Searching for Supplier Information

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Searching for Supplier Information in UDX

This guide will illustrate:

How to find information related to 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.

Checking the registration status of new suppliers:
• In UD Exchange, you can find a supplier before they are accessible in UDX or webforms, as well as where they are in approval workflow and see reference numbers to confirm it’s your supplier.
Searching for a Contracted Supplier in UDX

UD employees may want to obtain a quote from an existing contracted supplier or may be looking for a supplier’s contact information to follow-up on a previously placed order.
To access a specific supplier’s information from the UD Exchange Homepage:

Select **Contracts** > **Type Supplier Name** > Click **Magnifying Glass**
Your search defaults to return contracts that are “Active for Shopping” with your supplier name included.

Click **Open Summary**.

The prefix “UD” on the contract number indicates that this is a University-wide contract that is available for everyone at UD to use.
This screen provides basic details about the Contract.

Click View Summary.
The **Contract Summary** pop-up contains contract details including: delivery information, sales tax, notifications, and direct contact information for company sales representatives.
If you don’t know the name of a supplier but want to find one that offers specific goods or services, start on the UD Exchange Homepage:

**Contracts > Type Keyword into the Search Field > Click Magnifying Glass**
Your search defaults to return contracts that are “Active for Shopping” with your search term included.

Click **Open Summary**.

The prefix “UD” on the contract number indicates that this is a University-wide contract that is available for everyone at UD to use.
This screen provides basic details about the Contract.

Click View Summary.
The **Contract Summary** pop-up contains contract details including: delivery information, sales tax, notifications, and direct contact information for company sales representatives.
To access supplier information from within an existing requisition or purchase order:

Click the **supplier’s name** in the line-item section of the document’s summary tab.
Select the **Contracts** tab on the pop-up.

Click the “i” icon next to the contract you wish to view.

If you see more than one contract, look at the one that says “Executed: In Effect” or the contract with a current date.
Click View Summary.
The **Contract Summary** pop-up contains contract details including: delivery information, sales tax, notifications, and direct contact information for company sales representatives.
Finding New Suppliers

• New suppliers are entered into UD Exchange by Procurement staff after they complete their online W9 form.

• Processes dictated by Internal Audit require Procurement staff to verify all information submitted, some of which happens at the time of entry, and some at the time of payment.

• If the supplier has used the comments field on the online W9 form to indicate that they are working with you, Procurement will start the process of entry to confirm their information and begin the required review and approval process.
  – Confirming TIN, OFAC, banking information, etc.

• If you have the supplier’s W9 reference number, you can locate the supplier at any point after this process begins.
In this example, an employee is looking for a new supplier named Ametek. Their contact at Ametek confirmed that they completed the online W9 and received reference number 66987.

Suppliers > Manage Suppliers > Type “Ametek” into the search field > Click Magnifying Glass
The search returns a single supplier named Ametek, entered on April 29.

Both the Legal name and DBA name have been entered for this supplier; the search will return either.

For more information, click on the supplier’s name.
The **Supplier 360** View includes basic details. The user can see that **Supplier No.** field 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 progress, 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 requires banking verification prior to payment.
As the user scrolls further down the History View, they can see their supplier’s W9 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 an online W9 was submitted to make updates to an existing supplier’s information, this area will let 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
- Who is responsible for that step
- What needs to be completed before the supplier is approved

New suppliers go through Registration workflow. Existing suppliers needing updates go through Review workflow.
Once the supplier is approved and synced in UD systems, the **Registration Status** will be **Approved**. A **Supplier Number** (from PeopleSoft) will be visible 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 provides answers to frequently asked questions.
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 display Registration Status: None.
If the History shows no recent updates or submission into workflow, the supplier should be able to be used in requisitions without errors.
However, 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 the updates are approved.
Fulfillment Centers are now displayed *instead of* addresses when you are selecting a supplier on a requisition.

Each new W9 a supplier submits adds a fulfillment center to their profile.

Outdated information will be inactivated as UD’s supplier cleanup effort continues.

*To ensure you select the correct Fulfillment Center, refer to the supplier profile as illustrated in the next slide…*
Fulfillment Centers are now shown in the Supplier profile. A fulfillment center links together:
- The address where the PO is sent (fulfillment address),
- The address where Payment is sent (remittance address),
- The Payment Method selected by the supplier on their W9.

These may or may not be the same address.

The following slides illustrate how to ensure you are selecting the correct supplier record when beginning your requisition…
Choosing the Correct Supplier

In the following example, you need to complete a Non-PO Payment form to pay an invoice for conference registration fees to the University of Maryland Schaefer Center for Public Policy.

Their invoice has a PO box number listed as their remittance address and requests payment by ACH.
When you create your requisition, you will only see Fulfillment Centers on the Suppliers page.

None of the centers show a PO box.
If you navigate to the **Supplier Profile, Contacts and Locations > Fulfillment Centers**, you can browse various Fulfillment centers to view the remittance addresses associated with each one. Here, you see that the remittance address associated with the Schaefer Center for Public Policy is PO Box 2016.
In Accounts Payable > Payment Methods, you can see that we have an ACH Payment method on record with this Fulfillment Center.

With this information you can select this Fulfillment Center with confidence on your requisition!

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

If a remittance address that matches your documentation is NOT listed in the supplier profile, then the supplier will need to submit a new online W9 with the additional information. Accounts Payable cannot simply enter a new remit address when they process an invoice.

If you don’t want to keep looking your supplier up in UDX to check on their registration or update status, Procurement runs an export every Monday of all suppliers updated in the past seven days. You must be logged in with UD credentials to access the shared Google drive.

Verification of supplier banking information is now done at the time of payment. If a supplier has new or updated banking information, their payment voucher will be placed on hold pending verification. A comment will be added to the voucher noting the hold for verification.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Auto Return Troubleshooting Tips