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: 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.

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

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.

1) Navigate to the Review Supplier Page: Navigator > 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.

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, Audit Information).

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

Once a thorough search has been conducted and it has been concluded that a Supplier is not already in UTShare, Departments can enter Supplier information into UTShare. When preparing to enter a new Supplier into UT Share, first obtain the information from the Supplier on the Vendor Supplier Information form (Index BF-PGS-F13). The Supplier must complete and return the form for processing. The form will contain information such as:

- Entity Information (e.g. Sole Owner, Partnership, Corporation)
- Federal Employer Identification (FEIN) or Social Security Number (SSN)
- Physical address

Departments will only setup Suppliers that do not exist in the system (except for foreign Suppliers – the Office of Disbursements will enter foreign Suppliers). Departments are responsible for setting-up Businesses, Independent Contractors, and Consultants. To initiate the request, the department will enter the information from the Vendor Supplier Information form into UTShare and attach the form to the Supplier Information page.

The Office of Disbursements is responsible for approving all Supplier requests. In addition, this office will setup additional addresses and make changes to existing addresses for U.S. Suppliers. The Office of Disbursements will also manage all request for foreign addresses (new, additional, and any changes). To initiate the request, the department will submit the completed Vendor Supplier Information form to the Office of Disbursements for processing.

1) To add a new Supplier, begin by navigating to the Supplier Information search page at Navigator > Suppliers > Supplier Information > Add/Update > Supplier.

2) Click the Add a New Value tab.

3) Leave the default values: SetID (UTARL), Supplier ID (NEXT) and Persistence (Regular).

4) Click the Add button.

5) Starting entering information on the Identifying Information page:
   a. Enter the supplier’s legal name in the Supplier Name field.
   b. If the supplier has a DBA (doing business as), enter the DBA in the Additional Name field.
   c. Provide a Supplier Short Name. If setting up a business, enter the first 10 characters of the business name. If setting up an individual, start with entering the last name first and then enter first name.
   d. Leave the default values: Classification (Outside Party), Persistence (Regular) and Supplier Status (Unapproved). Leave the HCM Class field blank.
Use the Attachments link to attach the Vendor Supplier Information form.

6) Click the Address tab. This page is used to enter address information:
   a. Enter “Shared” into the Description field.
   b. The Effective Date will default to the current date. This field can be changed if necessary.
   c. Enter the supplier’s Address, City, Postal code, State.
   d. If the supplier has an alternate name that should appear on payments generated, use the Payment/Withholding Alt Names section to enter the name as it should appear on payments.
      i. Enter the supplier’s legal name in the Name 1 field. This information should match the name provided in the “Supplier Name” field (located on the Identifying Information page).
      ii. Use the Name 2 field to enter additional names for the company, such as a DBA (Doing-Business-As).
   e. If available, enter the Supplier’s Phone Information.
   f. Click the “+” button to add more addresses if necessary (remittance, billing, etc.).
7) Click the Location tab. The Location page is used to indicate the Supplier’s location. This is not a physical location, but a set of rules that define how you conduct business with the Supplier.
   
   a. In the Location field, enter “001”.
   
   b. In the Description field, enter “Shared”.

8) Click the TINS tab. This page is used to indicate the Entity and Ownership information.
   
   a. Select the Supplier’s Entity Type.
   
   b. Enter the Supplier’s Tax Identification Number in the TINS Tax ID field.
   
   c. Select the Owner Type. Based on the Ownership Type that you select, additional information may be required (i.e. Owner or Partner Name, SSN, Charter Number, etc).

9) Once all supplier information has been entered, click on the Identifying Information tab and click the Check for Duplicates button. This process will check for duplicates against the supplier address and Tax ID Number.

   If no duplicate is found, proceed to save the supplier information.

   If a duplicate supplier is identified, investigate the supplier ID’s that populate on the error. If the supplier is found under a different name or with a different address, provide the updated Vendor Supplier Information form to the Office of Disbursement to update the Supplier profile.

10) Click the Save button. Click “Yes” to submit the Supplier for approval after saving. Notice, the top-left-side of the page, a Supplier ID number has been assigned