PROCUREMENT MANUAL

A GUIDE TO PURCHASING, APPROVING, AND RECEIVING GOODS AND SERVICES VIA WORKDAY

goodwill®

SF BAY

TABLE OF CONTENTS

GETTING STARTED:

 To purchase items, you begin with a requisition. A requisition is a request that lists the items (e.g., goods/services) you want to purchase. To get started, review the decision tree below and follow the steps.

REQUISITION DECISION TREE

1. Are you attempting to create a requisition to purchase Goods and/or Services from a new Supplier?
    - A. If yes, refer to the **Workday Request a New Supplier Guide.** Continue with Question #2 after the new Supplier is added.
    - B. If no, proceed to Question #2.

2. Are you attempting to create a Punch Out Requisition to purchase Goods from an external supplier connect such as Amazon or ODP?
    - A. If yes, see pages 4-7
    - B. If no, proceed to question #3

3. Can the Goods and/or Services be found in the Workday catalog for the Supplier?
    - A. If yes, see page 8 for steps on **How to Create a Requisition for Catalog Items**
    - B. If no, see page 10 for steps on **How to Create a Requisition for Non-Catalog Items**

1. Log in to Workday > Click **Menu** > Select **Purchases**
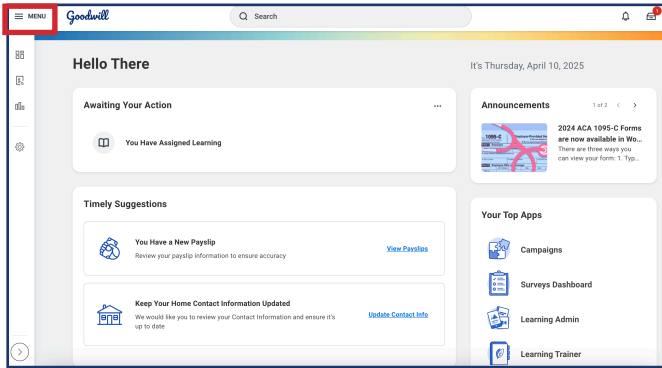
2. Click **Connect to Supplier Website**
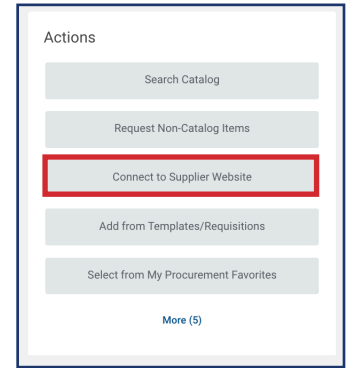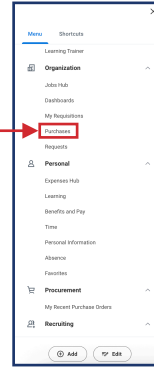
3. Under *Requisition Type*, > Review the form > Make changes, if necessary > Click **OK**

Connect to Supplier Website

Requester	*	✕ Christine McBride ⋯
Company	*	✕ Goodwill of Central & Northern Arizona ⋯
Currency	*	✕ USD
Requisition Type		
Deliver-To		✕ 110406 - Burlingame Store ⋯
Ship-To	*	1215 California Drive ✕ Burlingame, CA 94010 United States of America
Cost Center		✕ 110406 Burlingame Store ⋯
Grant		
Project Task		
Additional Worktags		✕ Business Unit: Retail - GSFB ✕ Region: Retail District 32 ⋯

IMPORTANT! Confirm that the *Deliver-To* and *Ship-To* locations are correct.

Note: The cost center auto-populates. If the cost center needs to be changed, click the stacked bars icon and select the appropriate option.

Note: If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.
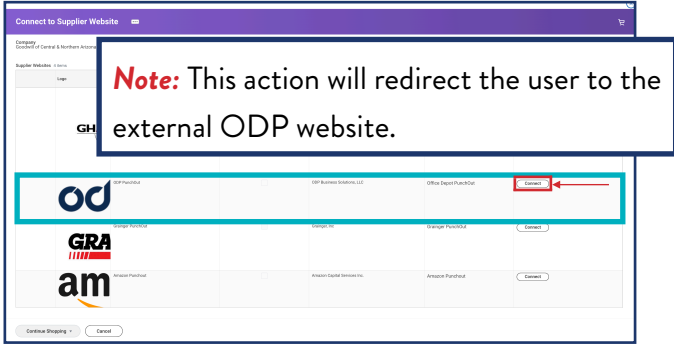
Note: If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option.
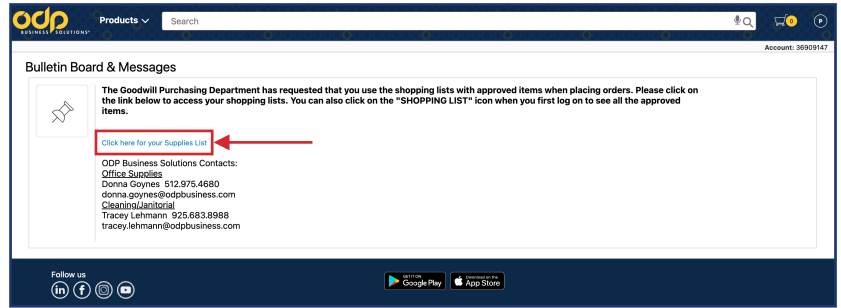
OK   Cancel

4. Click **Connect** under the *ODP Punchout* row

Note: This action will redirect the user to the external ODP website.

