

The Supplier Management Process

(From Searching for a Supplier to Requesting a New Supplier)

Job Aid
(July 2026)

YORK 



The Supplier Management Process Job Aid

FROM SEARCHING FOR A SUPPLIER TO REQUESTING A NEW SUPPLIER

The Supplier Management portal in Sm@rtBuy allows you to access and update supplier information or request a new supplier.

The Process

To issue a Purchase Order (PO) or process a payment to a supplier, a supplier profile is required in Sm@rtBuy.

This job aid will guide you through the following steps to ensure that a supplier profile exists or an existing supplier profile is up to date:

1. Search for an Existing Supplier.
2. Add New Supplier (if a supplier profile does not exist)
NOTE:** A supplier quote, invoice or contract/written agreement is **required to complete this step*
3. Update Supplier Information (if supplier profile exists)
4. View request status

Roles available in Sm@rtBuy

All active York employees have access to Sm@rtBuy and are assigned different roles in Sm@rtBuy according to their assigned responsibilities within the platform.

Understanding your role is important as each role is unique and has specific core functions.

Shopper: These users can shop for items but cannot submit carts. Shoppers must assign a Requisitioner to the cart. Only Requisitioners can submit carts in Sm@rtBuy.

Requisitioner: These users can shop for items and submit carts (that they created or were assigned from a Shopper).

Approver: These users can review (approve, reject, or return) Purchase Requisitions but typically cannot submit their own shopping cart. They must ask a Shopper or Requisitioner within their department to create and submit a shopping cart.

Need help finding your Sm@rtBuy role? Visit the [Sm@rtBuy Roles Reference Guide](#) to access your Sm@rtBuy profile and confirm your assigned role. Watch the [How-To Understand Your Role in Sm@rtBuy](#) training video for a visual walkthrough.

Quick Links to Specific Steps

Walk through this document or click on the heading below for the step you want to explore.

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Sign-in to Sm@rtBuy

- 1) Click on this [Faculty & Staff Resources and Services](#) link to access the **Faculty & Staff Resources and Services** page in the York main website (**bookmark it for future reference**)
- 2) Select **Sm@rtBuy** in the Administrative Quick Links
- 3) Click on **Login** after entering your Passport York Login credentials



Passport York Login



Passport York authenticates you as a member of the York community and gives you access to a wide range of computing resources and services.

Username:

3

Password:

Login

New to Passport York?

- [New Student and Applicant Sign Up](#)
- [New Employee Sign Up](#)

Passport York Information

- [Information for Students and Alumni](#)
- [Information for Faculty and Staff](#)

Search for an Existing Supplier

Before requesting to add a new supplier or update supplier information, you **must first** complete a supplier search to see if a supplier already exists in the system.

- If no existing supplier profile is found, click on this link to [add a new supplier](#).
- If a profile is found and the supplier information requires an update, click on this link to [update supplier information](#)

Note: Supplier banking information is not viewable by faculty and staff.

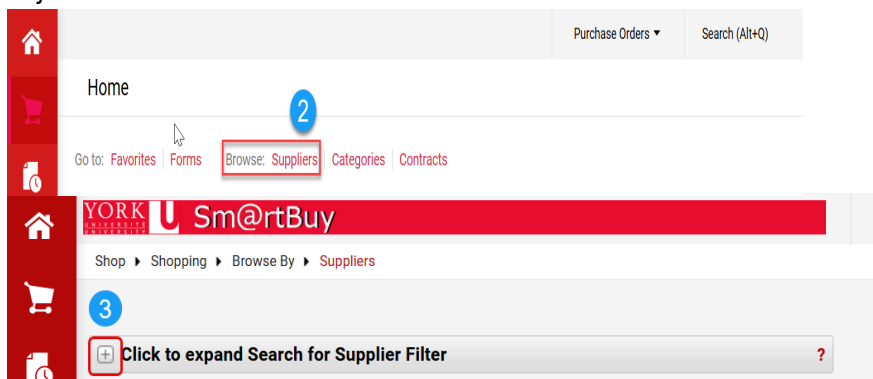
There are two primary ways to search for a supplier in Sm@rtBuy:

- Quick Search - by Supplier Name
- Detailed Search - by Supplier details (e.g. Diversity Classification, Registered Ontario Business)

Note: The "Quick Search" option will return only Active supplier profiles, while the "Detailed Search" option will return both Active and Inactive supplier profiles.

