



CHANGE TO AN EXISTING SUPPLIER

You can request changes to an existing supplier that is set up in Workday. Please contact the Purchasing Administrative Assistant, at extension 3874, if you have any questions before entering your Change to Existing Supplier request. After entering the required information, the request will route to the Purchasing Administrative Assistant for approval and completion.

The Supplier Update Form should be completed by the supplier before starting the Supplier Request. This form can be found in the Purchases App in Workday or Under Workday Resources/Purchasing in CougarWeb. See Appendix F.

From your home page:

1. First type *Find Supplier* in the Search bar and press the Enter key to begin your search for an existing supplier.



2. Click on the Find Suppliers report.

=	\bigcirc		Q find suppliers
	Saved Categories	\sim	Tasks and Reports
	People	0	Find Suppliers
	Tasks and Reports	2	Report View selected suppliers. Details include supplier name, supplier ID, status, supplier category, supplier group, customer account number, address information, parent supplier and 1099 applicability.
:=	More Categories	>	Find 1099 Suppliers - Collin Report

3. Click in the Supplier field or on the three dashes on the right of the Supplier field.

Find Suppliers		
Supplier	Search	:=
Supplier Name	Suppliers By Supplier Group	>
	All independent Contingent Workers	>
Supplier ID	Independent Contingent Workers by Organization	>
Supplier Status	Suppliers By Supplier Category	>
	Suppliers Inactive	>
Supplier Category	Suppliers on Hold	>
Supplier Group		:=







CHANGE TO AN EXISTING SUPPLIER

4. Type the *Supplier* name in the field and press the Enter key to get a short list of suppliers then Click on the checkbox beside the supplier,

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Search Results		Find Suppliers							
Categories	Search Results 22 items	Supplier	Dell Marketing	\times	- 15				
Common	Tasks and Reports	Supplier Name	Search Results	(2)	- 88				
Assets Banking	Find Suppliers View selected suppliers. Det number, address information	Supplier ID	Dell Marketing LP Punchout Dell Marketing LP		- 8				
Drive	Find Supplier Backorder	Supplier Status		:=	- 88				
Expenses Financial Accounting	Find Supplier Contracts Use this report to search for	Supplier Category		:=	- 8				
Grants	Find Supplier Duplicates	Supplier Group		:=	- 88				
Integrations	This Advanced report uses to similar or identical values on More (12)	Customer Account Number							

or choose Suppliers by Category, such as D, then scroll to find the supplier.

Find Suppliers			Find Suppliers		
Supplier	ßearch	≔	Supplier	Search	:=
Supplier Name	Suppliers By Supplier Group All Independent Contingent Workers	>	Supplier Name	← Suppliers By Su	pplier Category
Supplier ID	Independent Contingent Workers by Organization	>	et: Supplier ID	0 A	>
Supplier Status	Suppliers By Supplier Category	>	Supplier Status	в	>
Supplier Category	Suppliers Inactive Suppliers on Hold	>	S Supplier Category	C D	>
Supplier Group		:=	Supplier Group	E	>
Customer Account Number			on Customer Account Number	F	>
OUNS Number			DUNS Number	н	>
Payee Alternate Names		:=	Payee Alternate Names	J	>
Supplier Contacts		:=	nt Supplier Contacts	К	>
Primary Remit-To Address			>o Primary Remit-To Address		
Parent Sunnlier		:=	Parent Supplier		:=

5. Click on the OK button to begin your search.







6. Click on the supplier's name at the top. This is a link into their full profile.

Find S	Suppliers 🚥 💡													×	
appror	Dell Marketing LP	RS 1099 Supplier No	×									Turn on	the new t	ables view	
1 item															-
1 item Supplier	Supplier Name	Supplier ID	Supplier Status	Supplier S Category S	Supplier Group	Customer Account Number	DUNS Number	Alternate Name	Supplier Contacts	Parent Supplier	IRS 1099 Supplier	Remit-To Address	X	Ⅲ 〒 匝 Worktag Only	-

7. Click on the *Contact Information* tab to review their *Phone(s), Address(es),* and *Email*. You may want to take a screenshot and paste into a Word .docx for reference during the supplier change request, or open another application window or

You can right click on the related actions to open a new tab to view on a different screen. Items cannot be completed on this screen. This is for viewing purposes only.

8. Type create request in the search bar and select the Create Request Task.



9. Click on the three dashes.



10. Click on the right pointing caret beside *All* then Click on the radio button beside *Change to Existing Supplier.*







Create Requ	est		;
Request Type *	Search	:=	
	Change to Existing Supplier		
ок	Cancel		

- **11.** Click on the *OK* button.
- 12. Entering information into the Describe the Request field is required (see samples below).

