

UNIVERSITY OF DELAWARE EXCHANGE

UDX Changes in 26.1 System Release

Updated 3/24/26

26.1

- With 26.1 coming March 30th, 2026 to our UDEExchange system, there will be the following change(s):
 - New Form UI



New Form UI

- With 26.1, all form request has had a visual change
- Guides have been updated to reflect the new visuals
- This will affect all areas – Contracts, Requisitions, Sourcing, and Supplier



Crystal Springs

Template	Request to Invite Supplier or Payee
Request Status	Incomplete

Instructions

Questions ✓

Requester Contact Inform...

Review and Complete

Supplier Request Workflow

Classic View

Instructions

[Print Request](#) | [History](#) | ?


Before completing this form, **search for the supplier in UD Exchange (UDX)** to determine whether they are ready (Active) for a Procurement transaction:

- **Active suppliers** display a **green check mark** and/or the words **"Active"** or **"Active for Shopping"**.
 - These suppliers **do not** need to be re-invited or onboarded again and **this form is NOT required**.
 - If new or updated information is required for an active supplier record, the supplier must be invited to register for the Supplier Portal so they can manage their own record.
 - **If the supplier is already registered, the supplier needs to simply login into the Supplier Portal to make updates.** If a Supplier is not registered in the Supplier Portal or is unsure, the supplier or the dept. representative should email procurement@udel.edu for assistance.
- **Inactive suppliers** display a **red "X"** with the status **"Inactive"**.
 - Typically, a supplier has been made Inactive due to no procurement activity in 18+ months
 - Complete all required information on this form. Procurement will review the request and may **"Reject"** the form due to a duplicate supplier name. **Don't worry, this usually means the Supplier record was reviewed and the supplier was sent an onboarding invitation as updates may be required for reactivation.** You can look up the Supplier Name to follow the progress of their registration.
- **If no supplier record is found**, complete all required information on this form. Procurement will review the request and, upon approval, will send an onboarding invitation to the supplier/payee.
 - The supplier will then register for secure access to the UDX Supplier Portal and provide required information, including legal tax entity classification, transaction addresses, payment method, and current W-9/W-8 tax documents.

Once your request is submitted, you can track its progress in UDX . Please see the job aid available [here](#).

After the supplier completes registration, Procurement will review all submitted information. If approved, the supplier will be enabled for **Shopping**.

Please note: In UDX, the term **"supplier"** or **"payee"** refers to **any individual or entity receiving any type of payment** from Procurement. This includes honoraria, reimbursements, stipends, awards, and other non-purchase disbursements.

This onboarding process replaces previous use of the online UD substitute W-9 and the IRS W-8/SDC form collection processes. Going forward, **all suppliers must register through the UDX Supplier Portal** to do business with UD. In addition, Procurement will begin a phased rollout of invitations to existing active suppliers to establish their portal access credentials.

Additional Resources:

[How to Onboard a New Supplier: Completing the Supplier Request Form](#)

[Bulk Supplier Onboarding](#)

[Procurement Supplier Onboarding Webpage](#)

[Next >](#)


New View



Save Progress

Next

1 Instructions

⚠ Questions

✓ Requester Contact Information

✓ Review And Complete

Instructions

Tabs that were previously along the left will be found across the top

Instructions and Discussion are now available in the top if available for that form

Summary

Incomplete

Crystal Springs

Template Request to Invite Supplier or Payee
Request Status Incomplete

What's next?

Workflow

 Show skipped steps


Draft
Active



Supplier Request Approval
Future



Finish
Future

The Approval tab has been replaced with the workflow along the right side.

Before completing this form, **search for the supplier in UD Exchange (UDX)** to determine whether they are ready (Active)

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Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)

