

Search for a Supplier

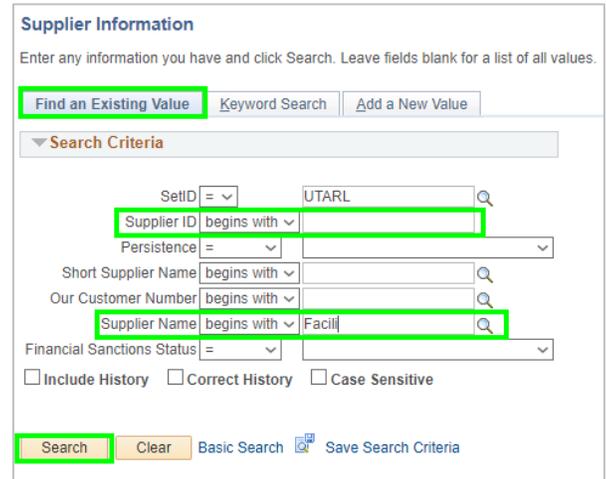
The purpose of this job aid is to explain how to search for a Supplier that is **connected** to PaymentWorks and can be used for ordering goods and services for the University of Texas at Arlington. A thorough search should be performed to select the correct supplier to avoid duplication.

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: Navigator > 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 Add a New Value

▼ Search Criteria

SetID = UTARL

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with Facilit

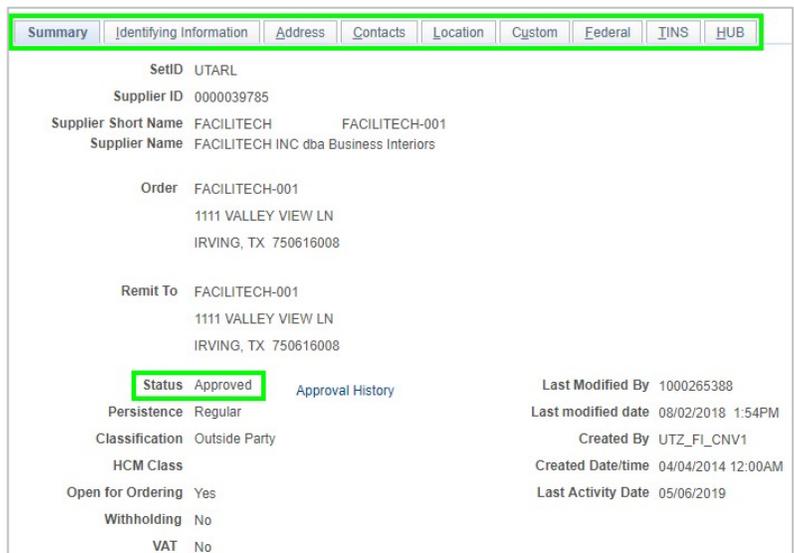
Financial Sanctions Status =

Include History Correct 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 Federal TINS HUB

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 750616008

Remit To FACILITECH-001

1111 VALLEY VIEW LN

IRVING, TX 750616008

Status Approved Approval History Last Modified By 1000265388

Persistence Regular Last modified date 08/02/2018 1:54PM

Classification Outside Party Created By UTZ_FI_CNV1

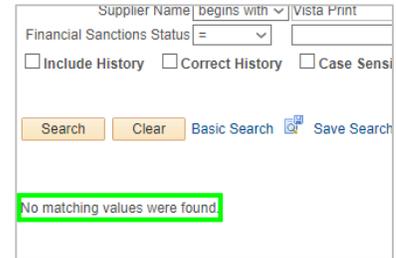
HCM Class Created Date/time 04/04/2014 12:00AM

Open for Ordering Yes Last Activity Date 05/06/2019

Withholding No

VAT No

- 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).
- 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.

