

eReq

eProcurement Web Requisition System

How Do I Select the Supplier for My Requisition?



Procurement Services – Purchasing
June 2014

What Supplier will I use for this requisition?

User Options on the Supplier tab:

Using the eReq **Supplier tab**, eReq users will be able to access 5 separate screens. The functionality of these 5 screens will allow the users to:

1. Search the UB Supplier File database in order to select a Supplier for their requisition
2. Request an edit of a Supplier entry found in the Supplier File or add a new location to an existing Supplier
3. Request an addition of a new Supplier entry to the Supplier File

The Supplier tab screens:

In eReq, the Supplier tab is comprised of five (5) separate screens:

1. The *Supplier Search*, *Supplier Advanced Search* and *UB Supplier Search* screens, where a user can search the existing Supplier File database and view their search results.
2. The *Supplier Add/Edit* screen, where the user can:
 - request a new Supplier entry be added to the Supplier File **OR**
 - request that an existing Supplier entry be edited **OR**
 - request the addition of a new Location to an existing Supplier.
3. The *Supplier Home* screen, where the selected Supplier is displayed:
 - once the user has selected it from the search results on the *Supplier Search* screen **OR**
 - once the user has
 1. requested that this new Supplier be added to the Supplier File by saving the pertinent information on the *Supplier Add/Edit* screen.
 2. requested that this existing Supplier be updated by successfully editing and saving the information on the *Supplier Add/Edit* screen.
 3. requested that this new Location for an existing Supplier be added by successfully editing and saving the information on the *Supplier Add/Edit* screen.

The five (5) screens of the **Supplier tab** will be covered in detail on the pages that follow.

For:

1. *Supplier Search* screen - see pages 2 & 3; *Advanced Supplier Search* screen – see page 10
2. *Supplier Add/Edit* screen - see pages 5 & 6 for adds; pages 8 & 9 for edits
3. *Supplier Home* screen - see pages 4, 7 & 9
4. *UB Supplier File Search* screen - see page 10
5. *Supplier Advanced Search* screen - see page 10

Supplier Search Screen:

The first screen the user will see when s/he clicks on the Supplier tab is the *Supplier Search* screen (see picture below).

The screen pictured to the right is the **Supplier Search** screen.

For a new requisition at the Begin step, or if no Supplier has been selected or assigned to this requisition, this is the first screen that is displayed from the Supplier Tab.

UB eRequisition

Doc Type:	Regular	Incident #:	Unassigned	Creator:	Lorango, Barbara
Created:	02/10/2014	Requisition #:	Unassigned	Last Approver:	
Total:	0.00	PO #:	Unassigned	Supplier:	

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

Advanced Search | Enter New Supplier | Supplier File

Supplier Search

Search allows wildcard characters. (i.e. *)
Example: Entering "Abc*" for Supplier Name would return all suppliers whose name begins with Abc.

Supplier Name: SFS Vendor ID:

Supplier ID: Foreign Indicator: ALL

TIN:

Quick Tips for searching the Supplier database:

- All Search criteria fields are optional, however it would be to the user's benefit to enter some valid criteria in order to narrow the results received.
- If no search criteria is entered then the search will yield results that include every active Supplier in the database (to date, well over 10,000 Suppliers).
- The search screen is not case sensitive so you do not need to be exact with capitalization.
- Use what you know, but note you do not need to use the wildcard character in most cases:** * (see the table below for an illustration of different types of searches and their corresponding results)
- Please Note:** Suppliers are entered into the UB Supplier File database by either their DBA (doing business as) name or their legal tax ID name. Naming standards are applied to each entry. **For example: you may be looking for Staples but it has been entered as Staples Advantage. If you simply search on Staples then your search will come back with Staples Advantage.**

Type of Search	Criteria Entered	Search Results
Basic / No Wildcard	Name = Jones Supply	Jones Supply Jones Supply and Bookstore Jones Supply Company
One Wildcard	Name = Jones Supply*	Jones Supply Jones Supply and Bookstore Jones Supply Company
More Than One Wildcard	Name = Jon*Suppl*	Jonathan Supplies Jonathan Supply Company Jones Supply Jones Supply and Bookstore Jones Supply Company

The *Supplier Search* screen (cont'd)~ Search for a Supplier:

This example illustrates a search omitting the wildcard (*) in the Supplier Name field.

