Searching for Supplier Information

Updated 1/18/2022
In This Guide:

- Supplier Information for Contracted Suppliers
- Finding New Suppliers
What’s different in UD Exchange?

Working with Contracted Suppliers

Previously, you might be able to access basic information, such as a link, at Blue Hen Market.

In UD Exchange, we provide more detailed information for working with our contracted suppliers (including catalog suppliers).

Searching for New Suppliers

Previously, until a supplier was entered into PeopleSoft, you could not see where they were in the process or W9 reference number.

In UD Exchange, you can find a supplier before they are actually accessible in UDX or webforms, as well as where they are in approval workflow and see reference numbers to confirm it’s your supplier.
Supplier Information for Contracted Suppliers

• UD Employees may want to engage a supplier for a quote, or may be looking for contact information to follow-up on a previously placed order.
• This guide will illustrate how to find detailed supplier information from the UD Exchange Homepage as well as from within an existing order.
• This applies to any supplier, including catalog suppliers, with whom we have a contract of any type.
1. To access supplier information from the UD Exchange Homepage, navigate to **Contracts** on the left-hand menu, then type the supplier name into the search field.
2. Click the **magnifying glass**.

This also works if you don’t know the supplier name (see slide 11)
1. Your search defaults to return contracts “Active for Shopping” with the search term included.
2. Click Open Summary.
This screen gives you basic details about the Contract. Click View Summary.
The **Contract Summary** pop-up contains details for supplier engagement which can include information regarding delivery, sales tax, notifications, and direct contact information for sales representatives.
1. If you don’t know the name of a supplier but want to find one that offers specific goods or services, begin on the UD Exchange Homepage, navigate to **Contracts** on the left-hand menu, then type a keyword into the search field.

2. Click the **magnifying glass**.
1. Your search defaults to return contracts “Active for Shopping” with the search term included.
2. Click **Open Summary**.

The prefix UD on the contract number indicates that it is available for everyone at UD to use.
This screen gives you basic details about the Contract. Click View Summary.
The **Contract Summary** pop-up contains details for supplier engagement which can include information regarding delivery, sales tax, notifications, and direct contact information for sales representatives.
To access supplier information from within an existing requisition or purchase order, **click the supplier’s name** in the line item details of the document’s summary page.
1. Select the **Contracts** tab on the pop-up.
2. Click the “i” next to the contract you wish to view.

If you see more than one, look at the one that says “Executed: In Effect” or whose end date has not passed.
Click View Summary.
The Contract Summary pop-up contains details for supplier engagement which can include information regarding delivery, sales tax, notifications, and direct contact information for sales representatives.
Finding New Suppliers

• At the time of this publication, suppliers are still being entered into UD Exchange after completing their online W9 form.
• New processes dictated by Internal Audit require Procurement to verify all information submitted, some of which happens at the time of entry, and some at the time of payment.
• If you have the supplier’s W9 number and know they have used the W9 comments field to indicate that they are working with you, Procurement will start the process of entry to confirm that information and begin the processes required (confirming TIN, OFAC, banking information, etc.). **You can locate the supplier at any point after this process begins.**
In this example, an employee is looking for a supplier named Ametek, and they know that Ametek completed the W9 with reference number 66987.

- From the UD Exchange Homepage, the user will navigate to Suppliers on the left-hand menu, then type the “Ametek” into the search field, then click the magnifying glass.
The search returns a single supplier named Ametek, entered on April 29.

For more information, the user can click on the supplier’s name.

Both the Legal name and DBA name have been entered for this supplier; the search will return either.
The Supplier 360 View includes basic details. The user can see that Supplier No. is blank. This means that this supplier has not yet synced to PeopleSoft and therefore cannot yet be used on a requisition (either in UDX or webforms).

- To view the supplier registration process, the user can click on View History.
The History View displays details of the registration process.

In this example, the user can see that the supplier requested ACH payments which will require banking verification prior to payment.
As the user scrolls further down the History View, they can see that the supplier does match the reference number, confirming that they are reviewing the registration of the supplier they wanted, not one which may have a similar name.
The supplier profile also contains additional Workflow and Review information, including any Internal Notes that may have been entered by Procurement during the review process.

If the W9 was submitted to update existing information, this area will help you know whether anything has been updated recently for that supplier.
The **Supplier Registration Workflow** view indicates what stage of approval the supplier is in, and who is responsible for that step, and what remains to be completed before the supplier is approved.

New suppliers go through **Registration** workflow. Updated suppliers go through **Review** workflow.
Once the supplier is approved and synced, the Registration Status will say “Approved” and there will be a supplier number (from PeopleSoft) in the field where it was previously empty. This supplier can now be used on any requisition.
Other Supplier Information

The following screens depict recent changes to supplier processes made since this guide was first published, and answers to frequently asked questions.
New suppliers are now Inactive while they are in the review process. They will be changed to Active for Shopping – at which point you can select them on a requisition – when they are approved.
Previously, suppliers’ names would change from Proper Case to all capitals on the sync to PeopleSoft. This is no longer an issue, so do not use the Proper Case to determine whether the supplier is active.
Suppliers that were imported from PeopleSoft to UD Exchange in 2020 and have not been updated since that time are available for use but will have **Registration Status: None**
If the History shows no recent updates and submission into workflow, they should be able to be used in requisitions without errors.
H Voice, Suppliers that were imported from PeopleSoft to UD Exchange in 2020 and have an update pending, will have both a supplier ID number and be active for shopping but will show Registration Status: In Progress.
If the History shows recent updates and submission into workflow, there may be errors when trying to submit a requisition before it is approved.
Every supplier location has a Fulfillment address (where an order is sent), a Remit address (where a payment is sent) and a payment method (how payment is set). These three all work together.
Choosing your Supplier

In the following example, let’s say you are trying to complete an Non-PO Payment form to pay the University of Maryland Schaefer Center for Public Policy’s invoice for registration fees for a conference they are hosting.

The invoice has a PO box number for a remit address and ACH payment information.
When you create your requisition, you will only see Fulfillment addresses when you choose your supplier on a form. None shows a PO box.
However, you will see that the Remit address associated with the Schaefer Center for Public Policy is PO Box 2016.
In Payment Methods, you can see that we have an ACH Payment method on record with this choice.

You will NOT be able to see account information, but AP can, and does check this as part of the vouchering process.
Procurement is in the process of a major supplier cleanup so that this information is consistent, accurate, adequately documented, and makes sense to end users.

If a remit address that matches your documentation is NOT listed in Addresses, then we will need a new online W9 submission from that supplier with the additional information. AP cannot simply enter a new remit address when they process an invoice.
If you don’t want to keep checking to see when your supplier is ready, we run a weekly export of all suppliers updated in the past seven days on Monday mornings, available in a shared Google drive. You must be logged in with UD credentials to access.

Verification of banking information is now done at the time of payment. If a supplier has new or updated banking information, the voucher will be placed on hold pending independent verification. A comment will be added to the voucher to this effect.
Resources

Procurement Services
procurement@udel.edu

For assistance with supplier error messages in returned requisitions, please see the guide “Auto Return Troubleshooting Tips.”