

09_Create a Supplier Request

Purpose: The purpose of this task is to add a supplier to Workday.

How to Access: Open the **Purchases** worklet, click **More** from the *Actions* section, and select the **Create Supplier Request** button.

Audience: Buyers and Approvers

Helpful Hints:

- Be sure to keep in mind that only select users will have access to create a supplier request in Workday. If you are not authorized, you will not be able to access this Workday task.
- If you need to remove any piece of contact information, click the **Remove** button under the required information to delete.
- Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.

Procedure: Complete the following steps to create a supplier request.

Create Supplier Request

Create Supplier Request

Please fill in all required fields and attach completed W9. If the supplier is a Diversity Business Enterprise or EDGE supplier, please select the box in the Classification tab and attach supporting documents.

Worker * Tricia Mckenney (497279)

Supplier Name *

DUNS Number

Supplier Category

Parent

Tax Authority Form Type

TIN Type

Tax ID

Justification

Contact Information | Classification | Attachments

Add at least one contact.

Add at least one phone number, mailing address, or email address

Add at least one mailing address, phone number, email address or web address.

OK
Cancel

1. As required, complete, review, and/or change the following fields:

Field Name	Required / Optional	Description
Worker	Required	Identify the employee creating the request.
Supplier Name	Required	Identifies the legal name of the company being added to Workday.
DUNS Number	<u>Do Not Use</u>	This functionality has not been enabled for CMSD.
Supplier Category	Required	Identifies the types of products or services the supplier provides.
Parent	Optional	If applicable, enter the name of the parent company.
TIN Type	Required	If applicable, select the withholding and/or tax reporting type for the supplier: <ul style="list-style-type: none"> • SSN or ITIN (Social Security Number or Individual Taxpayer Identification Number) • EIN (Employer ID Number)
Tax ID	Required	To report and file tax forms for the supplier with the IRS, enter the supplier's tax ID.
Justification	Required	Justify the supplier request.

2. Scroll down to add contact information.

Create Supplier Request – Contact Information

Add at least one contact.

Add at least one phone number, mailing address, or email address

Add at least one mailing address, phone number, email address or web address.

Phone

Add

Address

Add

Email

Add

Instant Messenger

Add

Web Address

Add

OK Cancel

3. Click **Add** under **Phone**, to expand the phone details.

Contact Information - Phone

Phone

Country Phone Code X United States of America (+1) ☰

Area Code

Phone Number *

Phone Extension

Phone Device * select one ▼

Type * X Business ☰

Primary

Use For
X Billing ☰
X Remit To
X Shipping

Visibility Public

Comments

Remove

Add

4. As required, complete, review, and/or change the following fields:

Field Name	Required / Optional	Description
Country Phone Code	Required	Do not change.
Area Code	Required	Enter the area code of the supplier's phone number.
Phone Number	Required	Enter the contact number.
Phone Extension	Optional	If applicable, enter the extension for the contact.

Field Name	Required / Optional	Description
Phone Device	Required	Identifies the type of device, and options include: <ul style="list-style-type: none"> • Fax • Landline • Mobile
Type	Required	Do not change.
Primary	Optional	Checkbox to identify if this is the main method of contact. Note: Must identify one of the phone numbers as the Primary.
Use For	Required	Identifies the purpose of this contact.
Visibility	Optional	Checkbox to identify if the contact information is displayed. Note: Always select the Public checkbox.
Comments	Optional	Text box for adding comments for the contact information.

Note: If additional Phone numbers are required, click **Add** and complete the required fields.

5. Click **Add** under **Address** to enter the Supplier's mailing address.

Contact Information - Address

Address

Effective Date * 

Country * 

Address Line 1 *

Address Line 2

City *

State * 

Postal Code *

County

Usage

Type * 

Primary

Use For 

Visibility Public

Comments

6. As required, complete, review, and/or change the following fields:

Field Name	Required / Optional	Description
Effective Date	Required	Identifies when the address is active.
Country	Required	Do not change.
Address Line 1	Required	Enter the street address.
Address Line 2	Optional	Enter the suite or apartment number.
City	Required	Enter the city.
State	Required	Enter the State.
Postal Code	Required	Enter the zip code.

Field Name	Required / Optional	Description
County	Optional	Enter the county.
Type	Required	Do not change.
Primary	Optional	Identify if this address is the main one to use. Note: Must identify one of the addresses as the Primary.
Use For	Optional	Identifies the purpose of the address.
Visibility	Optional	Identifies if the address is to be displayed to the public. Note: Always select the Public checkbox.
Comments	Optional	Enter any additional comments about the address.

Note: If additional addresses are required, click **Add** and complete the required fields.

- Click **Add** under Email to enter the contact's email address.

Contact Information - Email

Email

Email Address *

Type *

Primary

Use For

Visibility Public

Comments

- As required, complete, review, and/or change the following fields:

Field Name	Required / Optional	Description
Email Address	Required	Enter the email address for the supplier contact.
Type	Required	Do not change.

Field Name	Required / Optional	Description
Primary	Optional	Identify if this email is the main one to use. Note: Must identify one of the email addresses as the Primary.
Use For	Required	Identifies the purpose of the email address.
Visibility	Optional	Identifies if the email address is to be displayed to the public. Note: Always select the Public checkbox.
Comments	Optional	Enter any additional comments about the email address.

