ELAWARE EXCHANGE

Searching for Supplier Information Updated 11/30/2023



Searching for Supplier Information in UDX

This guide will illustrate:

How to find information related to 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.

Checking the registration status of new suppliers:

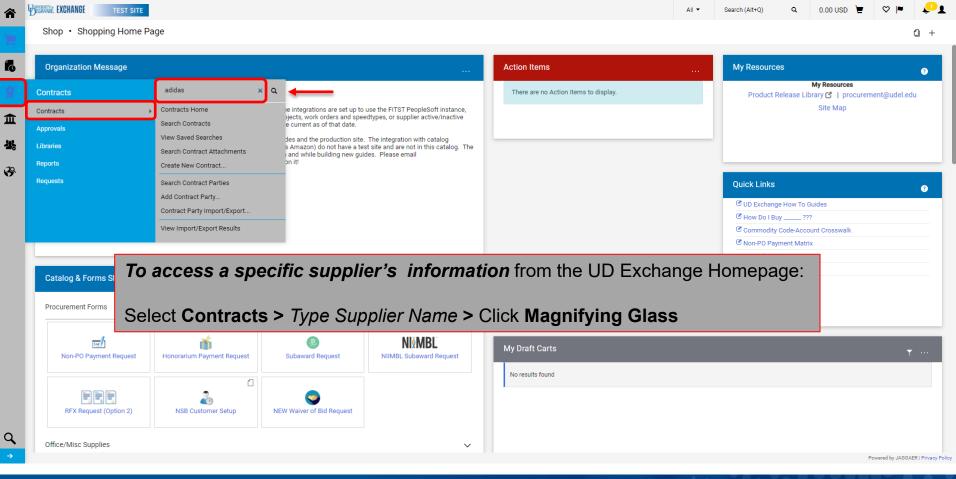
• In UD Exchange, you can find a supplier before they are accessible in UDX or webforms, as well as where they are in approval workflow and see reference numbers to confirm it's your supplier.



Searching for a Contracted Supplier in UDX

UD employees may want to obtain a quote from an existing contracted supplier or may be looking for a supplier's contact information to follow-up on a previously placed order.









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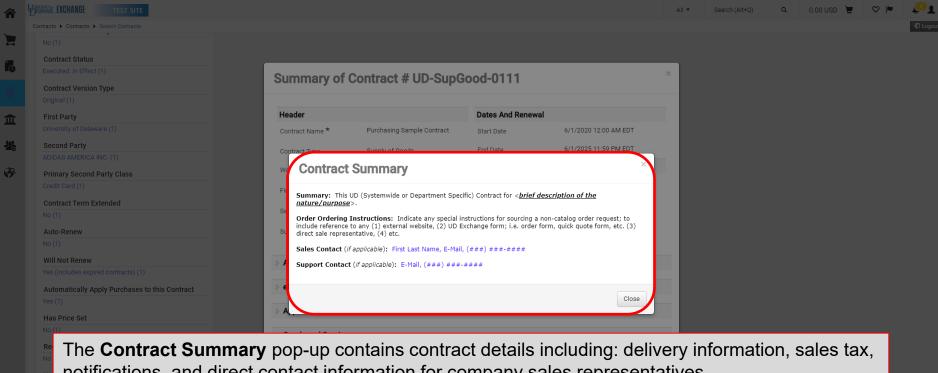


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notifications, and direct contact information for company sales representatives.