First, enter your search criteria.

Then, click on the *Find Supplier* button OR press the *Enter* key of your keyboard.

UB eRequisition

Doc Type:	Regular	Incident #:	Unassigned	Creator:	Lorango, Barbara
Created:	02/10/2014	Requisition #:	Unassigned	Last Approver:	
Total:	0.00	PO #:	Unassigned	Supplier:	

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

Advanced Search | Enter New Supplier | Supplier File

Supplier Search

Search allows wildcard characters. (i.e. *)
Example: Entering "Abc*" for Supplier Name would return all suppliers whose name begins with Abc.

Supplier Name: SFS Vendor ID:

Supplier ID: Foreign Indicator:

TIN:

Your Search Results are displayed:

You will note that your search criteria remain on the top of the screen.

Results are displayed in the bottom portion of the screen. In this case, there are only four (4) Suppliers that meet the search criteria.

UB eRequisition

Doc Type:	Regular	Incident #:	Unassigned	Creator:	Lorango, Barbara
Created:	02/10/2014	Requisition #:	Unassigned	Last Approver:	
Total:	0.00	PO #:	Unassigned	Supplier:	

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

Advanced Search | Enter New Supplier | Supplier File

Supplier Search

Search allows wildcard characters. (i.e. *)
Example: Entering "Abc*" for Supplier Name would return all suppliers whose name begins with Abc.

Supplier Name: SFS Vendor ID:

Supplier ID: Foreign Indicator:

TIN:

Supplier Search Results

4 Records Found

Supplier Name	Supplier ID	TIN	SFS Vendor ID	Address	City	State	Zip	Payee
POPE JOHN PAUL II HIGH SCHOOL	252636		1100059755	151 RITTENHOUSE ROAD	ROYERSFORD	PA	19468	00002
POPPYSEED RESTAURANT	89628			3870 MCKINLEY PARKWAY	BLASEDELL	NY	14219	UB001
POPSON COUNSELING ASSOCIATES	175197			40 MAIN STREET	HAMBURG	NY	14075	UB001
POPULAR SCIENCE	10033			PO BOX 60001	TAMPA	FL	33660-0001	UB001

Supplier not found, click [Enter New Supplier](#)

Found Supplier, but need different address, click the Supplier's "Add" button.

Now, you have eight (8) options (numbered in the picture above):

1. **Select one of the Suppliers** listed by clicking on the *Select* button to the right of the Supplier. (This action takes the user to the *Supplier Home* screen which is illustrated on page 4).
2. **Click on the Select & Edit** button to select one of the suppliers with the intent of editing a portion of the supplier info shown.
3. **Click on the Add button** if you intend to select that supplier but want to use a different address than the one shown.
4. **Perform a new Search** by entering different or adjusted criteria and clicking on the *Find Supplier* button again.
5. **Choose to enter a new Supplier** because you cannot find your desired Supplier. This can be done by clicking on the *Enter New Supplier* button at the top of the screen. (This action takes the user to the *Supplier Add/Edit* screen. This screen is discussed in detail on pages 5 & 6)
6. **Do not select any Supplier for this requisition at this time. (Remember though: a Supplier is required for Campus users.)** Instead, simply click on the *Continue* button to move to the Ship To tab OR click on any of the tabs across the top to go directly to that tab.
7. **Perform an advanced Search** by entering new Supplier type or demographic information. This can be done by clicking on the *Advanced Search* button at the top of the screen. (This action re-displays this search screen with additional criteria at the bottom. This is discussed on page 10).
8. **Continue your search by accessing the Supplier File** directly by clicking on the *Supplier File* button at the top of the screen. (This action displays the *Supplier File Search* screen. This is discussed on page 10).

The *Supplier Home* screen~

Your Selected Supplier is displayed:

The screen shown below is the *Supplier Home* screen.

