

INSTRUCTIONS FOR SUPPLIERS TO UPDATE COLUMBIA SUPPLIER PROFILE INFORMATION

Columbia Suppliers are able to self-serve when updating their information in the University system. Below you will find instructions for updating contact information, addresses, emails, government certifications (minority, women, veteran status), and facilities-related information (primary trade, specialties, union status). As this information populates multiple systems, including our financial system, the Vendor Management System (VMS), the Capital Project Management System (Unifier) and our Work Order System (Maximo), it is critical for us to have your current and accurate information. We strongly recommend periodic updates to ensure our systems provide correct contact and descriptive information for your firm.

The Vendor Management web portal also provides you with the opportunity to update banking and financial information, but this manual is to address fields that populate Facilities systems as described below.

1. ACCESSING THE SUPPLIER MODIFICATION FORM

Begin by visiting the following URL:

<https://forms.finance.columbia.edu/vendor-request/>.



Select “Create/Modify a Vendor” from the carousel menu and “Access the Vendor/Payee Request Web Form” links.

On the next page, you will see:

COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK | Finance Gateway *ARC Vendor/Payee Request Web Form*

Welcome to the ARC Vendor/Payee Request Web Form. This online application will allow departments to request the setup of New Vendors or Payees, as well as request any modifications.

If you are a vendor, use this application to make any modifications to your information. But, please be aware that only current Vendors in our system are able to make modifications. If you are looking to add yourself to our system, please contact the Department that is requesting your services so that they may initiate the process.

In order to get started, please enter one of the following pieces of information:

- Vendor Name
- Employee Identification Number (EIN)
- ARC Vendor Number (if the Vendor/Payee already exists)

NEW / EXISTING VENDOR INFORMATION *

Submit

Enter your company’s name, EIN or ARC Vendor ID number and select “Submit.” You will see a list of your name and any that match the characters you entered in the above field.

COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK | Finance Gateway *ARC Vendor/Payee Request Web Form*

Based on your search criteria, we have identified the following existing Vendors /Payees in our system. If you are looking to modify one of these entries, please select below and click 'Edit'. If you do not see the Vendor/Payee that you are looking for, please click the 'Search Again' button, Last, if you know that the Vendor/Payee does not already exist, please click 'Add New'.

Search Result

Vendor Name	Classification	Vendor ID	Status
<input type="radio"/> LING CHAO TEST 1	Supplier	0000162657	

Edit Add New Search Again Start Over

Select the button next to your firm’s name and edit. Note if you do not see your company’s name, select “Start Over” and try entering only the first few letters of the name, or one of the other allowable entries (EIN or ARC ID).

The next screen provides you entry into the modification form:

In order to modify this Vendor/Payee, please choose the type of modification you are looking to make:

- **Header Modification:** Use this choice to change any basic information, including Government Agency certification(s) and business size, on the Header record. Please note that if this is not a Supplier, you must be a valid Columbia University employee, and you will be required to sign in. For changing or adding a dba name, please use the Address Modification choice.
- **Address Modification:** Use this choice to change any basic information on the Address records, including Purchasing and Remit To addresses. In addition, use this choice to add or change a dba name. Please note that if this is not a Supplier, you must be a valid Columbia University employee, and you will be required to sign in.
- **W8/W9 Modification:** This will allow for a new submission of an electronic W8/W9 form. Please note that you must be completing this form as the Vendor/Payee.
- **Direct Deposit (ACH) Modification:** Use this to alter the way Columbia University pays this Vendor/Payee to ACH/direct deposit.
- **Wire Modification:** Use this to alter the way Columbia University pays this Vendor/Payee to wire transfer.

Type of Modification

Please choose the type of modification you are looking to make for this Vendor/Payee. Vendors who provide Facilities-Related services and who need to update their union status, primary trade and specialties definitions and/or contact information must select "Facilities Use Only" from the "Type of Modification" dropdown box.

TYPE OF MODIFICATION:
Facilities Use Only

REASON FOR MODIFICATION:
Test

Continue Go Back Start Over

Please carefully read the instructions as they describe the different fields that can be modified. **Please note, you are only able to modify one field at a time and after submitting. You must start over if you wish to modify another setting.**

Select the field you wish to modify from the dropdown menu and enter a reason for the modification before selecting “Continue.”

This instruction manual will guide you through three modification fields: a) Header, b) Address and c) Facilities Use Only. Please note that in each modification field, you must answer all questions even if there are no changes to your prior registration. **The updated submission will overwrite your previous record.**

2. HEADER MODIFICATION

The header modification form allows you to update your company’s name and various certifications. In this section, be sure to complete the “**Ethnicity**” field and the question that reads “**Are you Certified with a Government Agency?**” This information will then populate VMS.

Firms that have a government certification (Minority, Woman, Veteran Owned Business Enterprise) must update their information in this section, in order for it to reflect in VMS.