Approaching PR Tier Notification







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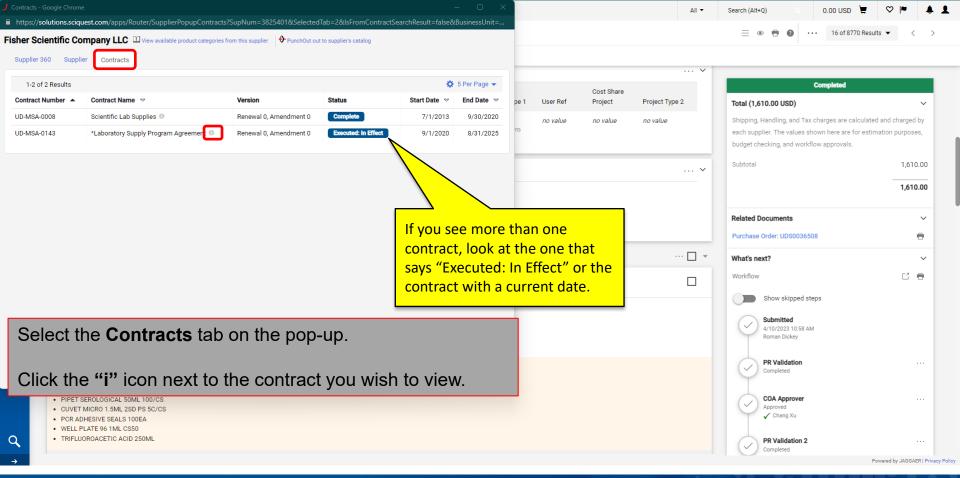


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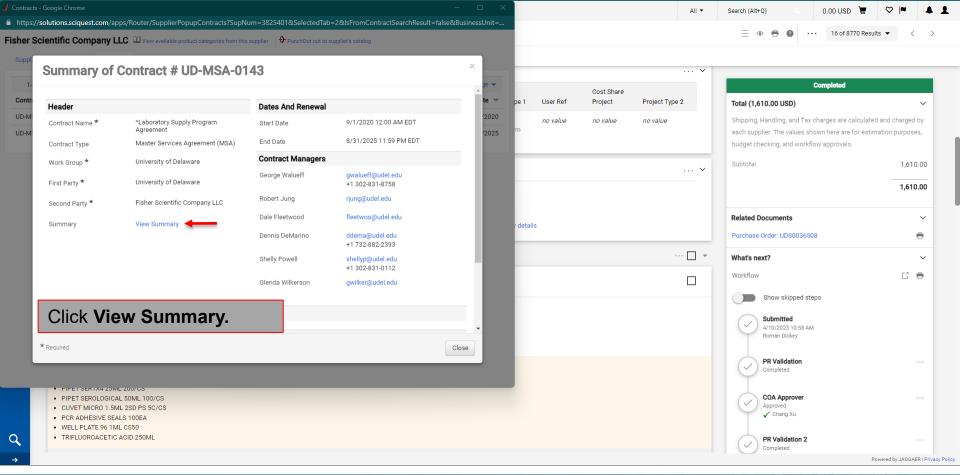
















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Finding New Suppliers

- New suppliers are entered into UD Exchange by Procurement staff after they complete their online W9 form.
- Processes dictated by Internal Audit require Procurement staff to verify all information submitted, some of which happens at the time of entry, and some at the time of payment.
- If the supplier has used the comments field on the online W9 form to indicate that they are working with you, Procurement will start the process of entry to confirm their information and begin the required review and approval process.
 - Confirming TIN, OFAC, banking information, etc.
- If you have the supplier's W9 reference number, you can locate the supplier at any point after this process begins.



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₩ Â	provides a familiar online shopping ex	<pre>kperience and negotiated pricing from UD leed, just put it in your shopping cart, and</pre>	ity of Delaware Exchange (also referred to as UD Exchange, or UDX) s preferred suppliers. You can search for items by keyword or item assign or submit. If you can't find what you need, click on the Non-			Product F	Release Lib	orary 🕑 procurem Site Map	ent@udel.ed	L
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3 9	Manage Suppliers	Supplier Management Home Search for a Supplier View Saved Searches	ith missing items. within 3-5 business days. W9s entered into UD Exchange on piler (W8) requests will normally be approved within 2-3 business			Quick Links				3
	Requests Performance to use form guides UDX users through	a series of questions validating the hono	ests. Effective Monday, April 3rd, the Honorarium Payment previously caused by returns and holds for clarification, this easy varium request. The honorarium payment type has been removed			C UDX Connel UD Exchang How Do I Bu	ge How To G	Buides		
	In this examp	ole, an employe	e is looking for a new suppli ne W9 and received referen		conta				led	