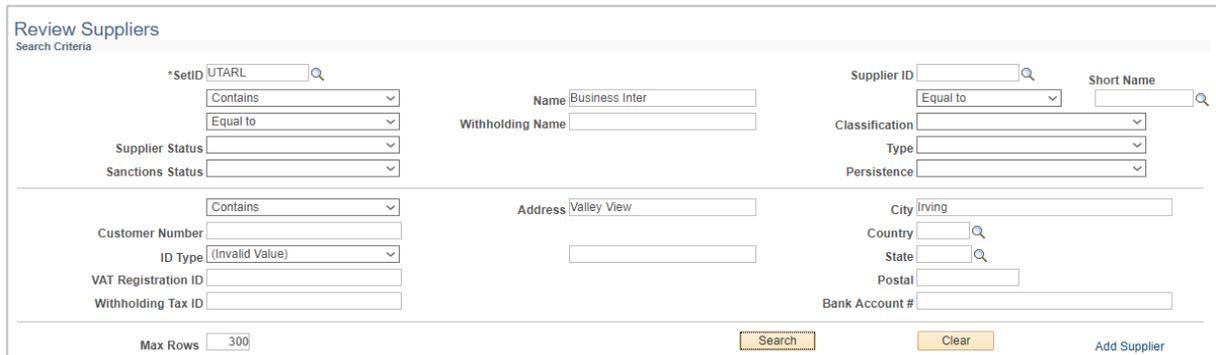


Supplier Name: begins with | Vista Print
 Financial Sanctions Status: =
 Include History Correct History Case Sensitive
 Search Clear Basic Search Save Search
 No matching values were found

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.

- Navigate to the Review Supplier Page: Navigator > Supplier > Supplier Information > Add/Update > Review Suppliers.
- 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

Name: Business Inter
 Withholding Name

Supplier ID
 Equal to
 Short Name
 Classification
 Type
 Persistence

Customer Number
 ID Type (Invalid Value)
 VAT Registration ID
 Withholding Tax ID

Address: Valley View
 City: Irving
 Country
 State
 Postal
 Bank Account #

Max Rows: 300
 Search Clear Add Supplier

- Click the Search button.
- 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).



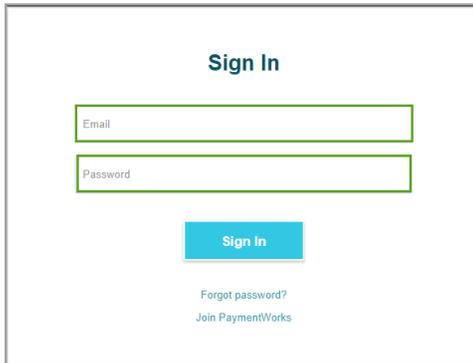
Actions	SetID	Supplier ID	Supplier Name	Short Name	Address	City	State	Country	Effective Status	Status
▼ Actions	UTARL	0000000001	UNIVERSITY OF TEXAS	UNIVERSITY-033	PO BOX 7398	AUSTIN	TX	USA	Active	Approved
▼ Actions	UTARL	0000000001	UNIVERSITY OF TEXAS	UNIVERSITY-033	PO BOX 7399	AUSTIN	TX	USA	Active	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.

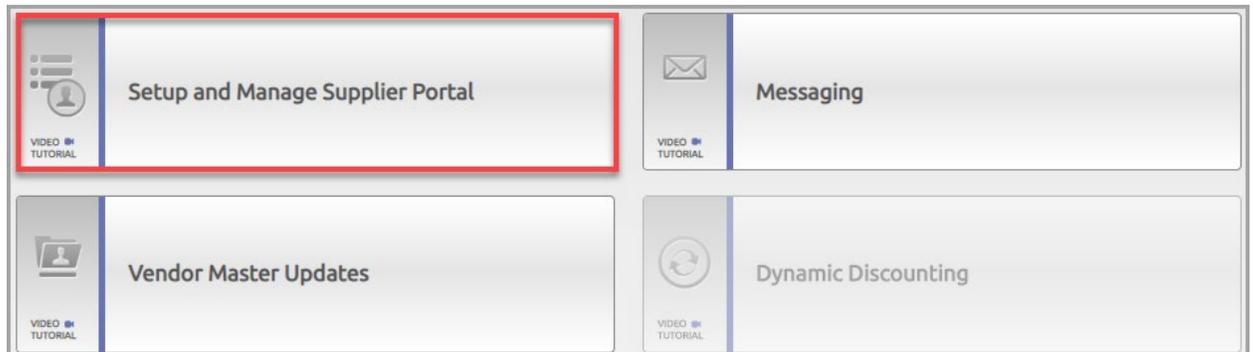
Step 2: PaymentWorks

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.

