Merge Vendor Number - FIN8800

Table of Contents

Merge Vendor Number - FIN8800

Finance > Utilities > Merge Vendor Number

This utility is used to move all vendor information from one vendor to another vendor. It can also be used when two different vendor numbers are assigned to the same vendor.

Notes:

- When you select to merge from vendor A to vendor B, the transactions for vendor A are combined with vendor B's transactions, and then vendor A is deleted.
- In Finance, the vendor name for paid checks will remain the same (From Vendor) after merging the vendors. The vendor number will change to the To Vendor number.
- In Finance, the vendor name for unpaid checks will be the To Vendor Remittance Address name. If the remittance address is blank, then the To Vendor name will be used.
- In Human Resources, liability checks paid and unpaid will assume the To Vendor name, not the Remittance Address Name. In Finance, the processed checks are displayed with the original vendor (From Vendor) name.
- Upon export, the program will export all file IDs where transactions exist. The program will include file ID C, even if there are no transactions in file ID C for the From Vendor, as long as transactions exist in other file IDs. If no transactions exist for any file ID for the From Vendor, the program will still export or back up file ID C.
- When importing, users should be in file ID C. File ID C must be imported first.

Merge vendor numbers:

Field	Description
From Vendor Number	Begin typing the vendor name or number. As you type the data, a drop-down list of corresponding data is displayed. Select the desired vendor number or name. Or, click ⋮ to select a valid vendor from the list of existing vendors (both active and inactive). The **Vendor Information**, **Order Address**, and **Remittance Address** sections are populated based on the to vendor number selected. This is a required field.

☐ Click **Refresh From Vendor** to update the vendor information if the vendor number in the **From Vendor Number** field is changed.

To Vendor Number	Begin typing the vendor name or number. As you type the data, a drop-down list of corresponding data is displayed. Select the desired vendor number or name. Or, click ⋮ to select a valid vendor number from the list of existing vendors (both active and inactive). The **Vendor Information**, **Order Address**, and **Remittance Address** sections are populated based on the to vendor number selected. This is a required field.

☐ Click **Refresh To Vendor** to update the vendor information if the vendor number in the **To Vendor Number** field is changed.

☐ Click **Execute** to start the merge process. A message is displayed indicating that you are about to update records permanently and confirming that you want to continue.

- Click **Yes** to continue processing the merge function, or click **No** to cancel the merge.
- If you click **Yes**, you are prompted to create a backup using the Export By File ID Utility before continuing.
    - Click **Yes** to continue with the merge. A message is displayed indicating that the vendor numbers were merged. Click **OK**.
    - Click **No** to exit the process.