5. Click the blue **Click here for your Supplies List** link
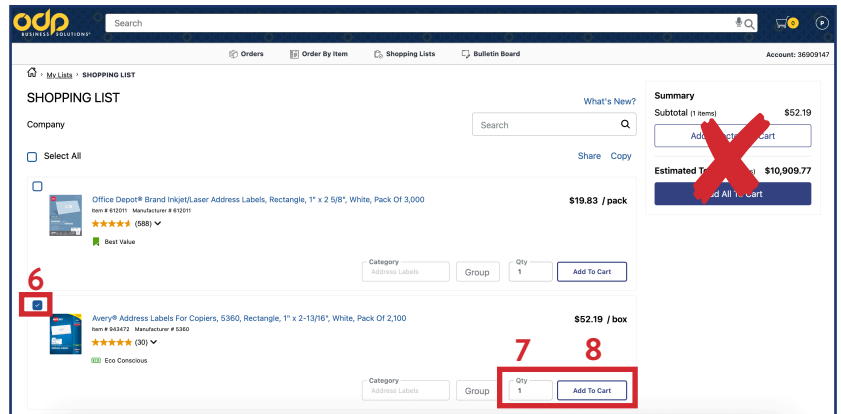

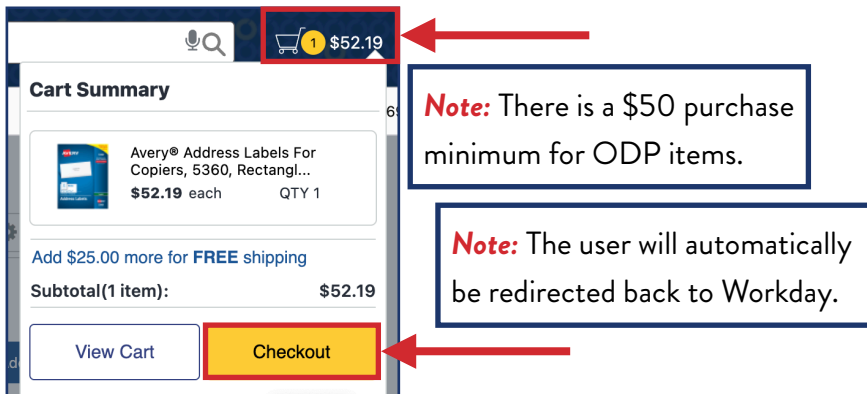**6.** Select the checkbox to the left of the desired item

7. Adjust the **quantity (Qty)** to the desired number
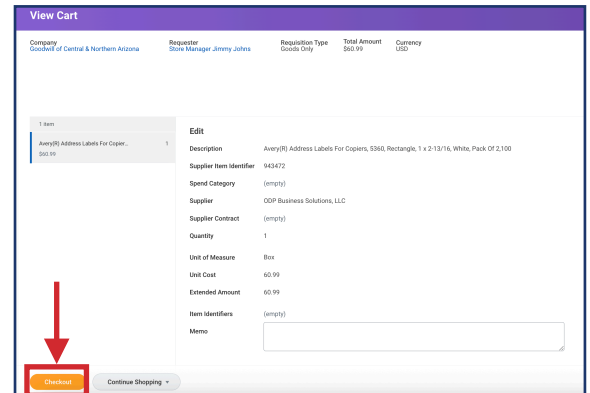
Qty
1

8. Click **Add To Cart**

Add To Cart

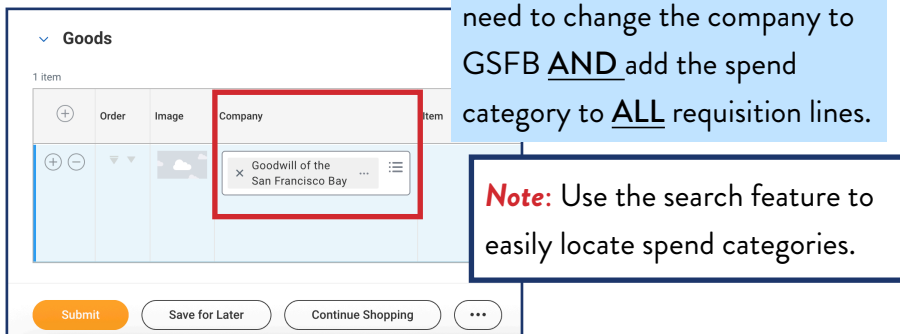**IMPORTANT!** Do **NOT** click Add Selected To Cart **OR** Add All To Cart under the *Summary* section.

**9.** Hover over the shopping cart icon > Click **Checkout**

Note: There is a $50 purchase minimum for ODP items.

Note: The user will automatically be redirected back to Workday.

10. Review the form > Click **Checkout**

11. Change the *Company* to Goodwill of the San Francisco Bay

IMPORTANT! Team members need to change the company to GSFB **AND** add the spend category to **ALL** requisition lines.

Note: Use the search feature to easily locate spend categories.