This application form is to be used for adding or updating header information for a Supplier.

Vendor's Contact Info

VENDOR NAME: *

LING CHAO TEST 1

VENDOR NAME, CONT'D:

DUNS NUMBER:

If you would like to obtain a DUNS Number, please follow this link: <http://www.dnb.com/get-a-duns-number.html>

VENDOR'S E-MAIL ADDRESS: *

VENDOR'S PHONE COUNTRY CODE:

- None -

VENDOR'S PHONE NUMBER:

Format: 8001234567

VENDOR'S PHONE EXTENSION:

Vendor Categorizations

PRIMARY SIC CODE:

- None -

[SICCODE.com - The Leader in SIC and NAICS Codes, Company Search, Business Lists](#)

SECONDARY SIC CODE (OPTIONAL):

- None -

ADDITIONAL SIC CODE (OPTIONAL):

- None -

NUMBER OF EMPLOYEES:

- None -

ANNUAL GROSS REVENUE:

- None -

HUB ZONE:

- None -

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

ETHNICITY:

- None -

ARE YOU CERTIFIED WITH A GOVERNMENT AGENCY?: *

- None -

Contact Info

CONTACT NAME: *

SUBMITTED BY E-MAIL: *

CONTACT PHONE NUMBER:

Format: 8001234567

By checking this box, you certify that you do not have any conflict of interests between yourself and Columbia University.

Review & Continue

Go Back

Start Over

3. ADDRESS MODIFICATION

This section is where your contact information is stored and fed into the Facilities systems. The first dropdown you will see requests “Address Description.” You will have two choices: Billing Address and Ordering Address. The Facilities systems (VMS, Unifier and Maximo) are only able to pull from one field and utilize the **Ordering Address** entries.

IT IS STRONGLY RECOMMENDED THAT ALL SUPPLIERS VISIT THIS SECTION AND ENTER INFORMATION IN THE “ORDERING ADDRESS” FIELD.

Many suppliers currently have incomplete information in the Facilities systems due to the fact that they only provided Billing Address information. In order to ensure that we have your telephone number and email address, it is critical that you update the Ordering Address information. Note that the email address you enter will be the one used for requesting electronic bidding, accounts payable, purchase orders and all other notifications.

This field also determines your designation if you are a Local Business Enterprise based on the zip code you enter.

Address Info

+

+

ADDRESS DESCRIPTION: **
Ordering Address

COUNTRY: **

ADDRESS LINE 1: **

ADDRESS LINE 2:

ADDRESS LINE 3:

CITY: **

POSTAL CODE: **

TYPE OF PHONE OR FAX 1: **

COUNTRY CODE 1: *
- None -

PHONE/FAX NUMBER 1: *
Format: 8001234567

EXTENSION 1:
1234

TYPE OF PHONE OR FAX 2:
- None -

COUNTRY CODE 2: *
- None -

PHONE/FAX NUMBER 2:
Format: 8001234567

EXTENSION 2:
1234

E-MAIL ADDRESS: **

VENDOR NAME:

VENDOR NAME, CONT'D:

Add more values

Contact Info

CONTACT NAME: *

SUBMITTED BY E-MAIL: *

CONTACT PHONE NUMBER:
Format: 8001234567

By checking this box, you certify that you do not have any conflict of interests between yourself and Columbia University.

Review & Continue Go Back Start Over

4. FACILITIES USE ONLY MODIFICATION

This section is specific to Facilities-related suppliers. The first screen will provide you with three modification options:

- Facilities Header – Union Status and Primary Trade
- Specialties – Services and descriptions that further define your company
- Signers – Primary Contact(s) and Employees Authorized to Sign Contracts

You may select a single field from the above three, any combination of all three. Note that any field you select needs to be completed in full, even if there is no change in information. For example, if you choose the Facilities Header field, you will need to enter Union Status **and** Primary Trade information, even if one of them did not change from before.

Facilities Header:

Vendor Info
VENDOR ID: 0000162657
VENDOR NAME: * LING CHAO TEST 1
VENDOR NAME 2:
Facilities Information
PLEASE SELECT MODIFICATION SECTION(S): *
<input checked="" type="checkbox"/> Facilities Header - Union Status and Primary Trade
<input type="checkbox"/> Specialties - Services and descriptions that further define your company
<input type="checkbox"/> Signers - Primary Contact(s) and Employees Authorized to Sign Contracts
UNION STATUS: * - None - <input type="button" value="v"/>
PRIMARY TRADE: * - None - <input type="button" value="v"/>
Select only one
<input type="button" value="Review & Continue"/> <input type="button" value="Go Back"/> <input type="button" value="Start Over"/>

Specialties:

Please note that you may only select up to 10 specialties from the list. Selecting more than 10 specialties will require you to resubmit this section choosing no more than the maximum limit.

