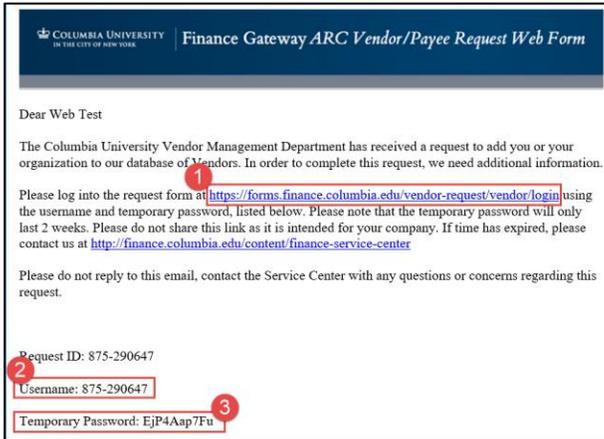
Columbia University Finance Training

Submitting a Vendor/Payee Profile Request

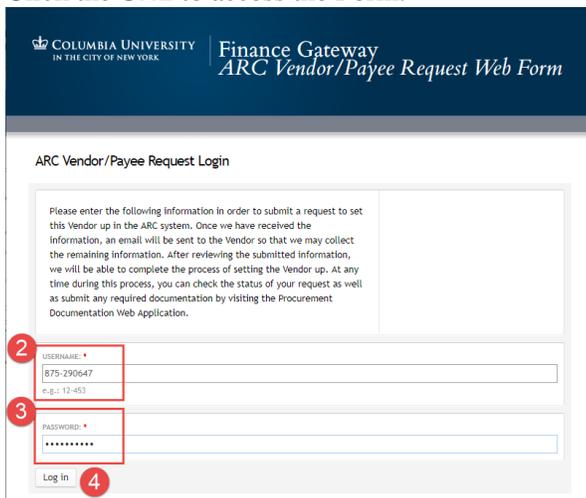
This guide covers instructions for completing the Vendor/Payee Request web form. As this information populates multiple systems, it is critical for us to have your current and accurate information.

Logging in to the Vendor/Payee Profile Request Form

You will receive an email from Vendor Maintenance confirming that Vendor Management Department has received your request to add your organization. It contains the link to log in to the Vendor/Payee Request Form with your Username and Password.



1. Click the **URL** to access the Form.



2. Enter your Username from the email in the **USERNAME** field.
3. Enter your Password from the email in the **PASSWORD** field.
4. Click the **Log In** button.

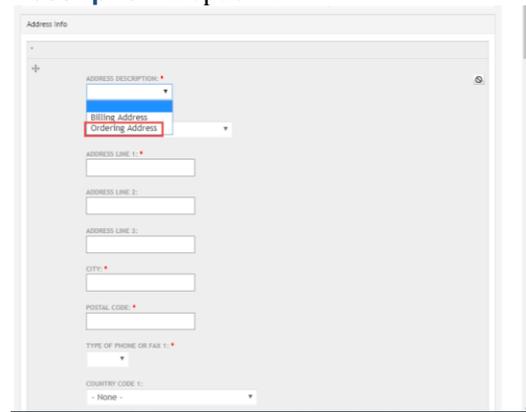
Note: Contact the Finance Service Center (refer to the end of this document for contact information) if you need to reset your password or have the Vendor/Payee Request Form resent.

Entering Address Details

The Address Info section of the form allows you to enter addresses for your Billing Address and, if you require Purchase Orders, Ordering Address. If you have a New York based address, you can also add it.

Entering an Ordering Address (if you require Purchase Orders)

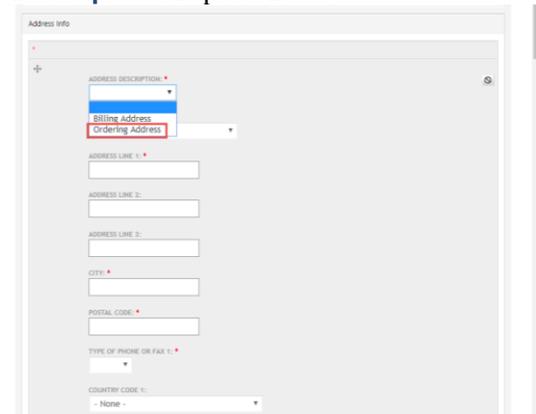
1. Select **Ordering Address** from the **Address Description** dropdown.



2. Enter Address information into the appropriate fields. Fields with an * are required.
3. If you are also entering a Billing Address, click **Add more values**.

Entering a Billing Address

1. Select **Billing Address** from the **Address Description** dropdown.



2. Enter Address information into the appropriate fields. Fields with an * are required.
3. If you haven't already entered an Ordering Address and need to do so, click **Add more values**.

Entering Local Address Info (New York Address)

1. Select **Yes** from the question dropdown **Local Address Info** section.

The Address fields appear.

2. Enter Address information into the appropriate fields. Fields with an * are required.

Entering Vendor Categorization Details

The Vendor Categorizations section contains a mixture of optional and required fields (indicate by *). If your Billing or Ordering Address is in the United States, fields for Hub Zone and Certifying Agency Approval appear in this section and will not appear if your address is outside the United States.

1. Optional fields include **SIC Codes** which you can select to categorize your business. For more information, click the SICCODE.com link. Select the appropriate Code(s)/Category from the dropdowns.
2. Select the range that you feel best represents the **Number of Employees** from the dropdown.

3. Select the range that you feel best represents the **Annual Gross Revenue** from the dropdown.

4. If your Billing or Ordering Address is in the United States, the **HUB Zone** field appears. You can select the applicable item from the dropdown. For more information regarding this field, click the link below the dropdown.

