

# Vendor Merge

## Quick Reference Guide

Version 24.x

Last Modified 24.0 | March 2024

## Overview

Vendor Merge functionality allows for easy elimination of duplicate vendor records by using the Vendor Main frame.

## Steps



If System Flag 5385 is set to V, this functionality will not be available.



You must have the VENDOR MERGE role privilege to merge one vendor into another.

Home Favorites History Reports<sup>64</sup> Dashboard Merge with another vendor

SAVE UNDO REFRESH DELETE FIND ATTACH MORE RELATED

### Vendor Main

**Vendor Information**

Number: 0000000012 Name: 3M COMPANY Status: Active

**General** Payable Notes Service Codes Locations Distributors Reorder Vendor Gateway

**Mailing Address**

Name: 3M COMPANY

Address: 3M CENTER BLDG 275-5W-05

1. Navigate to the Vendor Main frame and enter or select the vendor number of the vendor to **remain**.
2. Hover over the MORE dropdown at the top of the frame and select the 'Merge with another vendor' option. Alternatively, if your profile is set to display the MORE options as icons, there will be a merged-arrow icon you can select to execute the vendor merge.

3. This launches the Vendor Merge frame. The vendor entered on Vendor Main will automatically display in the 'Vendor to remain' section.
4. Enter or select the Vendor Number of the vendor you want to eliminate.
5. You will receive an Action Required pop-up asking you to confirm the scheduling of the Vendor Merge Batch process.

The screenshot shows the 'Vendor Merge' interface. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these, the 'Vendor Merge' title is displayed. On the left, there are two sections: 'Vendor to be eliminated' and 'Vendor to remain'. Both sections have fields for 'Number' and 'Name'. The 'Vendor to be eliminated' section shows 'Number: 000000001303' and 'Name: 3M COMPANY'. The 'Vendor to remain' section shows 'Number: 000000001302' and 'Name: 3M COMPANY'. A 'Refresh' button is located below these sections. In the center, an 'Action Required' pop-up dialog is displayed. The dialog asks: 'Would you like to schedule the Vendor Merge of Vendor 000000001303 and Vendor 000000001302?'. It also includes a note: 'Note: This action cannot be undone.' and two buttons: 'Yes' and 'No'. Below the dialog, there is a table titled 'Scheduled Vendor Merges (Loaded 2 records)'. The table has columns: Record No., Merge Status, Merge Process Error Message, Scheduled Date, Merge Started, Old Vendor Number, and Merged Vendor Number. The table contains two records. The first record has 'Record No. 3', 'Merge Status' with a 'Resubmit' button, 'Merge Process Error Message' with a 'Merge Error' hyperlink, 'Scheduled Date' 03/11/2021 18:08:55, 'Merge Started' (empty), 'Old Vendor Number' 7103-D, and 'Merged Vendor Number' 7103-C. The second record has 'Record No. 6', 'Merge Status' with a 'Resubmit' button, 'Merge Process Error Message' with a 'Merge Error' hyperlink, 'Scheduled Date' 03/12/2021 11:00:00, 'Merge Started' (empty), 'Old Vendor Number' 7103-F, and 'Merged Vendor Number' 7103-A.

Record No.	Merge Status	Merge Process Error Message	Scheduled Date	Merge Started	Old Vendor Number	Merged Vendor Number
3	<a href="#">Resubmit</a>	<a href="#">Merge Error</a>	03/11/2021 18:08:55		7103-D	7103-C
6	<a href="#">Resubmit</a>	<a href="#">Merge Error</a>	03/12/2021 11:00:00		7103-F	7103-A

6. Select 'Yes' to schedule the merge.
7. After scheduled, the Vendor Merge batch process will display on the i-frame at the bottom of the frame.
8. When the process is complete, the system sends a confirmation message to the email address associated with the application user profile.
9. If there is an issue with the merge process, the merge record will remain on the i-frame after scheduling with a 'Merge Error' hyperlink in the Merge Process Error Message column. You can select the hyperlink to view the error message associated with the merge.

# Processing Rules and Considerations

## Screen Side Validation Rules

- The user will get an error under these situations:
  - If either vendor has distributor data (table is VENDOR\_DISTRIBUTOR).
  - If either vendor has gateway related data (tables are VEND\_JOB\_CODE\_CT, VEND\_SYMPTOM\_CT).
- The user will get a component error under the situations below. This is to ensure a smoother process:
  - If the vendor to be eliminated is already scheduled to be eliminated.
  - If the vendor to remain is already scheduled to be eliminated.
  - If the vendor to be eliminated is already scheduled for other vendors to be merged into.

## Table Side Merge Rules

- The vend\_loc\_reorder records will remain for the remaining vendor and all records on the table for eliminated vendor will be deleted.
- For vendor items, the vendor\_item existed on old vendor that do not exist on new vendor will be merged to the new vendor and the duplicated vendor\_item on the eliminated vendor will be deleted.
- For other tables:
  - The record on VENDOR table for the eliminated vendor will be deleted completely (this will include the comment for the old vendor).
  - For all other tables, if updating will cause any db errors the error will be caught to be displayed on the frame.
  - There are a total 129 tables included in the merge process.
  - After the vendor is eliminated and user entered it on vendor main frame it will be replaced by the remaining vendor. This is to prevent the old vendor from being created again. This is to ensure a data integrity/consistence throughout the system. There are some tables, though they have vendor\_id (or number )field, they're skipped from the process due to various reasons.

## Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.