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.

COLUMBIA UNIVERSITY	Finance Gateway ARC Vendor/Payee Request Web Form
Dear Web Test	
The Columbia University V organization to our database Please log into the request fo the username and temporary last 2 weeks. Please do not	endor Management Department has received a request to add you or your e of Yendors. In order to complete this request, we need additional information. form at https://forms.finance.columbia.edu/vendor-request/vendor/login y password, listed below. Please note that the temporary password will only share this link as it is intended for your company. If time has expired, please
contact us at http://finance.c Please do not reply to this er request.	columbia.edu/content/finance-service-center mail, contact the Service Center with any questions or concerns regarding this
Pequest ID: 875-290647 Username: 875-290647 Temporary Password: EjP4,	Aap7Fu

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

COLUMBIA IN THE CITY OF	UNIVERSITY New YORK	Finance Gatew ARC Vendor/P	ay ayee Reques	t Web Form
			_	
ARC Vendor/P	ayee Request L	ogin		
Please enter the this Vendor up is information, an the remaining in we will be able time during this as submit any re Documentation	following informati in the ARC system. Or email will be sent to formation. After rev to complete the prov process, you can che quired documentatie Web Application.	on in order to submit a request to si cice we have received the the Yendro so that we may collect iewing the submitted information, cess of setting the Vendor up. At an ack the status of your request as we on by visiting the Procurement	કર્ષ પ્ર મા	
USERNAME: •]			
875-290647 e.g.: 12-453				
PASSWORD: •	1			
Log in				

- 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.

ŀ	ADDRESS DESCRIPTION: • Billing Address Ordering Address	0
	ADDRESS LINE 1: *	
	ADORESS LINE 2:	
	ADDRESS LINE 3:	
	CITY: •	
	POSTAL CODE: *	
	TYPE OF PHONE OR FAX 1: •	

- 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.

ADDRESS DESCRIPTION: •	S
Billing Address	
Ordering Address	
ADDRESS LINE 1:	
ADDRESS LINE 2:	
ADDRESS LINE 3:	
CITY: •	
POSTAL CODE: *	
TYPE OF PHONE OR FAX 1: *	
*	
COUNTRY CODE 1:	
None . T	

- 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**.

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Entering Local Address Info (New York Address)

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



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 you address is outside the United States.

- 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.

NUMBER OF EMPLO
- None - 🛛 🔻
- None -
1-10
11-25
26-50
51-100
101-250
251-500
501-1,000
Over 1,000

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:	
- None -	Ψ
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.

1
- None - Y
CERTIFYING AGENCY: •
- None - 🔻
CERTIFICATION NUMBER:
CERTIFICATION BEGIN DATE: *
Format: 05/02/2019
COTTOC ATOM EVEN DATO DATE .
Format: 05/02/2019

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.

HAS YOUR COMP	ANY BEEN APPROVED	BY A CERTIFYING	AGENCY OR BODY?: *
No 🔻			

ARE YOU SELF-CERTIFYING OR ARE CERTIFIED WITH A NON-GOVERNMENT AGENCY?: *

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Entering a Payment Method

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

Payment Method
PREFERRED PAYMENT METHOD: *
ACH/Wire
Check

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

CH/Wire Instructional Info	
Please provide the name your firm or organization Columbia University will i banking information.	and contact information for the person authorized to provide banking information for (if you are the authorized person, please provide your name and contact information) independently validate the authorized person and may reach out to them to verify
CH/Wire Authorized Person's I	Info
AUTHORIZED PERSON'S PHONE:	•
AUTHORIZED PERSON'S NAME: *	
AUTHORIZED PERSON'S TITLE: •	

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.

D Numbers		
DUNS NUMBER:		
ID TYPE: *		
- None -	T	
Please select the ty	pe of tax identification number you are entering.	
The ID number mus	t be digits only, no longer than 9.	

- 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.

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Certifying, Previewing, and Submitting

1. Select Agree to the Certify questions.

I certify that
 the business size, and/or the characteristics of the firm's ownership, are accurately reflected as indicated above; all information supplied herein is correct; and that neither the applicant nor any person or concern in any connection with the applicant as principal or officer, so far as known, is debarred or otherwise declared ineligible by any agency of the Federal Government from making offers for furnishing materials, supplies or services to the Government or any agency thereof.
DO YOU AGREE?: *
Agree
Disagree
4) I have read and am in compliance with Section 15 U.S.C. 645(d), CFR 121.
DO YOU AGREE?: *
Agree
Disagree
Preview

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

Annual Gross Reven	e field is required
	, in the second s
Do you Agree? field	is required.
Do you Agree? field	is required.
The ID Type field is	required if the location is US.
The ID Number field	is required if the location is US.
The Are you self-ce certified with a Gov	tifying or are certified with a non-government agency? field is required if the Are you ernment Agency? field is No.
875-290647	
875-290647 Nature of Tra	nsaction
875-290647 Nature of Tra Describe the r	nsaction ature of the transaction: sample questionnaire
875-290647 Nature of Tra Describe the r	nsaction ature of the transaction: sample questionnaire
875-290647 Nature of Tra Describe the r Vendor's Con Vendor Name:	nsaction ature of the transaction: sample questionnaire
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875-290647 Nature of Tra Describe the r Vendor's Con Vendor Name: Vendor Short I Vendor's E-Ma	nsaction ature of the transaction: sample questionnaire act Info Web Test Iame: Web Test IAddress: pm3@columbia.eduss
875-290647 Nature of Tra Describe the r Vendor's Con Vendor Name: Vendor Nort I Vendor's E-Ma Vendor's Phon	nsaction ature of the transaction: sample questionnaire tact Info Web Test lame: Web Test Address: pm3@columbla.educa Country Code: United States, Puerto Rico,
875-290647 Nature of Tra Describe the r Vendor's Con Vendor Name: Vendor Short I Vendor's E-Ma Vendor's Phon Canada 1	nsaction ature of the transaction: sample questionnaire act Info Web Test Jadress: pm3@columbia.edusa Country Code: United States, Puerto Rico,

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 (Suppler Number).

/endor Search n order to view the stat /endor Number, please	s of a Vendor application, or to upload documentation, please enter either the Request ID or ARC Vendor ID below. To obtain your A risit the ARC Vendor ID Lookup Tool.
D Number	
Request ID	
(ARC Vendor ID	
Request ID	

 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.

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Getting Help

http://finance.columbia.edu/content/finance-servicecenter

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