Quick Search

- 1) [Sign-in](#) to Sm@rtBuy via Faculty & Staff Resources and Services
- 2) Select **Browse: Suppliers**
- 3) Click on the "+" button to expand the Search criteria section
- 4) Type the name of the Supplier on the Search Field and click "**Search**"



- Click the Supplier Name and select the **Supplier** to view supplier details

Search For Supplier

Supplier: (4)

Supplier Type: (v)

Search

Click to expand Search for Supplier Filter ?

Showing 1 - 7 of 7 Results

Results Per Page: 20

Supplier Name	Type	Preference	Supplier N
Aurora Grove Public School			Test Groves Supplier
Glen Grove Suites Inc			Groves & Company LLC (5)
Linden Grove Floral Studio			Grove, Jaleen
Maple Grove Public School			

Results Per Page: 20

Groves & Company LLC

Supplier 360 **Supplier** Contracts

Groves & Company LLC

Address: Groves & Company LLC

Fulfillment Center 1:
9901 Brodie Lane
Suite 160 PMB902
Austin, Texas 78748
United States

Supported Currencies/Duns No.?: -

SQ Supplier Id: 1002982155

Supplier Number: 0002050847

Enabled for Procurement: ☒

Phone No.: +1 647-524-3837

Toll-Free Phone No.: -

Fax No.: -

E-mail: hrqaempl@yorku.ca

Supplier Payment Method: -

Commodity Code: -

Technical Contact ?

Name: -

Phone No.: -

Toll-Free Phone No.: -

Fax No.: -

E-mail: -

Detailed Search

- Sign in to Sm@rtBuy and navigate to **Suppliers>Manage Suppliers>Search for a Supplier**
- Type the Supplier name in the **Quick Search** box if you know the supplier you want to search OR
- Click on **“Quick Filters”** on the left hand of the page and select the information type you want to search by.

Suppliers (1)

Quick search

Manage Suppliers

Supplier Management Home

Search for a Supplier

Requests

Performance

Search Suppliers

Quick Filters My Searches Relationship: In Network Status: Enabled for Pro... Quick search (2)

Save As Pin Filter

- For example: Search by Specific Diversity Classification:
 - Navigate to **“Supplier Classes”** in the Quick Filter section of the page
 - Select **“Show More”**
 - Check the checkbox(es) of the specific Diversity Classification(s) you are looking for
 - Select **“Apply”** to view the list of Suppliers aligned to the search criteria

Suppliers > Manage Suppliers > Search for a Supplier

Search Suppliers

Quick Filters

Workflow Error

Show More

Supplier Classes

No Supplier Classes 22352

Service 29

Good 28

Information Technology 27

Education 23

See More

Show More

Relatic

Select All

☐ ZSLGTBQ-Owned Business
 ☐ Attorney
 ☐ Benefit Remittance
 ☐ Bookstore

☐ CAD Science Catalog
 ☐ Charity
 ☐ Concur Expense
 ☐ Consultant

☐ CSBO Vendor
 ☐ Education
 ☐ Financial Services - (Banking, Treasury, Auditing)
 ☐ Food Service/Catering

☐ Furniture supplier
 ☐ General Contractor/Renovation Services
 ☐ Good
 ☐ Government

☐ Grants/Awards
 ☐ Hold for Go-live Testing
 ☐ Independent Contractor
 ☐ Indigenous-Owned Business

☐ Information Technology
 ☐ Insurance (Health, Life, Auto, CURIE, etc)
 ☐ IT Vendor
 ☐ Maintenance Repair Operations