12. Under *Spend Category*, Select either **Office Supplies OR** Janitorial Supplies > Click **Submit**
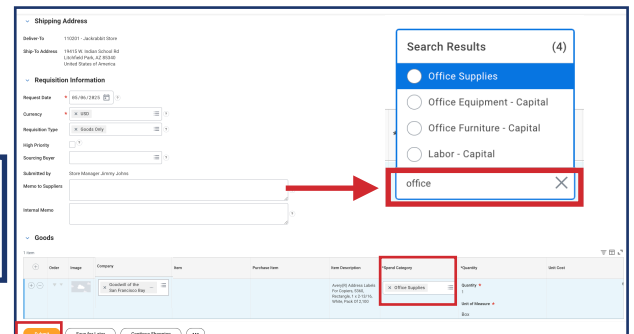
1. Log in to Workday > Click **Menu** > Select **Purchases**
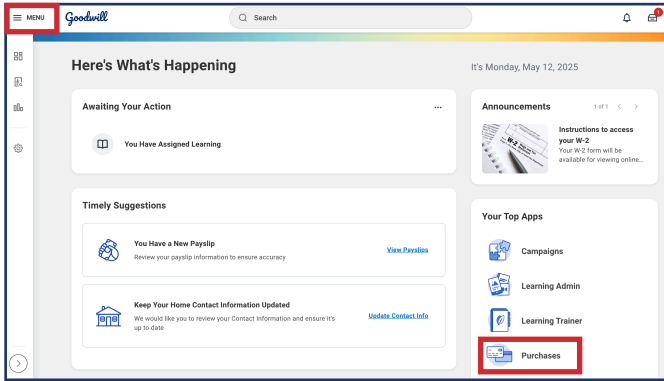
2. Click **Connect to Supplier Website**
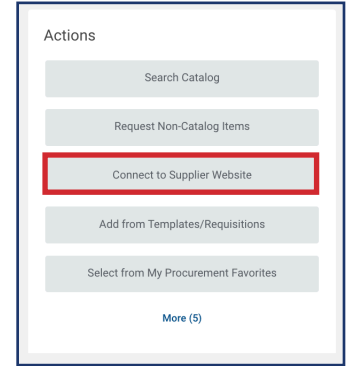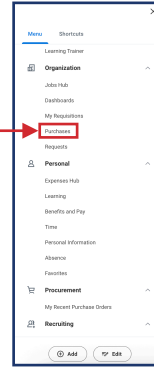
3. Under *Requisition Type*, Click to select **Goods Only** > Review the form > Click **OK**

Connect to Supplier Website

| Requester | * | ✕ Christine McBride ··· | ☰ | ? |

| Company | * | ✕ Goodwill of Central & Northern Arizona ··· | ☰ | ? |

| Currency | * | ✕ USD | ☰ | ? |

| Requisition Type | | | ☰ | ? |

| Deliver-To | | ✕ 110406 - Burlingame Store ··· | ☰ | ? |

| Ship-To | * | ✕ 1215 California Drive Burlingame, CA 94010 United States of America | ☰ | ? |

IMPORTANT! Confirm that the *Deliver-To* and *Ship-To* addresses are correct.

| Cost Center | | ✕ 110406 Burlingame Store ··· | ☰ |

Note: The cost center auto-populates. If the cost center needs to be changed, click the stacked bars icon and select the appropriate option.

| Grant | | | ☰ |

Note: If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.

| Project Task | | | ☰ |

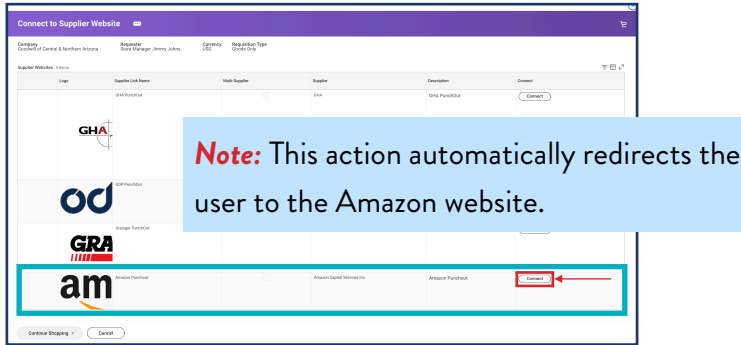| Additional Worktags | | ✕ Business Unit: Retail - GSFB / ✕ Region: Retail District 32 ··· | ☰ |

Note: If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option.
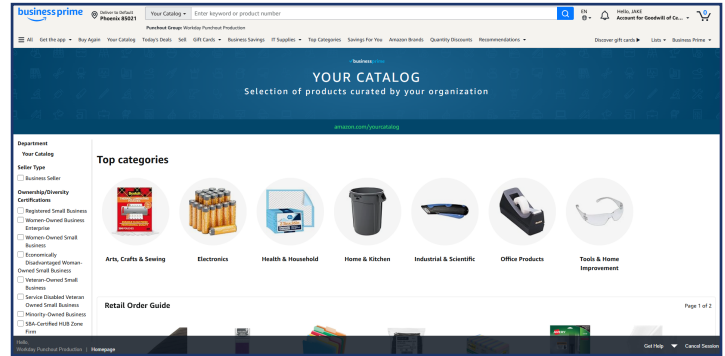
OK   **Cancel**

4. Click **Connect** under the *Amazon Punchout* row

Note: This action automatically redirects the user to the Amazon website.

5. View items from **Your Catalog**

6. Scroll to the bottom of the page > Click **See All Results**

7. Click on an item to select it for purchase
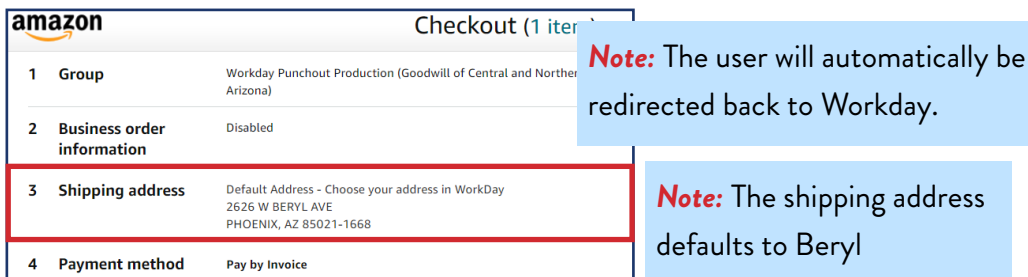
8. Adjust the **Quantity** to the desired number

9. Click **Add to Cart**

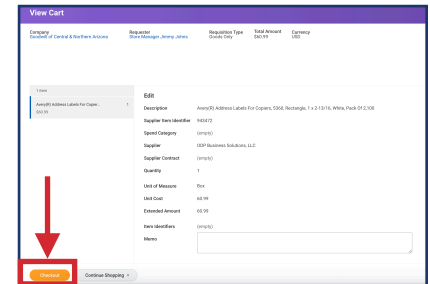**10.** Click the shopping cart icon > Review the cart > Make changes, if necessary