Suppliers > Manage Suppliers > Type "Ametek" into the search field > Click Magnifying Glass

the information about onboarding suppliers on the main page of our website. (updated 12/4/22 WAG)

Payment Vouchers placed on hold with a comment referencing an "ACH Exception":

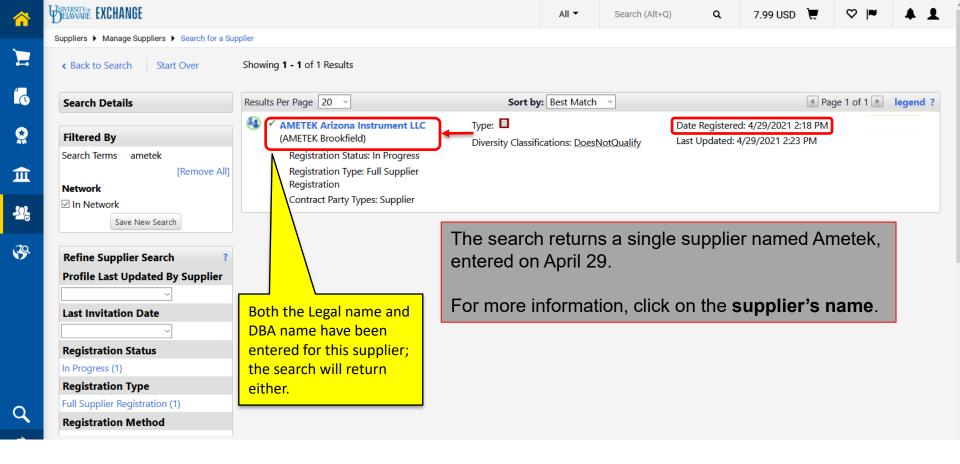
In some cases, Procurement must validate new or updated banking information provided by a supplier before a payment can be released. This is a measure to mitigate fraud and ensure that accurate banking information is being used. There is no *further action* required by the departmental end user. The process is internal to Procurement, and involves independent verification of the information at our discretion. UD departments should *not* reach out to their supplier contact in an attempt to provide assistance in resolving the matter, as it interferes with the independent verification on process. If ACH payment information is unable to be successfully verified within 14 days, the payment method may be converted to a physical check payment to avoid further disbursement delays. No results found

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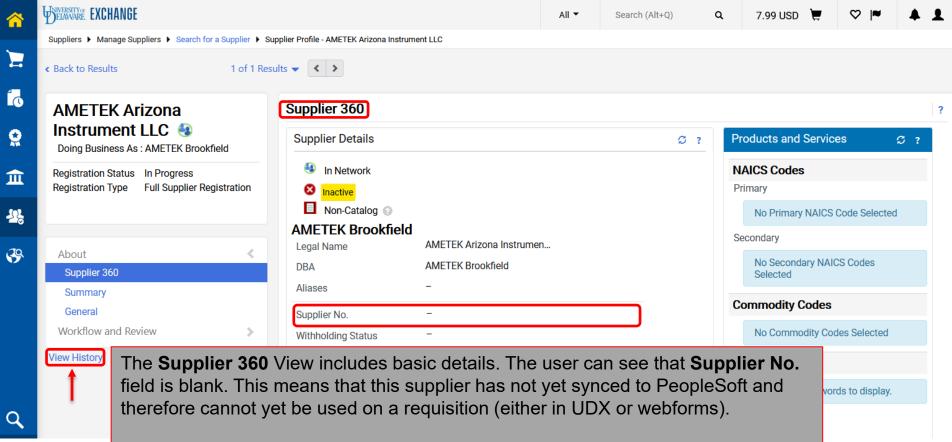




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To view the supplier registration progress, click on View History.



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Suppliers Manage Suppliers Search for a Supplier Supplier Profile - AMETEK Arizona Instrument LLC

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As the user scrolls further down the History View, they can see their supplier's W9 reference number, confirming that they are reviewing the registration of the supplier they wanted, not one which may have a similar name.