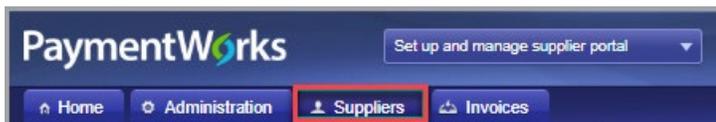


The image shows the 'Sign In' page for PaymentWorks. It features a title 'Sign In' at the top. Below the title are two input fields: 'Email' and 'Password'. A blue 'Sign In' button is positioned below the password field. At the bottom of the page, there are two links: 'Forgot password?' and 'Join PaymentWorks'.

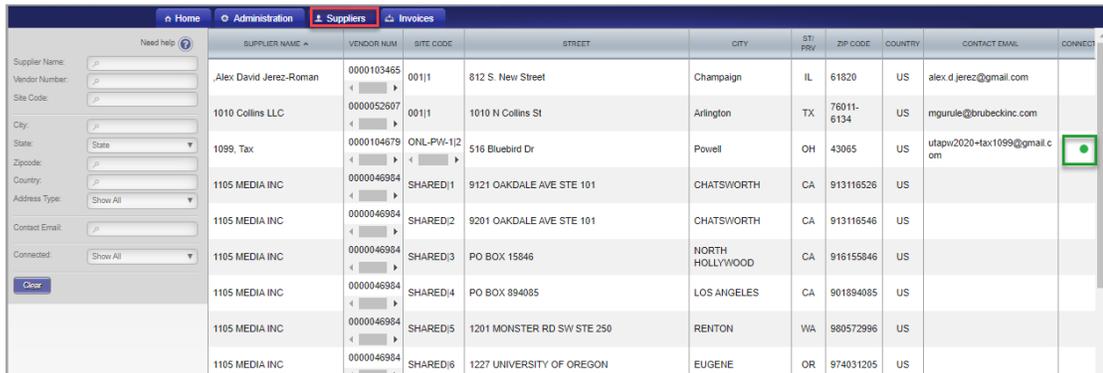
3. Click on **Setup and Manage Supplier Portal**.



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

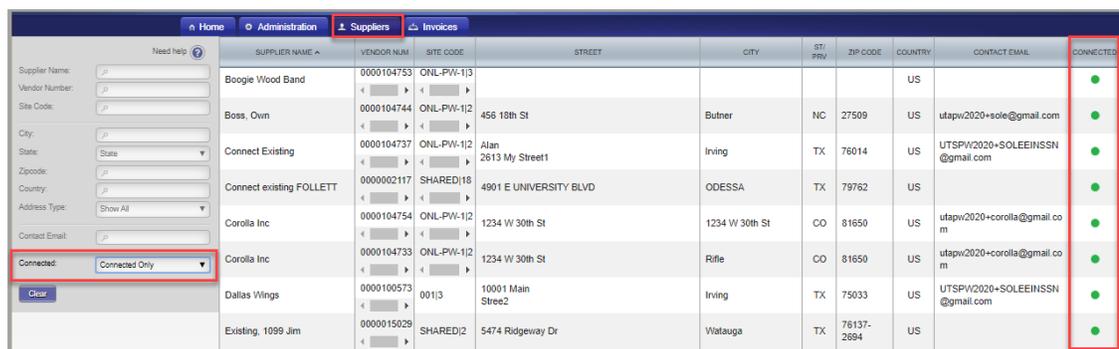


- The Supplier list is displayed and includes connected and non-connected Suppliers. The **green dot** in the “Connected” column indicates that the Supplier is **connected** and can be used for purchasing goods and services.



