Create Supplier Contracts

The Create Supplier Contracts tip sheet is for Supplier Contract Specialists and Buyers.

1. In the Workday Search bar, type "**Create Supplier Contract**" and select the task.
2. In the Create Supplier Contract window, type or select the **Company** associated with the contract.
3. Type or select the **Supplier** associated with the contract.

NOTE: If a selection returns an error with too many results to display, type in the Search field and press **Enter** locate matches.

4. Type or select the **Contract Type**. The contract type is based on the contract or purchase details.
5. Select **Create Blank Supplier Contract** to start from scratch.
   OR
   Select **Copy Details from Existing Supplier Contract** and type a contract number to copy. The copied contract may be edited as needed.

NOTE: Use the Find Supplier Contracts report to locate existing supplier contracts.

6. Select **OK**.
7. In the Contract Information section, confirm existing or enter new details.
8. Select or search for a **Company**.
9. Select or search for a **Supplier**.
10. Confirm the **Contract Specialist**.
11. Select a **Contract Type**.

NOTE: To the right of the selected Contract Type, select ⋯ to display additional details such as Manual Purchase Orders, Manual Invoices, and Renewal Terms.

12. In **Contract Name**, type the name of the contract.
13. In **Contract Reference**, include any RFP number, Statewide Price Agreement, CES, GSA, or other contract number.
14. In the Terms and Amounts section, in **Start Date**, type or select the date the contract begins.
15. Optional: Type or select a **Contract Signed Date**.
16. Optional: Type or select an **End Date**.

NOTE: Invoices submitted prior to the **Start Date** or after the **End Date** result in an error.

17. Type a **Total Contract Amount** to serve as a control. This amount must be greater than or equal to the total of all line amounts. Enter zero if purchase orders are issued against the Supplier Contract. Type an amount if invoices without a PO are issued against the Supplier Contract.
18. In **Contract Overview**, type a narrative description of the contract.
19. Select the **Goods Lines** tab or **Service Lines** tab as appropriate.
20. Select **+** to add a row.
21. In **Line number**, type the order lines from the contract.
22. Type or select the **Spend Category**. Purchase items result in multiple values for spend categories, unit costs, units of measure, and unit cost. Additional information can also automatically be entered depending on the item mapping (item identifiers).
23. Scroll to the right to complete **Entity**, **Cost Center**, and **Additional Worktags**.
24. After required fields are completed, system and custom validations may be triggered and additional fields may be required before submitting.

NOTE: It is normal to have solved error messages and when you submit, new error messages may appear. Simply solve those as well and you will eventually be able to submit.

25. Select **Submit**. The contract routes for review and approval. When all approvals have taken place, the contract will be in an approved status and available for receiving and invoicing.

Amend Supplier Contract

1. In the Workday Search bar, type **Find Supplier Contracts** and select the report.
2. In the Find Supplier Contracts area, complete the necessary fields to search for the supplier contract you would like to edit.
3. Select **OK.**
4. Locate the supplier contract you would like to edit.
5. Hover the cursor in the Supplier Contract column and select ⋯ > **Supplier Contract** > **Amend Supplier Contract**. Create Supplier Contract Amendment displays.
6. Select the **Amendment Type**.
7. Confirm the **Amendment Date**.
8. In the **Amendment Description**, type a narrative about the changes to the contract.

9. Adjust the contract as needed.

NOTE: If funds are added at the line level, don't forget to change the **Total Contract Amount** to equal or greater than the total of all contract line amounts.

10. Select **Submit**. Changes to Supplier Contracts enter the approval flow.

Helpful Reports

The following reports may be helpful for Supplier Administrators in maintaining suppliers and supplier contracts. All reports may be accessed in Workday via the Search bar by typing and selecting the name of the report.

- **Find Supplier Contracts:** Use this report to search for supplier contracts with values you know, for example, Company, Supplier, or Contract Type.
- **Find Suppliers:** View selected suppliers. Details include Supplier Name, Supplier ID, Status, Supplier Category, Supplier Group, Customer Account Number, Address Information, Parent Supplier, and 1099 Applicability.

NOTE: Access to reports is based on Workday security. If you have any questions, please contact your manager or supervisor.