Vendor Search Tips

Overview
The purpose of this document is to provide detailed instructions on the different ways of searching for a Vendor.

Key Points
There are multiple methods of searching for vendors and new search fields such as contains and begins with that have made searching for Vendors a lot easier and faster. The search fields are no longer case sensitive.

Navigation
Vendors – Vendor Information – Add/Update - Vendor

Detailed Directions

Scenario
You have received an invoice from Australian Broadcasting Commission and are about to enter it as a voucher in Accounts Payable. Does this vendor exist? What is the Vendor ID? Their ABN is quoted on the invoice as 52429278345.

Step 1.
To Search for a Vendor, Navigate to:
Vendors, Vendor Information, Add/Update, Vendor

Expected Results
The Vendor Search Page appears
The Short Vendor Name is no longer case sensitive. More options are available when searching for a Vendor, you can select things such as begins with, contains, =, etc. There is no need to use % anymore, just use contains.

Step 2. Use of a Vendor Short Name field:
Enter or select the following:

- **SetID:** ANUID
- **Short Vendor Name:** "contains" (from the drop down list) & enter “ABC”

(In many cases the short name will be the first 10 characters of the vendor name, in this case it is an abbreviation.)

**Expected Results**  
Correct data entry.

**Step 3.** Click  
A list of vendors based on the search criteria displays below.
Step 4. Select Vendor: ABC-001

**Expected Results**
The Vendor Summary Page for the chosen vendor will display.

A Summary Panel is added which displays basic Vendor details including Vendor ID, Vendor Name details, Vendor Address details, and the system status of the Vendor.

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Step 5.

Select Return to Search

**Expected Results**
Return to Vendor Search page.

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Step 6.

Use of the ABN field:
Enter or select the following:

**SetID:** ANUID
**Australian Business Number:** 52429278345

Click Search

**Expected Results**
A list of vendors based on the search criteria displays below.

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Step 7.

Select Vendor: ABC-001

**Expected Results**
The Vendor Summary Page for the chosen vendor will display.
Step 8.
Select

Expected Results
Return to Vendor Search page.

Step 9.
Use of the Name 1 Field:
Enter or select the following:

SetID: ANUID
Name 1: Select “contains” (drop down list) & enter “Broadcasting”.
Note: Enter a specific distinctive component of the Vendor Name.

Expected Results
Correct data entry.

Step 10.
Click

Expected Results
A list of vendors based on the search criteria displays below.

<table>
<thead>
<tr>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>SetID</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>ANUID</td>
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<tr>
<td>ANUID</td>
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<td>ANUID</td>
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<tr>
<td>ANUID</td>
</tr>
</tbody>
</table>

Step 11.
Select Vendor: ABC-001

Expected Results
The Vendor Summary Page for the chosen vendor will display.
Step 12. Review the data for the vendor, and ensure you have the correct vendor.

Does this vendor need modification?

Compare the vendor information to the information supplied on the invoice.

<table>
<thead>
<tr>
<th>Expected Results</th>
<th>Correct details.</th>
</tr>
</thead>
</table>

Note: Other Key Changes to Vendors

Vendor bank account information is now displayed on the vendor.

NEW! Vendors – Vendor Information – Add/Update – Vendor Location – Payables – Vendor Bank Account Options

ABN’s are now validated.