Note: If additional email addresses are required, click **Add** and complete the required fields.

- As required, click the **Classification** tab to enter the classification for the supplier.

Classification

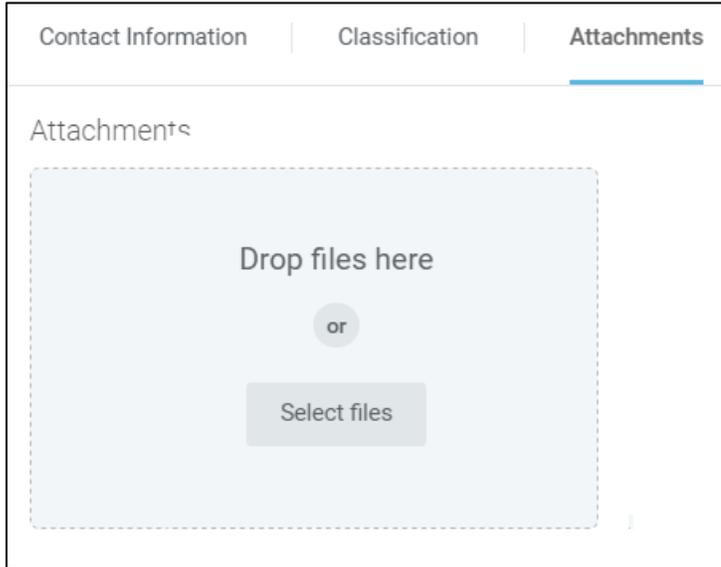
Contact Information	Classification	Attachments
MBE/WMBE Business	<input type="checkbox"/>	
Certification Expiration Date	MM / DD / YYYY 	
Certificate Number	<input type="text"/>	
Certified By	<input type="text"/>	
Spend Categories/Hierarchies	<input type="text"/>	

- As required, complete, review, and/or change the following fields:

Field Name	Required / Optional	Description
MBE/WMBE Business	Optional	Checkbox to confirm the supplier is any form of a diversity or minority certified supplier.
Certification Expiration Date	Optional	Enter the end date of the certification validity period.
Certificate Number	Optional	Enter the certification number.
Certified By	Optional	Enter the name of the person who confirmed the certification.
Spend Categories/Hierarchies	Optional	Identifies the types of products or services the supplier provides.

- As required, click the **Attachments** tab to add all supporting documentation.

Attachments



Contact Information | Classification | **Attachments**

Attachments

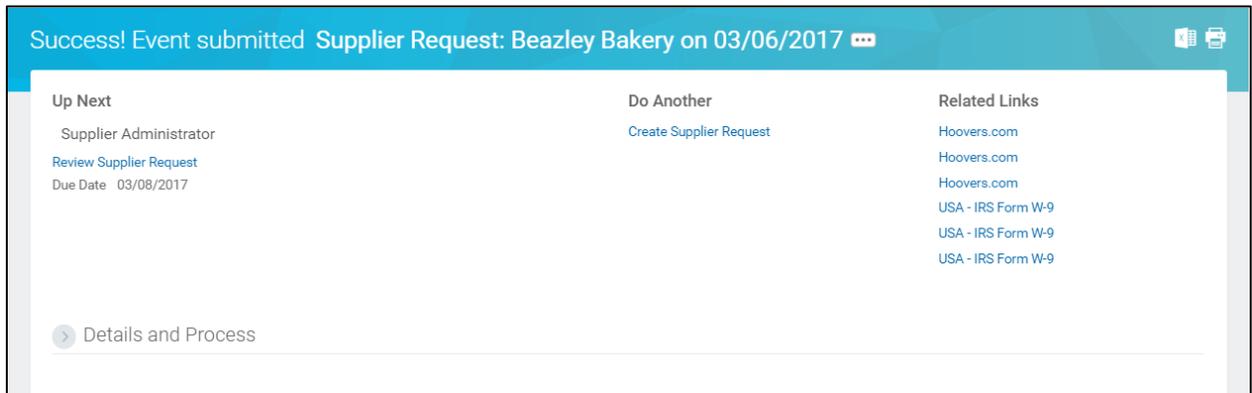
Drop files here

or

Select files

12. Add attachments by dragging and dropping the files in the box, or click **Select files** and navigate to the required file.
13. Click **Ok** to complete the Supplier Request task.

Supplier Request - Success



Success! Event submitted Supplier Request: Beazley Bakery on 03/06/2017

Up Next	Do Another	Related Links
Supplier Administrator	Create Supplier Request	Hoovers.com
Review Supplier Request		Hoovers.com
Due Date 03/08/2017		Hoovers.com
		USA - IRS Form W-9
		USA - IRS Form W-9
		USA - IRS Form W-9

> Details and Process

14. Review the displayed information, and pay particular attention to the **Up Next** section to see the next step in the process.

Result:

You have successfully created a Supplier Request, but be sure to click **Done** to exist this task.

Note: For additional information on this Supplier Request, click  to the left of **Details and Process** and review the available details, prior to clicking **Done**.