

Creating a new supplier in Workday

Create Requests for Suppliers - Create requests for suppliers that aren't currently set up in Workday. Suppliers must be set up before you can create a requisition.

Workday > Menu > Purchases > Create Supplier Request

The screenshot shows the 'Create Supplier Request' interface in Workday. It is divided into two main sections: 'Actions' and 'View'. The 'Actions' section on the left contains a vertical list of buttons: 'Request Non-Catalog Items', 'Connect to Supplier Website', 'Add from Templates/Requisitions', 'Select from My Procurement Favorites', 'Create Receipt', 'Create Supplier Request' (which is highlighted with a blue border), and 'Edit Receipt'. Below these buttons is a link that says 'Less (2)'. The 'View' section on the right contains two buttons: 'Requisitions' and 'Supplier Requests'.

An IRS Form W-9 and a New Vendor/Supplier Application form must be completed by the vendor/supplier and attached to the supplier request. The forms are located on the UWS website at Inside UWS > Udocs > Business Office > New Supplier Forms.

These forms and a more comprehensive guide to Workday purchasing can be found at Workday > Menu > Purchases > Training and Support > Procurement Job Aids

In the Workday supplier request, complete the following fields based on the information on the IRS Form W-9:

1. Supplier Name – Line 1 of the W-9
2. Tax Authority Type – Choose 1099 (MISC/NEC)

3. TIN Type – Choose EIN or SSN, depending on entry in field completed in Part I of the Taxpayer Identification Number (TIN) field on the IRS Form W-9
4. Tax ID – Enter the number from Part I of the Taxpayer Identification Number (TIN) field on the IRS Form W-9. Include the dashes.

Make sure the IRS form W-9 is signed and dated. Note: There is a comment section to request that an alternate name be included if line 2 of the W-9 is completed (example later in the document).

Worker	* Debbie Ziolkowski
Supplier Name	* <input type="text"/>
DUNS Number	<input type="text"/>
Restricted to Companies	<input type="text"/> ⋮
Supplier Category	<input type="text"/> ⋮
Parent	<input type="text"/> ⋮
Tax Authority Form Type	select one ▼
TIN Type	<input type="text"/> ⋮
Tax ID	<input type="text"/>
Justification	<input type="text"/>

Complete the Contact information by clicking the add button for **Phone, Address, and Email.**

Contact Information	Classification	Attachments
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Phone

Add

Address

Add

Email

Add

See detailed example below for data entry specifications. Many of the options will pre-populate.

For the **Phone** field - use parenthesis and dashes to separate the segments of the phone number and select a phone device type, and mark the primary box.

For the **Address** field - enter the address, city, state and zip code with at least the first 5 zip code digits. County is a required field, please enter if known, otherwise enter the city name. Select the Primary box.

For the **Email** field – enter the email address and select the primary box.


Other fields are optional, enter if you have them. The Use For field pre-populates, if your vendor/supplier has different contact information for various type of functions or transactions, please contact Amanda Thornton or Lisa Lopez for further guidance.

Attach the W9 and the New Supplier/Vendor Application Form by selecting Attachments and attach the applicable files by dropping the files or selecting the files.

Make sure the IRS form W-9 is signed and dated.

Use the comment section to request that an alternate name be included if line 2 of the W-9 is completed.

enter your comment



Please add alternate name of TESTING LLC as indicated on line 2 of the W-9|

Then **Click OK**. Your Supplier Request along with the attachments will go to Accounts Payable for review and approval.

Create Supplier Request

Complete the information below. Use the Attachment tab to upload the New Vendor Form and W9 (or W8 for international) completed and signed by the supplier.

Worker * Debbie Ziolkowski

Supplier Name *

DUNS Number

Restricted to Companies

Supplier Category

Parent

Tax Authority Form Type

TIN Type

Tax ID

Justification

Contact Information Classification **Attachments**

Attachments

Drop files here

or

Select files



OK

Cancel

Example of a completed Supplier Request:

Complete the information below. Use the Attachment tab to upload the New Vendor Form and W9 (or W8 for international) completed and signed by the supplier.

Worker	★ Felecia Brown
Supplier Name	★ TEST Supplier Request
DUNS Number	
Restricted to Companies	
Supplier Category	
Parent	
Tax Authority Form Type	1099 MISC
TIN Type	X 1 - EIN
Tax ID	423669873
Justification	

Contact Information Classification Attachments

Phone

Country Phone Code	★ X United States of America (+1)
Phone Number	★ (312) 379-1613
Phone Extension	
Phone Device	★ Landline
Type	★ Business
Primary	<input checked="" type="checkbox"/>
Use For	X Billing X Remit To X Shipping
Visibility	<input checked="" type="checkbox"/> Public
Comments	

Address

Effective Date * 07 / 03 / 2019 

Country * United States of America 

Address Line 1 *

Address Line 2

City *

State * Illinois 

Postal Code *

County

Usage

Type * Business

Primary

Use For Billing 
 Remit To

Email

Email Address *

Type * Business

Primary

Use For Billing 
 Remit To
 Shipping

Visibility Public

Comments

Contact Information Classification Attachments

Attachments

 w9_starter.pdf 
Comment

 New Vendor Application Form_starter.pdf 
Comment

Questions? Please contact:

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