

10_Create a Supplier Change

Purpose: The purpose of this task is to request a change to a Supplier in Workday.

How to Access: Enter the Supplier's name in the **Search** field, press enter, and click on the supplier's name to access the supplier's details screen.

Note: If the supplier does not display, click the **All of Workday** category, and then click on the supplier's name.

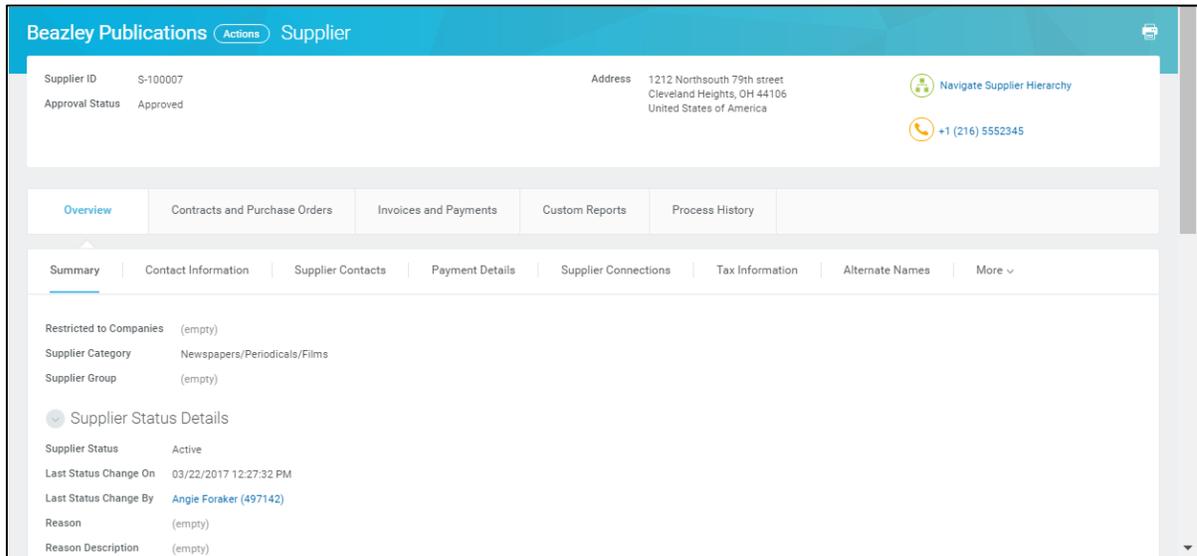
Audience: Buyers

Helpful Hints:

- Be sure to keep in mind that only select users will have access to create or edit a supplier request in Workday. If you are not authorized, you will not be able to access this Workday task.
- 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 change in Workday.

Supplier



Beazley Publications **Actions** Supplier

Supplier ID S-100007 Address 1212 Northouth 79th street
Approval Status Approved Cleveland Heights, OH 44106
United States of America

Navigate Supplier Hierarchy
+1 (216) 552345

Overview Contracts and Purchase Orders Invoices and Payments Custom Reports Process History

Summary Contact Information Supplier Contacts Payment Details Supplier Connections Tax Information Alternate Names More

Restricted to Companies (empty)
Supplier Category Newspapers/Periodicals/Films
Supplier Group (empty)

Supplier Status Details
Supplier Status Active
Last Status Change On 03/22/2017 12:27:32 PM
Last Status Change By Angie Foraker (497142)
Reason (empty)
Reason Description (empty)

1. Review the Supplier's details to confirm the information requires a change.
2. Click **Actions** > **Supplier** > **Create Supplier Change** to edit the Supplier's details.

Create Supplier Change

Create Supplier Change

Only select the Areas you want to Change. Once you click OK, a Draft Supplier Change will be created.

Select All

Supplier and Tax Details	<input type="checkbox"/>	Alternate Names	<input type="checkbox"/>
Payment Details	<input type="checkbox"/>	Procurement Options	<input type="checkbox"/>
Supplier Hierarchy	<input type="checkbox"/>	Classifications	<input type="checkbox"/>
Contact Information	<input type="checkbox"/>	Contingent Worker Options	<input type="checkbox"/>
Settlement Bank Account	<input type="checkbox"/>	Attachments	<input type="checkbox"/>

3. Select only those checkboxes that corresponds to the Supplier's information requiring a change.
Note: For the purpose of this job aid, the **Supplier and Tax Details, Contact Information, Classifications, and Attachments** checkboxes were selected. These are the checkboxes that most users would ever change.
4. Click **Ok**.