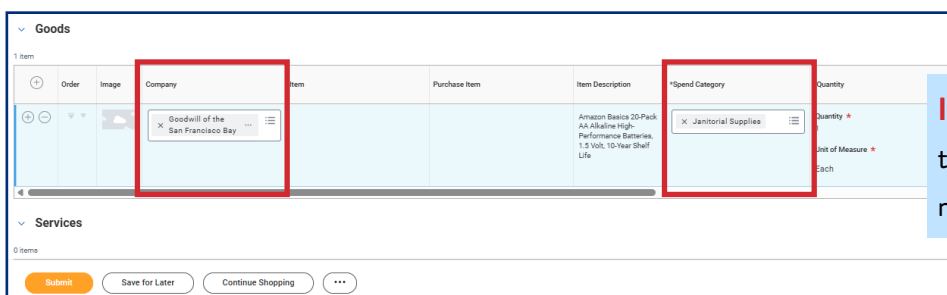**11.** Click **Proceed to checkout**

Proceed to checkout

In Stock

Quantity: 1

Add to Cart

Buy Now

12. Click **Submit order for approval**

Note: The user will automatically be redirected back to Workday.

*Note:* The shipping address defaults to Beryl

13. Click **Checkout**

14. Change the *Company* to **Goodwill of the San Francisco Bay** > Enter the appropriate **Spend Category**

IMPORTANT! The company must be changed to GSFB, and the appropriate spend category must be entered on every requisition line.
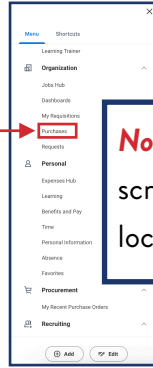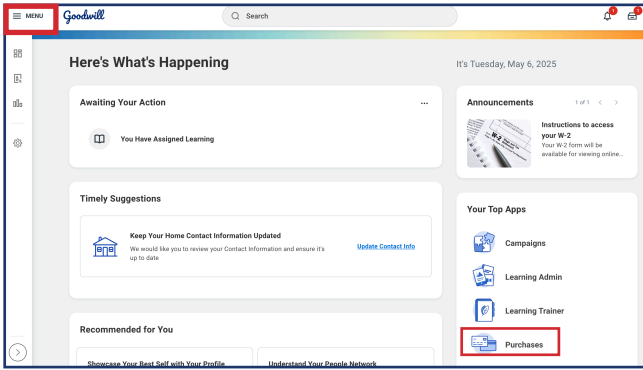
15. Scroll to view the right side of the form > Confirm the *Ship-To* and *Deliver-To* locations are set to the appropriate location
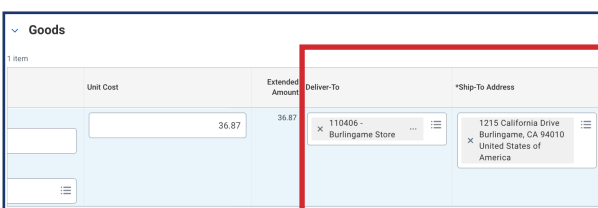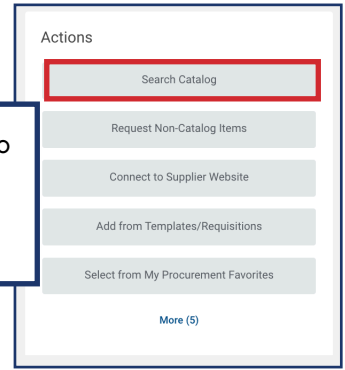

16. Verify the order > Click **Submit**

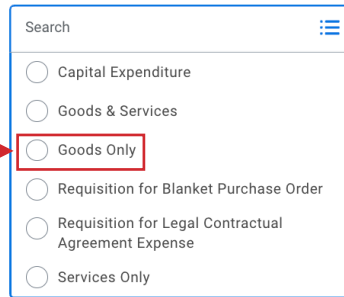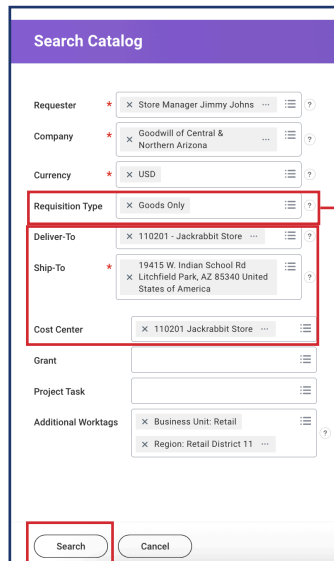**1.** Log in to Workday > Click **Menu** > Select **Purchases**

2. Click **Search Catalog**

Note: The user might have to scroll down on the menu to locate the *Purchases* option.

3. Under *Requisition Type*, Click to select **Goods Only** > Confirm the *Deliver-To*, *Ship-To* locations, and the *Cost Center* > Click **Search**

