MC MONTGOMERY COLLEGE

Create Supplier Request
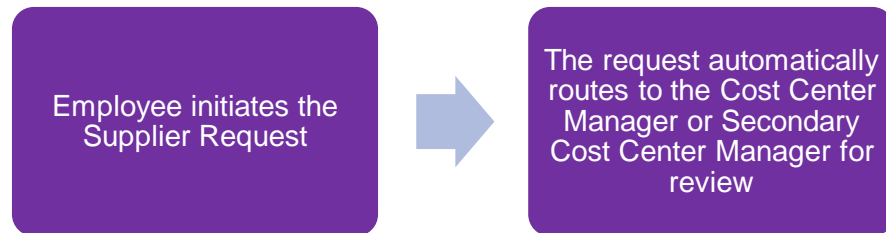*Workday Job Aid for Employees*

Overview

This job aid explains how to create a request for a supplier that is yet to be set up in Workday. If the Supplier does not exist in Workday, then a Supplier Request must be created. Once the Request is created, the requestor receives a notification, and the supplier invoice can be created by AP Data Entry Specialist or Project Manager AP Data Entry Specialist.

Process Flow: Supplier Request

Employee initiates the Supplier Request ➡ The request automatically routes to the Cost Center Manager or Secondary Cost Center Manager for review

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Workday Job Aid for Employees

Create Supplier Request

1. Using the Search field, enter and select **Create Supplier Request**.

2. The Worker field will automatically populate with your name.

3. Enter the **Supplier Name**.

4. Leave **DUNS Number** blank.

5. Leave **Unique Entity Identifier** blank.

6. Leave **Restricted to Companies** blank.

7. Select a **Supplier Category**, if applicable.

   Note: Categories are assigned by the first letter of the Supplier Name. Select the letter category using the first letter in the supplier's name.

8. Leave **Parent** blank.

9. Leave **Tax Authority Form Type** blank.

   Note: Procurement Office will populate this field.

10. Leave **TIN Type** blank.

    Note: Procurement Office will populate this field.

11. Enter the **Tax ID**.

    Note: It is mandatory to enter a Tax ID.

12. Enter a **Justification**, if applicable.

13. Select the **Contact Information** tab. Enter either the Supplier's **Phone, Address,** or **Email** information by using the **Add** button.

    - **Phone**: Enter **Country Phone Code, Phone Number**, **Phone Device**, **Use For**, **Visibility** and any **Comments.**

    - **Address:**
      Enter **Country, Address**, **City**, **State**, **Postal Code Use For**, **Visibility** and any **Comments**.

    - **Email**: Enter **Email Address, Primary** (if applicable) **Email Address Use For**, **Visibility** and any **Comments**.

      Note: You must select **Primary**.

14. Select the **Attachments** tab.

15. Drag-and-drop the files into the field or click **Select Files** to browse files on your computer.

    Note: The supplier's W-9 form is required to upload.

16. If you are not ready to submit your request, click **Save for Later**. If you are ready to submit your request, click **Submit**.

    Note: The process will route to the Cost Center Manager or Secondary Cost Center Manager for review.