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	AMETEK Arizona Instrument LLC 🚳	Internal Notes						?
ATA	Doing Business As : AMETEK Brookfield	05/11/2021: Checked UDX / Hallenbrook (michelle.haller	upplier p	profile also co	ontains	additional	Workflo	w
血	Registration Status In Progress Registration Type Full Supplier Registration	contact information for Joe that m	nay have	nformation, ir been entere		0 7		
1 5		04/26/2021: TDX 155084 by review	v proces	S.				
\$	About Workflow and Review Internal Notes Supplier Registration Workflow Supplier Review Workflow View History	If an online W9 v updates to an ex this area will let has been update	isting supp you know	olier's informatio whether anythin	Ig			
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BELANARE EXCHANGE				All 💌	Search (Alt+Q)	Q	7.99 USD 📜	♡ ■	
Suppliers Manage Suppliers Search for a Supplier	Supplier Profile - AMETE	< Arizona Instrument LLC							
Back to Results 1 of 1 Re	esults 👻 < 🔉								
AMETEK Arizona	Supplier Re	egistration Workflow							
Instrument LLC 🚯 Doing Business As : AMETEK Brookfield		OFAC Supplier Check	Duplicate Robot	Registration R	Review	urement	Approval	Sync to ER	P
Registration Status In Progress Registration Type Full Supplier Registration	Submitted 4/29/2021	Completed 🗸	Completed ✓	Approved V Sean Malon		Active View appro	2	Future 🔫	
	2:23 PM			Wo	rkflow Step Approv			? X	
				Арр	prover Group : Procur	ement App	roval		
About				E	David Fenkel dsfenk	el@udel.ed	u		
Workflow and Review						Close		- 81	
Internal Notes									
Supplier Registration Workflow Supplier Review Workflow		The Su	upplier Regis	stration W	orkflow vi	ew in	dicates:		
			at stage of a						
View History						5 111			
			io is responsi		•				
		• Wh	at needs to b	e complet	ed before	the su	applier is a	approve	ed .
New suppliers go through Reg	stration wo	rkflow							
Existing suppliers needing upd			W						
Existing suppliers needing upu			<u>vv.</u>						





Back to Results 1 of 1 F	Results 🗸 🔺						
AMETEK ARIZONA	Supplier 360						
INSTRUMENT LLC Doing Business As : AMETEK Brookfield	Supplier Details			Ø?	Produ	cts and Services	2
Supplier Number 0000040021 Registration Status Approved Registration Type Full Supplier Registration	 In Network Active Non-Catalog (2) 	AMETEK Brookfield Legal Name DBA	AMETEK ARIZ AMETEK Broc	ZONA INSTRU bkfield	Primar	S Codes y p Primary NAICS Code	Selected
		Aliases	-		Second	ŕ	Jelected
About <		Supplier No. Withholding Status	0000040021	WH=07		o Secondary NAICS Co elected	odes
Supplier 360 Summary General		Date of Last Order Registration Status	– Approved		Comn	nodity Codes	
General	Business Description				No	o Commodity Codes S	elected

This supplier can now be used on any requisition.



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Other Supplier Information

The following screens depict recent changes to supplier processes made since this guide was first published and provides answers to frequently asked questions.



DELAWARE EXCHANGE						All 🔻	Search
Suppliers Manage Suppliers Search for a Suppli	er 🕨 Supplier Profile - DELMARV, FAC	<u>Į</u>					
Back to Results 1 o	f 1 Results - Cld	er supplier re	ecords				
DELMARVA POWER 😔	Supplier 360						?
Supplier Number 0000018920	Supplier Details			C ?	Products and Services	S ?	
Registration Status None Registration Type Full Supplier Registration	n 🧐 In Network	Active Legal Name DELM			NAICS Codes Primary		
	Non-Catalog 💡	DBA	DELMARVA POWER		No Primary NAICS Code Selecter	d	
About	<	Aliases	-		Secondary		
Supplier 360 Summary		Supplier No. Withholding Status	0000018920 WH=N		No Secondary NAICS Codes Selected		
General		Date of Last Order	12/22/2021		Commodity Codes		
System Settings		Registration Status	None		No Commodity Codes Selected		
Contacts and Locations Workflow and Review	Business Description There is no business des	cription available for this supplie	er.		Keywords		
Accounts Payable eProcurement	> <			>	There is no Keywords to display.		-

