

How to Search for a Vendor

For University of Idaho employee use. Email acctpay@uidaho.edu for additional help.

1. How to Search for a vendor in Banner

A. Navigate the Launch Enterprise Applications Page and Click **Banner 9** <u>https://support.uidaho.edu/TDClient/40/Portal/Requests/ServiceDet?ID=707</u>



B. Type **FTIIDEN** in the search Bar





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C. It is possible to search by ID, Last and First name, however you may want to broaden your search by using only one field. Type all or part of the vendor name in the **Last Name** field. Use the % sign as a wild card when there may be additional text before or after the portion of the name you are familiar with. **Click Go**

TAILS	Settings	Insert	Delete 🗖 Co	py 🔍 Filter
sic Filter Advanced Filter				O
Last Name First Name Middle Name Middle Name		•		
ity Indicator				
			Clear	All Go

Records are returned by the search:

	Grant Personnel Terminated Financial Managers					agers	
DETAILS							
Active filters	s: Last Name: %Amazon% 🗢 Cle	ar All					
ID	Last Name	First Name	Middle Name	Entity Indicator	Change Indicator	Vendor	F
AMAJAC	Amazon Jack's Restaurant & Jungle			Corporation		Terminated	٨
AMAWEB	Amazon Web Services Inc			Corporation		Yes	٨
AMACOM	Amazon.com Books			Corporation		Terminated	١
K ◀ 1	of 1 🕨 🕨 10 🗸 Per Page						
Case Ins	ensitive Query O Case Sensitive Query						

- 2. How to Search for a vendor in PaymentWorks
 - a. Login to the University of Idaho SSO site. Please email <u>acctpay@uidaho.edu</u> for the link.
 - b. Click Vendor Master Update

Setup and Manage Supplier Portal	VIDEO M TUTORIAL	Messaging	
Vendor Master Updates	VUED IN TUTORIAL	Payments	



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c. Click on New Vendors Tab

Payme	ntWørks	Vendor M	•	
# Home	Vendor Profiles	✓ Updates	New Vendors	

Make sure SHOW Onboardings Tracker is on

o ^o SHOW:	Onboarding Tr	acker 🗸
Filter Dee	ultor 0	

d. Enter Vendor Name or Number - can also search partial email

	TUTORIAL
Filter Results: 0	
Vendor Name:	
Vendor #:	
Contact E-Mail:	

e. If not found, they will need to be sent an invite to connect to University of Idaho



3. Vendor Invite Status

a. Show: Onboarding Tracker shows invite status

A Home	New Vendors					
o ^o SHOW: Onboard	ing Tracker 🗸					
		Onboardings		Sort By: Date modified ~	Descending 🗸	Need help 🔞
Filter Results: 42 Records		James Spader				*
Vendor Name:			 			
Vendor #:		INVITATION INITIATED	INVITATION EMAIL OPENED			
Contact E-Mail:		08/24/2022 12:37 PM	08/24/2022 1:20 PM 15 days			>
Invitation		Karen Robinson				
Approval			 			
Invitation	~					
Delivered:		08/24/2022 12:55 PM	INVITATION EMAIL OPENED 08/30/2022 9:05 AM			

b. You can search for only your invites, by adding your name in Invitation Initiator box at the bottom of the Filter Results:



4. Tracking Onboardings

	VIDEO M TUTORIAL	ONBOARD START	UPDATED .	VENDOR NAME	INVITATION	VENDOR ACCOUNT N	EW VENDOR REGISTRATION	% COMPLETE	
Filter Results: Vendor Name:		04/22/2018	04/22/2018	Ashley Watson Laundry	Clicked	Email Validated	In Progress		
/endor #:	•					1	-		
Approval: trivitation ¢ Delivered: Account ¢ Created: Registration ¢ Form:		Invitation column: • Sent • Delivered • Not Deliverable • Opened • Clicked		mn: able	Account Column: • Email Validated • Created • Confirmed • No Account		New Vendor Registration colun • Submitted • Approved • Processed • Complete • Rejected		
nvitation		• 5	ell Registe	reu			• Invitatio	on/Reminders Cancelle	



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Notes:

- Please email <u>acctpay@uidaho.edu</u> with **ANY** questions you have.
- If a vendor sits in APPROVED status for over 24 hours, PW & Banner may not have connected correctly. Please email acctpay@uidaho.edu
- With other Universities using PaymentWorks, it's important to send email invite to the correct person so they can have one account with all customers.