4. Click the checkbox(es) to select the desired item(s) to purchase > Click **Add to Cart**

Note: Click the checkbox to filter the catalog by Supplier.
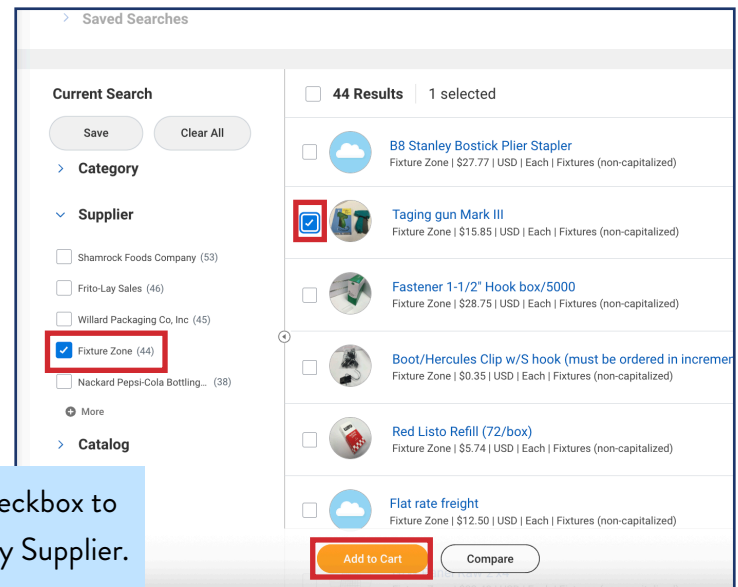
5. Click the shopping cart icon > Click **View Cart**
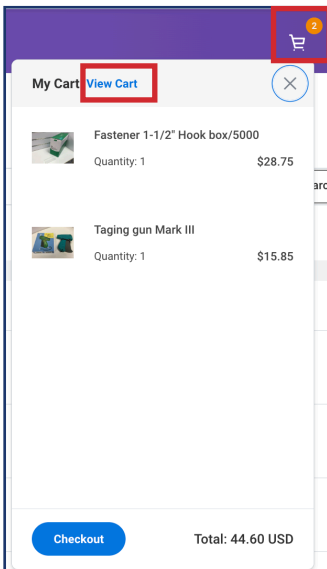
Note: Click the checkbox to filter the catalog by Supplier.

6. Click each item on the list > Enter the desired quantity for each item > Click **Checkout**

7. Review the information > Enter an internal note and/or note to the supplier(s), if desired > <u>Scroll down on the page</u>

Checkout

Requisition Information

Shipping Address

Optional: Note to the Suppliers

Optional: Internal Note

8. Review the Goods section of the form > Scroll to view the <u>right side of the page</u>

9. Change the company to **Goodwill of the San Francisco Bay** on the requisition line.

10. Enter the desired Delivery Date **(Optional)**

11. Confirm and/or change the Cost Center, if necessary   *Note:* The cost center auto-populates.

12. If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.

13. If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option

14. Review the entire form for accuracy > Click **Submit**

1. Log in to Workday > Click **Menu** > Select **Purchases**

2. Click **Request Non-Catalog Items**

Note: The user might have to scroll down on the menu to locate the *Purchases* option.
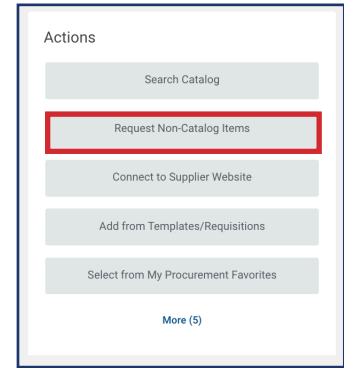
3. Under *Requisition Type*, Click to select the appropriate option > Confirm the *Deliver-To*, *Ship-To* locations and the *Cost Center* > Click **OK** at the bottom of the form
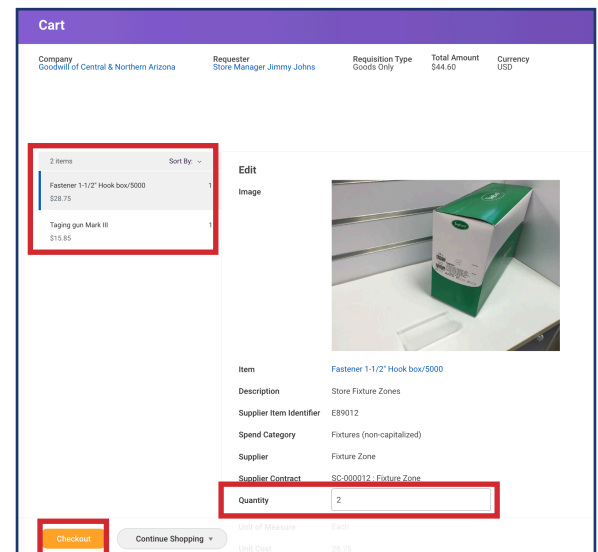

Note: The *Deliver-To, Ship-To*, and *Cost Center* should automatically populate.

IMPORTANT! Select either **Goods Only OR** Services Only **OR** Capital Expenditure

4. Select **Request Goods OR Request Service**

5. Enter a description of the good or service

6. Under *Spend Category*, Click the stacked bar icon > select the category that best describes the good or service

7. Under *Supplier*, Click the stacked bar icon > select the appropriate supplier

8. Enter the desired quantity

9. Enter the dollar amount

10. Click to select the unit of measure that best describes the purchase

11. Click **Add to Cart**

12. Click the shopping cart icon > Verify the quantity amounts are correct > Click **Checkout**

Note: Click *View Cart* to adjust the quantity and/or make additional changes.

Note: Click the trash can icon to delete the item from the cart.

My Cart | View Cart

Example Good
Quantity: 1 $2.00

Checkout   Total: 2.00 USD

Edit
Description * | Example Good
Spend Category | Store Equipment - Capital
Supplier | (empty)
Supplier Contract | (empty)
Quantity | 1
Unit of Measure | Roll
Unit Cost | 2.00
Extended Amount | 2.00
Item Identifiers | (empty)
Memo | Example memo

Checkout   Continue Shopping ▾

13. Review the information > Enter an internal note and/or note to the supplier(s), if desired > <u>Scroll down on the page</u>

Checkout

Company	Requester	Requisition	Status	Total Amount
Goodwill of Central & Northern Arizona	Store Manager Jimmy Johns	RQ-062931	Draft	73.35 USD

Requisition Information

⌄ Shipping Address

Deliver-To   110201 - Jackrabbit Store

Ship-To Address   19415 W. Indian School Rd
                  Litchfield Park, AZ 85340
                  United States of America

Note: Review the *Shipping Address.*

⌄ Requisition Information

Request Date   * 05/06/2025 📅 ?