Create Supplier Change

Create Supplier Change

Please provide any supporting documents for supplier changes. If changing a supplier's TIN, please create a new supplier request. If you have any further questions, please contact Michelle Michels 216.838.0418.

Beazley Publications Proposed Supplier Name * Supplier ID S-100007 Approval Status Draft

Changes Allowed

Supplier Status

Supplier Status * Reason Reason Description

Supplier Details

Restricted to Companies DUNS Number Supplier Category * Supplier Group Customer Account Number Certificate of Insurance Date

Payment Details

Default Payment Terms (empty) Payment Type * Default Payment Type * Credit Card (empty) Always Separate Payments Do not pay during Bank Account updates Accept All Currencies Accepted Currencies USD Default Currency (empty) Remittance Integration System (empty)

Default Supplier Payment Memo

Default Text Use Supplier Reference Use Invoice Memo Use Supplier Connection Memo None of the above

Supplier Hierarchy

Children (empty) Parent (empty)

 [Home](#) [Tax Information](#) [Alternate Names](#) [Procurement Options](#) [Classifications](#) [Contingent Worker Options](#) [Change History](#) [Attachments](#)

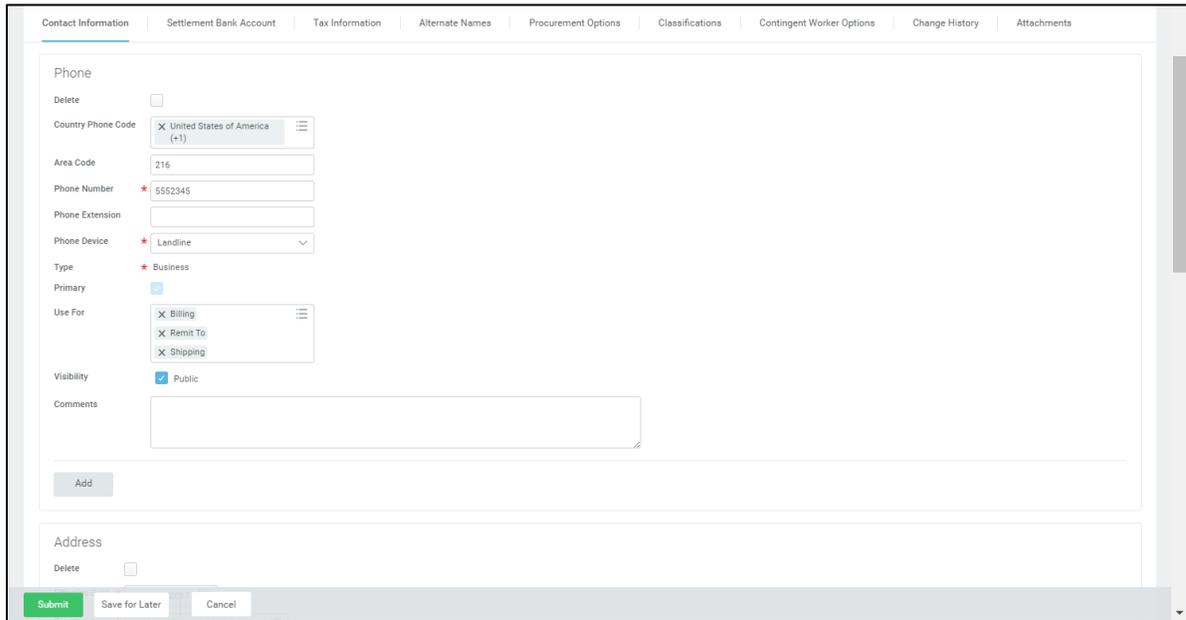
5. As required, complete, review, and/or change the following fields:

Field Name	Required / Optional	Description
Proposed Supplier Name	Required	Identifies the legal name of the company being added to Workday.
Supplier Status	Required	Identifies the current status of the supplier.
Reason Description	Required	Identifies the changes being requested. Note: Be sure to list what is changing, so the approver will know what is different.
Supplier Category	Optional	Identifies the types of products or services the supplier provides.

6. Scroll down to review the *Contact Information* section.

Note: If you are not making a change to this section, scroll to the step applying to the changes you are making to the supplier.