☐ Membership
 ☐ No Supplier Classes
 ☐ NonPOInvoiceHeaderCapture
 ☐ Ontario Business

☐ Persons with a Disability-
 ☐ POInvoiceHeaderCapture
 ☐ Preferred Supplier 12
 ☐ Professional Consultant (Engineering,

Apply

Cancel

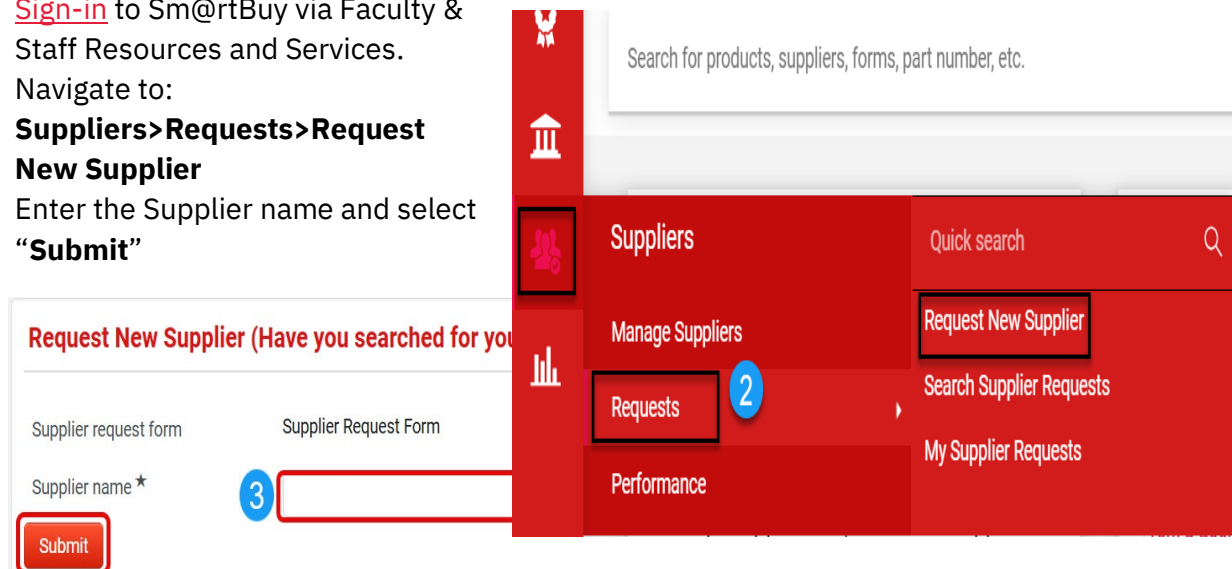
Add a New Supplier

Always obtain a supplier quote, invoice or contract/written agreement **first** before completing this form (this is required for all new supplier requests or reactivations).

Follow the steps below once this supporting documentation is available.

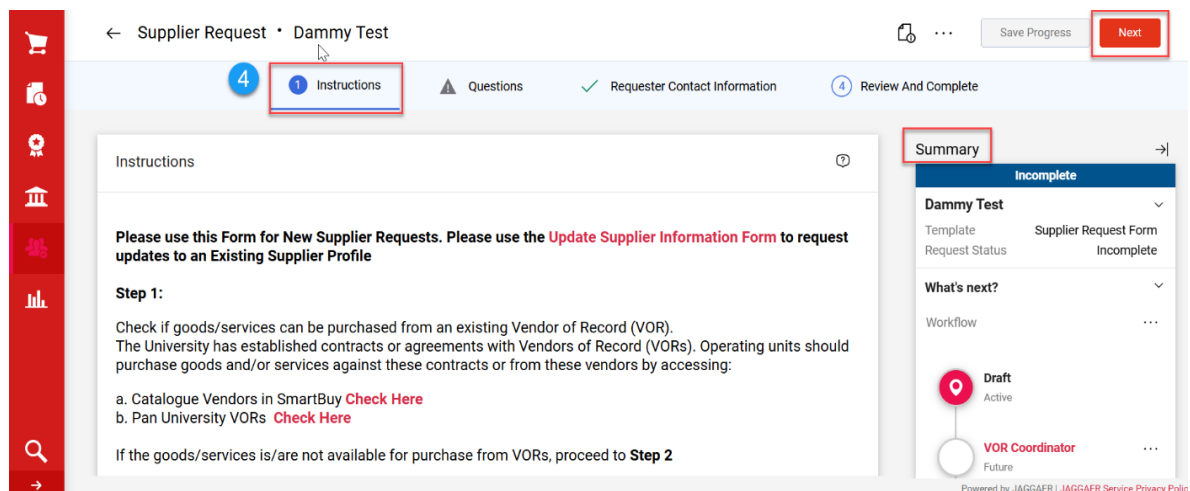
Note: For guidance on how to address each field in this section, access the help text icon  available for each required field.

