

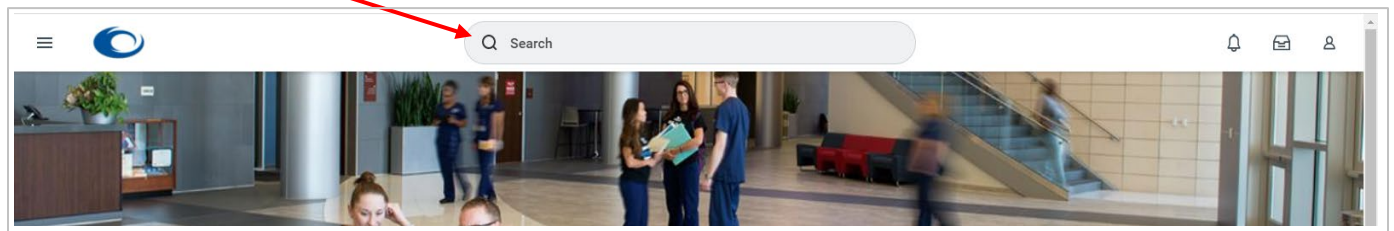
CHANGE TO AN EXISTING SUPPLIER

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.

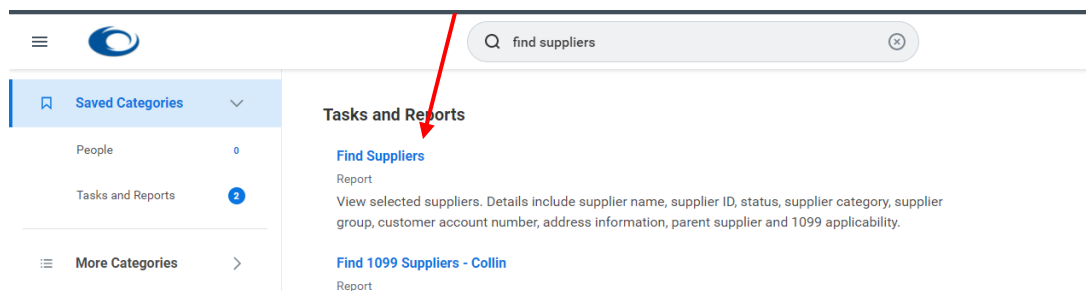
The Supplier Update Form should be completed by the supplier before starting the Supplier Request. This form can be found in the Purchases App in Workday or Under Workday Resources/Purchasing in CougarWeb. See Appendix F.

From your home page:

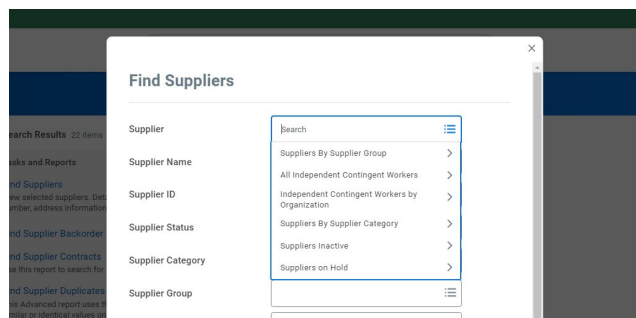
1. First type *Find Supplier* in the Search bar and press the Enter key to begin your search for an existing supplier.