The user is taken directly to this *Supplier Home* screen after clicking on the *Select* supplier button for this Supplier on the *Supplier Search* screen *OR* after entering/editing a Supplier.

The Supplier information is flooded to the *Supplier Home* screen.

UB eRequisition

Doc Type:	Regular	Incident #:	Unassigned	Creator:	Lorango, Barbara
Created:	02/10/2014	Requisition #:	Unassigned	Last Approver:	
Total:	0.00	PO #:	Unassigned	Supplier:	POPULAR SCIENCE

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

2 Add New Location | 3 Edit Existing Location | 4 Clear Supplier | 5 Enter New Supplier | 6 Supplier Search | 7 Supplier File

Supplier

POPULAR SCIENCE
PO BOX 60001
TAMPA , FL 33660 - 0001
US
Supplier ID: 10033
TIN: *****

1 Continue

From here, you have seven (7) options (numbered in the picture above):

1. Leave this as the selected Supplier and click on the *Continue* button to move to the Ship To tab *OR* click on any of the tabs across the top to go directly to that tab.
2. Click on the *Add New Location* button to go to the *Add New location* screen with the intent of submitting a different address than the address option(s) listed for this vendor.
3. Click on the *Edit Existing Location* button to go to the *Supplier Add/Edit* screen to request an edit for this particular Supplier entry. For example: you notice that this is the Supplier you want but the address is actually PO Box 125, not 60001. (This option will be explained in more detail when the *Supplier Add/Edit* screen is discussed – see pages 8 & 9).

Or, if you determine this is not the Supplier you wish to use for this requisition. You can:

4. Click on the *Clear Supplier* button to take this Supplier off of the requisition. This takes you back to a blank *Supplier Search* screen where you can conduct a new search of the Supplier File.
5. Click on the *Enter New Supplier* button to remove this Supplier from the requisition and go directly to the *Supplier Add/Edit* screen to request a new Supplier be added to the Supplier file. (This option will be explained in more detail when the *Supplier Add/Edit* screen is discussed – see pages 5 & 6).
6. Click on the *Supplier Search* button to replace this Supplier on the requisition by searching for a different Supplier altogether. This takes you back to a clear *Supplier Search* screen where you can conduct a new search of the Supplier File.
7. Click on the *Supplier File* button to research all the suppliers on the UB Supplier File itself. (This action displays the *UB Supplier Search* screen. This is discussed on page 10).

The *Supplier Add/Edit* screen~

Request a new Supplier be added:

Clicking on the *Enter New Supplier* button either from the *Supplier Home* screen or the *Supplier Search* screen would take you directly to a blank *Supplier Add/Edit* screen as pictured below.

The *Supplier Add/Edit* screen (to add a new Supplier):

The name of the Supplier is the only **required** field on the *Supplier Add/Edit* screen. (see note below)

It is highly recommended: provide as much information about the Supplier as possible to the UB Purchasing Office.

This screen not only accounts for U.S. suppliers but has also been set up to accommodate the entry of foreign Supplier information. (Please refer to the on-screen hints)

The screenshot shows the 'Supplier' tab interface with a sub-tab 'Add New Supplier / Location'. At the top, there are navigation tabs: Order Details, Order Items, Supplier, Ship to, Funding, Notes, Attachments, Summary, and My Actions. A red message reads: '****Please provide as much Supplier information as possible in order to avoid delay in processing your eReq.****'. A search box for 'Supplier' is in the top right.

The form fields include:

- Foreign Indicator: DOMESTIC (dropdown)
- TIN: (text box)
- *Name: (text box)
- Address 1, 2, 3: (text boxes)
- City: (text box) with note '(City is a required field for US or Canadian locations.)'
- State: (dropdown) with note '(State is a required field for US locations.)'
- Zip: (text box) with note '(Zip is a required field for US or Canadian locations.)'
- Zip Suffix: (text box)
- Province: (dropdown) with note '(Province is a required field for Canadian locations.)'
- Country: UNITED STATES (dropdown)
- Phone: (text box) with format '() x '
- Fax: (text box) with format '() x '
- Website: (text box) with note '(include http:// or https://)'
- PO eMail Address: (text box)
- SFS Vendor ID: (text box)

Below the fields are radio buttons for 'Choose One': Large Business, Small Business, Not for Profit, Individual, and Unknown (selected).