HUB ZONE:

<http://www.sba.gov/content/applying-hubzone-program>

5. Optionally, select an **Ethnicity** from the dropdown.
6. If your Billing or Ordering Address is in the United States, The required field regarding **Approval from a Certifying Agency or Body** appears.

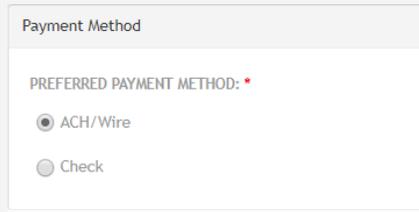
- If you select **Yes** from the dropdown to the question, a **Certification** section appears. Complete the required fields in this section.

Note: If you have multiple certifications, click Add more values.

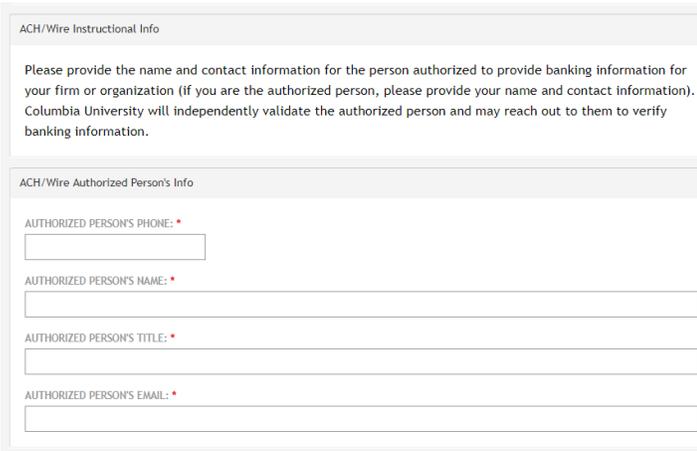
- If you select **No**, a field for **Self-Certifying or Certified with a Non-Government Agency** appears. Select the appropriate answer.

Entering a Payment Method

You can select if you want payment via **ACH/Wire** or **Check** as the **Payment Method**.



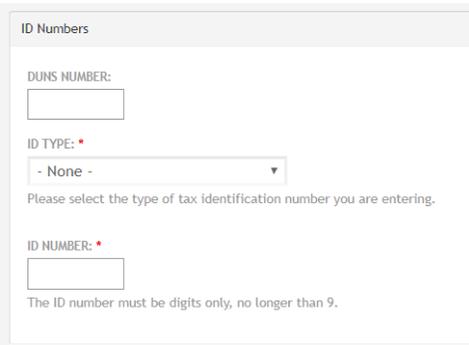
If you select ACH/Wire, a section appears for you to complete the **ACH/Wire Authorized Person's Info**. Complete the required information.



Note: As specified in the on-screen instructions, Vendor Management will reach out to the authorized person to validate banking information.

Entering ID Numbers

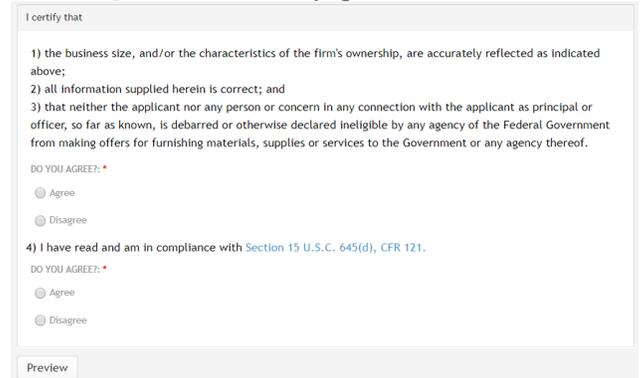
If your Billing or Ordering Address is in the United States, the **ID Numbers** section appears.



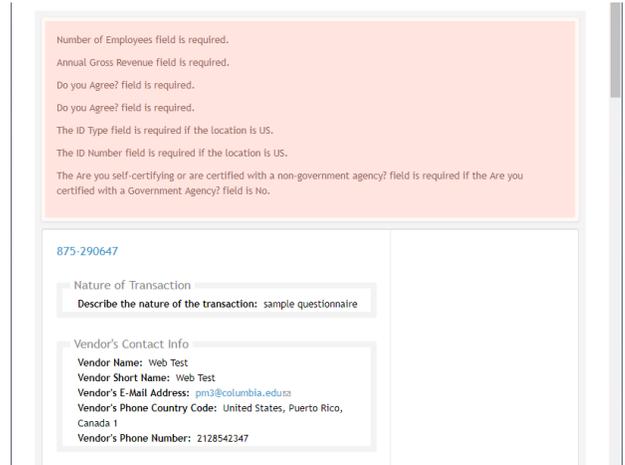
1. Optionally, enter your **DUNS Number** if you have one.
2. Select the **ID Type** from the dropdown that you will type in the ID Number field.
3. Type the **ID Number** for the ID Type you selected.

Certifying, Previewing, and Submitting

1. Select **Agree** to the Certify questions.



2. Click **Preview**. The Preview screen appears with your entries and indicates any errors or missing information.



3. Click **Submit**.

Viewing Vendor Submission Status

1. Go to <https://forms.finance.columbia.edu/edm/documents/vm>.
2. Enter the **Request ID** or **ARC Vendor (Supplier Number)**.



3. Click **Submit**. The Search Result for the matching Vendor Names(s) appear if it is in the system. The **Current Status** displays the current approval status of the vendor.

Getting Help

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>

Or, you can contact the Service Center by phone: (212) 854-2122