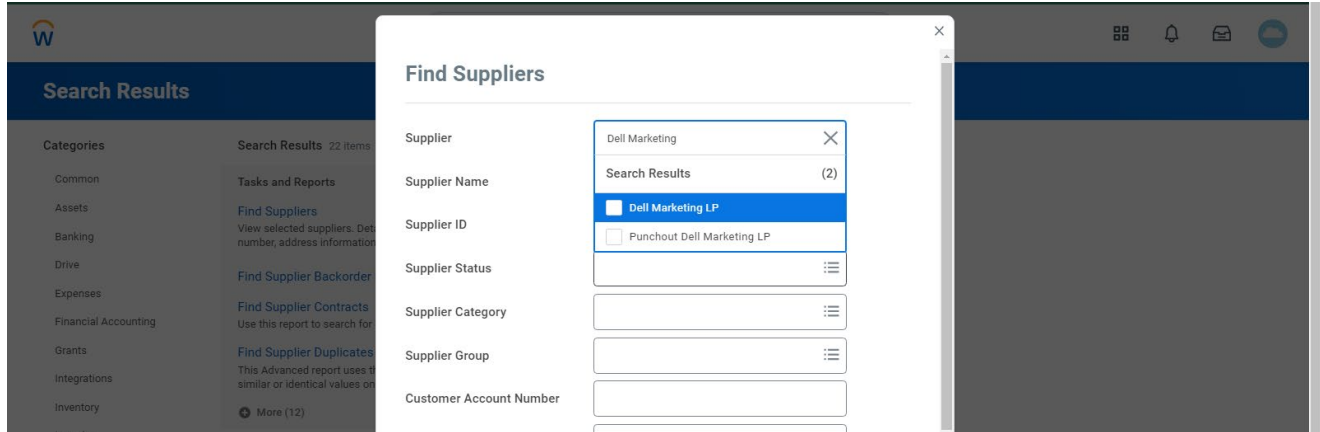
2. Click on the *Find Suppliers* report.



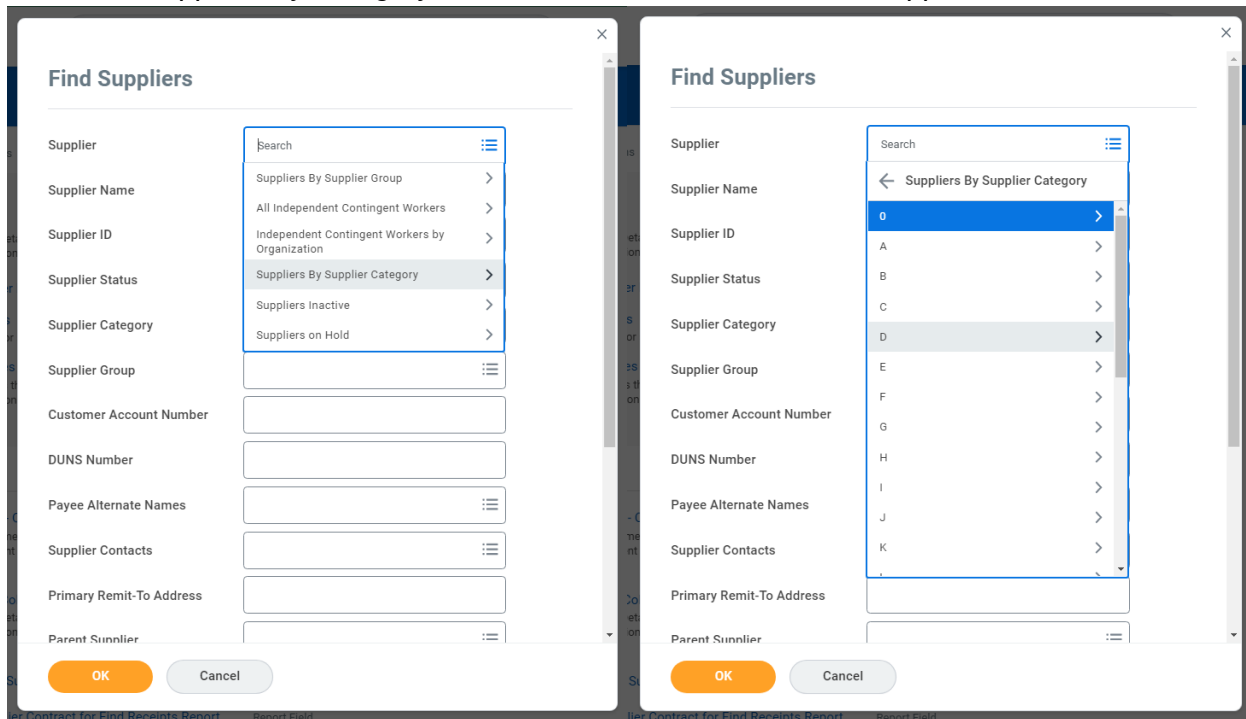
3. Click in the *Supplier* field or on the three dashes on the right of the *Supplier* field.



