Create A Supplier Request

This How-To Guide covers how to **add a new supplier** to Workday. Suppliers are used to **pay invoices** and **purchase goods and services**.

Start Here

Before proceeding, be sure to gather the following information:

Supplier's W-9 Federal tax form

If the vendor is a US organization or US Taxpayer a W-9 must be fully completed, signed, and currently dated.

- Lines 1 and 2: include the organization's Name and their Doing Business As (DBA) name (if applicable) or, for an individual, their legal first and last name.
- Lines 3a and 3b: federal tax classification
- Lines 5 and 6: current, primary address should match the address for tax filing
- Part I: Taxpayer Identification Number (TIN) – use either a Social Security Number (SSN/ITIN) or Employer Identification Number (EIN)
- Part II: Certification – form must be signed and dated within the last 12 months

Supplier's W-8 BEN tax form

If the vendor is a foreign organization, foreign individual, or non-US taxpayer, the supplier's W8Ben Additional Identity documentation may be required for US Source income subject to tax withholding.

- All applicable sections of the W8 must be completed
- Signed and dated within the last 12 months.
- If applicable, submit Glacier documents/Tax Treaty documentation. Questions can be directed to Patricia Szybowski (pszybowski@brynmawr.edu).
- If a foreign wire is needed, obtain the banking information. Documentation of banking must be directly from the source.

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PATH to Workday

Submit a Supplier Request

1. Open **Google Chrome**.
2. Navigate to **Workday**.
3. If prompted, login with your **College email** and **password.**
4. In the **Search bar**, type in and select **Create Supplier Request.**
5. Enter the following information:
    - **Supplier Name** (First Name, Last Name or Company Name)
    - **TIN Type** – Select **2-SSN or ITIN** for a W8/non-US taxpayer supplier.
    - **Tax ID number**
6. For **Justification**, enter the following information:
    - Brief **explanation of what is being purchased** from this supplier
    - Indicate **Purchase Order** or **Non-Purchase Order**
    - Alert Accounts Payable to issue payment by Foreign Wire (if applicable)
7. Enter the following **contact information**.
    - **Phone**
        - **Country Phone Code**
        - **Primary phone number**
        - **Phone Device**: Landline or Mobile
        - **Use For**: Billing, Remit To, and Shipping
            - Use the **X** to remove any incorrect options. Use the drop down to select **Procurement when needed**.

      Note: all requests must have at least one phone number, address, and email address. Use the **Add** buttons to add this information. When there are multiple phone numbers, be sure to update the defaulted business use of each number in the **Use For** field.
    - **Address**
        - Effective Date
        - Country
        - **Primary Address, City, State, and Postal Code** from the W9/W8 form. Be sure to check the **Primary** box under the Usage section for this address only.
        - **Use For**: Billing, Remit To, and Shipping.

   - Use the **X** to remove any incorrect options. Use the drop down to select **Procurement or Mailing when needed**.

Note: Confirm the **Remit To Address** is properly assigned to avoid issues with mailing check payments. This appears inside the **Address** field when a supplier is selected. To add more addresses, select the **Add** button at the bottom of the box. When there are **multiple addresses**, be sure to **update the defaulted business use** of each address in the **Use For** box.

- **Email**
  - Add the supplier's email address. Select **Primary** if this should be the main remittance or general contact email.

  Note: the email indicated as **Primary** is the record that will be used to **send the payment remittance to EFT (direct deposit) suppliers**. The email assigned as **Use For Procurement** is the record that will be used to **distribute the electronic Purchase Order**.
  - **Use For**: Billing, Remit To, and Shipping
    - Use the **X** to remove any incorrect options. Use the drop down to select **Procurement** or **Mailing.**

  Note: Confirm the **Procurement email** is properly assigned to avoid issues with the distribution of the purchase order. To add more emails, select the **Add** button at the bottom of the box. When there are **multiple emails**, be sure **to update the defaulted business use** of each email in the **Use For** box.
- **Website**, if available

8. Select the **Attachments** tab
   - Add the supplier's W9, W8 and/or other documents (ex: guest invitations, contracts, foreign wire banking, Glacier)
9. Select the **Supplier Contact**
   - Select the **Add** button and provide the **First and Last Name** of a verified contact, including their **email address**.

10. Select **Submit**. Your request will be routed to the **Purchasing Department** for review.

Note: If more information or corrections are needed, the request will be sent back to your Workday **My Tasks** for review and/or correction.

Review a Supplier Request

In the Workday **search bar**, type in and select **My Supplier Requests.** The following information will display:

- Each **request** and its **status**
  - **When complete**: the name of the supplier (**Supplier Created**)
  - **When in progress**: the name of the person to which the task is assigned (**Next Assigned**).
- To open the original request, select the **magnifying glass** icon in the first column.

Have Questions? For assistance, please contact help@brynmawr.edu or 610-526-7440.