

Search for a Supplier

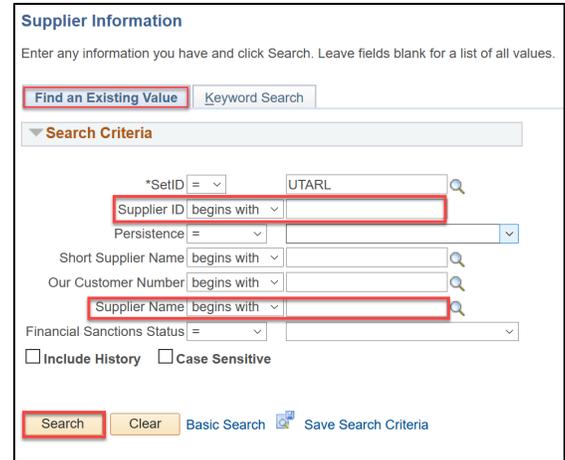
The purpose of this job aid is to explain how to search for a Supplier that is **connected** to PaymentWorks and can be used for ordering goods and services for the University of Texas at Arlington. A thorough search should be performed to select the correct supplier to avoid duplication.

Step 1: UTShare

There are two screens that can be used to search for a Supplier in UTShare, the Supplier Information page and the Review Supplier page.

Search for a Supplier using the Supplier Information Page

- 1) Navigating to the Supplier Information page: NavBar > Menu > Financials > Suppliers > Supplier Information > Add/Update > Supplier.
- 2) The Supplier Information page is displayed. From the Find an Existing Value tab, leave the default value "UTARL" in the SETID field. You may search for an existing Supplier by Supplier ID or Name. Enter the appropriate search criteria for the Supplier you want to view.
- 3) Click the Search button.



Supplier Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Keyword Search

Search Criteria

*SetID = UTARL

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

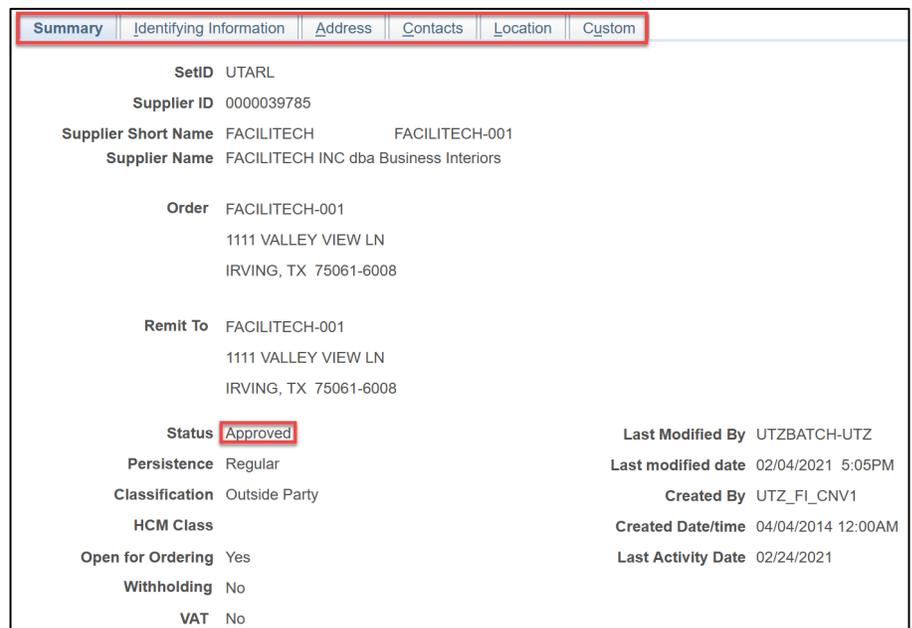
Financial Sanctions Status =

Include History Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

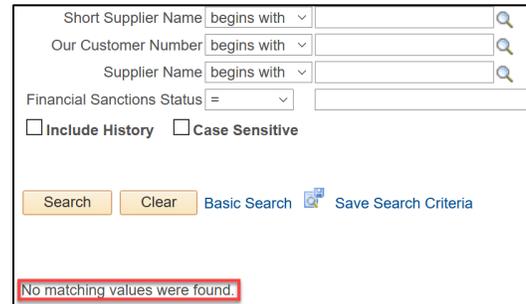
- 4) A Search Results table is displayed with a list of Suppliers that meet the search criteria entered. To view details for a specific Supplier, select the appropriate Supplier from the list. Clicking on any value on the supplier's row will populate the Supplier Information screen.

