

## CREATING A SUPPLIER REQUEST

**Purpose:** To request a supplier not currently available in the Supplier Masterfile.

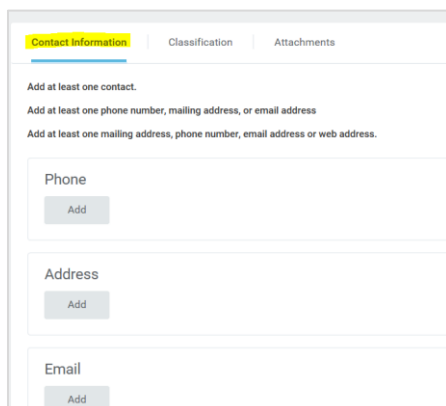
**How to access:** Open the **Purchases** worklet, then select **Create Supplier Request**.

**Helpful hints:**

- Do not place orders directly with a new supplier until the supplier has been approved by Purchasing and added to the Masterfile. Allow 2 business days to establish a supplier. For emergencies contact the Purchasing Department at x3456.
- **You will not be able to edit your Supplier Request form after it is submitted. Contact Purchasing to provide additional information to the request.**

1. Click the **Purchases** worklet, then under **Actions**, select **Create Supplier Request**.
2. In the **Supplier Name** field, enter the Supplier's full name.
3. In the **Justification** field, provide a detailed description of the Supplier's business.
4. Complete each contact section below.

**Note: You must enter and select as PRIMARY one Address, Phone and Email.**



The screenshot shows a web form with three tabs: "Contact Information" (selected), "Classification", and "Attachments". Below the tabs, there are three sections for adding contact information:

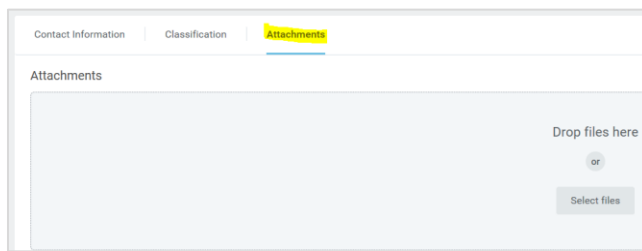
- Phone:** A section with an "Add" button. Above it, the text reads "Add at least one phone number, mailing address, or email address".
- Address:** A section with an "Add" button. Above it, the text reads "Add at least one mailing address, phone number, email address or web address".
- Email:** A section with an "Add" button.

5. Click the **Add** button under **Phone**.
  - 5A. Enter each of the following fields: **Area Code**, **Phone Number**, **Phone Device**, **Type** and check the **Primary** box where applicable.
  - 5B. Use the **Comments** field to add any **Contact Names**.
  - 5C. Click the **Add** button only to provide another phone number.

6. Click the **Add** button under **Address**.
  - 6A. Enter each of the following fields: **Address, City, State, Postal Code**. Then select **Usage Type** and check the **Primary** box where applicable.
  - 6B. Use the **Comments** field to add any **Contact Names**.
  - 6C. Click the **Add** button only to provide additional addresses.
7. Click the **Add** button under **Email**.
  - 7A. Enter a valid **Email Address** and **Type**, check the **Primary** box where applicable.
  - 7B. Use the **Comments** field to add any **Contact Names**.
  - 7C. Click the **Add** button only to provide additional email addresses.

The image displays three screenshots of the Workday Finance interface, each showing a different section of a contact record. The sections are Phone, Address, and Email. Each section has a similar layout of fields and options. In the Address section, the 'Effective Date' is set to 09 / 26 / 2017 and the 'Country' is 'United States of America'. The 'Address Line 1' field is highlighted in yellow. In the Email section, the 'Email Address' field is highlighted in yellow. The 'Primary' checkbox is checked in all three sections. The 'Use For' dropdown menu is set to 'Billing' in all three sections. The 'Visibility' checkbox is checked for 'Public' in all three sections. The 'Comments' field is empty in all three sections.

8. Click on the **Attachments** tab and upload the Supplier completed W9 form if available.

A screenshot of a web form interface. At the top, there are three tabs: 'Contact Information', 'Classification', and 'Attachments'. The 'Attachments' tab is selected and highlighted in yellow. Below the tabs, the word 'Attachments' is displayed. The main area is a large, light gray rectangular box. On the right side of this box, the text 'Drop files here' is visible, followed by a small circle containing the word 'or', and a button labeled 'Select files'.

9. After all information has been entered, click **OK** in the lower left corner, then **Done**. The Supplier Request is then sent to the Purchasing Department for approval and processing.

**Note: You will not be able to edit your Supplier Request form after submission. Contact Purchasing to provide additional information for the request.**