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,

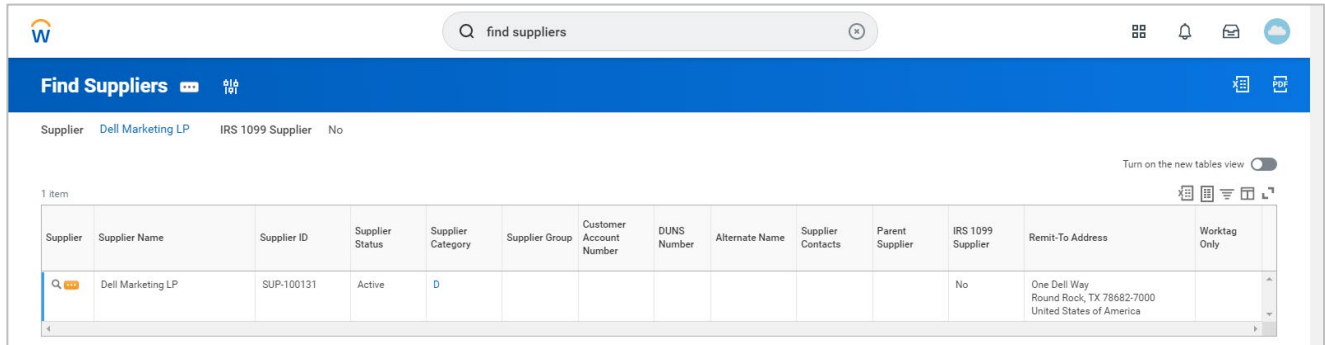


or choose *Suppliers by Category*, such as D, then scroll to find the supplier.



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

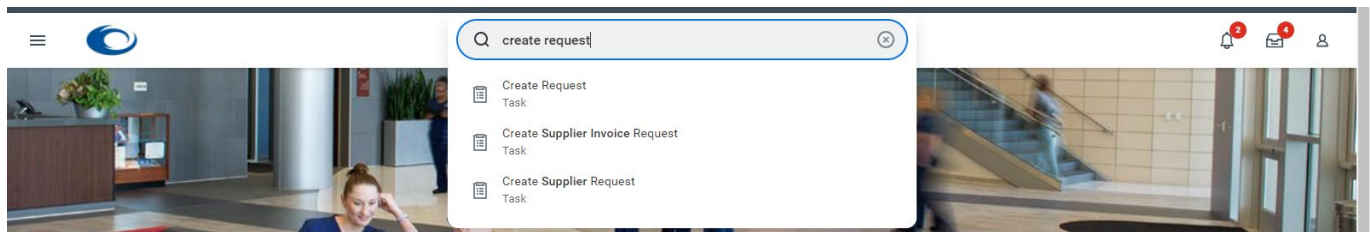
6. Click on the supplier's name at the top. This is a link into their full profile.



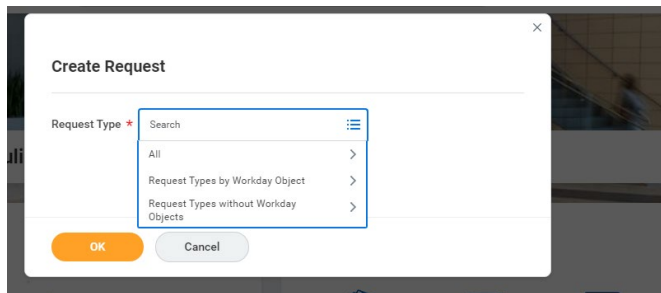
7. Click on the *Contact Information* tab to review their *Phone(s)*, *Address(es)*, and *Email*. You may want to take a screenshot and paste into a Word .docx for reference during the supplier change request, or open another application window or

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.

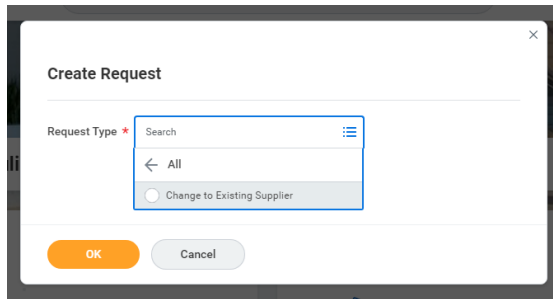
8. Type *create request* in the search bar and select the *Create Request Task*.



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*.



