



Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Create a Supplier

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■ Purpose

This guide provides step-by-step instructions for creating a supplier in Workday.

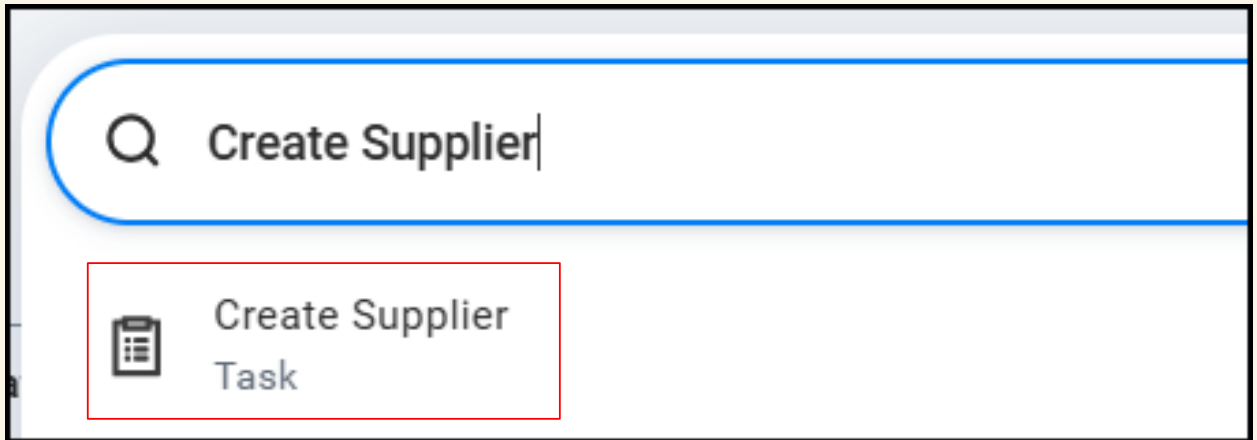
■ Prerequisites

To effectively create a *Supplier*, ensure the following:

- You have the appropriate Workday Security role (e.g., Supplier Administrator)
- Ensure the Business Process: Supplier Event has an approval workflow for creating suppliers.
- Ensure Supplier Categories and Payment Types are configured

■ Create Supplier

- Search for *Create Supplier* and select the related task.





- Populate the required fields: *Supplier Name, Supplier Category, Payment Type, Default Payment Type, and Currencies.*
- You may populate any other additional fields that be of relevance.
- Select, *OK.*

Create Supplier

Supplier Name

*

ABC

Create Supplier from Business Entity

DUNS Number

Unique Entity Identifier

Supplier Category

*

X Services

Supplier Group

Default Payment Terms

Payment Type

*

X Manual

Default Payment Type

*

X Manual

Default Reference Type

Credit Card

Accept All Currencies

Accepted Currencies

Cancel

OK



- Populate any additional information to complete the supplier.
- Navigate to the Contact Information tab. Under the Address section, enter the supplier's physical or mailing address and mark one as Primary.
- If a non-manual payment type is selected, navigate to the Settlement Bank Account tab, and enter the required banking information such as Bank Name, Account Number, and Routing Transit number. Associate the bank account with the correct Payment Type and Accepted Currency.

Supplier Details		Payment Details		Default Supplier Payment Memo	
Restricted to Companies		Default Payment Terms		☐ Default Text	
DUNS Number		Payment Terms Based on Invoice Received Date	☐	☐ Use Supplier Reference	
Unique Entity Identifier		Exclude from Supplier Invoice Discount		☐ Use Invoice Memo	
Supplier Category	* Utilities	Accepted Payment Types	* Manual	☐ Use Supplier Connection Memo	
Supplier Group		Default Payment Type	* Manual	☒ None of the above	
Customer Account Number		Default Reference Type			
Certificate of Insurance Date	MM / DD / YYYY	Credit Card			

Contact Information	Settlement Bank Account	Tax Information	Alternate Names	Procurement Options	Related Worktags	Classifications	Contingent Worker Options	Attachments	Notes
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■ Common Errors and Resolutions

Issue	Description	Resolution
Unable to Create the Supplier	The Supplier contact already has an existing Workday Account	To prevent duplicate accounts, you will need to use a different email address.

■ Best Practices

- To create multiple suppliers, use the 'Submit Supplier' EIB
 - On the EIB, ensure the columns Submit and Auto-Complete are set to 'Y', and the Approved Status column is set to 'APPROVED'.
 - Review Custom Validations to ensure the supplier record won't be stuck in Draft or In Progress status.



Thank You

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