- 1) [Sign-in](#) to Sm@rtBuy via Faculty & Staff Resources and Services.
- 2) Navigate to:
Suppliers>Requests>Request New Supplier
- 3) Enter the Supplier name and select **“Submit”**



- 4) Read the information on the Instructions page which emphasizes Vendor of Record (VOR) prioritization and the need to search for a supplier first, then select **“Next”** at the top right-hand side of the page.

Note: The summary box at the right-hand side shows the status and workflow of the form



- 5) Complete the required information on the **General Information** page:
 - Select your **Sm@rtBuy role**
 - Select the Supplier **Business Type**
 - Indicate if the Supplier is being created for a “**one-time purchase/payment**”

Note: If a potential match exists for the supplier’s name, a message will appear at the top of the General Information page, Click the link to review the information in the pop-up window and ensure supplier does not exist before proceeding.

The screenshot shows the 'General Information' tab selected. A message at the top states: 'Potential matching suppliers have been found in your network based on information given. Click here to view the list of potential matching suppliers.' A pop-up window titled 'Potential Matching Suppliers' is displayed, showing a table with the following data:

Supplier Name	Supplier Id
North Star Limousine Services Inc.	1005 [REDACTED]

The pop-up window includes a 'Close' button and a 'Close Potential Matching Suppliers' button.

- 6) Select “**Save Progress**” and “**Next**” at the top right-hand side of the page to navigate to next page.
 *This should be done on every page to save the information you have entered on the form.

The screenshot shows the 'General Information' page with the 'Save Progress' and 'Next' buttons highlighted in red boxes. The page is titled 'Supplier Request - Dammy Test'. The 'General Information' section includes a dropdown for 'Requester' and a text field for 'Supplier Name' with the value 'Dammy Test'. The 'Business Type' section has radio buttons for 'Incorporated' (selected), 'LLC', 'Partnership', 'Sole Proprietor/Independent Contractor', and 'Other'. The 'Insurance Requirement' section has a text area with a '2000 characters remaining' indicator. The 'Is the Supplier needed for a one-time purchase/payment?' section has radio buttons for 'Yes' and 'No' (selected). The 'Summary' sidebar on the right shows the 'Draft' status and a list of steps: 'Draft', 'VOR Coordinator', 'Procure to pay', 'VOR Coord Invite Supplier', and 'Finish'.

- 7) Complete the following information and attach the required documentation (e.g. quote, contract, invoice) under the **New Supplier Request Fields** section, Save progress and click **Next**:

- Supplier contact information
- Reason for Engaging Supplier
- Their GST/HST Registration number (*if available*)
- Currency of payment the supplier will be paid for goods/services rendered
- Conflict of Interest
- Building Ontario Business Initiative Act - [BOBIA](#)

Note: You must attach a quote, contract or invoice to proceed

Supplier Request • Dammy Test

Instructions Questions Requester Contact Information Review And Complete

General Information **New Supplier Request Fields**

Supplier Contact Details

Name ★

Type ★

First Name

Last Name

Summary Incomplete

Dammy Test

Template Supplier Request Form

Request Status Incomplete

What's next?

