

SP.020.012 – SEARCHING SUPPLIERS BASED ON CRITERIA

Purpose	- To use search criteria to successfully retrieve expected results from the Review Suppliers option. - To view detailed supplier search results.
Description	Perform a search for suppliers using multiple advanced search criteria. Although there can be several other scenarios, the ones demonstrated in this topic should provide insight to search for other criteria. For this topic, we are going to show a variety of scenarios for supplier searches. These scenarios are: - Users are searching for a specific supplier but you want to select this supplier only in a particular city and state. - Users know the Tax ID number of a supplier but want to see if other suppliers already exist so that you don't add a duplicate supplier of the same Tax ID number. - Users need to know the list of suppliers who are SMB (Small Business Suppliers).
Security Role	BOR_AP_INQUIRY
Dependencies/Constraints	None
Additional Information	None

Procedure

Below are instructions on how to search for suppliers based on criteria. Start by searching for a specific supplier in a particular city and state.

Step	Action
1.	In the Navigator menu, click the Suppliers link.
2.	Click the Supplier Information link.
3.	Click the Add/Update link.
4.	Click the Review Suppliers link.
5.	Enter your SetID in the field.
6.	To the left of the Name field, click the dropdown button and select Contains .
7.	Enter the supplier name or a part of the supplier's name in the Name field. (Ex: "Dell")
8.	In the Country field, click on the search icon to select the country in which the supplier is located. (Ex: "USA") You must have this field populated in order to be able to select a valid value for the State (field).
9.	Click on the search icon to select the state in which the supplier is located in the State field. (Ex: "GA") Remember: The Country field is needed to obtain a valid value in the State field.
10.	Click the Search button.
11.	Scan through the list of suppliers that meet the criteria the user entered. In the Actions column, click on the dropdown arrow and select Maintain Supplier for the supplier chosen. This action will open another window so that you can review supplier specific information.
12.	In the Maintain Supplier screen, users can view the Summary, Identifying Information, Address, Contacts, Location & Custom information by clicking on the tabs across the top of the page.
13.	When the user finished reviewing the information, users can close the page. The Review Suppliers page should remain open.

Step	Action
14.	REMEMBER! Users need to clear the search criteria (using the Clear button) after every new supplier search because some 'hidden' criteria may prevent users from achieving all the necessary results for the user's next search.
15.	Search for duplicate TAX ID/W2 supplier.
16.	In the Navigator menu, click the Suppliers link.
17.	Click the Supplier Information link.
18.	Click the Add/Update link.
19.	Click the Review Suppliers link.
20.	In the ID Type field, choose Tax Identification Number from the dropdown menu . This step can also be used to search for a W2 Identification number. Just select W2 Identification Number in the dropdown menu .
21.	Type the tax identification number or the W2 identification number in the blank field box to the right of the ID Type field.
22.	Click the Search button.
23.	The search results will return all suppliers that match the tax ID number you entered.
24.	If the user would like to review any of the returned suppliers, click on the dropdown arrow in the Actions column and choose Maintain Supplier for the supplier you choose. This action will open another window so that users can review supplier specific information.
25.	In the Maintain Supplier screen, users can view the Summary, Identifying Information, Address, Contacts, Location & Custom information by clicking on the tabs across the top.
26.	When the users have finished reviewing the information, users can close the page. The Review Suppliers page should still be open.