- 5) The Summary tab will show general Supplier information, including the Supplier Status. To see further information, click on the appropriate tab.



Summary	Identifying Information	Address	Contacts	Location	Custom
SetID	UTARL				
Supplier ID	0000039785				
Supplier Short Name	FACILITECH	FACILITECH-001			
Supplier Name	FACILITECH INC dba Business Interiors				
Order	FACILITECH-001	1111 VALLEY VIEW LN IRVING, TX 75061-6008			
Remit To	FACILITECH-001	1111 VALLEY VIEW LN IRVING, TX 75061-6008			
Status	Approved				
Persistence	Regular				
Classification	Outside Party				
HCM Class					
Open for Ordering	Yes				
Withholding	No				
VAT	No				
				Last Modified By	UTZBATCH-UTZ
				Last modified date	02/04/2021 5:05PM
				Created By	UTZ_FI_CNV1
				Created Date/time	04/04/2014 12:00AM
				Last Activity Date	02/24/2021

- 6) If the supplier is not in UTShare, the search will return a message stating “No matching values were found.” Ensure that the name being searched is the supplier’s “legal” name (the name that is associated with their Tax ID number).
- 7) If the supplier is not found, an invitation will need to be sent via PaymentWorks and **connected** before a requisition or payment voucher can be processed.

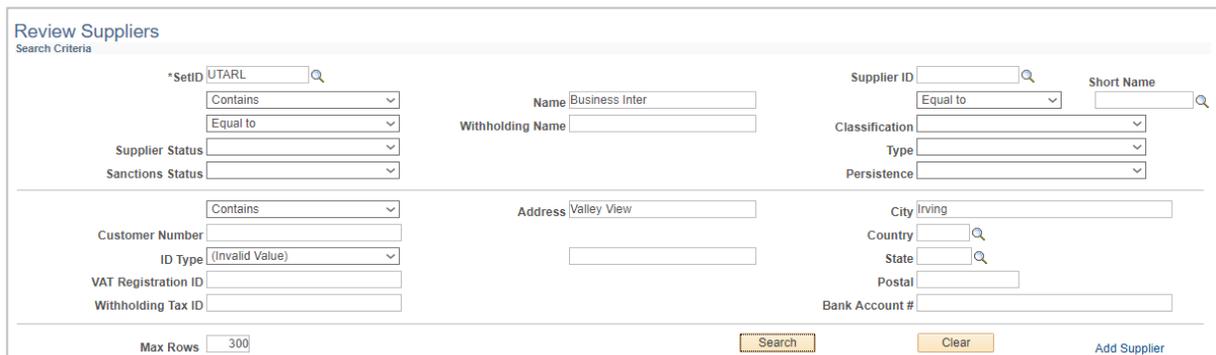


Short Supplier Name begins with
Our Customer Number begins with
Supplier Name begins with
Financial Sanctions Status =
 Include History Case Sensitive
Search Clear Basic Search Save Search Criteria
No matching values were found.

Search for a Supplier using the Review Supplier Page

The Review Supplier page is used to search for an existing Supplier. This page provides additional fields not available on the “Supplier Information” page. It allows detailed information for multiple Suppliers to be viewed at one time. The Review Suppliers page includes several options for searching for a Supplier, including by Supplier ID, name or address.

- 1) Navigate to the Review Supplier Page: NavBar > Menu> Supplier > Supplier Information > Add/Update > Review Suppliers.
- 2) You may search for a Supplier by ID, name, or address. Enter the appropriate search criteria for the Supplier to be viewed. Using the search operator “Contains” will return more robust search results.



Review Suppliers
Search Criteria

*SetID UTARL
Contains
Equal to
Supplier Status
Sanctions Status
Customer Number
ID Type (Invalid Value)
VAT Registration ID
Withholding Tax ID
Name Business Inter
Withholding Name
Supplier ID
Equal to
Short Name
Classification
Type
Persistence
Address Valley View
City Irving
Country
State
Postal
Bank Account #
Max Rows 300
Search Clear Add Supplier

- 3) Click the Search button.
- 4) A Search Results table is displayed with a list of Suppliers that meet the search criteria entered. To view details for a specific supplier, click the appropriate tab (i.e. Main Information, Additional Supplier Info, and Audit Information).



