Supplier Portal
Quick Reference Guide

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Overview

Supplier Portal quick reference describes the main functional areas of the Supplier dashboard. For additional assistance or questions about using the Supplier Portal, contact utswaccounting@utsouthwestern.edu.
Change Password

Navigation:

Click in menu bar under UT Southwestern Log: **Main Menu>Change My Password** - A

**Favorites > Main Menu**

**Search Menu:**
- Maintain Supplier Information
- Manage Orders
- Review Payment Information
- eSettlements
- Change My Password

**Top Menu**

**The menu**

**Search Menu**

The menu 

**Recently Used** pages now appear under the Favorites menu, located at the top left.

**Breadcrumbs** visually display your navigation path and give you access to the contents of subfolders.

**Menu Search**, located under the **Main Menu**, now supports type ahead which makes finding pages much faster.
A. Enter Current Password
B. Enter New Password
C. Enter New Password to confirm password change
D. Click Change Password
Supplier Dashboard

Description

The Supplier Dashboard will provide a snapshot of aging information along with links to specific invoices and their payment status.

Navigation

Click in menu bar under UT Southwestern logo - **Main Menu>eSettlements>Supplier Dashboard**

A. Click **View All** to view all items in the General Summary grid.
B. Click on the dollar amount hyperlink under Total Gross in USD column – Invoice Balance line to view Past Due and Current Due. See example screenshot of results on next page.
C. Click on Back to Dashboard to return to Supplier Dashboard.
Review Payment Information

Description

- Entering an invoice number will provide the payment reference that paid the invoice in question or status of the invoice if it’s pending payment.
- Entering a specific payment reference number such as check number, ACH number or SUA number will provide you with a list of invoices paid by that reference number.

Navigation

Click in menu bar under UT Southwestern Logo - Main Menu>Review Payment Information>Payments.

A. Enter Invoice Number OR/AND
B. Enter Payment Reference.

Note: Make sure From and To Payment Date is blank.

Leaving invoice number blank returns results of all invoices on record.

Review Payments

Filter Options

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

**Invoice Number:**

**Payment Reference:**

**From Payment Date:** (example: 12/31/2000)

**To Payment Date:** (example: 12/31/2000)

Search

Return to Vendor List
Review Invoice Information

Description

View detailed information about invoice payment status, amount paid, and/or payment reference ID number.

Navigation

Click in menu bar under UT Southwestern Logo - Main Menu>Review Payment Information>Invoices

A. Enter To and From Invoice Number.
B. Leave From Date and To Date blank.
C. Click Search. (This may take some time to populate information. You will see a “spinning wheel” while the information is being processed). Screen shot of results on next page.
A. Click Invoice number to view specific invoice detail.

B. Click ‘grid’ symbol to download results into a spreadsheet. You can then sort by date or invoice number to further analyze your information.
A. Payment status.
B. Amount of invoice paid.
C. Payment reference ID.
D. Method of payment.
E. Total of payment (may include additional invoices paid on same payment).
F. Click hyperlink on reference ID to see additional invoices paid with same reference ID.

See results on next page.
Review Purchase Order Information

Description

Entering a Purchase Order (PO) will provide the status, all invoices associated with that the PO, and the related payment reference ID.

Navigation

Click in menu bar under UT Southwestern Logo - Main Menu>Manage Orders>Purchase Orders.

A. Enter To and From PO Number. Leaving To blank will result in multiple PO numbers to be populated. Entering the same PO in the TO space will return that specific PO.
B. Leave From Date and To Date blank.

Click Search. (This may take some time to populate information. You will see a “spinning wheel” while the information is being processed). Screen shot of results on next page.
A. Click on the Purchase Order number hyperlink to view specific details.

B. Click on the Invoice number hyperlink to see additional information.
Tips and Tricks

1. **Spinning Wheel** – Indicates the system is retrieving the data you requested.

![Spinning Wheel Image]

2. **Download Grid** – This button allows you to download your search results into a spreadsheet. Once downloaded you can sort your data in whatever manner you need, you may add columns for notes or additional information.

![Download Grid Image]

3. **Find Feature** – This button will allow a search feature within the on-line results. Helpful when search returns with a large number of transactions.

![Find Feature Image]
4. **Search by date range:** Do not enter an invoice, enter range of dates. This search will provide a list of all invoices on record between dates entered.

5. **Retrieve information for a single invoice:** Enter the same invoice number in the From and To Invoice lines. Leave the To and From Dates blank. You will only receive information on the single invoice.
6. **Change the sort order of columns**: Click on a column heading to change the sort order.

   ![Invoice List](image)

7. **Invoice numbers are case sensitive.**