Currency   * ✕ USD

Requisition Type ✕ Goods Only

Note: Review the *Requisition Type.* Appropriate options include: **Goods Only OR Services Only OR Capital Expenditure.**

High Priority   ☐ ?

Sourcing Buyer

Submitted by   Store Manager Jimmy Johns

Memo to Suppliers

Optional: Note to the Suppliers

Internal Memo   Example memo

Optional: Internal Note

⌄ Goods

IMPORTANT! Scroll down on the page.

GOODS

14A. Scroll to view the right side of the form > Edit the *Company* on the requisition line to **Goodwill of the San Francisco Bay**

15A. Enter the desired Delivery Date **(Optional)**

16A. Confirm and/or change the Cost Center, if necessary   *Note:* The cost center auto-populates.

17A. If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.

18A. If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option

19A. Review the entire form for accuracy > Click **Submit**

SERVICES

14B. Scroll to view the right side of the form > Edit the *Company* on the requisition line to **Goodwill of the San Francisco Bay**

15B. Enter a memo **(Optional)**

16B. Confirm and/or change the Cost Center, if necessary   *Note:* The cost center auto-populates.

17B. If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.

18B. If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option

19A. Review the entire form for accuracy > Click **Submit**

1. Log in to Workday > Click **Menu** > Select **My Requisitions**

2. View your most recent requisitions > Click **View More Details** to view additional requisitions not displayed

Requisition	Date	Memo to Suppliers	Internal Memo	Status
RQ-061892	04/05/2025			Successfully Completed
RQ-061694	04/01/2025			Successfully Completed
RQ-060828	03/08/2025			Successfully Completed
RQ-060829	03/08/2025			Successfully Completed
RQ-060063	02/14/2025			Successfully Completed

View More Details...

3. Enter search criteria, if desired or just click **OK** to view all requistions

Note: Enter search criteria to narrow down specific requisitions such as:
a.   **Requistion Number**
b.   **Status**
c.   **Document Date Range**
d.   **Supplier**

My Requisitions

Company	× Goodwill of Central & Northern Arizona ...
Requisition	
Status	
Requisition Type	
Requesting Inventory Site	
Document Date On or After	04/06/2025
Document Date On or Before	MM/DD/YYYY
Supplier	
Spend Category	
Item	
Project	
Purchase Order	
Exclude Canceled	☑
Exclude Closed	☑
Include Job Requisitions	☐
Results in Requisitions Worklet	☐

Cancel   OK

Note: To search for all of your requisitions, Click **OK** without entering any search criteria.

4. View the status of the procurement requisistion > Click the **Requistion Number** to view more details

My Requisitions

Create Requisition

∨ **Selection Criteria**

Company	Goodwill of Central & Northern Arizona
Document Date On or After	04/07/2025
Exclude Canceled	Yes
Exclude Closed	Yes

Note: The requisition number

Note: The request status

∨ **Procurement Requisitions**

1 item

Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Suppliers	Purchase Orders	Request Status	Memo to Suppliers	Internal Memo	Edit Requisition
RQ-062931	Goods Only		05/06/2025	73.35	USD	Fixture Zone		In Progress		Example memo	Edit Requisition

5. Click the **Process Hitory** tab

View Requisition RQ-062931 ...

Company	Goodwill of Central & Northern Arizona	Requester Employee: Store Manager Jimmy Johns	Status In Progress	Total Amount 73.35 USD

∨ **Requisition Information**

Request Date	05/06/2025
Currency	USD
Requisition Type	Goods Only
High Priority	No
Sourcing Buyer	(empty)
Submitted by	Store Manager Jimmy Johns
Consolidate Requisitions on Purchase Orders	No
Exclude Ship-To Address when Consolidating Requisition Lines	No
Memo to Suppliers	(empty)
Internal Memo	Example memo

∨ **Shipping Address**

Deliver-To	110201 - Jackrabbit Store
Ship-To Address	19415 W. Indian School Rd Litchfield Park, AZ 85340 United States of America

Add More

Goods Lines | Process History

6. Review the *Process* list to determine if an event is awaiting action or if the step is completed.

Process History 8 items

Process	Step	Status
Requisition Event	Requisition Event	Step Completed
Requisition Event	Approval by IT Asset Management	Not Required
Requisition Event	Approval by Grant Manager	Not Required
Requisition Event	Approval by Project Manager	Awaiting Action

IMPORTANT! The requisition status must be "In Progress" in order to cancel it.

1. Log in to Workday > Click **Menu** > Select **My Requisitions**

2. Locate the appropriate requisition

Requisition	Date	Memo to Suppliers	Internal Memo	Status
RQ-063202	05/11/2025			In Progress
RQ-061892	04/05/2025			Successfully Completed
RQ-061694	04/01/2025			Successfully Completed
RQ-060828	03/08/2025			Successfully Completed
RQ-060829	03/08/2025			Successfully Completed
View More Details...				

3. Click the *Related Actions* button (i.e., three-dot icon) next to the requisition number > *Hover* over Requisition > Click **Cancel**

Note: The *Related Actions* button appears when the user hovers over the requistion number.

4. Click **OK** > Click **Done** on the next page

Note: The status of the requisition should show "Canceled".