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

Change to Existing Supplier

This allows all end users to request a change to an existing supplier in Workday.

Describe 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.

Search for the Supplier by 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 requiring updated information.

If this is a name change please attach W-9 Form.

Please enter the Supplier ID found in "Find Suppliers". (Required)

Please enter the Supplier Name found in "Find Suppliers" (Required)

Please enter the Supplier's Current Email Address (Required)

Submit
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)

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

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

Does this Supplier require a Name Change? (Required)

Yes

No

- 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)

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

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

Does this Supplier require a new Business Fulfillment Address Change? (Required)

Yes

No

Please enter the new Supplier Business Fulfillment Address. (Required)



Note: 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.

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.

Does this Supplier require a new Accounts Payable Address? (Required)

Yes

No

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.

Does this Supplier require a new Accounts Payable Address? (Required)

Yes

No

Please enter the new Accounts Payable Address. (Required)

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.

Does the old Accounts Payable Address need to be deactivated so that it cannot be used on any future purchases? (Required)

Yes

No

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.

Does the old Accounts Payable Address need to be deactivated so that it cannot be used on any future purchases? (Required)

Yes

No

Please enter the old Accounts Payable address you wish to deactivate. (Required)

20. Answer the question *Does this Supplier require an Entity Type Change? (Required)*

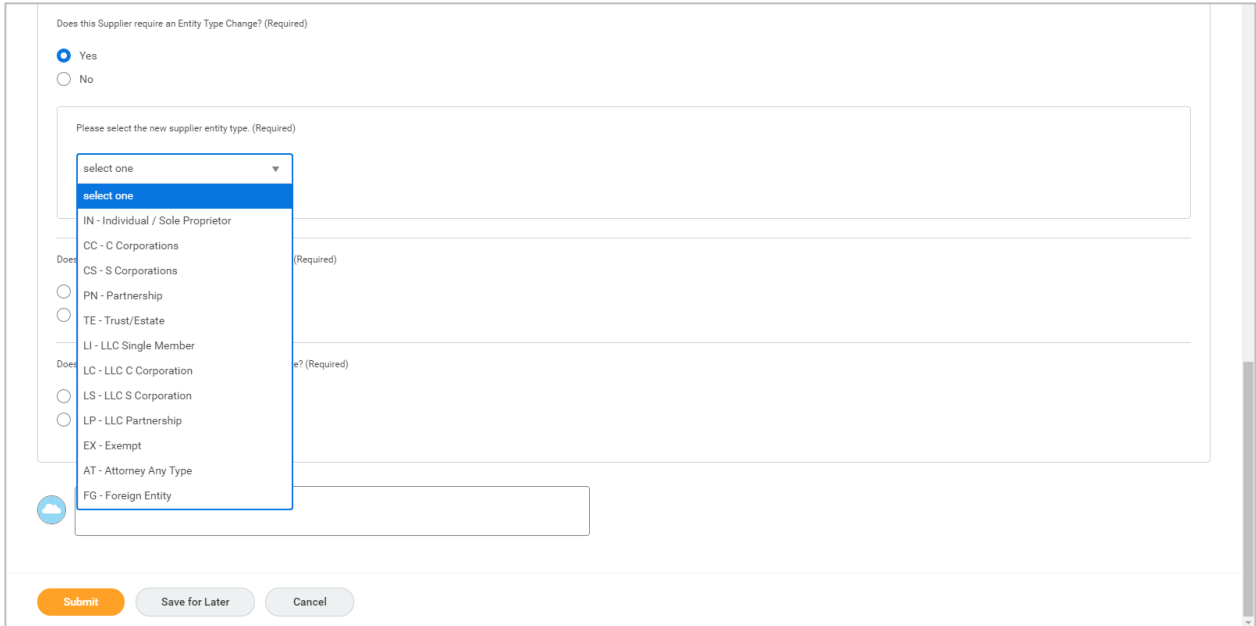
a. If your answer is No, Click on the No radio button.