There are checkboxes for 'Check all that apply':

- Incorporated, State Preferred Source, Handicapped, SDVO, Hub Zone
- Women Owned, Minority, Veteran Owned, HBCU
- NYS Certified Women Owned, NYS Certified Minority

Buttons at the bottom include 'Save Supplier', 'Reset', and 'Continue'.

Please Note: A Supplier is not required at the Begin step of eReq. You will only receive an error message if you click on the Save Supplier button but you have not entered a Supplier name.

However, if you have entered a requisition with the Ordering Instructions equal to "Confirming/Received" or "Confirming/Do Not Duplicate", a Supplier is required before the requisition is sent to Purchasing. Otherwise an error message will be displayed. An invoice must also be attached.

Pictured on the next page is an example of a filled in Supplier Add/Edit screen.

**The Supplier Add/Edit screen (cont'd)~
Request a new Supplier be added (cont'd):**

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

*****Please provide as much Supplier information as possible in order to avoid delay in processing your eReq.*****

1 Search for Supplier

Add New Supplier / Location

Foreign Indicator: DOMESTIC

TIN: []

*Name: eProcurement Solutions, Incorporated

Address 1: 123 Haversham Road

Address 2: []

Address 3: []

City: Buffalo (City is a required field for US or Canadian locations.)

State: NEW YORK (State is a required field for US locations.)

Zip: 14210 (Zip is a required field for US or Canadian locations.)

Zip Suffix: []

Province: [] (Province is a required field for Canadian locations.)

Country: UNITED STATES

Phone: (716) 823-3333 x []

Fax: (716) 826-3000

Website: http://www.epsinc.com (include http or https://)

PO eMail Address: []

SFS Vendor ID: []

Choose One:

Large Business Small Business Not for Profit Individual Unk

Check all that apply:

Incorporated State Preferred Source

Women Owned Minority Handicapped SDVO Unk

NYS Certified Women Owned NYS Certified Minority Veteran Owned HBCU

Save Supplier **Reset** **2** **3** **Continue**

Fill out as much information as you have available. This will help expedite the purchasing process.

Important: Once you have completed filling out the form, click on the **Save Supplier** button. This is the only way to save the new Supplier information to the requisition.

You will then be brought to the Supplier Home screen and your new Supplier information should be flooded there. (See page 7).

Please Note: if you decide you do not wish to have this Supplier added, as long as you have not yet clicked on the Save Supplier button, then you have three (3) options (numbered in the picture above):

- 1. Click on the Search for Supplier button** to return to a blank Supplier Search screen to look for a different Supplier.
- 2. Click on the Reset button** to reset this screen to a blank Supplier Add/Edit screen.
- 3. Leave the Supplier tab** by clicking on the Continue button to go directly to the Ship To tab OR click on any of the tabs across the top of the screen to go directly to that tab.

The Supplier Home screen (after Supplier has been added/edited)~

Your request to add a new Supplier has been saved and your new Supplier is displayed on the Supplier Home screen (as shown below):

UB eRequisition

Doc Type:	Regular	Incident #:	Unassigned	Creator:	Lorango, Barbara
Created:	02/12/2014	Requisition #:	Unassigned	Last Approver:	
Total:	0.00	PO #:	Unassigned	Supplier:	eProcurement Solutions, Incorporated

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

2 Add New Location | 3 Edit Existing Location | 4 Clear Supplier | 5 Enter New Supplier | 6 Supplier Search | 7 Supplier File

Supplier

Important Notes:

- Supplier record currently requires maintenance.

eProcurement Solutions, Incorporated
123 Haversham Road
Buffalo, NY 14210
US

1 Continue

This standard message appears for any Supplier that was added or edited on the *Supplier Add/Edit* screen.