Create Supplier Change – Contact Information (Phone, Address, & Email)



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

Field Name	Required / Optional	Description
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.
Phone Device	Required	Identifies the type of device, and options include: <ul style="list-style-type: none"> • Fax • Landline • Mobile
Use For	Required	Identifies the purpose of this contact.
Visibility	Optional	Checkbox to identify is the contact information is displayed.
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. The **Primary** checkbox must be selected for at least one of the phone number(s) listed for the supplier.

8. As required, complete/review/change the following Address fields:

Field Name	Required / Optional	Description
Effective Date	Required	Identifies when the address is active.
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.
County	Optional	Enter the county.
Type	Required	Do not change.
Use For	Optional	Identifies the purpose of the address.
Visibility	Optional	Identifies if the address is to be displayed to the public.
Comments	Optional	Enter any additional comments about the address.

Note: If additional addresses are required, click Add and complete the required fields. The **Primary** checkbox must be selected for at least one of the address(s) listed for the supplier.

9. As required, complete/review/change the following Email fields:

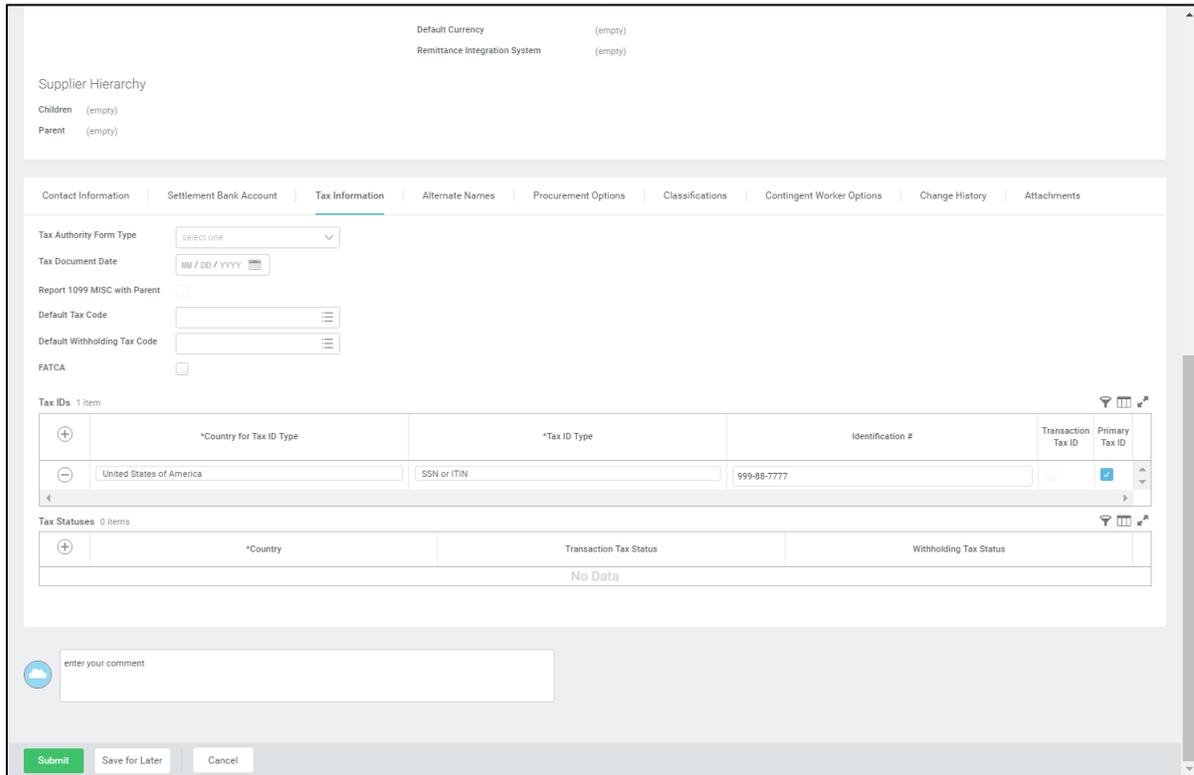
Field Name	Required / Optional	Description
Email Address	Required	Enter the email address for the supplier contact.
Use For	Required	Identifies the purpose of the email address.
Visibility	Optional	Identifies if the email address is to be displayed to the public.
Comments	Optional	Enter any additional comments about the email address.

Note: If additional email addresses are required, click Add and complete the required fields. The **Primary** checkbox must be selected for at least one of the email address(s) listed for the supplier.