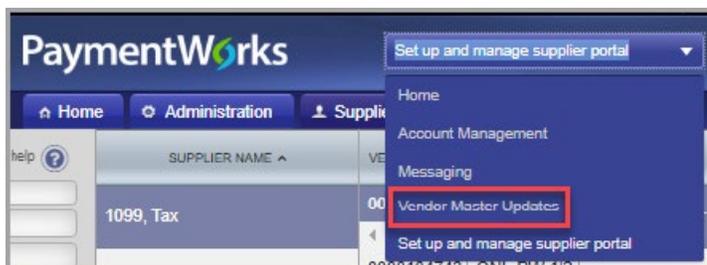
SUPPLIER NAME	VENDOR NUM	SITE CODE	STREET	CITY	ST/PRV	ZIP CODE	COUNTRY	CONTACT EMAIL	CONNECTED
Alex David Jerez-Roman	0000103465	001 1	812 S. New Street	Champaign	IL	61820	US	alex.d.jerez@gmail.com	
1010 Collins LLC	0000052607	001 1	1010 N Collins St	Arlington	TX	76011-6134	US	mgurule@brubeckinc.com	
1099, Tax	0000104679	ONL-PW-12	516 Bluebird Dr	Powell	OH	43055	US	utapw2020+tax1099@gmail.com	●
1105 MEDIA INC	0000046904	SHARED 1	9121 OAKDALE AVE STE 101	CHATSWORTH	CA	913116526	US		
1105 MEDIA INC	0000046904	SHARED 2	9201 OAKDALE AVE STE 101	CHATSWORTH	CA	913116546	US		
1105 MEDIA INC	0000046904	SHARED 3	PO BOX 15846	NORTH HOLLYWOOD	CA	916155846	US		
1105 MEDIA INC	0000046904	SHARED 4	PO BOX 894085	LOS ANGELES	CA	901694085	US		
1105 MEDIA INC	0000046904	SHARED 5	1201 MONSTER RD SW STE 250	RENTON	WA	980572996	US		
1105 MEDIA INC	0000046904	SHARED 6	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-13					US		●
Boss, Ovn	0000104744	ONL-PW-12	456 18th St	Butner	NC	27509	US	utapw2020+sole@gmail.com	●
Connect Existing	0000104737	ONL-PW-12	Alan 2613 My Street1	Irving	TX	76014	US	UTSPW/2020+SOLEINSSN@gmail.com	●
Connect existing FOLLETT	0000002117	SHARED 18	4901 E UNIVERSITY BLVD	ODESSA	TX	79762	US		●
Corolla Inc	0000104754	ONL-PW-12	1234 W 30th St	1234 W 30th St	CO	81650	US	utapw2020+corolla@gmail.com	●
Corolla Inc	0000104733	ONL-PW-12	1234 W 30th St	Rifle	CO	81650	US	utapw2020+corolla@gmail.com	●
Dallas Wings	0000100573	001 3	10001 Main Street2	Irving	TX	75033	US	UTSPW/2020+SOLEINSSN@gmail.com	●
Existing, 1099 Jim	0000015029	SHARED 2	5474 Ridgeway Dr	Watauga	TX	76137-2694	US		●

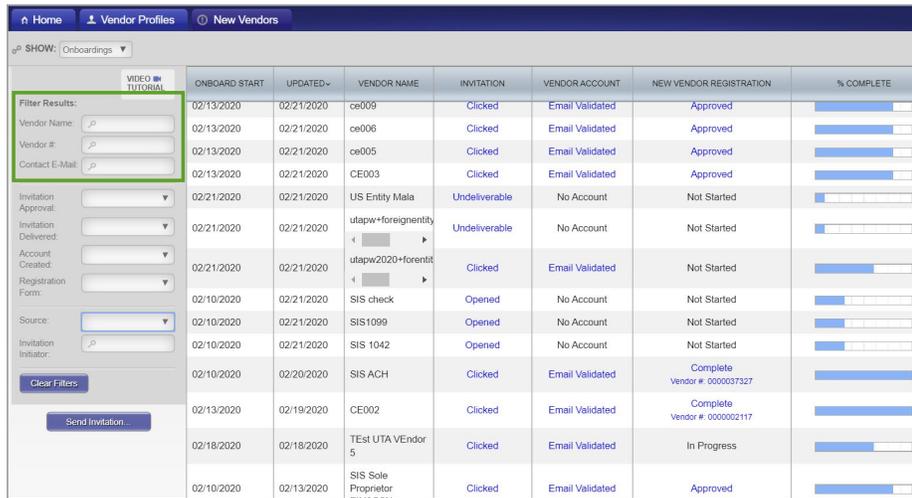
- If the Supplier name and correct address are found, the Supplier is **connected** and can be used for purchasing goods and/or services at UTA. No additional searching is required. NOTE: **Verify** the Supplier address is the same as the Supplier for which you are searching.
- If the Supplier name is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