Workflow ...

Draft Active

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- 8) Confirm that your Requester Contact information is correct and click **Next**. Ensure a green checkmark appears next to all the listed sections. Click the certification checkbox and select **“Complete Request”** to verify the supplier information and submit your New Supplier Request.

Note:

- You can click the edit button next to each section to edit its information
- The “Complete Request” button will be greyed out until you check the certification box

Requester Contact Information

Requester Name: York Requestor

Requester Email: rmarfa@yorku.ca

Supplier Request • Dammy Test

Save Progress Previous **Complete Request**

Instructions Questions Requester Contact Information **4 Review And Complete**

Review and Complete 8

Instructions Questions

General Information New Supplier Request Fields Requester Contact Information

Certification

I certify that the statements and information in this request are true and correct to the best of my knowledge and belief.

Summary

Incomplete

Dammy Test

Template Supplier Request Form
Request Status Incomplete

What's next?

Workflow

Draft Active
VOR Coordinator Future
Procure to pay Future

9) Select “Yes” on the Confirm pop up screen. This completes your request.

Purchase Orders Search (Alt+Q) 0.00 CA

Confirm 9

Are you sure you are ready to complete your new supplier request?

Yes No

Dammy Test

Instructions

Review And Complete

Summary

Dammy Test

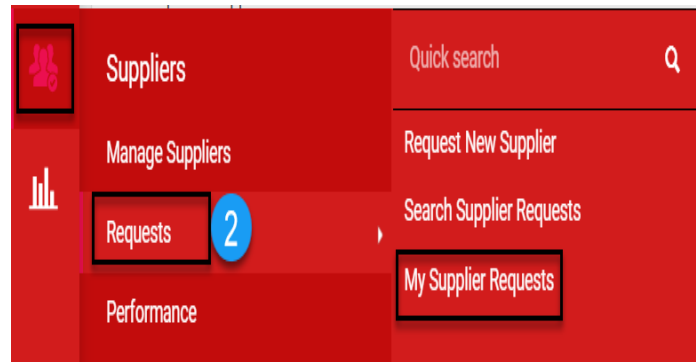
Template
Request Status

View New Supplier Request Status

1) [Sign-in](#) to Sm@rtBuy via Faculty & Staff Resources and Services

2) Navigate to **Suppliers>Requests>My Supplier Requests** to view all requests submitted by you

3) Search for a specific request by entering the supplier's name in the search box and clicking the search icon OR view the status of all your requests under **"Request Status"**. Click on the Supplier name to view information in the form.



My Supplier Requests

Filter Supplier Requests

Requested Supplier, Template Name

Request Status * ☒ Approved ☒ Incomplete ☒ Rejected
☒ Returned ☒ Under Review ☒ Completed

Include public Supplier request form? ☐

Apply

Page 1 of 8 1-10 of 78 Results 10 Per Page

Requested Supplier	Template	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status	Actions
Dammy Test	Supplier Request Form	Under Review	VOR Coordinator	-	09/04/2026 4:00 PM	09/04/2026 2:17 PM	-	-	Actions
North Star Limousine Services Inc.	Supplier Request Form	Incomplete	-	-	09/04/2026 2:45 PM	09/04/2026 2:45 PM	-	-	Actions
New Testing	Supplier Request Form	Under Review	VOR Coordinator	-	02/04/2026 9:25 AM	02/04/2026 9:06 AM	-	-	Actions

Note: To view requests with a **specific status** e.g. "Under Review", check the box(es) that applies to the specific **Request Status** and select **"Apply"**. This will generate a list of only supplier requests that have been rejected

My Supplier Requests

Filter Supplier Requests

Requested Supplier, Template Name

Request Status * ☐ Approved ☐ Incomplete ☐ Rejected
☐ Returned ☒ Under Review ☐ Completed

Include public Supplier request form? ☐

Apply

Requested Supplier	Template	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status	Actions
Dammy Test	Supplier Request Form	Under Review	VOR Coordinator	-	09/04/2026 4:00 PM	09/04/2026 2:17 PM	-	-	Actions
New Testing	Supplier Request Form	Under Review	VOR Coordinator	-	02/04/2026 9:25 AM	02/04/2026 9:06 AM	-	-	Actions
test	Supplier Request Form	Under Review	VOR Coordinator	-	26/10/2025 6:58 PM	26/10/2025 6:56 PM	-	-	Actions

Note: The “Results” section will display all existing requests that match the Search criteria.