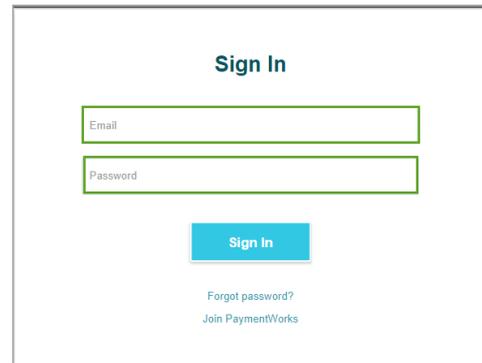
Actions	SetID	Supplier ID	Supplier Name	Short Name	Address	City	State	Country	Effective Status	Status
▼ Actions	UTARL	0000000001	UNIVERSITY OF TEXAS	UNIVERSITY-033	PO BOX 7398	AUSTIN	TX	USA	Active	Approved
▼ Actions	UTARL	0000000001	UNIVERSITY OF TEXAS	UNIVERSITY-033	PO BOX 7399	AUSTIN	TX	USA	Active	Approved
▼ Actions	UTARL	0000000001	UNIVERSITY OF TEXAS	UNIVERSITY-033	Office of Accounting	Austin	TX	USA	Active	Approved
▼ Actions	UTARL	0000000003	TORONTO RESEARCH CHEMICALS INC	TORONTO RE-001	2 Brisbane Road	North York	ON	CAN	Active	Inactive

Note: The Supplier Status is on the **Additional Supplier Info** tab.

5) If the Supplier is not found in the Review Supplier page search, go to Step 2: PaymentWorks.

Step 2: PaymentWorks

1. Navigate to PaymentWorks by going to: myapps.uta.edu and click on the PaymentWorks icon **OR**
2. Log in with your UTA email address and NetID password. Click Sign In.
3. Click on **Setup and Manage Supplier Portal**.



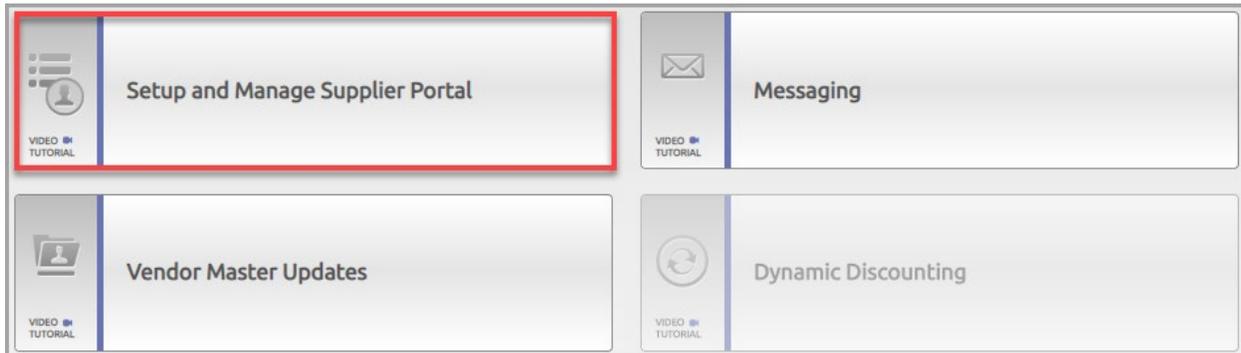
Sign In

Email

Password

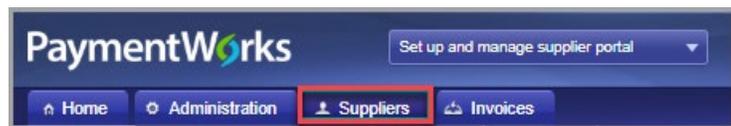
Sign In

[Forgot password?](#)
[Join PaymentWorks](#)



