

Vendor Merge Quick Reference Guide

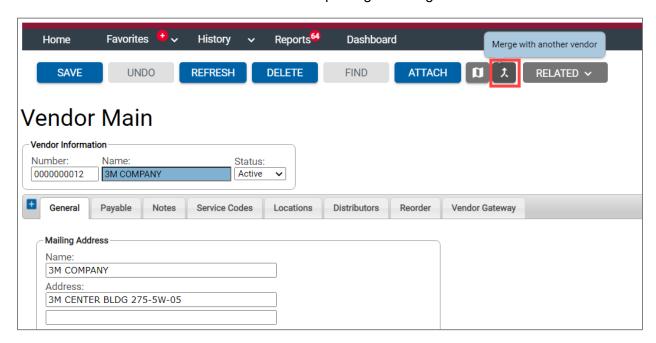
Version 24.x Last Modified 24.0 | March 2024

Overview

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

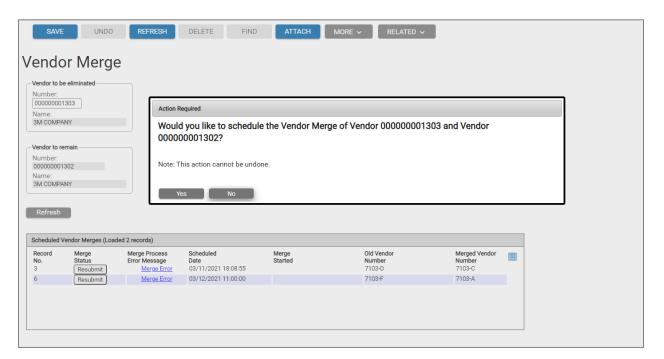
Steps

- 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.



- 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.



- 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:
 - o 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.
 - o 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.