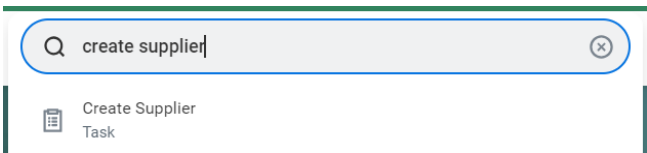


Supplier Accounts: Create Supplier without a Request

Audience / Role	Supplier Administrator
Description	This job aid provides instructions to create a supplier without a request (for information about a supplier request, please see the Supplier Request job aid).

Create Supplier without a Request

1	In the Search bar, enter Create Supplier. In the search results, select the Create Supplier task. 
2	Under Create Supplier, read the instructions and complete the fields for this task. All required fields are indicated with a red asterisk. Enter the following into the fields: • Supplier Name – The legal name spelled fully and correctly. • Create Supplier from Business Entity – Leave blank. • DUNS Number – Leave blank. • Unique Entity Identifier – Leave blank. • Supplier Category – Classifies suppliers for reporting from 1 – 10 and/or A – Z. • Supplier Group – Classifies suppliers for reporting. • Default Payment Terms – Specifies the payment terms agreed to with the supplier in the supplier contract. Default payment terms must be immediate. • Payment Type – Select the payment types accepted by the supplier. • Default Payment Type – Select the supplier primary, or default payment type. • Default Reference Type – Leave blank. • Credit Card – Leave blank. • Accepted Currencies – Select this option and select USD. • Default Currency – (Optional) Select USD. • Select OK.
3	Under Create Supplier, complete the fields for this task. All required fields are indicated with a red asterisk. Enter or confirm the Supplier Name in the Supplier Name field.
4	Under the Proposed Supplier Status section, select status of Active, Inactive, or Hold. Requisitions, Purchase Order, Supplier Contracts, and Supplier Invoices cannot be created for Suppliers with a status of inactive.

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5	Under Top 10 Possible Duplicates , Workday filters the existing Suppliers list and populate 10 Possible Duplicates based on Supplier data fields. Confirm the Supplier is not already in Workday.
6	Under Supplier Details , add the new Supplier to one Category in the Supplier Category field and as many Groups as necessary in the Supplier Group field.
7	Under Payment Details, enter in the Default Payment Terms, Accepted Payment Types, Default Payment Types, and Accepted Currencies fields. • Always Separate Payment – select this checkbox to create separate payments for each supplier invoice. If unchecked, invoices are consolidated into a single payment.
8	Under Default Supplier Payment Memo , select None of the Above .
9	Under the Contact Information tab, add Phone Numbers, Addresses, and Email Addresses: For Phone: select the Add button under Phone and enter phone contact information. This is required for new suppliers. For Address: select the Add button under Address and enter address contact information. • Effective Date – defaults to today's Date • Country – defaults to United States of America. • Address Line 1 – enter the street address. • Address Line 2 – enter additional street address information as applicable such as unit number. • City – enter the city. • State – enter the state. • Postal Code – enter the postal code. Under Usage enter the following information: • Primary – Check this checkbox. • Use For – Transactions should be specified as appropriate that apply to these addresses: Billing, Remit To, Shipping, and Procurement. * Based on Use For selection, create corresponding Supplier Connections. • Visibility – check this checkbox. For Email: select the Add button under Email and enter email contact information.
10	Under the Settlement Bank Account tab, if EFT was selected as the payment type, complete all fields except for: Account Nickname – blank, Bank Identification Code – blank and Bank Instructions – blank.
	Under the Tax Information tab, enter the following into the fields: • Tax Authority Form Type – select 1042-S, 1099 (MISC/NEC), DAS2, or TDS. • Tax IDs – specify the tax IDs for the supplier. Select the + sign to add.

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	• Tax ID Type – enter EIN for business, SSN for individual/individually owned. • Identification # - enter ID# with no spaces or dashes. • Primary Tax ID – select this checkbox. • Tax Statutes – leave blank.
11	Under the Alternate Names tab , add the Doing Business As name if it differs from the supplier’s legal name or select any other business usage name as appropriate.
12	Under the Procurement Options tab, enter the following into the fields: For the Purchase Order Options section: • Issue Option – select the option for issuing purchase orders. • Disable Change Order – select this checkbox if this supplier does not accept change orders. • Shipping Terms – Optional; set up this value for the supplier. • Shipping Method – Optional; set up this value for the supplier. • Acknowledgment Expected – select to expect this supplier to create purchase order acknowledgments from issued purchase orders. Consider: • Email: select to issue purchase orders through email. • Print: select to issue printed purchase orders. This option requires a purchase order print layout. If you do not specify an issue option, Workday uses the Print option.
13	Select Submit .

What Happens Next?

- Initiate Create Supplier Connections.
- You can transact against Supplier with an Active Status.

Related Reports

- Find Suppliers