From here, you still have seven (7) options (numbered in the picture above):

1. Leave this as the selected Supplier and click on the *Continue* button to move to the Ship To tab OR click on any of the tabs across the top to go directly to that tab.
2. Click on the *Add New Location* button to go to the Add New location screen with the intent of submitting a different address than the address option(s) listed for this vendor.
3. Click on the *Edit Existing Location* button to go to the *Supplier Add/Edit* screen to request an edit for this particular Supplier entry. For example: you notice that this is the Supplier you want but the street address is actually 12 Haversham Road, not 123. (This option will be explained in more detail when we discuss editing a Supplier – see pages 8 & 9).

Or, if you determine this is not the Supplier you wish to use for this requisition. You can:

4. Click on the *Clear Supplier* button to take this Supplier off of the requisition. This takes you back to a blank *Supplier Search* screen where you can conduct a new search of the Supplier File.
5. Click on the *Enter New Supplier* button to remove this Supplier from the requisition and go directly to the *Supplier Add/Edit* screen to request a different new Supplier be added to the Supplier file.
6. Click on the *Supplier Search* button to replace this Supplier on the requisition by searching for a different Supplier. (This takes you back to a clear *Supplier Search* screen where you can conduct a new search of the Supplier File.)
7. Click on the *Supplier File* button to search the UB Supplier File directly to find the particular Supplier that you wish to use. (This action displays the UB *Supplier Search* screen where you can conduct a new search. See page 10)

**The Supplier Add/Edit screen~
Edit an existing Supplier entry:**

To request an edit of a Supplier entry: click on the **Edit Existing Location** button on the **Supplier Home** screen. In this example, Corr Distributors was the selected Supplier and was displayed on the Supplier Home screen. Clicking on the **Edit Existing Location** button brought us to the **Supplier Add/Edit** screen which has been flooded with the current information for this supplier.

The screen for an edit is slightly different than it is for an add of a new Supplier.

The banner at the top reads: Edit Existing Supplier / Location.

The fields are already flooded with the existing information.

And, there is a **Cancel Edit** button that is not part of the screen on an add. The user can click on this button to cancel any changes they have made and return to the **Supplier Home** screen (as long as they have not yet clicked on the **Save Supplier** button.)

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

*****Please provide as much Supplier information as possible in order to avoid delay in processing your eReq.*****

Edit Existing Supplier / Location Search for Supplier

Foreign Indicator: DOMESTIC

TIN: 1000007775

*Name: CORR DISTRIBUTORS INCORPORATED

Address 1: 89 PEARCE AVE

Address 2:

Address 3:

City: TONAWANDA (City is a required field for US or Canadian locations.)

State: NEW YORK (State is a required field for US locations.)

Zip: 14150 (Zip is a required field for US or Canadian locations.)

Zip Suffix:

Province: (Province is a required field for Canadian locations.)

Country: UNITED STATES

Phone: (716) 8738323 x

Fax: (716) 8732968

Website: (include http:// or https://)

PO eMail Address:

SFS Vendor ID: 1000007775

Choose One:

Large Business Small Business Not for Profit Individual Unknown

Check all that apply:

Incorporated State Preferred Source

Women Owned Minority Handicapped SDVO Hub Zone

NYS Certified Woman Owned NYS Certified Minority Veteran Owned HBCU

Save Supplier | **Cancel Edit** | Reset | Continue

From the *Supplier Add/Edit* screen~

Edit a Supplier entry and save the edited information:

In this example, the user will make a change to the street address of the Supplier entry and click on the *Save Supplier* button (located at the bottom left of the screen-not shown in this example).

Note the change made to the Address 1 line. →

Then let's say the user clicked on the *Save Supplier* button.

Save Supplier

Edit Existing Supplier / Location

Foreign Indicator: DOMESTIC

TIN: 100117702

*Name: CORR DISTRIBUTORS INCORPORATED

Address 1: 100 SMITH STREET

Address 2:

Address 3:

City: TONAWANDA (City is a required field for US or Canadian locations.)

State: NEW YORK (State is a required field for US locations.)

