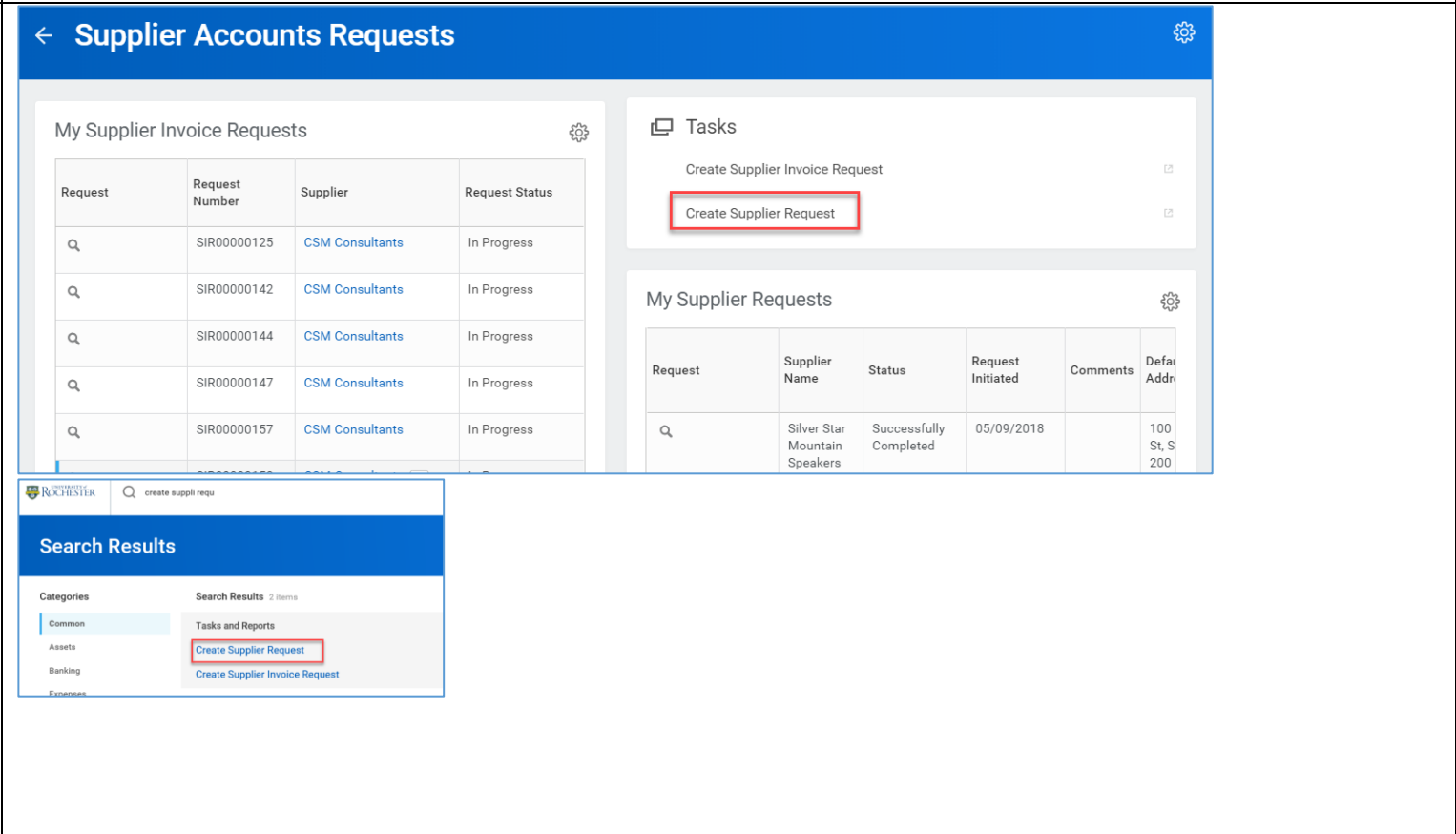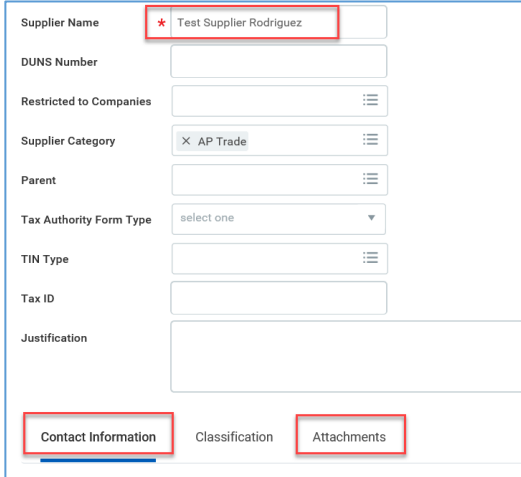# UR Procurement – Create Supplier Request
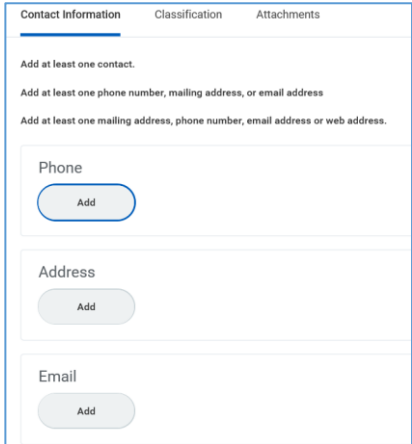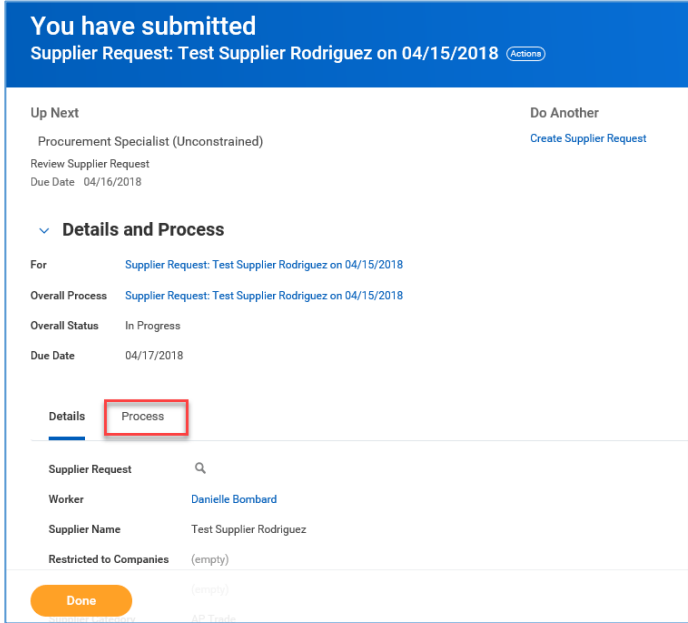
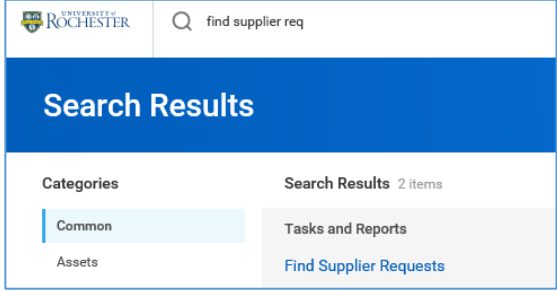Implementation Tenant - https://wd5-impl.workday.com/rochester3