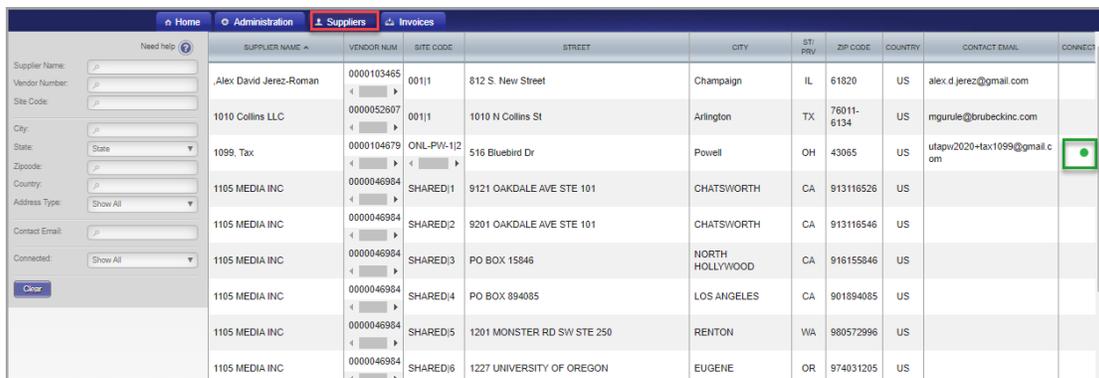
The dashboard shows four main sections: **Setup and Manage Supplier Portal** (highlighted with a red box), **Messaging**, **Vendor Master Updates**, and **Dynamic Discounting**. Each section includes a 'VIDEO TUTORIAL' icon.

4. Click on the **Suppliers** tab.



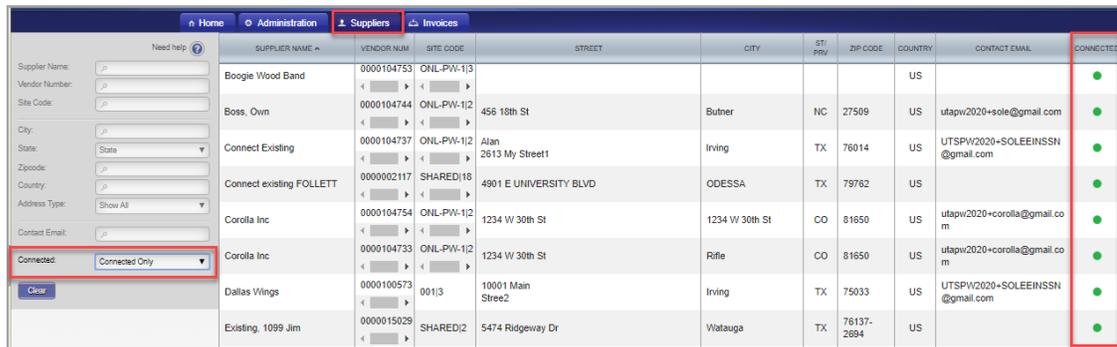
The navigation bar includes: Home, Administration, **Suppliers** (highlighted with a red box), and Invoices. A dropdown menu for 'Set up and manage supplier portal' is also visible.

5. The Supplier list is displayed and includes connected and non-connected Suppliers. The **green** dot in the “Connected” column indicates that the Supplier is **connected** and can be used for purchasing goods and services.



SUPPLIER NAME	VENDOR NUM	SITE CODE	STREET	CITY	ST. PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECT
Alex David Jerez-Roman	0000103465	00111	812 S. New Street	Champaign	IL	61820	US	alex.d.jerez@gmail.com	
1010 Collins LLC	0000052607	00111	1010 N Collins St	Arlington	TX	76011-6134	US	mgurule@brubeckinc.com	
1099. Tax	0000104679	ONL-PW-112	516 Bluebird Dr	Powell	OH	43065	US	utapw2020+tax1099@gmail.com	●
1105 MEDIA INC	0000046984	SHARED1	9121 OAKDALE AVE STE 101	CHATSWORTH	CA	913116526	US		
1105 MEDIA INC	0000046984	SHARED2	9201 OAKDALE AVE STE 101	CHATSWORTH	CA	913116546	US		
1105 MEDIA INC	0000046984	SHARED3	PO BOX 15846	NORTH HOLLYWOOD	CA	918155846	US		
1105 MEDIA INC	0000046984	SHARED4	PO BOX 894085	LOS ANGELES	CA	901894085	US		
1105 MEDIA INC	0000046984	SHARED5	1201 MONSTER RD SW STE 250	RENTON	WA	980572996	US		
1105 MEDIA INC	0000046984	SHARED6	1227 UNIVERSITY OF OREGON	EUGENE	OR	974031205	US		

