Suppliers and Purchases Tip Sheet

The **Purchases Application** will be the central hub for all Purchasing activity in Workday. You can now make requests for purchases and payment directly within Workday to streamline the process and have transparency.

What are the purchasing options in Workday?

Connect to Supplier Website (Punchout)

Use for all purchases from Staples and Amazon

Non-Catalog Requisition

Use for goods and services over $5,000

Supplier Invoice Request

Use for most goods and services under $5,000
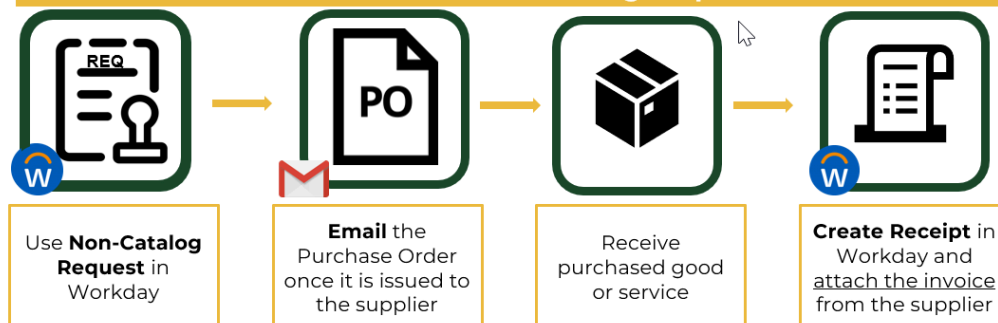
Workday Purchases Terminology

- <u>**Supplier**</u>: Any provider that sells goods or services to SNC (previously known as "vendor" in Banner)
- <u>**Requisition**</u>: Requests for purchases made directly in Workday. There are two types:
  - o <u>**Connect to Supplier Website (Punchout)**</u>: Use for all purchases from Staples and Amazon
  - o <u>**Non-Catalog Requisition**</u>: Use for goods and services over $5,000
- <u>**Receipt**</u>: Upon receiving the goods or services for any requisition, you must Create Receipt in Workday.
- <u>**Supplier Invoice Request**</u>: Use for most goods and services under $5,000

What does a Requester need to do in Workday?

What to do for a Punchout?

Use **Connect to Supplier Website** in Workday → Receive purchased good or service → **Create Receipt** in Workday

What to do for a Non-Catalog Request?

Use **Non-Catalog Request** in Workday → **Email** the Purchase Order once it is issued to the supplier → Receive purchased good or service → **Create Receipt** in Workday and <u>attach the invoice</u> from the supplier

Frequently Asked Questions

Requisition FAQs
1. Do I need to create an account with my SNC email address for Staples and Amazon?
   - No, when creating a punchout in Workday, you use Connect to Supplier Website, which directly connects you automatically to the SNC business accounts.
2. I submitted a Punchout (Connect to Supplier Website) requisition in Workday. How do I know that my Staples or Amazon order has shipped?
   - You will receive a notification in Workday that the PO was issued.
3. What do I do after I submit a Non-Catalog Requisition?
   - Once you receive a notification that the PO has been issued, you <u>must</u> send the PO to the supplier directly.

Receipt FAQs:
1. Do I need a receipt for every purchase?
   - You must submit a receipt for all requisitions including Punchouts and Non-Catalog Requisition. You do not need to submit a receipt for Supplier Invoice Requests.
2. Create Receipt Details
   a. What do I need to include as an attachment for Create Receipt?
      - For Connect to Supplier (Punchout) Requisitions, no attachment is needed.
      - For Non-Catalog Requisitions, a supplier invoice is required.
   b. What do I do if I don't have an invoice to attach for a Non-Catalog Requisition?
      - Please contact the supplier directly and request a supplier invoice. Note: SNC will only pay the supplier once an invoice is attached in Workday. Packing slips, order forms, confirmations, etc., are not acceptable attachments.
3. What should I do if I did not receive everything in my order?
   - It depends on the situation:
      i. If the items were shipped separately, create the receipt for the portion received and do not select "fully receive."
      ii. If all shipments have been delivered but an item is missing, reach out to the supplier directly.

Supplier Invoice Request FAQs
1. What should I do if I don't see my Supplier in Workday?
   - You need to submit a Supplier Request in Workday. This task is available in the Purchases Application. Once the request is processed, your Supplier will be visible in Workday.
2. What do I need to include in a Supplier Invoice Request?
   - You must include the invoice from the supplier as an attachment to the request in Workday.
3. Do I need to complete this task for all purchases?
   - No. This process is for any goods or services under $5,000 already received. This is not used for requisitions in Workday.

Other Purchases FAQs
1. Can I delegate purchasing tasks?
   a. Yes, all purchasing tasks can be delegated.