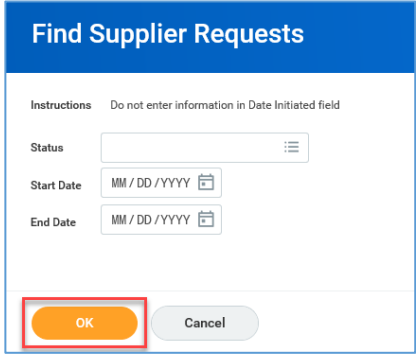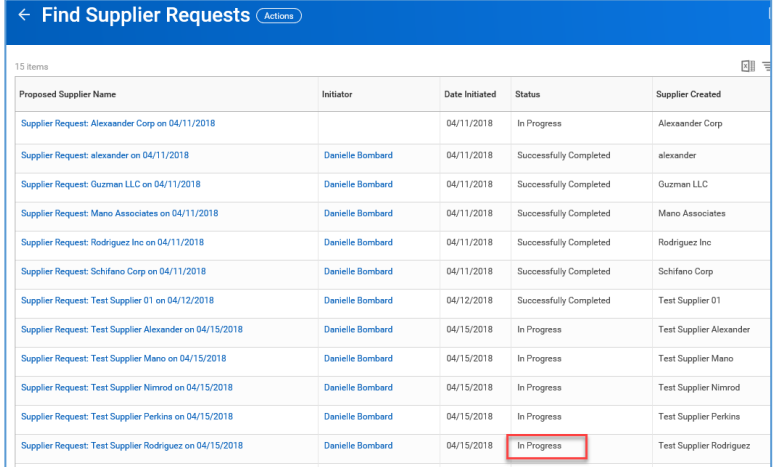| Instructions	Details and Screenshots
Home page: • Use the UR logo to return to this Home screen • Use the Search field with keywords o **_Create Supplier Request_** • Use the Inbox for Workday messages • Use the Procurement worklet for frequently used tasks and reports • Use the Supplier Accounts dashboard	

