

## <u>OUICK REFERENCE GUIDE</u>

Vendors with Multiple Doing-Business-As (DBA) Names

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## What You Should Know About Vendor Names

The vendor file vendor names are listed in SWIFT using the DBA name for most vendors having only one DBA. This may differ from the vendor's Tax Identification Name (TIN). For vendors conducting business under various names you will need to look up the vendor using the TIN. Or, if you know the Vendor ID it is important to select the correct Location code. A query has been developed to assist in finding the correct vendor and location.

If the Vendor ID is not known and the vendor name is not found in the available vendor field search, follow these steps:

- 1. Navigate to Reporting Tools>Query>Query Viewer
- 2. Enter M\_PO\_GBL\_DBA\_NAME in the Search By field
- 3. Click the Search button
- 4. Click on the HTML link in the Run to HTML column
- 5. Enter the vendor name as the DBA Name field, use % as a wild card. Example: %Wright% will find any vendors with "Wright" in any part of the name
- 6. Click on the View Results button
- 7. Note the Vendor ID or Vendor Name 1 as you will need this to complete the order

If the Vendor ID or TIN Name is known, follow these steps:

- 1. Navigate to Purchasing>Purchase Orders>Add/Update POs
- 2. Click the Add button to create a new purchase order
- 3. Enter the Vendor ID in the Vendor ID field or short TIN name in the Vendor field
- 4. Click the Vendor Details link next to the Vendor field
- 5. Click the magnifying glass icon next the Location field
- 6. Select the Location with the DBA name to use on the order
- 7. Click OK

**NOTE:** The order screen will display the TIN of the vendor (Figure 1). The purchase order document will print the DBA name selected (Figure 2).

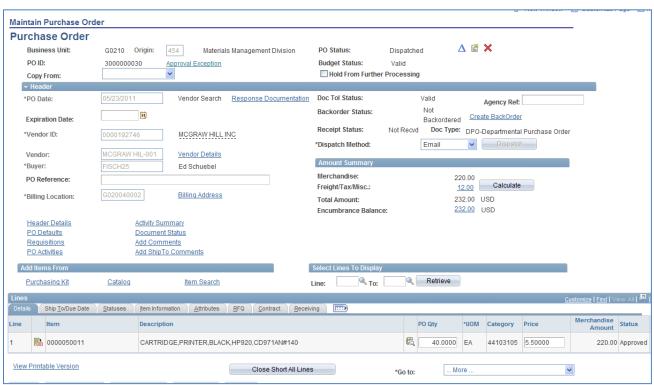


FIGURE 1 - VENDOR NAME DISPLAYS AS MCGRAW HILL INC ON THE ORDER SCREEN.



FIGURE 2 – THIS IS HOW THE VENDOR NAME WILL APPEAR ON THE PURCHASE ORDER. (I.E., WRIGHT GROUP THE)