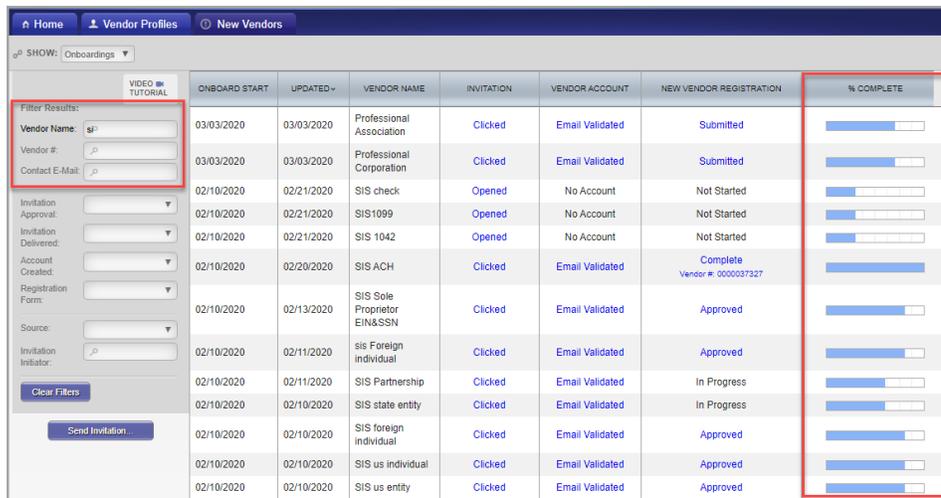


10. The **Filter Results** panel is displayed, and you can search by the Supplier name or email address.
Note: You can click on the column headers to re-sort the column.



ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
02/13/2020	02/21/2020	ce009	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/13/2020	02/21/2020	ce006	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/13/2020	02/21/2020	ce005	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/13/2020	02/21/2020	CE003	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/21/2020	02/21/2020	US Entity Mala	Undeliverable	No Account	Not Started	<div style="width: 0%;"></div>
02/21/2020	02/21/2020	utapw+foreignentit	Undeliverable	No Account	Not Started	<div style="width: 0%;"></div>
02/21/2020	02/21/2020	utapw2020+forentit	Clicked	Email Validated	Not Started	<div style="width: 0%;"></div>
02/10/2020	02/21/2020	SIS check	Opened	No Account	Not Started	<div style="width: 0%;"></div>
02/10/2020	02/21/2020	SIS1099	Opened	No Account	Not Started	<div style="width: 0%;"></div>
02/10/2020	02/21/2020	SIS 1042	Opened	No Account	Not Started	<div style="width: 0%;"></div>
02/10/2020	02/20/2020	SIS ACH	Clicked	Email Validated	Complete Vendor #: 0000037327	<div style="width: 100%;"></div>
02/13/2020	02/19/2020	CE002	Clicked	Email Validated	Complete Vendor #: 000002117	<div style="width: 100%;"></div>
02/18/2020	02/18/2020	TEst UTA VEndor 5	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>
02/10/2020	02/13/2020	SIS Sole Proprietor	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>

11. The search results will display and provide the Supplier status. The **% Complete** column will indicate the Supplier’s stage in the registration and approval process.



ONBOARD START	UPDATED	VENDOR NAME	INVITATION	VENDOR ACCOUNT	NEW VENDOR REGISTRATION	% COMPLETE
03/03/2020	03/03/2020	Professional Association	Clicked	Email Validated	Submitted	<div style="width: 0%;"></div>
03/03/2020	03/03/2020	Professional Corporation	Clicked	Email Validated	Submitted	<div style="width: 0%;"></div>
02/10/2020	02/21/2020	SIS check	Opened	No Account	Not Started	<div style="width: 0%;"></div>
02/10/2020	02/21/2020	SIS1099	Opened	No Account	Not Started	<div style="width: 0%;"></div>
02/10/2020	02/21/2020	SIS 1042	Opened	No Account	Not Started	<div style="width: 0%;"></div>
02/10/2020	02/20/2020	SIS ACH	Clicked	Email Validated	Complete Vendor #: 0000037327	<div style="width: 100%;"></div>
02/10/2020	02/13/2020	SIS Sole Proprietor EIN&SSN	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/10/2020	02/11/2020	sis Foreign individual	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/10/2020	02/11/2020	SIS Partnership	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>
02/10/2020	02/10/2020	SIS state entity	Clicked	Email Validated	In Progress	<div style="width: 50%;"></div>
02/10/2020	02/10/2020	SIS foreign individual	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/10/2020	02/10/2020	SIS us individual	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>
02/10/2020	02/10/2020	SIS us entity	Clicked	Email Validated	Approved	<div style="width: 100%;"></div>

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



02/21/2020	02/27/2020	UTA US Individual	Clicked	Email Validated	Complete Vendor #: 0000104740	<div style="width: 100%;"></div>
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13. If the Supplier name and correct location are found and the “New Vendor Registration” status is **anything other** than “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.