Vendor Naming Conventions

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OVERVIEW

The purpose of this document is to set forth vendor naming standards and best practices for maintaining vendors on the Vendor file. Naming standards will be used to provide a guideline for consistency and accuracy in the naming conventions for new vendors. Improper or lax standards can cause significant degradation of the accuracy of information generated from the system, fines for improper tax reporting, and loss of control. The naming conventions discussed here make it easier for users to identify vendors they want to use for transactions and reduce the number of duplicate vendors.

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VENDOR SHORTNAME STANDARDS

The vendor shortname is entered into the system to uniquely identify a vendor for voucher and purchasing entries. Each vendor entered into the system will have its own vendor shortname which cannot be identical to another vendor shortname. The system utilizes a number extension to keep the shortname unique.

General Rules

- 1. Use ALL CAPS when entering the shortname.
- 2. Do not use any spaces.
- 3. Enter up to the first ten (10) characters of the name. If the vendor name has 10 or more characters, the shortname should have 10 characters.

Examples

COMPANY/INDIVIDUAL	SHORTNAME
ExxonMobile	EXXONMOBIL
Home Depot	HOMEDEPOT
Staples	STAPLES
Sterling Consulting	STERLINGCO
Thomas Chevrolet	THOMASCHEV

4. Never include '-CAT' in the Vendor Short Name. This is currently being used to identify GeorgiaFIRST Marketplace Vendors (i.e. STAPLE-CAT).

Businesses

1. When a company name has an **ampersand** (&), do not include the ampersand in the shortname.

COMPANY	SHORTNAME
A & B Construction	ABCONSTRUC
Baker & Associates	BAKERASSOC
Broadways To & Go	BROADWAYST
August Red & Blue	AUGUSTREDB



2. When a company name uses **initials**, include the initials in the shortname.

Examples

COMPANY	SHORTNAME
L R W Corporation	LRWCORPORA
TG Enterprises	TGENTERPRI
P G&G Medical	PGGMEDICAL

3. When a company name contains **punctuation** (see below), do not include the punctuation.

```
period [.]
colon [:]
semicolon [;]
comma [,]
question mark [?]
exclamation [!]
dash [-]
slashes [/ or \]
```

Examples

COMPANY	SHORTNAME
M-P Association	MPASSOCIAT
C/I Mitchell & Best	CIMITCHELL
Buy.com	BUYCOM

4. When a company name contains **numbers**, include the numbers.

Examples

<u>COMPANY</u>	SHORTNAME
WFXG Fox 54 TV	WFXGFOX54T
WGAC 780 AM	WGAC780AM
1st Source	1STSOURCE
Curtis 1000	CURTIS1000

5. When a company name contains a **special character** (see below), do not include the special character.

Special Characters [@ % * # \$] Includes: Apostraphe ['] Quotation ["]

Examples

<u>COMPANY</u>	SHORTNAME
Inn @ Ellis Square	INNELLISSQ
McDonald's	MCDONALDS
AAMCO #1221	AMMCO1221
Party City #21	PARTYCITY2

6. When the **first word** of a company's name is '**The**' do not include it in the shortname.

Examples

COMPANY	SHORTNAME
The Citi Group	CITIGROUP
Just The Fax	JUSTTHEFAX
Pete's on the Hill	PETESONTHE
A World of Music	AWORLDOFMUS
The Supply Corp	SUPPLYCORP

7. When the **first words** of a city vendor is '**City of**' include it in the shortname.

Examples

<u>COMPANY</u>	<u>SHORTNAME</u>
City of Smyrna	CITYOFSMYR
City of Alpharetta	CITYOFALPH

8. When the **first word** of a vendor's name is '**University**', use the abbreviation UNIV followed by the additional letters as the shortname.

Examples

COMPANY	SHORTNAME
University of Georgia	UNIVOFGEOR
University Press	UNIVPRESS
University Patrol	UNIVPATROL

9. If a company contains "**INC**" "**LLC**" or any other **professional acronym**, do not include it in the shortname.

COMPANY	SHORTNAME
Xerox Inc.	XEROX
Thomas LLC	THOMAS



Individuals

These individual vendors pertain to 1099 vendors and employees. Banner student vendors are automatically loaded through a batch process.

1. Enter the last name first followed by the first name and middle initial(s) as the shortname.

Examples

<u>INDIVIDUAL</u>	SHORTNAME	
John B. Smith	SMITHJOHNB	
John Bradford Smith	SMITHJOHNB	
Stan Henry Joe Lee	LEESTANHJ	
Kimberly Anderson	ANDERSONKI	
William Mathews	MATHEWSWIL	
Oscar DeLaHoya	DELAHOYAOS	

2. Do not use parentheses, apostrophes, or any other punctuation.

Examples

INDIVIDUAL	<u>SHORTNAME</u>
Lisa O'Brien	OBRIENLISA

3. Do not use **degrees**, **military rank**, **professional title**, **Roman numerals** (I, II, III, etc), or '**Jr**' in the shortname.