View Histo Suppliers that were imported from PeopleSoft to UD Exchange in **2020** and have *not been updated* since that time are *available for use* but will display **Registration Status: None**





UNIVERSITY OF EXCHANGE										All 🔻	Search (Alt+Q)
Suppliers Manage Suppliers Search for	a Supplier 🕨 Sup	plier Profile - DELM	ARVA POWER								
Back to Results	1 of 1 Resu	lts 🔻 < >									
DELMARVA POWER	9	History									?
Supplier Number 0000018920 Registration Status None		> Filter His	tory							E	xport CSV
Registration Type Full Supplier Reg	jistration	Results Per	Page 20	~		Rec	cords found: 85		4	Page 1 🗸	of 5 🕨 ?
		Date 💌	User 🗠	Action	Context 🗠	Section 4	Field	Old Value	New Value		Note
About	>	10/7/2021 12:32:41 PM	David Heckman	Modified	Address: ORDER (Physical)	Addresses	Postal Code	19801-3550	19801		
Contacts and Locations Workflow and Review	>	7/15/2021 1:21:29 PM	Sheila Lawlor	Viewed		Payment Information	Account Number			Direc	tDeposit1
Accounts Payable eProcurement	>	6/7/2021 4:30:34 PM	Kristen Pickering	Modified	Fulfillment Center: COMMUNITY OFFICE	Terms and Conditions	Days After	30	0		
View History		1/8/2021 9:26:13 AM	System	Modified (via System)	OFFICE	Supplier Registration Information	Registration Type	empty	Full Supplier Registratio	on from	default
		7/30/2020	System	Modified		General	Company	empty	Outside Party		
		-	ould		-		Submission Cequisition Country of Origin				

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BELAWARE EXCHANGE						All 👻	Search (Al
Suppliers Manage Suppliers Search	for a Supplier 🕨 S	upplier Profile - College Board					
Back to Results	1 of 1 Res	sults 🗸 💙					
College Board 😣		Supplier 360					?
Supplier Number 0000015821		Supplier Details			Ø ?	Products and Services \mathcal{Z} ?	
Registration Status In Progress Registration Type Full Supplier Registration		 In Network Active 	College Board Legal Name	College Board		NAICS Codes Primary	
		Active	DBA Aliases	College Board –		No Primary NAICS Code Selected	
About	<		Supplier No.	0000015821		Secondary	
Supplier 360 Summary			Withholding Status	WH=N		No Secondary NAICS Codes Selected	
General			Date of Last Order	12/21/2021		Commodity Codes	
System Settings			Registration Status	In Progress		No Commodity Codes Selected	
Contacts and Locations	>	Business Description					
Workflow and Review	>	There is no business des	cription available for this suppl	lier.		Keywords	
Accounts Payable	>	<			>	There is no Keywords to display.	

View HOWEVER, Suppliers that were imported from PeopleSoft to UD Exchange in **2020** and have an *update pending*, will have both a supplier ID number and be active for shopping *but* will show **Registration Status: In Progress.**