Change to Exis	sting Supplier 储
his allows all end users	to request a change to an existing supplier in Workday.
escribe the Request *	The current Remit To address is no longer valid. Please inactivate for historical purposes and create a new Remit To address. OR The supplier has relocated. Please inactivate for historical purposes and create a new Shipping address.
uiring updated informat	y typing "Find Supplier" in the Workday Search bar. If desired supplier does not exist please use the Supplier Request Form instead to get them added to Workday. This form is only applicable to existing suppliers re- ion. please attach W-9 Form.
Please enter the Supplier	ID found in 'Find Suppliers'. (Required)
SUP-100131	
Please enter the Supplier	Name found in 'Find Suppliers' (Required)
Dell Marketing LP	
Please enter the Supplier	's Current Email Address (Required)
	Save for Later Cancel

- **13.** In the *Please enter the Supplier ID found in "Find Suppliers. (Required)* field, enter the Workday Supplier ID that you searched for and made a note of earlier.
- 14. In the *Please enter the Supplier Name found in "Find Suppliers" (Required)* field, enter the supplier's name exactly as it appears in the supplier profile.
- **15.** In the *Please enter the Supplier's Current Email Address (Required)* field, enter the appropriate Email (Remit To or Ship To).

Please enter the Supplier's Current Email Address (Required)	
Rose.Ward@dell.com	

16. Answer the question *Does this Supplier require a Name Change? (Required).*







a. If your answer is No, Click on the No radio button.



b. If your answer is Yes, Click on the Yes radio button, and you will get a field to enter the new supplier name.

Does this Supplier require a Name Change? (Required)	*
O Yes	
○ No	
Please enter the new Supplier Name as it should appear in Workday (Required)	

- 17. Answer the question Does this Supplier require a new Business Address Change? (Required).
 - a. If your answer is No, Click on the No radio button.

	Does this Supplier require a new Business Fulfillment Address Change? (Required)
	◯ Yes
	No No

b. If your answer is Yes, Click on the Yes radio button, and you will get a field to enter the new business address.





<u>Note</u>: All addresses should be entered in ALL CAPS to insure proper USPS delivery. Workday limits addresses to three lines inclusive of the City, ST Postal Code+4.





CHANGE TO AN EXISTING SUPPLIER



- **18.** Answer the question *Does this Supplier require a new Accounts Payable (Remit To) Address Change? (Required).*
 - a. If your answer is No, Click on the No radio button.



b. If your answer is Yes, Click on the Yes radio button, and you will get a field to enter the new (Remit To) address.



- **19.** Answer the question, *Does the old Accounts Payable (Remit To) Address need to be deactivated so that it cannot be used on any future purchases? (Required).*
 - a. If your answer is No, Click on the No radio button.



b. If your answer is Yes, Click on the Yes radio button, and you will get a field to enter the old Accounts Payable (Remit To) address that you wish to deactivate.



- 20. Answer the question *Does this Supplier require an Entity Type Change? (Required)*
 - a. If your answer is No, Click on the No radio button.

Does this Supplier require an Entity Type Change? (Required)	
Ves	
No No	







CHANGE TO AN EXISTING SUPPLIER

b. If your answer is Yes, Click on the Yes radio button, and you will get a dropdown to select a new entity type.

	Please select the new supplier entity type. (R	lequired)
	select one	v
	select one	
	IN - Individual / Sole Proprietor	
Does	CS - S Corporations PN - Partnership TE - Trust/Estate LI - LLC Single Member	(Required)
0	LC - LLC C Corporation	e (reduced)
0	LP - LLC Partnership EX - Exempt	
5	AT - Attorney Any Type FG - Foreign Entity	

- 21. Answer the question *Does this Supplier require a Tax ID change (EIN/SSN)? (Required)*
 - a. If your answer is No, Click on the No radio button.

Does this Supplier require and Tax ID change (EIN/SSN)? (Required)	
O Yes	
O No	

b. If your answer is Yes, Click on the Yes radio button, and you will get a dropdown to enter the new Tax ID.



22. Answer the question *Does this Supplier require another change not listed above? (Required)*

a. If your answer is No, Click on the No radio button.

Does this Supplier require another change not listed above? (Required)	
Yes	
No No	







CHANGE TO AN EXISTING SUPPLIER

b. If your answer is Yes, Click on the Yes radio button, and you will get a field to describe what the change is.

O Yes			
O No			
Please describe what other chan	e is required for this Supplier. (Required)		
enter your comment			

- 23. Currently, an Alert is received for attaching a W-9 and Vendor Update Form. Attachment (W-9 and Supplier Update Form)
- 24. Click on the Submit button at the bottom left. You will get a message "You have submitted' with a View Details link.

COLLIN COLLEGE	You have submitted View Details	
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- 25. Click on the View Details link.
- 26. Click on Done button at the bottom left, and you will be returned to the Workday Home page.









CHANGE TO AN EXISTING SUPPLIER

27. When the Change to Existing Supplier Request has been completed by the Supplier Administrator, you will receive a notification, which you can view by clicking on the bell icon in the top right corner of the home page.

=	Q Search	↓ [●] [●] [●] [●] [●]

Notifications				
Vlewing: All Vlewi	Supplier Test Notifications submitted by Cindy White on 12/01/2021	XII	PDF	۲,
Supplier Test Notifications submitted by Cindy White on 12/01/2021 Your Supplier Request has been completed. 49 minute(s) ago	Your Supplier Request has been completed. Test Notifications SUP-102665 Details Supplier Test Notifications submitted by Cindy White on 12/01/2021			