Examples

INDIVIDUAL	SHORTNAME	
Dr. Mary Stone	STONEMARY	
Mary Stone, MD	STONEMARY	
Tom Weaver, Jr	WEAVERTOM	
Gary Wan II	WANGARY	

4. If the vendor has **two last names** or uses a **hyphen** between the names, enter the first last name first followed by the second. Do not include the hyphen.

Examples

INDIVIDUAL	SHORTNAME
Lisa Jenkins-Hopkins	JENKINSHOP
Holly Robinson Pete	ROBINSONPE

5. If the vendor has **two first names**, enter the last name first followed by first first name. The second first name should be treated like middle name and only use the initial.

INDIVIDUAL	SHORTNAME
Mary Jane Smith	SMITHMARYJ
Bobbi Jo Barnes	BARNESBOBB

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VENDOR NAME 1 STANDARDS

The vendor name 1 is the vendor's name that also appears on checks unless and alternate name is used. Use the following rules when entering the name 1.

General Rules

- 1. Use upper and lower case letters for the vendor name 1.
- 2. Spaces are allowed.
- 3. Enter up to the first forty (40) characters of the name.

Examples

COMPANY/INDIVIDUAL	NAME 1
ExxonMobile	ExxonMobile
Home Depot	Home Depot
Staples	Staples
Sterling Consulting	Sterling Consulting
Thomas Chevrolet	Thomas Chevrolet

Businesses

There are no standard rules that apply for what not to include in a business name. All characters of the business name are acceptable.

COMPANY/INDIVIDUAL	NAME 1
A & B Construction	A & B Construction
L R W Corporation	L R W Corporation
Sterling Consulting	Sterling Consulting
Thomas Chevrolet	Thomas Chevrolet
Amazon.com	Amazon.com
AAMCO #1221	AAMCO #1221
The Citi Group	The Citi Group
Thomas LLC	Thomas LLC
University of Georgia	University of Georgia
Inn @ Ellis Square	Inn @ Ellis Square



Individuals

1. Enter the name 1 using the format last name, first name middle initial.

Examples

INDIVIDUAL	<u>NAME 1</u>
John B. Smith	Smith,John B
John Bradford Smith	Smith,John B
Stan Henry Joe Lee	Lee,Stan H J
Kimberly Anderson	Anderson,Kimberly
William Mathews	Mathews,William
Oscar DeLaHoya	DeLaHoya,Oscar
Lisa Jenkins-Hopkins	Jenkins-Hopkins,Lisa
Mary Jane Smith	Smith,Mary J
Bobbi Jo Barnes	Barnes,Bobbi J

2. The use of **parentheses**, **apostrophes**, or any other punctuation is acceptable.

Examples

INDIVIDUAL	<u>NAME 1</u>
Lisa O'Brien	O'Brien,Lisa

3. Do not use degrees, military rank, or professional titles in the Name 1.

INDIVIDUAL	<u>NAME 1</u>
Dr. Mary Stone	Stone,Mary
Mary Stone, MD	Stone,Mary
Tom Weaver, Jr	Weaver,Tom Jr
Gary Wan II	Wan,Gary II

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LOCATION STANDARDS

The location is used to establish default processing rules for vendors which includes payables, purchasing, and 1099 rules. Each non Banner vendor will have a MAIN location with alternate locations established when necessary.

General Rules

1. The first location should always have a name of MAIN.

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Define Vendor User D Maintain Approve	SettD: 27000 Vendor: 0000016629 Short Vendor Name: CAROLINASE-001 Name: Carolina Sewn Products Corp.	
 D 1099/Global Withholding D California EDD 	A vendor location is a default set of rules which define how you conduct business with a vendor.	
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2. Additional locations should be added if there is a need to have different processing rules.

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 Inventory Policy Planning Supply Planning 	Options: Payables Procurement Sales/Use Tax 1099 Expand All Collapse All	
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▷ IT Asset Management ▷ Banking		
 Cash Management Deal Management 		
 Risk Management Financial Gateway 		
 Excise and Sales Tax/VAT IND 		
Commitment Control		
General Ledger Allocations		
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NOTE: You can only have one DEFAULT location if you establish multiple locations.

3. The location name 'TRAVEL' should not be used when adding Vendor Locations. This location is reserved for use by the Concur T&E interface that creates employee travel vendors.