

EXPENSES

Create Supplier and Procurement Requests



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.

Create Supplier Request

Complete as much information about the supplier as you know. If you have a list of the supplier's items, include this as an attachment.

Worker * Brian Kaplan

Supplier Name *

DUNS Number

Restricted to Companies

Supplier Category

Parent

Tax Authority Form Type

TIN Type

Tax ID

Justification

OK **Cancel** **Attachments** **Done**

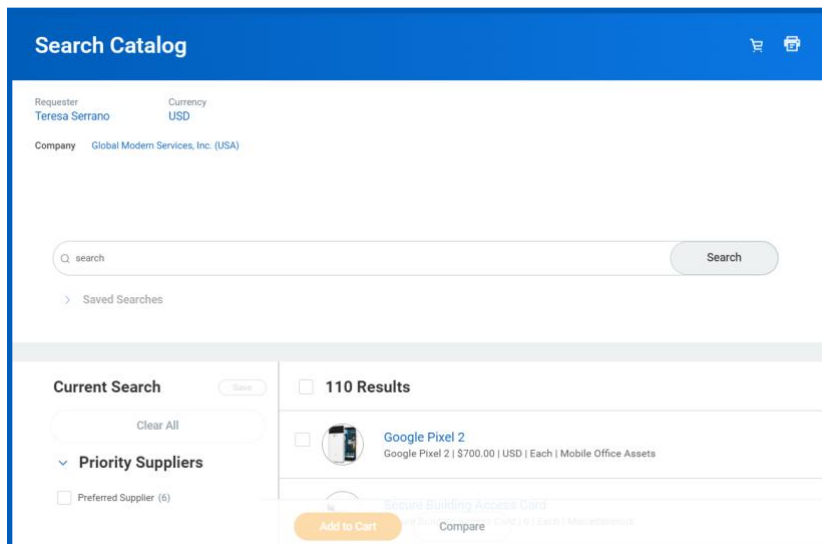
From your Home page:

1. Navigate to the **Create Supplier Request** task.
2. Include supplier information, if available:
 - a. Supplier Name (required)
 - b. DUNS Number
 - c. Restricted to Companies
 - d. Supplier Category
 - e. Parent
 - f. Tax Authority Form Type
 - g. TIN Type
 - h. Tax ID
 - i. Justification
3. Enter at least one piece of contact information. If you are entering a phone number, you will need to identify it as Primary.
4. Click **OK**, and then **Done**.


CREATE A PROCUREMENT REQUEST

You can create a procurement request to order job-related assets from your organization.

1. Navigate to the **Search Catalog** task.
2. Confirm your Company, Requester, Currency, Ship-To address, and optionally, Requisition Type, Cost Center, Location, Region, and Additional Worktags (many of these will auto-populate).
3. Click **Search**.
4. Search for items to order by either:
 - a. Scrolling through the list of available items.
 - b. Filtering items by Priority Suppliers, Category Hierarchy, Category, Supplier, Catalog, Item Tags, or Manufacturer (if your company has catalogs loaded).
 - c. Enter your criteria in the Search field.



5. Click the **checkbox** next to the items you want to order, and then click **Add to Cart**.

6. Review your cart by clicking the **Cart**  icon in the upper right, then click **Checkout** to proceed.



Note: Click Continue Shopping to select additional items from the Catalog. You can also Request Non-Catalog Items, Connect to Supplier website, Add from Templates and Requisitions, Select from My Procurement Favorites, or Request Project-Based Services.

7. You can review the procurement request before submitting it. You can also upload an attachment to provide more information for the approver.
8. Click **Submit**.
9. View the submitted purchase request and any approvals needed by your organization by expanding the details and process arrow. Click **Done** to complete your requisition.