Supplier Inquiry: Finding Supplier Information

Overview

Supplier Inquiry is a web-based application. To view Supplier information, you will first select the Supplier link/function from your Main Menu to open the web-based application. You will then use the tools provided by the web-based application to search, retrieve and view the information pertaining to Suppliers and Supplier's Sites.

Two AIS Responsibilities will use Supplier Inquiry.
- Unit 3: Fiscal Officer and Delegate Inquiry & Reporting
- Unit 5: PO Department Buyers

Navigation

- To begin, access AIS Production and Login using your AIS User Name and Password.
- The navigations paths are noted below.
  - From your AIS Home Page Main Menu:
    - Fiscal Officers and Delegates will select SIU Unit Payables Inquiry > Suppliers
    - PO Department Buyers will select SIU PO Department Buyer > Supplier Summary

Find Supplier

- To begin, drill down and select the Supplier function from your Home Page Main Menu. This will open the Suppliers web-based application.
- You will then perform a search to retrieve a Supplier's record.
  - To do this, populate one or more fields in the Search section; fields commonly used are Supplier Name or Number. If necessary, click the "plus" icon to Show More Options and make the search more specific.
  - Click the Go button at the bottom of the Search section to execute the search.
- The Search Results will display in a table format at the bottom of the page.
  - Each row contains a Supplier record.
  - The Supplier Names are listed alphabetically.
- Locate the Supplier record you need. If not displayed, use the Vertical Scroll Bar or Next 15 link to locate it.

Finding Inactive Suppliers

- Search options are also provided so that you can search for Inactive Sites. To search for Inactive sites:
  - Click the Site Status Down Arrow in the Supplier Sites section of the Quick Update window and then select Inactive from the picklist.
  - Enter specific search criteria in the Site Name field and then click the Go button.
  - The matching record(s) will display at the bottom of the Supplier web page.
  - Refer to the Inactive Suppliers section in this document for more information on Inactive Suppliers.

Viewing Supplier Information

- The Supplier record provides the Supplier Name, Number and Taxpayer ID.
- To find more information for a Supplier, select the Supplier's record and then click the corresponding Update icon to the right of that Supplier's record.
  - NOTE: If you enter enough search criteria to make the search unique to one Supplier, then the Update page opens automatically for that Supplier, bypassing the above step.
- The Quick Update page opens. You can view information about the Supplier, as well as Site information from the Quick Update page. Site information is address later in this document.
- A panel on the left side of the Quick Update page provides access to more Supplier information.
  - The information is grouped into three categories, Quick Update, Company Profile and Terms and Control.
Under **Company Profile**, you can access pertinent Supplier information such as:
- **Organization** – click this link to identify the Supplier type e.g., Not-for-Profit Organization, Sole Proprietor, Individual, etc., or view the W-9 information or the Supplier's state authorized status.
- **Business Classification** – click this link to view special Business classifications identified for the Supplier.
- **NOTE**: Address Book and Contact Directory links will be addressed later in this document.

**Supplier Sites**

In this web-based application, you will select a Supplier from the search results and then click the Update icon to view a specific Supplier's record. This action opens the **Quick Update** web page and displays the first “15” **Supplier Sites** for the selected Supplier at the bottom of the Quick Update page.

- Supplier Sites with an **Active Status** are displayed, by default.
- If the site you need is not found within the first 15 records, use the **Next 15** link to retrieve more Site records; or, use the Supplier Sites search option to search for the site you need.
- The available Supplier Site information is divided into two tabbed categories, **Key Purchasing Setups** and **Key Payment Setups**. Information relative to Key Purchasing Setups is displayed by default.
- If you click the **Key Payment Setups** tab you can view payment information for Sites. You will find site information comparable to that viewed for a Supplier e.g., Site Name, Invoice Match Option, and Payment and Terms.