Requested Supplier	Template	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status	
Dammy Test	Supplier Request Form	Under Review	VOR Coordinator	–	09/04/2026 4:00 PM	09/04/2026 2:17 PM		–	Actions
New Testing	Supplier Request Form	Under Review	VOR Coordinator	–	02/04/2026 9:25 AM	02/04/2026 9:06 AM		–	Actions
test	Supplier Request Form	Under Review	VOR Coordinator	–	26/10/2025 6:58 PM	26/10/2025 6:56 PM		–	Actions

- **Request Status** column
 - Incomplete – request form is incomplete and has not been submitted for approval. Reopen the form to add information and submit.
 - Under Review – request form was submitted and is under review.
 - Approved – request form has been approved
 - Rejected – request form has been rejected. Requisitioner **cannot** resubmit form
 - Returned – request form needs to be updated. Requisitioner will get a notification to update where necessary and resubmit form
 - Complete – request form is complete and ready for review
- The **Workflow Step** identifies the approval step in which the request is currently pending for review and approval.
To view this, click on the Supplier name under the “**Requested Supplier**” column. The workflow is on the right side of the page

[Instructions](#)
[Questions](#)
[Requester Contact Information](#)

Instructions

Please use this Form for New Supplier Requests. Please use the **Update Supplier Information Form** to request updates to an Existing Supplier Profile

Step 1:

Check if goods/services can be purchased from an existing Vendor of Record (VOR). The University has established contracts or agreements with Vendors of Record (VORs). Operating units should purchase goods and/or services against these contracts or from these vendors by accessing:

a. Catalogue Vendors in SmartBuy [Check Here](#)

b. Pan University VORs [Check Here](#)

If the goods/services is/are not available for purchase from VORs, proceed to **Step 2**

Step 2:

a. Click on [Supplier Search](#)

b. Type the name of Supplier in the search field

Summary

Under Review

Dammy Test

Template

Supplier Request Form

Request Status

Under Review

What's next?

Workflow

...

Submitted

09/04/2026 4:00 PM

VOR Coordinator

Pending - Approval

Procure to pay

Future

- The **Status Last Updated** column indicates the date and time the request was last modified.
- The **Created** column indicates the date and time when the request was created.
- The **Registration Status** –column indicates the status of the Supplier’s company profile registration process once the request form is approved, and they have been invited by the Procurement Operations to self-register via York’s Supplier Management Portal:
 - In Progress – Supplier has started the registration process but has not completed.
 - Profile Complete – Supplier has completed the registration process, and the submission is currently with Procurement Operations for review and approval.
 - Approved – Supplier profile is available and ready for use in Sm@rtBuy.
- The **Actions** dropdown button is to view, edit or delete the request form.

Page 13 of 17

The Supplier Management Process Job Aid

YORK U

Update Supplier Information

- 1) **Sign-in** to Sm@rtBuy via Faculty & Staff Resources and Services

- 2) Click on the **Update Supplier Information** form under the **"Forms"** category.

- 3) Review the

Instructions page to

confirm how to search for the supplier and then select **"Next"** at the top right-hand side of the page.

