CREATE A SUPPLIER REQUEST

You can create requests for suppliers that are not currently set up in Workday. After entering the required information, the request will route to the supplier administrator for approval and completion.

From your Home page:

1. Navigate to the **Create Supplier Request** task.

Supplier Information

Note: If this supplier is a non-US individual, please reach out to Margaret Lewis' team and they will submit the Supplier Request ensuring that all documentation and requirements are met. If it is a foreign entity/company we will need banking/wire information attached to the request as we do not mail checks outside the US & Canada.

2. Include supplier information, if available:

   a. Supplier Name (required)

   b. DUNS Number

   c. Restricted to Companies

   d. Supplier Category (if this is a Credit Card Supplier, please select Credit Card as the supplier category)

   e. Parent (leave blank)

   f. Tax Authority Form Type

   g. TIN Type

   h. Tax ID

   i. Justification (please tell us why you need this supplier added to the database)

Contact Information Tab

3. To enter contact information, click on the **Add** button under each of the fields (phone, address, email, etc.). When you select the **Add** button for each of the Contact Information methods, additional fields will populate Enter at least one piece of contact information, including an email. For each Contact Information field (phone, address, etc.), you'll need to identify a Primary (select the Primary checkbox).
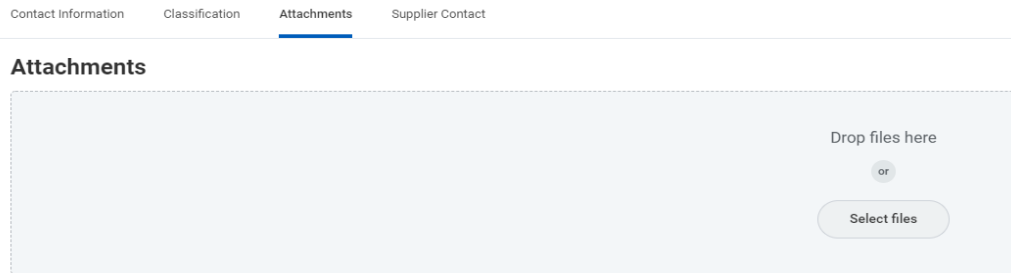
Note: For a Credit Card Supplier, you are not required to include a W9 form and any contact information that is not easily accessible.

4. *Business** will default as the type of the contact. The **Use For** field will define the usage and the **Visibility** checkbox will determine if the supplier record is public. Please use the default values populated by the system (there is no need to change these).

Attachments Tab

5. Select the **Attachments** tab and include an attachment for the supplier request (W9 form for example).

Contact Information   Classification   **Attachments**   Supplier Contact

Attachments

Drop files here

or

Select files

6. Click [OK] to begin the review and approval process by a **Supplier Administrator**. The Supplier Administrator will be responsible to review and populate any required additional information before the supplier is created.

7. Click **Done**.

Note: The Classification and Supplier Contact tabs are for internal Accounts Payable use only. You do not need to fill them out.

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