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*	BINNERSITY OF EXCHANGE								All 🗸	Search (Alt+Q)
-	Suppliers Manage Suppliers Search for a Supplier Supp	upplier Profile - College Board								
	Back to Results 1 of 1 Res	sults 🗸 💙								
U	College Board 🍕	History								?
2	Supplier Number 0000015821 Registration Status In Progress	> Filter History							E	xport CSV
ì	Registration Type Full Supplier Registration	Results Per Page 20	~		Records f	ound: 1 42		4	Page 1 v	of 8 🕨 ?
		Date 💌 User	△ Action △	Context 🗠	Section	Field 🗠	Old Value	New Valu	e	Note
2	About	12/29/2021 Bil 2:39:09 PM Gonzale	Modified (via z import)		TIN Compliance	TIN Matching Status	TIN Matching Not Run	0- IRS TIN Match		
	Contacts and Locations > Workflow and Review >	12/7/2021 Misha 9:37:19 AM Kaur	Supplier submitted to Supplier Review Workflow	Supplier Review Workflow						
	Accounts Payable > eProcurement >	12/7/2021 Misha 9:36:57 AM Kaur	Modified		Tax Information	71421_TIN Tax Documentation	*****	*****		lanual pload
	View History	12/7/2021 Misha 9:36:57 AM Kaur	Modified		Tax Information	71421_TIN Tax Document Year	empty	2021		
		12/7/2021 Misha 9:36:57 AM Kaur	Modified		Tax Information	71421_TIN Tax Type	empty	W-9		
		12/7/2021 Micha	Created		Тах	Tax Document Name				1421_TIN
	If the History shows	•				•	e may	/ be error	S	lanual
	when trying to subm	nit a requisitio	n <i>before</i> the	e update	s are a	pproved.			U	pload
		9:35:56 AM Kaur	Modified		Information	Document Year	empty	2021		
		12/7/2021 Misha 9:35:56 AM Kaur	Modified		Tax Information	71421_W9 Tax Type	empty	W-9		
		12/7/2021 Micha	Oraștad		Тау	Tay Document Name	e	TO A TA		1421 140

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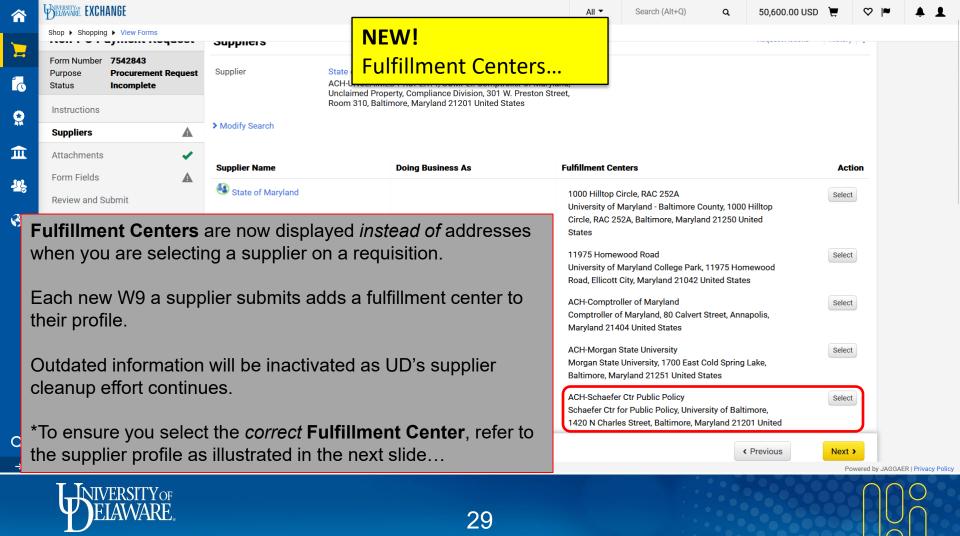
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â		nters are now shown i where the <i>PO</i> is sent		ofile. A fulfillment center links together: 🗮 😤 🛤 🔺 💄
	Back to Results • The address	where Payment is ser	nt (remittance add	lress),
6	• The Paymer State of Maryland	It Method selected by 1 Fulfillment Centers	the supplier on the	eir vv9. ?
♀	Supplier Number 0000038885 Registration Status Approved Registration Type Full Supplier Registration	Fulfillment Centers	General Ordering Order Distr	ibution Custom Data History
	regionation type - i an oupprior regionation	1000 Hilltop Circle, RAC 252A 11975 Homewood Road ACH-Comptroller of Maryland	Name Address ID	ACH-Univ of Baltimore, Schaefe
*	About Contacts and Locations Fulfillment Centers Workflow and Review Accounts Payable eProcurement View History	ACH-Comptoner of Maryland ACH-Worgan State University ACH-Schaefer Ctr Public Policy ACH-UnCLAIMED PROPERTY, COMPLI ACH-Univ of Baltimore, Schaefe ACH-Univ of MD, Ctr for Enviro CC-100 COMMUNITY PLACE MOTOR VEHICLE ADMINISTRATION Revenue Administration Divisio St Mary's College of Maryland Terps Lacrosse Club-University University of Maryland - Balti University of Maryland Extensi UOM-B- PO Box 41427 UOM-B- PO Box 41427	Active Primary Address ID Active Primary Address (used as default in application) Current Primary Address Associated Addresses	No Value These may or may not be the same address. ACH-UNCLAIMED PROPERTY, CO Selected Addresse Active Fulfillment Address Univ of Baltimore, Schaefer Ctr for r Public Policy Schaefer Ctr for Public Policy University of Baltimore 1420 N Charles Street Baltimore Maryland, 21201 Unived States No Active Contact Provided No Active Contact Provided
Q →		following slides illustra lier record when begin		you are selecting the correct ion
	ELAWARE.		30	