Note: The summary box at the right-hand side shows the status and workflow of the form

- 4) Select **Next** on **Details** page

- 5) Complete the following in the **Questions** page and select “**Save Progress**” and “**Next**” at the top right-hand side of the page to navigate to next page.
- Supplier Name
 - Supplier Contact Email Address
 - Specify the information that requires an update
 - Provide the required details
 - Upload supporting documentation (i.e. quote, invoice, contract or written request from the supplier requesting the update)

Generic Request • Update Supplier Information

5

Save Progress Previous Next

Instructions Details Questions Review And Submit

General Business Information

General Business Information

Supplier Name ★ Dammy test

Supplier Contact Email Address ★ smexternal163@yorku.ca

Please select the information that requires updates to the existing Supplier Profile:

★ ☒ General Business Information ☐ Address Information ☐ Contact Information ☐ Location Information

☐ Diversity Information ☐ Insurance Information ☐ Accounts Payable Information ☐ Tax Information

☐ Other

Summary

Incomplete

Update Supplier Information

Created Date 13/04/2026

Form Number 1287410

Purpose Generic Request

What's next?

Workflow

Draft Active

VOR Coordinator Future

- 6) Select **Submit** in the “**Review and Submit**” section of the form, to submit your update request.

Note:

- Ensure a green checkmark appears next to all the listed sections
- You can click the edit button next to each section to edit its information

Generic Request • Update Supplier Information

Save Progress Previous Submit

Instructions Details Questions Review And Submit

Review and Submit

☒ Details Edit

☒ Questions

☒ General Business Information Edit

Summary

Incomplete

Update Supplier Information

Created Date 13/04/2026

Form Number 1287410

Purpose Generic Request

What's next?

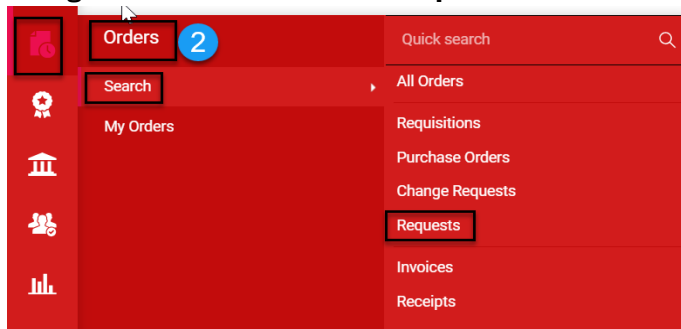
Workflow

Draft Active

VOR Coordinator Future

View Update Supplier Information Status

- 1) [Sign-in](#) to Sm@rtBuy via Faculty & Staff Resources and Services
- 2) Navigate to **Orders>Search>Requests**



- 3) Review the form status and specific information about the request including the date the request was submitted ("**Submitted Date**") and the date the request was approved ("**Completed Date**"). Click on the form to view its information.

	Form Name	Request Number	Request Purpose	Request Status	Created Date/Time	Current Workflow Step	Pending Approver	Form Type	Requestor	Submitted Date	Completed Date
☐	Update Supplier Information	1287410	Generic Request	Under Review	13/04/2026 1:35:27 PM	VOR Coordinator		Supplier Update	York Requestor	13/04/2026 2:17:18 PM	
☐	Non-Catalog Item	1281992	Procurement Request	Incomplete	02/04/2026 8:44:07 PM			Non-Catalog	York Requestor		
☐	Update Supplier Information	1281232	Generic Request	Incomplete	02/04/2026 10:02:29 AM			Supplier Update	York Requestor		
☐	Non-Catalog Item	1275877	Procurement Request	Incomplete	24/03/2026 3:25:34 PM			Non-Catalog	York Requestor		

Note: The "**Current Workflow Step**" column identifies the approval step in which the form is currently pending for review and approval. To view this, click on the specific form under the "**Form Name**" column. The workflow is on the right side of the page

← Generic Request • Update Supplier Information

Save Progress 1 of 13 Results

Details

Form Name (DO NOT EDIT) ★ Update Supplier Information

Purpose Generic Request

Template Title Update Supplier Information

Form Type Supplier Update

Summary

Under Review

Update Supplier Information

Created Date 13/04/2026

Form Number 1287410

Purpose Generic Request

What's next?

