Searching for Supplier Information
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 7)
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.
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 banking information provided by the supplier, and that the supplier is actively working with someone at UD.
• 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 on 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 (a longer process than credit card).
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.

Also note: the Supplier’s legal name has changed to all caps on sync with PeopleSoft. If you start a requisition with a supplier whose name is in Proper Case, check to see if they have a supplier number yet or are still being processed.
Resources

Procurement Services
procurement@udel.edu