10. Click the **Tax Information** tab to complete/change the tax information for the supplier.

Note: If you are not making a change to this section, scroll to the step applying to the changes you are making to the supplier.

Create Supplier Change – Tax Information



11. As required, complete the following fields:

Field Name	Required / Optional	Description
Tax Document Date	Optional	Identifies the validity date for the tax form.
Tax ID Type	Required	Identifies the form of Tax ID that the supplier uses.
Identification Number	Required	To report and file tax forms for the supplier with the IRS, enter the supplier's tax ID.

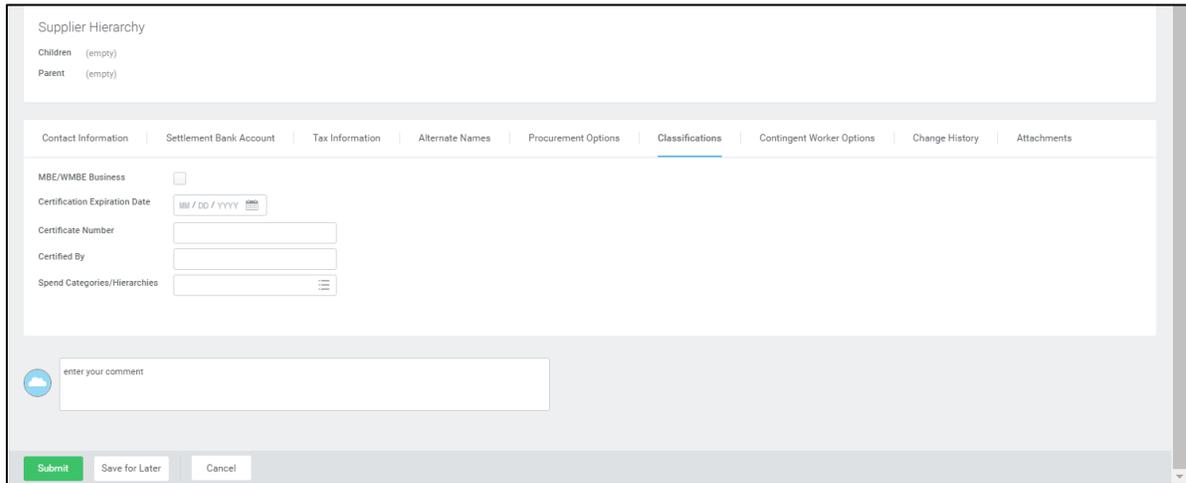
12. As required, select or deselect the **Primary Tax ID** checkbox.

13. Click the **Classification** tab to enter the classification for the supplier.

Note: This is only required for those suppliers who are MBE/DBE certified.

Note: If you are not making a change to this section, scroll to the step applying to the changes you are making to the supplier.

Create Supplier Change – Classification



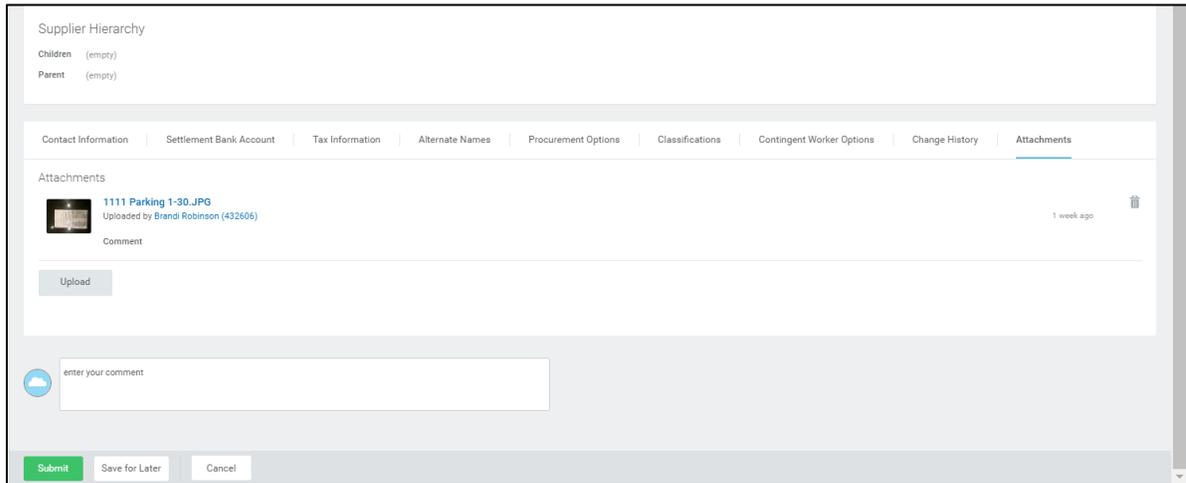
14. As required, complete, review, and/or change the following fields:

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.