Workflow

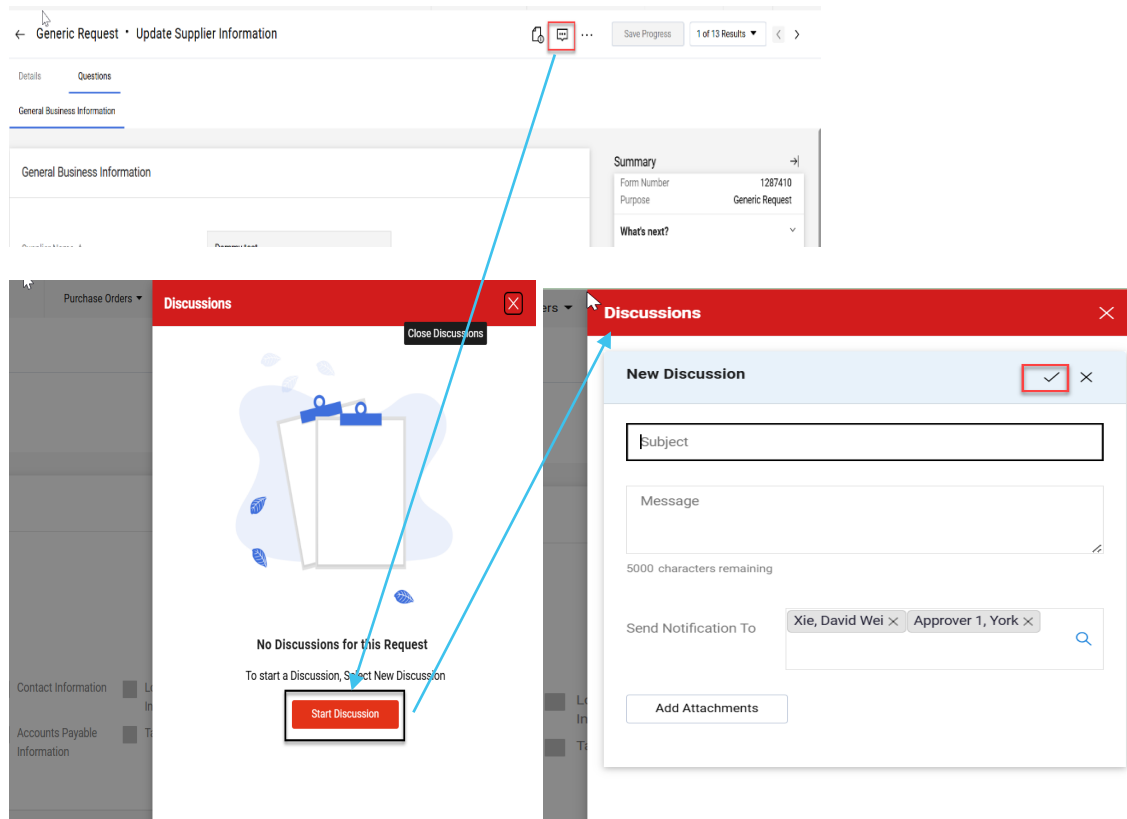
Submitted 13/04/2026 2:17 PM

VOR Coordinator Pending - Approval

Finish

Note: Use the “**Discussion**” section to post additional comments or notes regarding the request.

Click on chat icon  at the top of the screen, then click “**Start Discussion**” to start a discussion with anyone working on the request. Enter the Subject, message and attachment (*if applicable*), then click the check mark at the top to send your message



The screenshot displays the 'Generic Request' interface for 'Update Supplier Information'. At the top, a chat icon is highlighted with a red box. Below the main content area, a 'Discussions' panel is shown. This panel contains a graphic of a clipboard and the text 'No Discussions for this Request'. A red box highlights the 'Start Discussion' button. To the right, a 'New Discussion' form is open, featuring fields for 'Subject' and 'Message', a character count, a 'Send Notification To' section with user selection, and an 'Add Attachments' button. A red box highlights the checkmark icon at the top right of the form.