# workday.

#### VUMC BUSINESS EDUCATION



# **Request a New Supplier**

Workday allows anyone to request a new supplier if an existing supplier does not carry needed items. The employee initiates the supplier request and then a manager must approve the request before it is forwarded to a Supplier Contract Specialist for final approval. Follow the steps below to initiate a request for a new supplier. The Approved Supplier List can be found here: <u>Approved Supplier Guide</u>.

# Form the Workday Homepage:

1. In the search bar, type **Create Supplier Request**.

2. Select Create Supplier Request Task.

**Note:** All fields that are required are listed at the top of the item. Be sure to double check that you have completed all of these fields before submission.

3. A new window will open with the Create Supplier Request Task. The initiator's name will be linked as the Worker. Type the new **Supplier Name**.

Select the **Prompt** icon next to **Supplier Category**.
 Then choose the appropriate category from the drop-down menu.

5. Provide a **justification** for the new Supplier Request. **Note:** Common justifications may include a specialty item needed from a specific supplier or current suppliers no longer carry a needed item.

**Note:** All other fields are optional. You can add the information in if available.

## From Create Supplier Request:

1. At the bottom of the first page, select **Contact Information**.

**Note:** The only two items from this menu that are required are **Contact Information** and **Supplier Contact**.

2. In the request, you must provide contact information for the new supplier. The three that are required are **Phone**, **Address**, and **Email**. Select **Add** under **Phone**.

3. Type the **phone number** associated with the supplier.

4. Check the **box** next to **Primary**. If left unchecked, you will receive an error message.

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	Create Supplier Request						
	Create Supplier Invoice Request Task	ate Supplier Invoice Request					
Create Supplier Request							
Please enter Supplier Name, Supplier Category, Justification, Phone, Address, Email, Supplier Contact, and Supplier Contact's Email. For Justification, please explain what products or services will be purchased, why this supplier was selected, and why we cannot use an existing supplier.							
Worker * Walter Melion (1234567)							
Supplier Name * Dunder Mifflin							
Restricted to Co	Companies 📃						
Supplier Catego	gory × Office Supplies 📃 4						
Parent							
Tax Authority Fe	Form Type select one 💌						
TIN Type :=							
Tax ID							
Justification	Justification Paper supplier no longer carries printer paper.						
Contact Information Classification Attachments Supplier Contact							
OK Cancel							

Contact Info	rmation 1	Classification	Attachments	Supplier Contact	
Contact Information Phone Add	Classification Attachments	Suppler Contact	~~~~		
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Address

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#### From Contact Information:

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1. Once a phone number has been entered, scroll down and select **Add** under **Address**.

2. Some information will populate for you. Type the **address of the supplier**, including the street address, the state, and the postal code.

3. Check the **box** next to **Primary**. If left unchecked, you will receive an error message.

4. Once an address has been entered, scroll down and select **Add** under **Email**.

5. Type the **email address** of the supplier.

6. Check the **box** next to **Primary**. If left unchecked, you will receive an error message.

## From Supplier Contact:

1. Select Supplier Contact.

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2. In this section, you will add any information for a specific person you have been in contact with from the new supplier. Type in the Supplier Contact's **First** and **Last Names**.

3. Type in the Supplier Contact's **Email Address** and indicate whether this is a **Home** or **Work** email address.

4. Select OK.

**Note:** Your manager will receive an inbox notification and will have a To-Do task to approve or deny the request. The Supplier Contract Specialist will complete the same process.

Contact Information Cl	assification	Attachments	Supplier Contact				
Country * X United States of America		Email Address * dwightkschr	ute@nomail.com				
First Name * Dwight Middle Name Last Name * Schrute	2	Type * × Work Comments					
Suffix	:=						
OK 4 Cancel							

\* × United States of

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Add

**Next Steps:** After approval from your manager, the Supplier Contract Specialist will review the request. If approved, the request to establish the new supplier will be sent to the Supplier Maintenance team. The Supplier Maintenance team will reach out to the supplier utilizing the email address/contact information provided on the request. The Supplier will be required to complete the supplier record, banking information, and provide a W-9 through a secure portal. This information must be completed before the Supplier record can be finalized by the Supplier Maintenance team. Once the record is finalized, it will be added and available in Workday.

#### In case of error message:

- 1. Any states listed in contact information must match the Postal Code provided.
- 2. The phone number area code must be valid.
- 3. Email addresses must contain both an @ symbol and domain (.com, .org, .net, etc.).