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

Note: Attachments are required when selecting the **MBE/WMBE Business** checkbox.

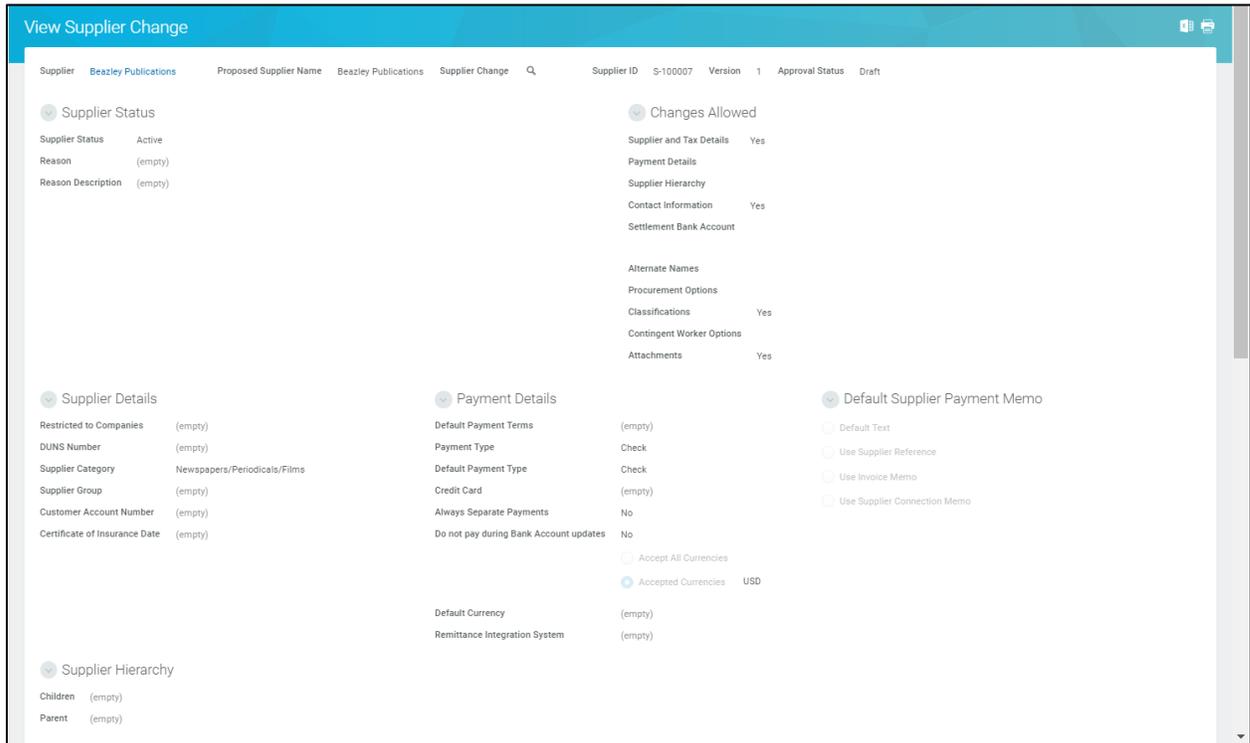
Create Supplier Change – Attachments



16. As required, click **Upload**, navigate to the required file, and click **Open** to add additional attachments to the supplier’s record.
17. As required, complete one or more of the following:

If you want to...	Then...	Go to
Cancel the update,	Click <input type="button" value="Cancel"/> .	– Note: This only cancels the screen/view.
Save the changes to the supplier, to finish processing at a later time,	Click <input type="button" value="Save for Later"/> .	Step 18
Finish processing the change to the Supplier,	Click <input type="button" value="Submit"/> .	Step 19