Zip: 14150 (Zip is a required field for US or Canadian locations.)

Zip Suffix:

Province: (Province is a required field for Canadian locations.)

Country: UNITED STATES

Phone: (716) 8738323 x

Fax: (716) 8732968

Website: (include http:// or https://)

PO eMail Address:

SFS Vendor ID: 1000007775

The *Supplier Home* screen~

The edit of the Supplier entry is saved:

Upon clicking on the *Save Supplier* button on the *Supplier Add/Edit* screen, the user will be taken to the *Supplier Home* screen as pictured below.

UB eRequisition

Doc Type:	Regular	Incident #:	Unassigned	Creator:	Lorango, Barbara
Created:	02/13/2014	Requisition #:	Unassigned	Last Approver:	
Total:	0.00	PO #:	Unassigned	Supplier:	CORR DISTRIBUTORS INCORPORATED CORR DISTRIBUTORS INC

Order Details Order Items **Supplier** Ship to Funding Notes Attachments Summary My Actions

Add New Location Edit Existing Location Clear Supplier Enter New Supplier Supplier Search Supplier File

Supplier

Important Notes:

- Supplier record currently requires maintenance. →

CORR DISTRIBUTORS INCORPORATED
CORR DISTRIBUTORS INC
100 SMITH STREET
TONAWANDA, NY 14150
US
Supplier ID: 29378
TIN: 100117702 →

This standard message appears for any Supplier that was added or edited on the *Supplier Add/Edit* screen.

Note that the address has been changed to what the user requested.

Continue

And as previously discussed, the user always has the same seven (7) options as to where to go from the *Supplier Home* screen. (See page 7).

Supplier Advanced Search Screen:

This screen appears after clicking on the *Advanced Search* button (referenced on page 3). This screen will allow the user to perform a specialized supplier search using specific types of information.

UB eRequisition

Doc Type:	Regular	Incident #:	Unassigned	Creator:	Lorango, Barbara
Created:	02/13/2014	Requisition #:	Unassigned	Last Approver:	
Total:	0.00	PO #:	Unassigned	Supplier:	CORR DISTRIBUTORS INCORPORATED CORR DISTRIBUTORS INC

Order Details | Order Items | **Supplier** | Ship to | Funding | Notes | Attachments | Summary | My Actions

Supplier Search | Enter New Supplier | Supplier File

Supplier Search

Search allows wildcard characters. (i.e. *)
Example: Entering "A*" for Supplier Name would return all suppliers whose name begins with A.

Supplier Name: SFS Vendor ID:
 Supplier ID: Foreign Indicator: ALL
 TIN:

Classification

Filter supplier search by classification
Example: Checking "Women Owned" would filter the above search results by only returning those suppliers that are also "Women Owned".

Minority NYS Certified Minority Women Owned NYS Certified Women Owned
 Handicapped Hub Zone Veteran Owned SDVO
 HBCU Preferred Source Incorporated

Choose One:
 Large Business Small Business Not for Profit Individual Any

The top of the **Advanced Supplier Search** screen is the same as the **Supplier Search** screen.

The bottom portion of the **Advanced Supplier Search** screen is where you can filter your supplier search by choosing additional search criteria.

UB Supplier File Search Screen:

This search screen can be accessed from both the *Supplier Search* screen (referenced on pages 3) and the *Supplier Home* screen (referenced on pages 4, 7 & 9). This screen will allow the user to directly access the **UB Supplier File** in order to find the desired supplier.

UB Supplier Maintenance

Main Menu > Supplier Home

Supplier Home

Name: TIN:
 Foreign Indicator: ALL RF Supplier ID:
 Supplier Status: ALL SFS Vendor ID:

1 Record Found

Name	Status	TIN	RF Sup ID	SFS VENDOR ID	SFS Name					
CHEMISTRY RESEARCH SOLUTION LLC	A	██████████	234077		CHEMISTRY RESEARCH SOLUTION	Edit	Location	Notes	Attachments	History

By clicking on this link, you will be able to view all data related to this vendor, including all location addresses, merge information and web address.