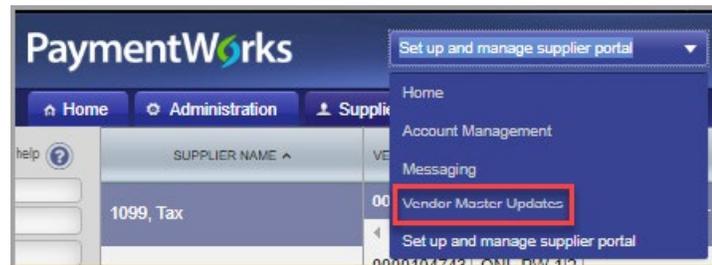
- To display **connected** Suppliers only, click in the “Connected” search field and select **Connected Only**. Scroll through the **connected** Supplier list or enter the search parameter(s) in the required search field(s) and click **Search**. The specified Supplier information is displayed.



SUPPLIER NAME	VENDOR NUM	SITE CODE	STREET	CITY	ST PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
Boogie Wood Band	0000104753	ONL-PW-1 3					US		●
Boss, Ovm	0000104744	ONL-PW-1 2	456 18th St	Bulmer	NC	27509	US	utapw2020+sole@gmail.com	●
Connect Existing	0000104737	ONL-PW-1 2	Alan 2613 My Street1	Irving	TX	76014	US	UTSPW2020+SOLEINSSN@gmail.com	●
Connect existing FOLLETT	0000002117	SHARED 18	4901 E UNIVERSITY BLVD	ODESSA	TX	79782	US		●
Corolla Inc	0000104754	ONL-PW-1 2	1234 W 30th St	1234 W 30th St	CO	81650	US	utapw2020+corolla@gmail.com	●
Corolla Inc	0000104733	ONL-PW-1 2	1234 W 30th St	Rifle	CO	81650	US	utapw2020+corolla@gmail.com	●
Dallas Wings	0000100573	00 1 3	10001 Main Stee2	Irving	TX	75033	US	UTSPW2020+SOLEINSSN@gmail.com	●
Existing, 1099 Jim	0000015029	SHARED 2	5474 Ridgeway Dr	Watauga	TX	76137-2694	US		●

- If the Supplier name and correct address are found, the Supplier is **connected** and can be used for purchasing goods and/or services at UTA. No additional searching is required. NOTE: **Verify** the Supplier address is the same as the Supplier for which you are searching.

- If the Supplier name is found but does not display a green dot (**connected**), click on the **Vendor Master Updates** to review the Supplier’s percent completion in the registration process.

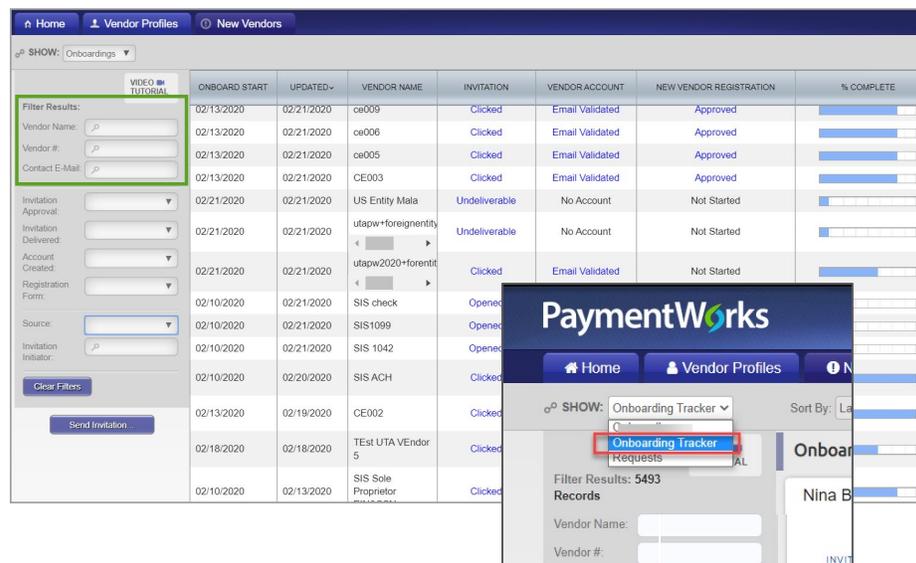


- Click on the **New Vendors** tab.