**Payment and Term Information for Sites**

- Payment and Term information for Supplier Sites can also be viewed under the **Invoice Management** link on the left panel.
- Click the Invoice Management link.
  - Invoice Payment Terms for the Supplier located at the top of this page, as before.
- At the bottom of the Invoice Management page, in the Supplier Sites section, information relative to Invoicing, Payment and Terms and Supplier Preferences is available for fifteen Supplier Sites.
- Active Supplier Sites are listed first. Search options are also available to retrieve a particular site.
  - To perform a search, populate the **Site Name** field and click the **Go** button.
- Use the Tabbed regions to view **Invoicing**, **Payment**, **Terms** and **Supplier Preferences** information.
  - This information parallels what is found for Suppliers under Key Payment Setups. However, for Supplier Sites, the information is arranged in small identifiable groups by tab.
  - The default tab, Invoicing, provides invoicing information specific to each Supplier Site.
  - Click one of the other tabs to view site related information for **Payment** or **Terms** or **Supplier Preferences**.

**Address Book**

To access Supplier contact information, you will first retrieve the Supplier's record; then, access the Address Book link to locate address and contact information for the Supplier's Sites.

- To access the Address Book, click the corresponding link in the left panel of the Supplier's web page.
- The top section of the Address Book web page provides Search options, which you can use to retrieve a specific site record.
- When the Address Book is opened for a specific Supplier, the Supplier Sites automatically display.
In the Address Book, there is a record row for each Site. You will find that:
- Most of the fields are self-explanatory.
- Customer Service sites may not provide a Name.
- The Site Names are listed, first in numeric order by Campus Identifier, then in alphabetical order.
- To the left of each Site Name is a column named Details. The Plus (+) and Show link allow you to access more detail about the site.

When more information is needed, locate the site you need and click the Plus(+) or Show in the Detail column.
- The page expands and the detailed information is displayed in a record row below the Site record.
- Included are Phone and Fax numbers.
- If needed, Site Uses are identified in the "Purpose" column.
- To close the detailed information popup, click the minus (-) link in the Details column of the Site record.

To the right and near the end of each row, is a Manage Sites icon. Clicking this icon opens a separate Manage Sites page for the selected record.
- At the top of this page, the Site Address and other identifying information are provided.
- In the Supplier Sites region are three tabbed regions, Uses, the default, Communication and Identification.
- The Uses tab provides another way to view Site information. This tab also provides access to Descriptive Flexfields.
  - Clicking on the enabled “Pencil” icon provides an Additional Phone Number; click Cancel to close this window.
  - Clicking the Communication tab gives access to Phone, Fax and Email information.
  - Clicking the Identification tab gives access to information that further identifies the Site, if provided.

To close the Manage Sites page, click Cancel.

Inactive Lists

When you query a Supplier’s record and then access the Address Book for that Supplier, Active Sites are displayed first. Inactive Sites are nested at the bottom of the list. You can use the Manage Sites icon to view the Inactive Date for a Site.
- Begin by scrolling down to the bottom of the page, until you see the section labeled Inactive Addresses.
- To view the Inactive Addresses, click the plus (+) on the section title bar.
  - All Inactive Addresses are displayed. Scroll down the page, if necessary, to view all the records.
- Again, more Details are available by clicking the Details plus (+) or Show link for an Inactive Address record.
- When viewing Inactive Addresses, one piece of information you can find is the Inactive Date.
  - You can find that date by clicking the Manage Site icon for the Inactive Address record. The Manage Sites window opens.
  - Inactive Sites will have an effective date entered in the Inactive Date field.
  - Click Cancel to close the Manage Sites window.

Contact Directory
- If the Address Book for site listings doesn't provide the contact information you need, click the Contact Directory link from the panel on the left side of your screen.
  - A list of contact Names and Phone Numbers is provided.
  - Contact information for CUSTOMER SVC is included in the listing.
- To exit the Contact Directory, click the Quick Update link from the panel on the left side of the web page.
- To Exit the Suppliers Quick Update window and return to the Suppliers search window, click the Suppliers breadcrumb link at the top of this window.
- Click Home to end the session.