

Managing Suppliers

Suppliers are individuals or companies that provide goods or services to the university. It is crucial that new Suppliers are setup correctly. Before adding a new Supplier, a thorough search should be performed to avoid duplications.

Searching for a Supplier

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

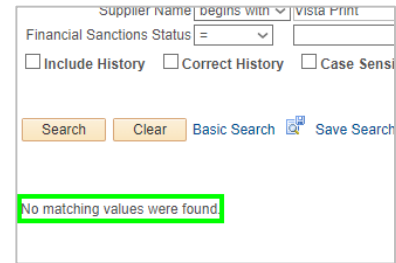
Search for a Supplier using the Supplier Information Page

- 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.

- 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.

- 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, it will need to be entered and approved before a requisition or payment voucher can be processed.

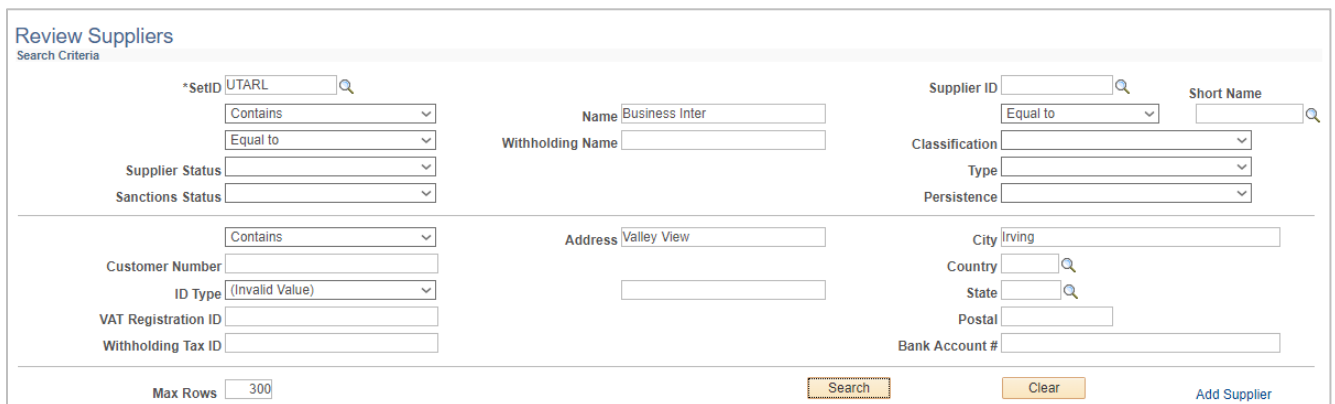


Supplier Name [begins with] [Vista Print]
 Financial Sanctions Status [=]
 Include History Correct History Case Sensitive
 Search Clear Basic Search Save Search
 No matching values were found.

Search for a Supplier using the Review Supplier Page

The Review Suppliers 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.

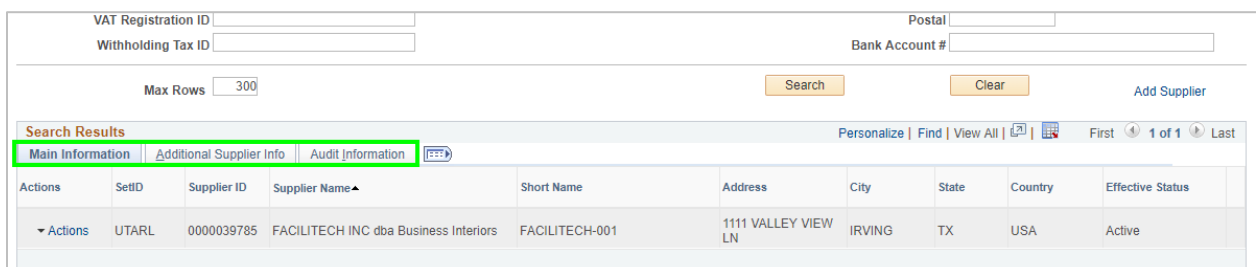
- Navigate to the Review Supplier Page: **NavBar > Menu > Financials > Supplier > Supplier Information > Add/Update > Review Suppliers.**
- You may search for a Supplier by ID, name, or address. Enter the appropriate search criteria for the Supplier to be viewed. Using the search operator “Contains”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



Review Suppliers
 Search Criteria

*SetID [UTARL] [Contains] [Search]
 Name [Business Interiors] [Equal to]
 Supplier ID [] [Equal to] [Search]
 Short Name [] [Search]
 Supplier Status []
 Sanctions Status []
 Classification []
 Type []
 Persistence []
 Customer Number [] [Contains] [Search]
 Address [Valley View]
 City [Irving]
 ID Type [(Invalid Value)] []
 Country [] [Search]
 State [] [Search]
 VAT Registration ID []
 Postal [] [Search]
 Withholding Tax ID []
 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, Audit Information).



VAT Registration ID [] Postal []
 Withholding Tax ID [] Bank Account # []
 Max Rows [300] Search Clear Add Supplier

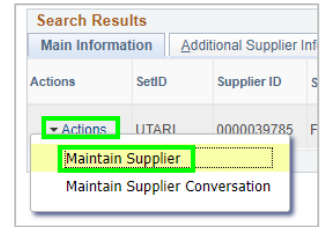
Search Results Personalize Find View All [2] [] First 1 of 1 Last

Main Information
 Additional Supplier Info
 Audit Information
 []

Actions	SetID	Supplier ID	Supplier Name	Short Name	Address	City	State	Country	Effective Status
Actions	UTARL	0000039785	FACILITECH INC dba Business Interiors	FACILITECH-001	1111 VALLEY VIEW LN	IRVING	TX	USA	Active

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

- 5) To access the Supplier Information screen for a Supplier in the Search Results, click the Action drop-down menu and select Maintain Supplier.



Adding a Supplier

Suppliers are now added via the PaymentWorks system. For instructions on inviting a supplier, see <https://www.uta.edu/business-affairs/training/training-business-apps.php> and click the PaymentWorks Tile.