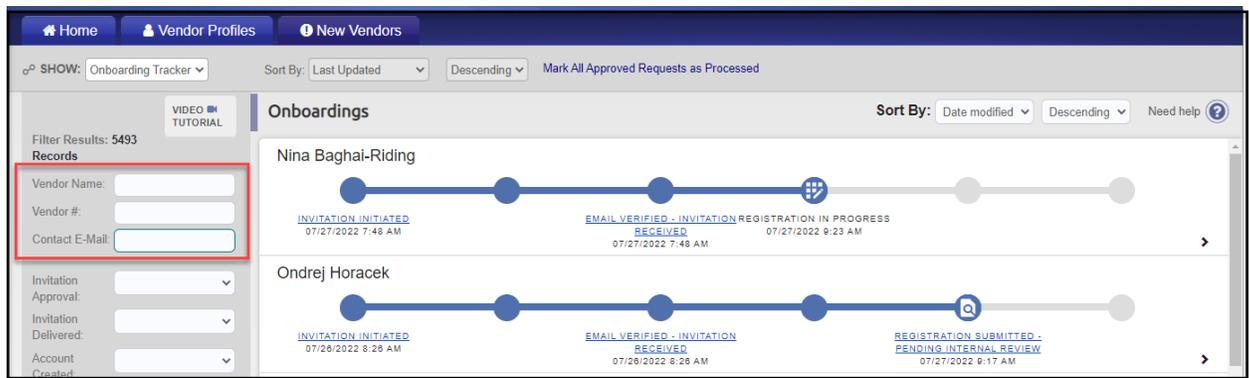


- The **Filter Results** panel is displayed, and you can search by the Supplier name or email address. It will default to the **Requests Page**. Choose **Onboardings Tracker** from the drop - down menu

Note: You can click on the column headers to re-sort the column.



ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
02/13/2020	02/21/2020	ca009	Clicked	Email Validated	Approved	100%
02/13/2020	02/21/2020	ca006	Clicked	Email Validated	Approved	100%
02/13/2020	02/21/2020	ca005	Clicked	Email Validated	Approved	100%
02/13/2020	02/21/2020	CE003	Clicked	Email Validated	Approved	100%
02/21/2020	02/21/2020	US Entity Mala	Undeliverable	No Account	Not Started	0%
02/21/2020	02/21/2020	utapw+foreignentity	Undeliverable	No Account	Not Started	0%
02/21/2020	02/21/2020	utapw2020+forentit	Clicked	Email Validated	Not Started	0%
02/10/2020	02/21/2020	SIS check	Openec			0%
02/10/2020	02/21/2020	SIS1099	Openec			0%
02/10/2020	02/21/2020	SIS 1042	Openec			0%
02/10/2020	02/20/2020	SIS ACH	Clicked			0%
02/13/2020	02/19/2020	CE002	Clicked			0%
02/18/2020	02/18/2020	TEST UTA VENDOR 5	Clicked			0%
02/10/2020	02/13/2020	SIS Sole Proprietor	Clicked			0%



11. The search results will display and provide the Supplier status.

Onboardings expand to the details view when the user clicks the arrow to the bottom right of each row. The details view includes up to three tabs depending on where the payee is in the onboarding process:

1. Progress - created when the onboarding is initiated
2. Invitation Detail - created when the onboarding is initiated
3. Account Info - created when the payee verifies their account

The Progress tab of the details view displays the following:

- The current status
- The last previous status for each of the completed steps
- Similar to the list view, each status is hyperlinked to a tab or page that displays more details if applicable
- A timestamp for each status
- The user name and email address of any user who actioned this onboarding
- Any messages sent to the payee with the invitation approval, invitation rejection, or registration return
- If a registration was returned, the number of submissions for this onboarding
- Which steps remain until the onboarding is complete

12. If the Supplier name and correct address are found **and** the “New Vendor Registration” status is **“Onboarding Complete” WITH a vendor number**, then the Supplier is **connected** and can be used for purchasing goods and/or services for UTA.

13. If the Supplier name and correct location are found and the “New Vendor Registration” status is **anything other** than “Onboarding Complete” WITH a vendor number, then the Supplier has been invited and/or is in some stage of the registration process. The Supplier is **not connected** and cannot be used for purchasing goods and/or services at the current time. Note: Do **NOT** re-invite an already invited Supplier.

14. If the Supplier name is not found or the required Supplier address is not listed, log into PaymentWorks and send an invite to the Supplier. Refer to the “Invite a Supplier” Job Aid.