



**Activity: Vendor Searches**  
**Munis>Departmental Functions>Vendor Inquiry**

**Searching Vendors Using Wildcards:**

1. Click **search** the ribbon
2. Key an asterisk (\*) then part of the vendor name followed by another asterisk in the Company Name field - For example to find a vendor named James Martin, enter \*Martin\* in the Company Name field
  - a. Result - all vendors with Martin as part of the name will be returned in the find set
  - b. It is best to enter less in the company name field with an asterisk before and after as this will result in more records in the find set and will also have a higher probability of finding the desired vendor
  - c. The system will find all records requested regardless of upper/lower case
  - d. To search Active Vendors select **Active** from the **Status** drop-down
3. Click **browse** in the ribbon to put the find set in a list, or use the arrow keys located at the bottom of the screen to scroll through the records
  - a. Click on column header titled **Alpha Sort Name** to sort alphabetically
  - b. If a vendor is on **Stop** status they cannot be used - contact Purchasing for additional information

**Review Vendor Activity:** Once the vendor record is found, P-Card, Purchase Order, Invoice, and Check activity can be viewed from the vendor inquiry screen

1. If **P-Card transactions** are available, the P-Card Transactions folder located at the bottom of the screen on the main tab will be yellow
  - a. Click on the envelope and the system will return a list of P-Card transactions in a browse format
2. To find **Purchase Order activity** click **PO Inquiry** in the ribbon
  - a. The fiscal year defaults
    - i. To search for a specific year, enter desired year in year box and delete the number from period box
    - ii. To search for a specific period in a specific year, enter year in year box and period desired in period box
    - iii. To search all years remove year from year box and delete the number from period box
    - iv. To search purchase orders with a specific status, chose status from the drop down – to see all status leave blank
  - b. Click **accept** - the system will return the set of purchase orders in a browse list
  - c. To view a purchase order from the list, highlight the purchase order
  - d. Click **accept** - the system will display the purchase order from Purchase Order Inquiry
  - e. Click **return** in the ribbon to return to the purchase order browse list
  - f. Click **return** in the ribbon to return to vendor inquiry
3. To find **Invoice Activity** click **Invoice Inquiry** in the ribbon
  - a. The fiscal year defaults
    - i. To search for a specific year, enter desired year in year box and delete the number from period box
    - ii. To search for a specific period in a specific year, enter year in year box and period desired in period box
    - iii. To search all years remove year from year box and delete the number from period box
    - iv. To search invoices with a specific status, chose status from the drop down – to see all status leave blank
  - b. Click **accept** - the system will return the set of invoices in a browse list
  - c. To view an invoice from the list, highlight the invoice
  - d. Click **accept** - the system will display the invoice
  - e. Use the attach icon to display the invoice and/or the check associated
  - f. Click **return** in the ribbon to return to the invoice browse list
  - g. Click **return** in the ribbon to return to vendor inquiry

4. To find **Check Activity** click **Check Inquiry** in the ribbon
  - a. The check criteria screen will display
  - b. Leave the cash account as is to find all district checks against the vendor - delete the cash account to find all checks against the vendor (including Student Activity)
  - c. The first day of the fiscal year will default as the check date - change the dates if a broader or more narrow search is desired
  - d. Click **accept** - the system will return the set of checks in a browse list
  - e. To view a check from the list, highlight the check
  - f. Click **accept** - the system will display the check detail record
  - g. Use the attach icon to display a copy of the check
  - h. Click **return** in the ribbon to return to the check detail browse list
  - i. Click **return** in the ribbon to return to vendor inquiry



To have vendors added to Munis email a W9 to [vendors@pasco.k12.fl.us](mailto:vendors@pasco.k12.fl.us) and Purchasing Services will add the vendor record to Munis.



If a vendor is a p-card vendor on stop and needs to be activated for requisitions and other Munis activity, email a W-9 to [vendors@pasco.k12.fl.us](mailto:vendors@pasco.k12.fl.us) and Purchasing Services will update the Munis vendor record.



Vendors with multiple names and/or address (Remits) will be located within the Vendor Inquiry screen in the Addresses folder. Click on the yellow folder to see a list of additional names and/or address for the vendor.



All lists can be exported into an EXCEL spreadsheet by clicking the EXCEL icon in the ribbon.