

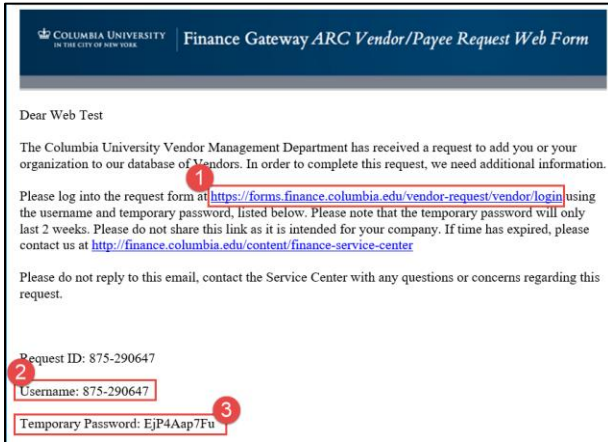
# Columbia University Finance Training

## Submitting a Vendor/Payee Profile Request

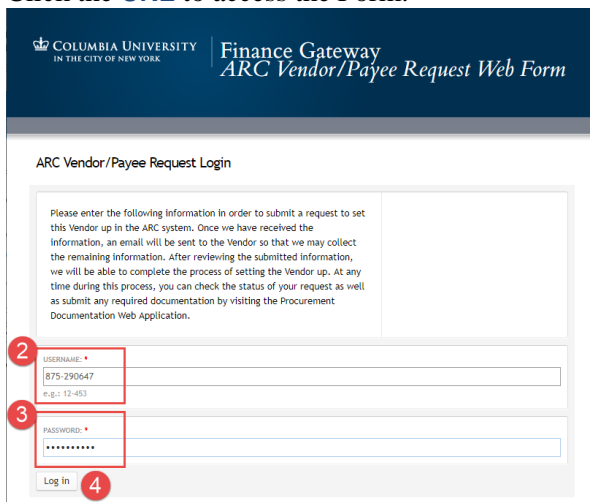
This guide covers instructions for completing the Vendor/Payee Request web form. As this information populates multiple systems, it is critical for us to have your current and accurate information.

### 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.

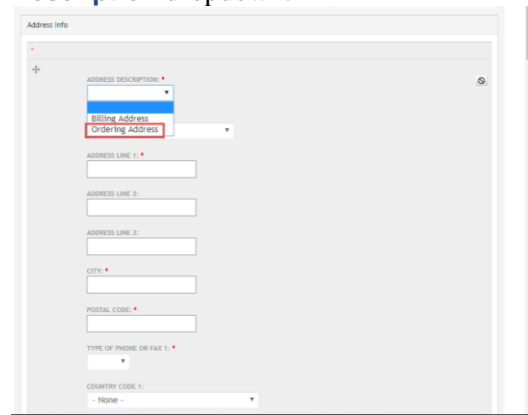
**Note:** Contact the Finance Service Center (refer to the end of this document for contact information) if you need to reset your password or have the Vendor/Payee Request Form resent.

### 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)

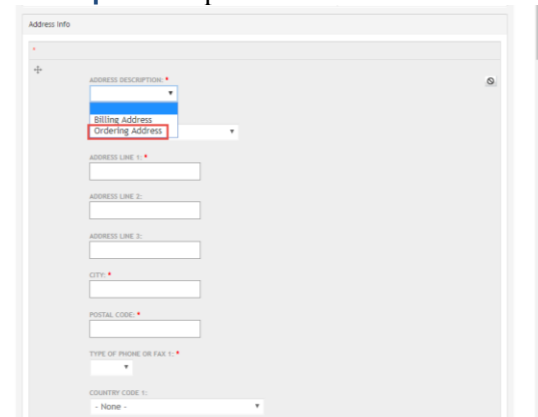
1. Select **Ordering Address** from the **Address Description** dropdown.



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.

Local Address Info

DOES YOUR COMPANY PROVIDE GOODS AND/OR SERVICES TO COLUMBIA UNIVERSITY FROM A NEW YORK BUSINESS ADDRESS?: \*

No  
No  
**Yes**

The Address fields appear.

Local Address Info

DOES YOUR COMPANY PROVIDE GOODS AND/OR SERVICES TO COLUMBIA UNIVERSITY FROM A NEW YORK BUSINESS ADDRESS?: \*

Yes

Local Address

Columbia University provides procurement preference in certain circumstances to local businesses. Please enter in the fields below the New York state address from which you provide goods/services to Columbia University, exactly as it appears on your Business Certificate.

COUNTRY: \*  
United States

ADDRESS LINE 1: \*

ADDRESS LINE 2:

ADDRESS LINE 3:

CITY: \*

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](http://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 EMPLOYEES: \*

- 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.

ANNUAL GROSS REVENUE: \*

- None -  
- None -  
Under \$250,000  
\$251,000 - \$1,000,000  
\$1,000,001 - \$2,000,000  
\$2,000,001 - \$5,000,000  
\$5,000,001 - \$10,000,000  
\$10,000,001 - \$20,000,000  
\$20,000,001 - \$100,000,000  
Over \$100,000,000

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 -

<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.

HAS YOUR COMPANY BEEN APPROVED BY A CERTIFYING AGENCY OR BODY?: \*

Yes

Please select from the drop-down menus below all current certifications your company holds and fill in the corresponding information. If your company "Values" button to add more fields. If the agency you are certified by is not listed in the drop-down menu, select Other. If your certificate does not have

Certification

CERTIFICATION TYPE: \*

- None -

CERTIFYING AGENCY: \*

- None -

CERTIFICATION NUMBER:

CERTIFICATION BEGIN DATE: \*

Format: 05/02/2019

CERTIFICATION EXPIRATION DATE: \*

Format: 05/02/2019

If your certificate does not have an expiration date, please enter 12/31/9999.

Add more values

**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 COMPANY BEEN APPROVED BY A CERTIFYING AGENCY OR BODY?: \*

No

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

- None -

### 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