

Create Supplier Request

QUICK TAKE: For New Suppliers, Create Supplier Request in Workday

Create Supplier Request

1. Items Needed to Create Supplier –
 - a) W-9 from Supplier – This will be upload as an attachment when Creating Supplier Request
 - b) What Spend Category (Currently known as Object Code)
 - a) Example: Advertisement, Entertainment, Supplies, etc.
 - c) Is the Supplier a 1099
 - a) Examples of 1099: *Auditing, Consulting, Contractors, Guest Speaker, Legal services, Maintenance Services, Performers, Professional Services, Rental properties, etc.*
 - d) *Supplier Contract Name*
 - e) *Email Address*
 - f) *Mailing Address*
 - g) *Phone Number*
 - h) *Website if Available*
 - i) *Any Attachments pertaining to Supplier*
 - a) *Example: Contract*

Create Supplier Request

Create Supplier Request

Worker * La'Sandra N. Lockett

Supplier Name *

DUNS Number

Restricted to Companies

Supplier Category

Parent

Tax Authority Form Type

TIN Type

Tax ID

Justification

Scroll down to add contact information

Required Boxes are Mark with an *

Field Name	Required/Optional	Description
Supplier Name	Required	Identifies the legal name of the company being added to Workday
Supplier Category	Required	Identifies the types of goods/service 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)
Tin Type	Required	To report and file tax forms for the supplier with the IRS, enter the supplier's tax ID. Information can be found on W-9
Justification	Required	Reason for Supplier Request

Create Supplier Request

[Contact Information](#)
 [Classification](#)
 [Attachments](#)
 [Supplier Contact](#)

Phone

Add

Address

Add

Email

Add

Instant Messenger

Add

Web Address

Add

Required Boxes are Mark with an *

Field Name	Required/Optional	Description
Phone	Required	Supplier Phone Number. Can add more than one phone. Required to mark primary
Address	Required	Supplier Address. Can add more than one address. Required to mark primary.
Email	Optional	E-mail address for Supplier.
Instant Messenger	Optional	If supplier has an instant messenger it can be provided.
Web Address	Option	Web address for Supplier
Justification	Required	Reason for Supplier Request

Click Ok to

Create Supplier Request

[Contact Information](#)
 [Classification](#)
 [Attachments](#)
 [Supplier Contact](#)

Phone

Add

Address

Add

Email

Add

Instant Messenger

Add

Web Address

Add

Required Boxes are Mark with an *

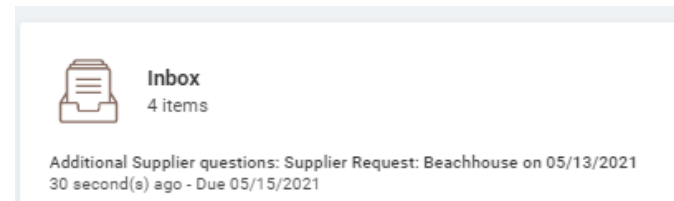
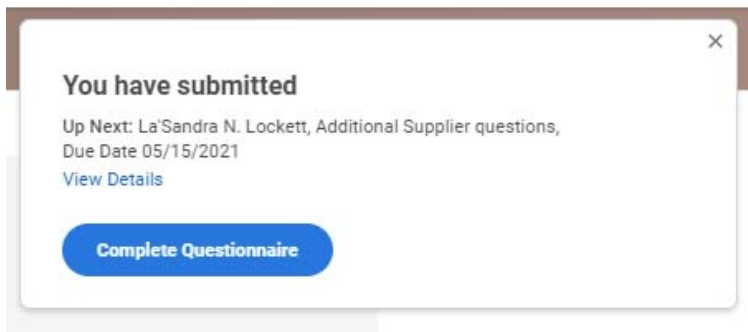
Field Name	Required/Optional	Description
Classification	Required	Select Spend Category for Supplier (supplies, software, etc...)
Attachment	Required	Upload W-9, Contract or any other information regarding new Supplier
Supplier Contact	Required	Provide Supplier Contact Information

Click Ok to more to Complete Questionnaire

Supplier Questionnaire

After Supplier Request has been completed, the next step is to Complete Supplier Questionnaire

- Complete Questionnaire will appear after you have clicked OK from the Create Supplier Request.
- Click on Complete Questionnaire
- Complete Questionnaire will also appear in your Inbox



Supplier Questionnaire

Complete Questionnaire 'Supplier Request' for Supplier Request: Beachhouse on 05/13/2021

54 second(s) ago - Due 05/15/2021

Supplier Request

Supplier Group (Required)

X SUPPLIERS A-L

Purchase order Informatio (Required)

Print
 Phone
 eMail

Payment Type (Required)

X ACH
X Check

Questionnaire provides additional information for Supplier

1. Select Supplier Group
2. Purchase order Information
3. How will purchase order be submitted to Supplier?
4. Payment Type – Select One or all
 1. ACH
 2. Check

Supplier Questionnaire

Payment Type (Required)

ACH
 Check

Please provide following ACH/Wire Banking Information:

Bank Country:
Bank Name:
Bank Routing Number:
Bank Account Number:
intermediator Bank name:

Bank Country:
Bank Name:
Bank Routing Number:

Payment Terms

- 1% Net 10
- 2% Net 10
- Due on Receipt
- Net 15
- Net 20
- Net 30
- Net 45
- Net 60

One Time Pay to Supplier (Required)

- Yes
- No

7/6/2021

4. If Banking Information is available – Copy and Paste Information in Box and provide the banking information from Supplier
5. Select Payment Terms if Known
6. One Time Pay to Supplier

Supplier Questionnaire

Once Supplier Request and Questionnaire is completed by the Requestor the request is routed to Irene, Sandy or Norman to complete the Supplier Request.

Once Supplier is created, the Requestor can Create Supplier Invoice Request.