View Supplier Change



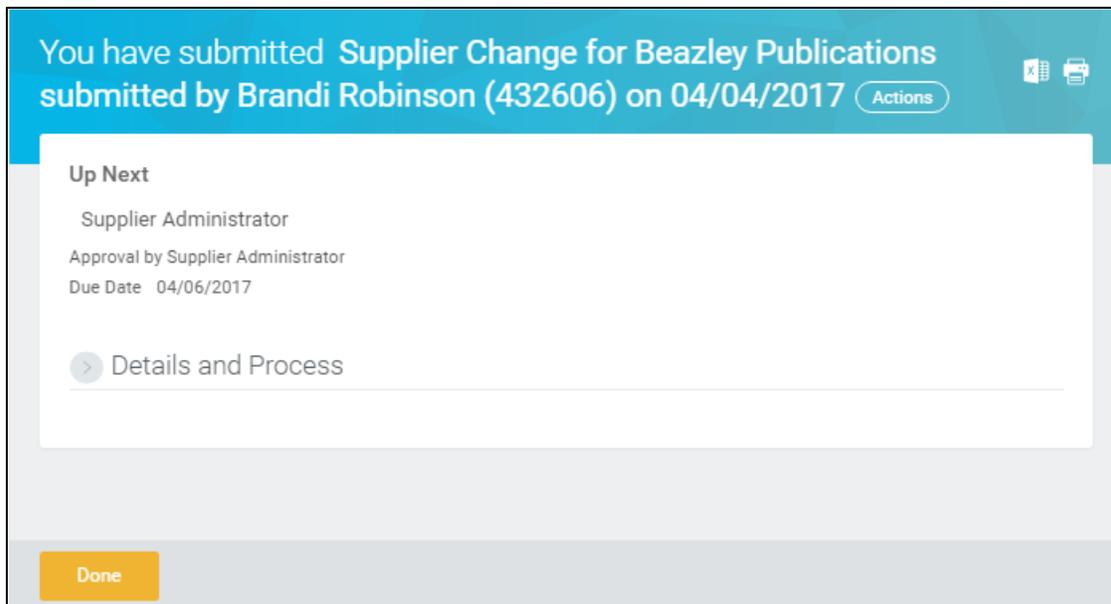
The screenshot shows the 'View Supplier Change' interface with the following sections:

- Supplier:** Beazley Publications
- Proposed Supplier Name:** Beazley Publications
- Supplier Change:** Search icon
- Supplier ID:** S-100007
- Version:** 1
- Approval Status:** Draft
- Supplier Status:** Active
 - Reason: (empty)
 - Reason Description: (empty)
- Changes Allowed:**
 - Supplier and Tax Details: Yes
 - Payment Details: Yes
 - Supplier Hierarchy: Yes
 - Contact Information: Yes
 - Settlement Bank Account: Yes
 - Alternate Names: Yes
 - Procurement Options: Yes
 - Classifications: Yes
 - Contingent Worker Options: Yes
 - Attachments: Yes
- Supplier Details:**
 - Restricted to Companies: (empty)
 - DUNS Number: (empty)
 - Supplier Category: Newspapers/Periodicals/Films
 - Supplier Group: (empty)
 - Customer Account Number: (empty)
 - Certificate of Insurance Date: (empty)
- Payment Details:**
 - Default Payment Terms: (empty)
 - Payment Type: Check
 - Default Payment Type: Check
 - Credit Card: (empty)
 - Always Separate Payments: No
 - Do not pay during Bank Account updates: No
 - Accept All Currencies:
 - Accepted Currencies: USD
 - Default Currency: (empty)
 - Remittance Integration System: (empty)
- Default Supplier Payment Memo:**
 - Default Text:
 - Use Supplier Reference:
 - Use Invoice Memo:
 - Use Supplier Connection Memo:
- Supplier Hierarchy:**
 - Children: (empty)
 - Parent: (empty)

18. The saved Supplier change displays in View mode.

Note: To re-access the current supplier change, click the **Additional Actions** button to the right of the Supplier's name, and select **Edit > Edit Pending Change**.

You have submitted



The screenshot shows a confirmation message with the following content:

- Header:** You have submitted Supplier Change for Beazley Publications submitted by Brandi Robinson (432606) on 04/04/2017. Includes an 'Actions' button and icons for Excel and Print.
- Up Next:**
 - Supplier Administrator
 - Approval by Supplier Administrator
 - Due Date 04/06/2017
- Details and Process:** A button with a right arrow icon.
- Done:** A large orange button at the bottom.

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

Result:

You have successfully created a Supplier Change, but be sure to click **Done** to exist this task. Now access your Workday **Inbox (Actions or Archive tabs)** to confirm the creation of the supplier change.

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