Choosing the Correct Supplier



In the following example, you need to complete a Non-PO Payment form to pay an invoice for conference registration fees to the University of Maryland Schaefer Center for Public Policy.

Their invoice has a PO box number listed as their remittance address and requests payment by ACH.



	BELAWARE. EXC	HANGE		All 🔻	Search (Alt+Q)	۹	9.33 USD 📜	♡	+ 1 ^		
	Shop 🕨 Shoppir	ng 🕨 View Forms									
	Back to Shop	pping Home									
í.	Non-PO P	Payment Request	Suppliers				Request Acti	ons 👻 🛛 Hist	tory ?		
	Form Number		Supplier	Maryland, State of							
	Purpose Status	Procurement Request Incomplete	Supplier	ACH-UNCLAIMED PROPERTY, COMPLI: Comptroller of Unclaimed Property, Compliance Division, 301 W. Pre							
	Instructions			Room 310, Baltimore, Maryland 21201 United States	<i>1</i>						
血			Modify Search								
<u>-12</u>	Suppliers	~									
~ 8	Attachments	s 🗸	Supplier Name	Doing Business As	Fulfillment Centers			A	Action		
	Form Fields	~	🕙 Maryland, State of		1000 Hilltop Circle, RAC 25	52.6					
	Review and S	Submit			University of Maryland - Ba Circle, RAC 252A, Baltimor States	altimore Count		Sel	lect		
		•	•	quisition, you will only n the Suppliers page.	ACH-Schaefer Ctr Public P Schaefer Ctr for Public Pol 1420 N Charles Street, Bal States	icy, University		Sel	lect		
	N	lone of the c	centers show	a PO box.	ACH-UNCLAIMED PROPE Comptroller of Maryland, L Compliance Division, 301 V Baltimore, Maryland 21201	Inclaimed Pro N. Preston Str	perty, eet, Room 310,	✓ Select	cted		
					ACH-Univ of Baltimore, Sch Schaefer Ctr for Public Pol 1420 N Charles Street, Balt States	icy, University		Sel	lect		
Q							<pre></pre>	Ne	xt >		
→										owered by JAGGAEF	R Privacy Policy