Rules	• Before initiating the new supplier request, be sure you have checked if the supplier record is already set up in UR Procurement.
	   o Search on the supplier using the following prompt: supplier:[supplier name]
	      ▪ For example, *supplier:abcxyz*
	      ▪ You may want to limit the search to the first 4-5 letters of the supplier's name
	• New Supplier Requests require an attachment, justifying the request. Acceptable attachments:
	   o Scanned copy of the supplier letterhead
	   o Sample invoice from the supplier
	   o W9

Instructions	Details and Screenshots
• Use the Supplier Accounts dashboard and select Create Supplier Request> • Or you can search for 'create supplier request' in the global search box and select <Create Supplier Request>	

Instructions	Details and Screenshots

After selecting <**Create Supplier Request**> you will be prompted to complete the request form.
• Supplier Name
• Supplier Category [AP Trade]
• Contact Information
    o Be sure to add a phone number, address and email address using the prompts. Add more than one address if needed (such as a different address for remit-to)
• **Attachments**
    o Be sure to attach a copy of the supplier letterhead or sample invoice
	Supplier Name * Test Supplier Rodriguez
	DUNS Number
	Restricted to Companies
	Supplier Category ✕ AP Trade
	Parent
	Tax Authority Form Type select one ▼
	TIN Type
	Tax ID
	Justification
	
	Contact Information Classification Attachments
	
	Contact Information Classification Attachments
	Add at least one contact.
	Add at least one phone number, mailing address, or email address
	Add at least one mailing address, phone number, email address or web address.
	
	Phone
	  Add
	
	Address
	  Add
	
	Email
	  Add

	When adding an address, if there is a separate Remit-to Address, enter that first and then add a second address for Procurement (for example). Specify the usage with the <Use For> section.

Instructions	Details and Screenshots

Instructions	Details and Screenshots
• Once you have selected <OK> to submit, you will see a confirmation screen	**You have submitted** Supplier Request: Test Supplier Rodriguez on 04/15/2018 _(Actions)_ Up Next Do Another Procurement Specialist (Unconstrained) Create Supplier Request Review Supplier Request Due Date 04/16/2018 ∨ **Details and Process** For Supplier Request: Test Supplier Rodriguez on 04/15/2018 Overall Process Supplier Request: Test Supplier Rodriguez on 04/15/2018 Overall Status In Progress Due Date 04/17/2018 Details Process Supplier Request 🔍 Worker Danielle Bombard Supplier Name Test Supplier Rodriguez Restricted to Companies (empty) **Done** (empty)
• To find your supplier request, use the global search box. ○ Search on <Find Supplier Requests>	UNIVERSITY of ROCHESTER 🔍 find supplier req **Search Results** Categories Search Results 2 items Common Tasks and Reports Assets Find Supplier Requests

Instructions	Details and Screenshots
• To see all your supplier requests, select <OK>. • You can also narrow the search by filling in fields.	**Find Supplier Requests** Instructions Do not enter information in Date Initiated field Status Start Date MM / DD / YYYY End Date MM / DD / YYYY **OK** Cancel
• Locate the supplier request in question and notice the Status. If it's In Progress, you may select the supplier request record and view the *Process History* section.	**← Find Supplier Requests** (Actions) 15 items | Proposed Supplier Name	Initiator	Date Initiated	Status	Supplier Created
---	---	---	---	---
Supplier Request: Alexaander Corp on 04/11/2018		04/11/2018	In Progress	Alexaander Corp
Supplier Request: alexander on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	alexander
Supplier Request: Guzman LLC on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Guzman LLC
Supplier Request: Mano Associates on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Mano Associates
Supplier Request: Rodriguez Inc on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Rodriguez Inc
Supplier Request: Schifano Corp on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Schifano Corp
Supplier Request: Test Supplier 01 on 04/12/2018	Danielle Bombard	04/12/2018	Successfully Completed	Test Supplier 01
Supplier Request: Test Supplier Alexander on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Alexander
Supplier Request: Test Supplier Mano on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Mano
Supplier Request: Test Supplier Nimrod on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Nimrod
Supplier Request: Test Supplier Perkina on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Perkins
Supplier Request: Test Supplier Rodriguez on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Rodriguez	