Vendor Info

VENDOR ID: 0000162657

VENDOR NAME: *

LING CHAO TEST 1

VENDOR NAME 2:

Facilities Information

PLEASE SELECT MODIFICATION SECTION(S): *

Facilities Header - Union Status and Primary Trade

Specialties - Services and descriptions that further define your company

Signers - Primary Contact(s) and Employees Authorized to Sign Contracts

SPECIALTIES: *

In order to choose multiple elements, please hold Ctrl or Shift while clicking the items. Please choose a maximum of 10 items.

- None -
- Abatement
- Acoustical
- Acid Waste
- Air Conditioners
- Air Handlers
- Air Monitoring
- Air Pollution Control
- Alarm - Fire
- Alarm - Smoke/CO2
- Alarm- Burglar
- Appliances - Repair Only

Signers:

You may enter multiple names for either or both fields by selecting “Add another item.”

Vendor Info

VENDOR ID: 0000162657

VENDOR NAME: *

LING CHAO TEST 1

VENDOR NAME 2:

Facilities Information

PLEASE SELECT MODIFICATION SECTION(S): *

Facilities Header - Union Status and Primary Trade

Specialties - Services and descriptions that further define your company

Signers - Primary Contact(s) and Employees Authorized to Sign Contracts

Primary Contact(s): *

+ []

Add another item

List Names Authorized to Sign Contracts: *

+ []

Add another item

Review & Continue **Go Back** **Start Over**

Due to the fact that we have found many Facilities suppliers with incomplete information, we recommend you complete all three fields:

Facilities Information

PLEASE SELECT MODIFICATION SECTION(S): *

Facilities Header - Union Status and Primary Trade

Specialties - Services and descriptions that further define your company

Signers - Primary Contact(s) and Employees Authorized to Sign Contracts

UNION STATUS: *

- None - [v]

PRIMARY TRADE: *

- None - [v]

Select only one

SPECIALTIES: *

In order to choose multiple elements, please hold Ctrl or Shift while clicking the items. Please choose a maximum of 10 items.

- None
- Abatement
- Acoustical
- Acid Waste
- Air Conditioners
- Air Handlers
- Air Monitoring
- Air Pollution Control
- Alarm - Fire
- Alarm - Smoke/CO2
- Alarm - Burglar
- Amplifiers - Repair Only

Primary Contact(s): *

+ []

Add another item

List Names Authorized to Sign Contracts: *


+ []

Add another item

Review & Continue **Go Back** **Start Over**

5. QUESTIONS?

Please address any questions for completing the Modification form by visiting the “help for vendors” link at: <http://finance.columbia.edu/fsc>


 **Finance Gateway**

SEARCH

ORGANIZATIONAL CHARTS

EVP Finance & IT | Controller | Financial Operations & Compliance | Budget | Procurement | Treasury | Internal Audit | Registrar | CUIT | Investments

Home » Finance Service Center



Do You Need Help?
We can provide you with a single point of contact for common inquiries.

Our Team of Service Center Analysts is Dedicated to:

- providing information and assistance
- tracking and monitoring your inquiries to ensure they are responded to in a timely manner
- analyzing data in our incident tracking database in order to continually improve our service

Welcome to the Finance Service Center!

GET HELP FROM THE SERVICE CENTER IN 2 DIFFERENT WAYS:

- 1 Report an Incident**
Users can report an incident by clicking on the button to the right, or by calling us. Please use the 'report an incident' button to get assistance, ask a question or inform us of an issue.
- 2 Request a Service**
Users can request a service using the self-service links to the right. We will continue to enhance the service request catalog over time.

report an incident

or call us at 212.854.2122
Monday, Tuesday and Thursday
9:00am – 5:00pm
Wednesday 9:30am – 5:00pm
Friday 9:00am – 4:00pm

Financial Systems Security Application
Financial Inquiry Application
Payment and Remittance Status Look-Up
Vendor / Payee Request Web Form
Staples Request Form
Stop a vendor payment (check or ACH)
Request a copy of a cashed check or verify ACH delivery of payment
Request a rush payment
Location setup request

HELP FOR VENDORS AND NON-COLUMBIA COMMUNITY MEMBERS:

help for vendors

GET STATUS

You will receive an automated notification with a reference number for each new incident or service request submitted. Navigate to the Service Now homepage to obtain real time status of your incidents and service requests across Finance, HR and CUIT. For a brief tutorial on the personalized Service Now home page please click here >>

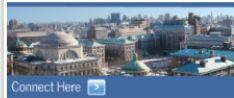
We Value Your Feedback

Feel free to let us know how we are doing by sending an e-mail to fscfeedback@columbia.edu

STAY INFORMED

- 10 JAN** December Closing Is Complete
The Controller's Office has completed all month-end closing processes for December. Click title for more info ...
- 22 DEC** Tax Reform
Click the title for information.
- 12 DEC** Endowment Income Distribution
The endowment income distribution for December 2017 has been processed in ARC.

SERVICE CENTER



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