

Merge Vendors

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Merge Vendors

Records > Vendors

Video Tutorial

Click the play button below for a video tutorial. This tutorial is about 5 minutes long. Written instructions are below the video.

NOTE: *If viewing from the right-side screen, to open the video on a larger screen, use the "Open in full site" link at the bottom left of the help display. If you are already viewing from the full site, click the play button below to begin the tutorial.*

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Step-by-Step Instructions

This option merges one A/P vendor or just an address into another. It is helpful if the same vendor has been added twice. This option will combine everything related to the vendors, including invoices and payments, merging all history into the **to** vendor.

From the main menu choose Records > Vendors.

Click the down arrow next to Edit and choose Merge.

To merge, select the "from" and "to" vendors. Click the search icon to select the vendor IDs.

- If you wish to delete the **From** vendor after merging, then check the box to delete vendor after merge.
 - If you wish to merge into a different address under another vendor then uncheck the Delete checkbox and use the search icon to choose the Address ID for the **To** vendor you wish to merge into.
 - When merging two vendors, you will have the option to add the **From** vendor address to the **To** Vendor address as a historical record with an Address ID assigned using the **From** Vendor ID.
 - Click **Merge** from the menu in the Merge Vendors pop-up box.
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