Does this Supplier require an Entity Type Change? (Required)

Yes

No

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



Does this Supplier require an Entity Type Change? (Required)

Yes
 No

Please select the new supplier entity type. (Required)

select one

- select one
- IN - Individual / Sole Proprietor
- CC - C Corporations
- CS - S Corporations
- PN - Partnership
- TE - Trust/Estate
- LI - LLC Single Member
- LC - LLC C Corporation
- LS - LLC S Corporation
- LP - LLC Partnership
- EX - Exempt
- AT - Attorney Any Type
- FG - Foreign Entity

Submit Save for Later Cancel

21. Answer the question *Does this Supplier require a Tax ID change (EIN/SSN)? (Required)*

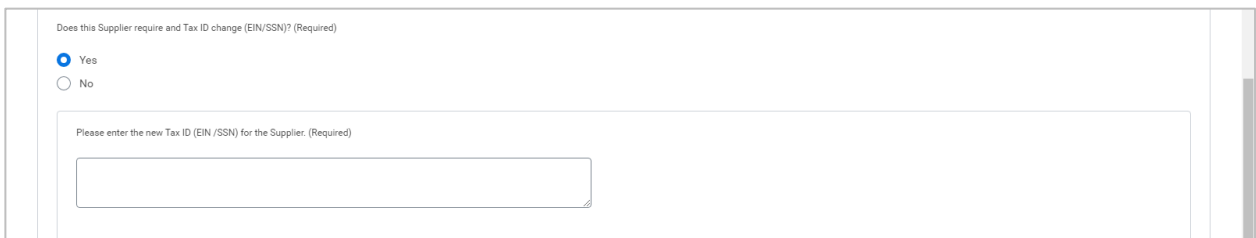
- a. If your answer is No, Click on the No radio button.



Does this Supplier require and Tax ID change (EIN/SSN)? (Required)

Yes
 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.



Does this Supplier require and Tax ID change (EIN/SSN)? (Required)

Yes
 No

Please enter the new Tax ID (EIN / SSN) for the Supplier. (Required)

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

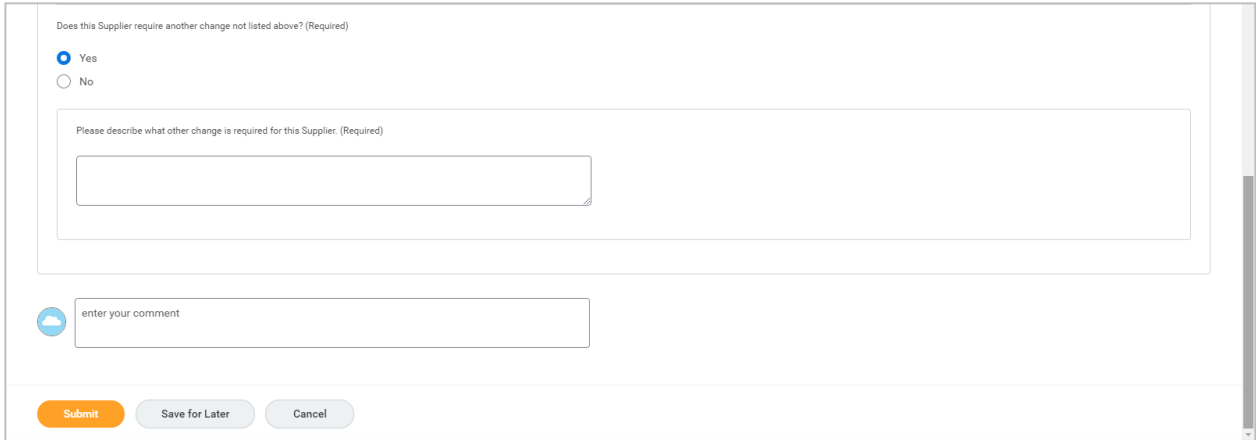
- a. If your answer is No, Click on the No radio button.



Does this Supplier require another change not listed above? (Required)

Yes
 No

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



Does this Supplier require another change not listed above? (Required)

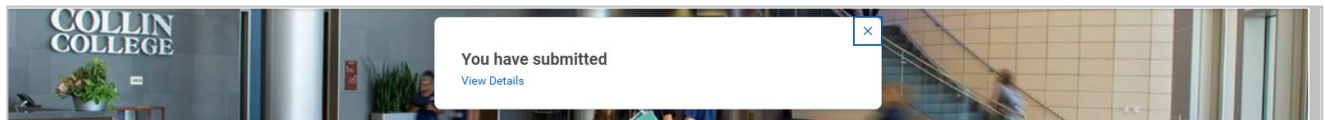
Yes
 No

Please describe what other change is required for this Supplier. (Required)