Confirm Requisition Cancel   RQ-063203

Company
Goodwill of Central & Northern Arizona

Requester
Employee: Store Manager Jimmy Johns

Status
In Progress

Total Amount
64.80 USD

Please confirm you wish to cancel the Requisition below

Comments

Requisition Information

Request Date	05/12/2025
Currency	USD
Requisition Type	Capital Expenditure
High Priority	
Sourcing Buyer	(empty)
Submitted by	Store Manager Jimmy Johns
Consolidate Requisitions on Purchase Orders	
Exclude Ship-To Address when Consolidating Requisition Lines	
Memo to Suppliers	(empty)
Internal Memo	(empty)

Shipping Address

Deliver-To   110201 - Jackrabbit Store

OK   Cancel

Requisition	Date	Memo to Suppliers	Internal Memo	Status
RQ-063202	05/11/2025			Canceled
RQ-061892	04/05/2025			Successfully Completed
RQ-061694	04/01/2025			Successfully Completed
RQ-060828	03/08/2025			Successfully Completed
RQ-060829	03/08/2025			Successfully Completed
View More Details...				

1. Log in to Workday > Click **Menu** > Select **My Recent Purchase Orders**
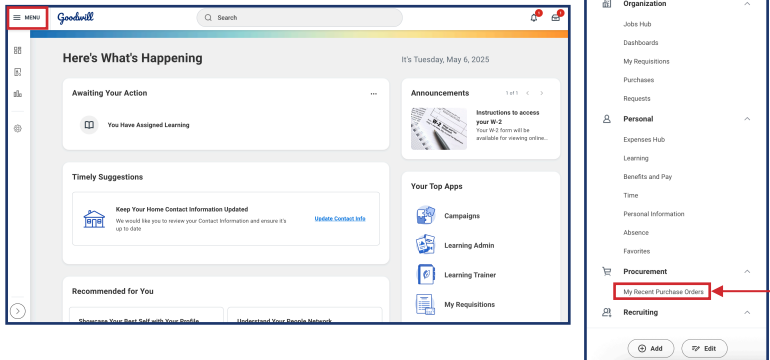
2. View your most recent purchases > Click **View More Details** to view additional purchases not displayed

PO Number	Supplier	Status	Amount	Currency	Date
PO-055615	Amazon Capital Services Inc.	Issued	31.40	USD	01/28/2025
PO-055614	Amazon Capital Services Inc.	Issued	364.20	USD	01/28/2025
PO-055610	Amazon Capital Services Inc.	Issued	27.68	USD	01/28/2025
PO-055609	Fixture Zone	Issued	147.99	USD	01/28/2025
PO-055607	Fixture Zone	Issued	726.08	USD	01/28/2025

View More Details...

3. Enter search criteria, if desired or just click **OK** to view all purchase orders

Find Purchase Orders

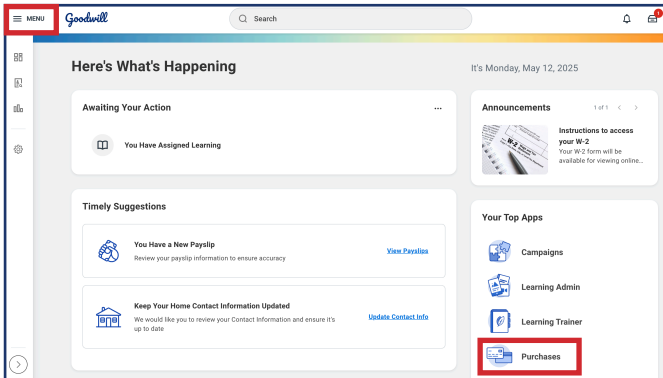| Company	
	Recommended
	+ AGES Arizona Goodwill Educati...
	+ Goodwill of the San Francisco ...
	+ Goodwill of Central & Northern ...
Supplier	
Buyer	
Purchase Order Type	
Purchase Order	
Document Date On or After	04/12/2025
Document Date On or Before	MM/DD/YYYY
Due Date On or After	MM/DD/YYYY
Due Date On or Before	MM/DD/YYYY
Status	
Issue Options	
Contract	

Cancel   OK

Note: To quickly access the receipt function,
1. Hover over the Purchase Order number
2. Click the three-dot icon (i.e., *Related Actions*)
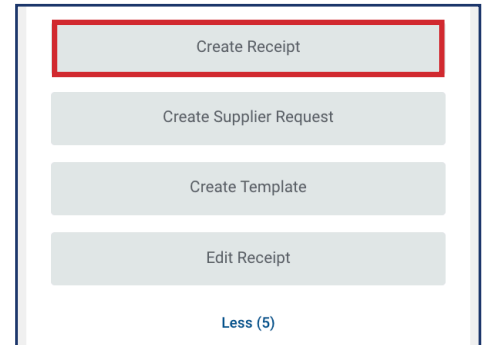3. Hover over *Receipt*
4. Click **Create**
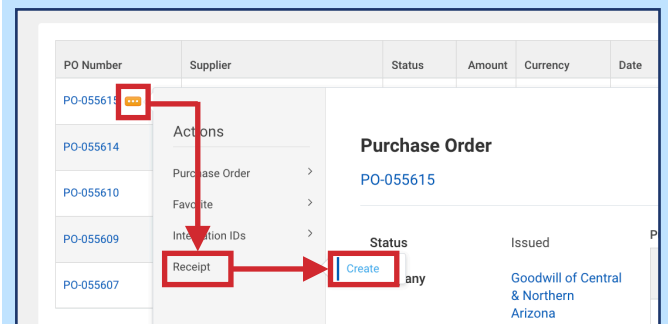
IMPORTANT! Once the vendor has delivered the products and/or performed the requested services, the next step is to create a receipt in Workday. If the store did **NOT** receive all of the products from the order, follow the process on page 22 to create a receipt.