If you navigate to the Su Fulfillment centers to vie Bac Here, you see that the re	w the remittance addr	esses associated	with each one.		
State of Maryland	Fulfillment Centers				?
Supplier Number 0000038885 Registration Status Approved Registration Type Full Supplier Registration	Fulfillment Centers Default Settings for this Supplier	General Ordering Order Distri	bution Custom Data History		?
	1000 Hilltop Circle, RAC 252A 11975 Homewood Road	Name Address ID	ACH-Univ of Baltimore, Schaefe		
About	ACH-Comptroller of Maryland ACH-Morgan State University	3rd Party Address ID	No Value		
Contacts and Locations	ACH-Schaefer Ctr Public Policy	Active	1		
Fulfillment Centers	ACH-UNCLAIMED PROPERTY,	Primary Address (used as default in application)	×		
Workflow and Review	ACH-Univ of Baltimore, Schaefe	Current Primary Address	ACH-UNCLAIMED PROPERTY, COM	MPLI	
Accounts Payable	ACH-Univ of MD, Ctr for Enviro	Associated Addresses	Selected Addresses		
eProcurement	CC-100 COMMUNITY PLACE		Active Fulfillment Address	Active Remittance Address	
	MOTOR VEHICLE ADMINISTRATION		Univ of Baltimore, Schaefer Ctr fo r Public Policy	Schaefer Ctr for Public Policy Re mit	
View History	Revenue Administration Divisio		Schaefer Ctr for Public Policy	Schaefer Ctr for Public Policy	
	St Mary's College of Maryland Terps Lacrosse Club-University		University of Baltimore 1420 N Charles Street	University of Baltimore PO Box 2016	
	University of Maryland - Balti		Baltimore	Baltimore	
	University of Maryland Extensi		Maryland, 21201	Maryland, 21203	
	UOM-B- PO Box 41427		United States	United States	
	UOM-B- РО Вох 41427		No Active Contact Provided	No Active Contact Provided	

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Suppliers Manage Suppliers Search for a Supplier Sup	pplier Profile - Maryland, State of						
Back to Results 10 of 15 Re	esults 🗸 🔪						
Maryland, State of 용	Payment Methods					2	
Supplier Number 0000038885 Registration Status Approved	Manage Accounts Payable	Edit Accounts Payable					
Registration Type Full Supplier Registration	ACH-Univ of Baltimore Schaefer Ctr Public Policy (Direct Deposit (ACH))	Payment Title Country	ACH-Univ of Baltimore United States	Schaefer Ctr Public Po	licy		
	CC - Community Place (Credit Card)	ERP Number					
	Check - Motor Vehicle Administration (Check)	Third Party Reference					
About	Check - UMBC 1000 Hilltop Clrcle (Check)	Payment Type	Direct Deposit (ACH)				
Contacts and Locations	Check - Unclaimed Property (Check)	Direct Deposit Format	CCD				
Workflow and Review	Check - University of Maryland - Baltimore (Check)	Remittance Address	Schaefer Ctr for Public	Policy Remit			
	Unclaimed Property - ACH (Direct Deposit (ACH))		(Remittance)				
Accounts Payable 🔍							
Payment Methods		Currency	USD				
Payment Custom Fields		Contact Name					
		Purpose	OVer ONe				
View History		Active	Yes O No				
In Accounts Davable	> Poymont Mothodo	Bank Account					
In Accounts Payable	Payment Methods,	Country	United States				

you can see that we have an ACH Payment method on record with this Fulfillment Center.

With this information you can select this Fulfillment Center with confidence on your requisition!

Electronic Remittance Email	USI (wubait.euu		
Currency	USD		
Contact Name			
Purpose			
Active	Yes O No		
Bank Account			
Country	United States		
Bank Name	Wells Fargo Bank, N.A.		
Account Holder's Name	University of Baltimore, Schaefer	You will NOT be able to see	
Account Type	Checking		
Account Number Type	Account Number	account infor	mation, but Accounts
SWIFT/BIC	No Value	Payable can, and does check this	
International Routing Code	No Value		
(IRC)		as part of the	vouchering process.
Routing/Transit Number	121000248		
Account Number	******		
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Additional Information



Procurement is in the process of a major supplier cleanup to ensure that supplier information is consistent, accurate, adequately documented, and makes sense to system users.



If a remittance address that matches your documentation is NOT listed in the supplier profile, then the supplier will need to submit a new online W9 with the additional information. Accounts Payable cannot simply enter a new remit address when they process an invoice.



Verification of supplier banking information is now done *at the time of payment*. If a supplier has new or updated banking information, their payment voucher will be placed on hold pending verification. A comment will be added to the voucher noting the hold for verification.





Questions:

• procurement@udel.edu

Resources:

- Procurement Services Website
- <u>Auto Return Troubleshooting Tips</u>