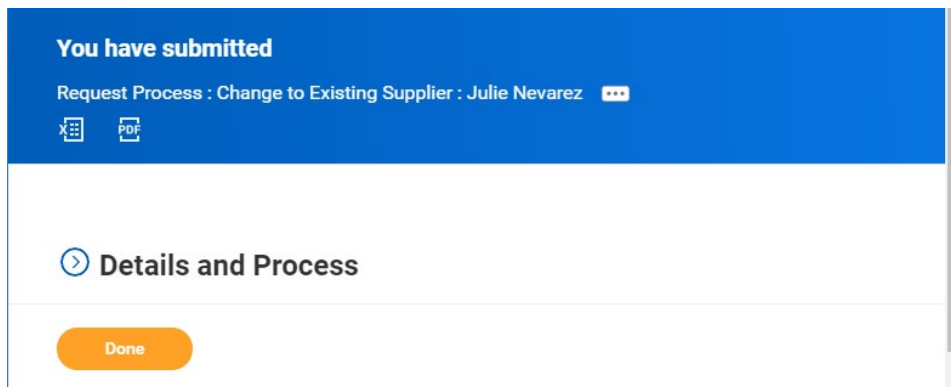
enter your comment

Submit Save for Later Cancel

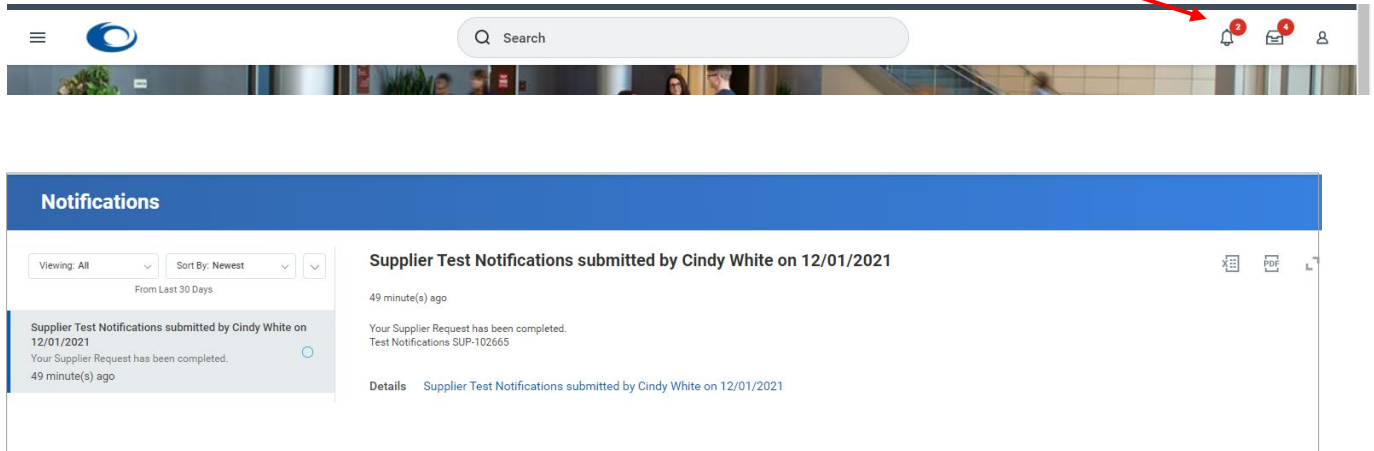
23. Currently, an Alert is received for attaching a W-9 and Vendor Update Form. Attachment (W-9 and Supplier Update Form)
24. Click on the Submit button at the bottom left. You will get a message "You have submitted" with a [View Details](#) link.



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.



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.



The screenshot shows the top navigation bar of the Workday Procurement system. On the right side, there is a notification bell icon with a red badge indicating two notifications. A red arrow points from the text in the previous block to this bell icon. Below the navigation bar, the 'Notifications' section is displayed. It includes a filter for 'Viewing: All' and 'Sort By: Newest'. A notification card is shown with the following details:

- Supplier Test Notifications submitted by Cindy White on 12/01/2021**
- 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