1. Log in to Workday > Click **Menu** > Select **Purchases**

2. Click **More** > Click **Create Receipt**

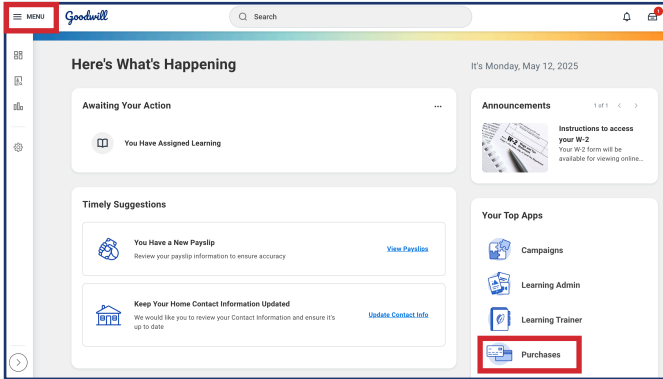**3.** Click the field under *Document Number* > Enter the Purchase Order Number > Select the appropriate order

4. If all items from the order were received, check the box > Click **OK**

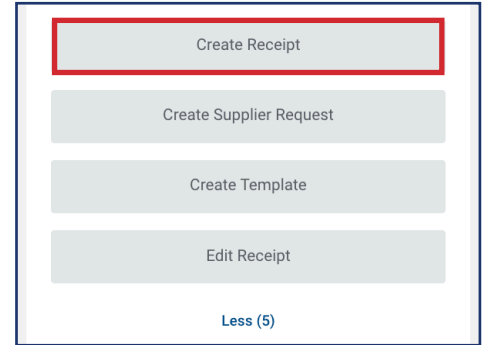**5.** Review the information on the next page > Click **Submit**

IMPORTANT! Once the vendor has delivered the products and/or performed the requested services, the next step is to create a receipt in Workday. If the store did **NOT** receive all of the products from the order, complete the stops of the following procedure.

1. Log in to Workday > Click **Menu** > Select **Purchases**

2. Click **More** > Click **Create Receipt**

3. Click the field under *Document Number* > Enter the Purchase Order Number > Select the appropriate order > Click **OK**

IMPORTANT! If the purchase order does not popualte, contact Purchasing at purchasing@goodwillaz.org.

Create Receipt

Please attach supporting documentation if receipt amount is different than what was included on the shipping documentation.

Retail - New Goods please remember to Receive your items in Dynamic 365.

Document Number *   ✕ PO-059145 (Pepsi-Cola)

Fully Receive

Tracking Number

Cancel   OK

4. Click each line to review > Enter the quantity received from the vendor for each product under *Quantity to Recieve*

5. Review the form for accuracy > Click **Submit**

*Note:* In this example, the *Quanity Orderded* was 36, but the vendor only supplied 24 items.

Create Receipt RC-072350 for PO-059145

Purchase Orders PO-059145 | Supplier Pepsi-Cola | Status Draft | Total Amount $413.64 | Currency USD

Information | Attachments | Lines

8 items | Sort By:

Search

Goods Lines

Bev - Aquafina Water 20oz 01215908 — 144/144

Celsius Sprkl WHT PCH Vibe 88939201019 — 0/36 Each

Bev - Lifewater 012000161162 — 60/60

Bev - Rockstar Original Energy 16 oz... 197779 — 24/24

Bev - Rockstar Sugar Free - 16 oz Can 197257 — 24/24

Bev - Mountain Dew Kickstart Black ... 012000043000 — 24/24

Bev - Starbucks Mocha Double Shot — 24/24

Line Information

Item   Celsius Sprkl WHT PCH Vibe

Item Description   Sparkling White Peach Vibe

PO Line   PO-059145 - Line 2

Quantity to Receive   24

Unit of Measure *   ✕ Each

Fully Receive

Quantity Ordered   36

Ordered Quantity Invoiced   0

Total Quantity Already Received   0

Supplier Item Identifier   88939201019

Memo

Image

Submit | Save for Later | Cancel

Note: The following procedure can be used to find purchase orders that have not had receipts created. All managers in the store have access to this function even if they are not the manager that submitted the purchase order.

1. Log in to Workday > Click **Menu** > Select **Purchases**
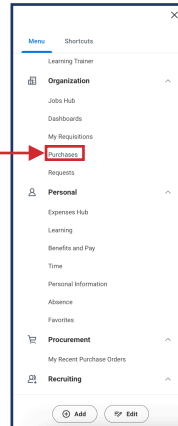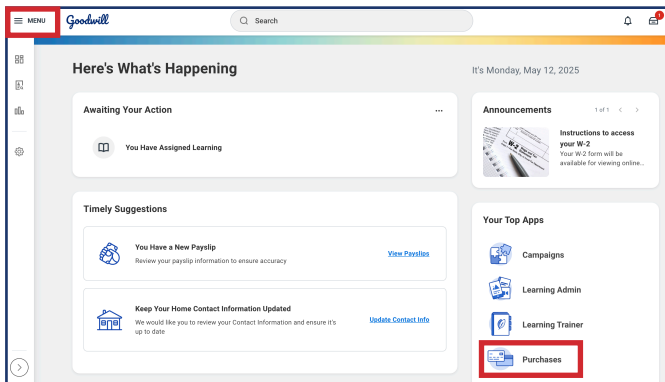
2. Click **GCNA—Purchase Order Lines not Recieved**
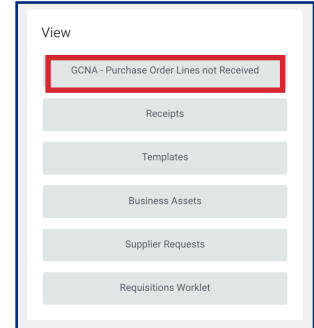
3. Click and select the appropriate store under *Cost Center* > **OK**

OPTIONAL: Enter a date range to narrow down the search for the appropriate purchase order(s).

4. Locate the appropriate purchase order > Hover over the purchase order number > Click the three-dot icon > Hover over *Receipt* > **Create**

IMPORTANT! If ALL items from the order were received, follow the process on page 18 to create a receipt. If there are missing items from the order, follow the process on page 19 .

Note: Connect with the Purchasing Team at purchasing@goodwillaz.org for questions.