# PROCUREMENT SOP

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



# TABLE OF CONTENTS

3	PROCURMENT OVERVIEW
4	GETTING STARTED
5-6	HOW TO CREATE A PUNCH OUT REQUISITION FOR ODP ITEMS
7-8	HOW TO CREATE A PUNCH OUT REQUISITION FOR AMAZON ITEMS
9-10	HOW TO CREATE A REQUISITION FOR CATALOG ITEMS
11-13	HOW TO CREATE A REQUISITION FOR NON-CATALOG ITEMS
14-15	HOW TO VIEW THE STATUS OF REQUISITIONS
16	HOW TO CANCEL A REQUISITION
17	HOW TO VIEW THE STATUS OF PURCHASE ORDERS
18	HOW TO CREATE A RECEIPT FOR ALL ITEMS RECEIVED
19	HOW TO CREATE A RECEIPT NOT ALL ITEMS RECEIVED
20	HOW TO LOCATE PURCHASE ORDERS BY STORE TO CREATE RECEIPTS



# **PROCURMENT OVERVIEW**

**PURCHASES:** The Workday Purchases Application contains links to purchasing-related tasks and information. The application allows users to perform the following tasks:



- **Create Requisitions**
- View the Status of Requisitions
- Approve Requisitions
- **Create Receipts**

The Procurement Process involves many steps and several different groups of people. Below is an illustration of the overall procurement process.





# **GETTING STARTED**

### **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 5-8
  - 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 <u>page 9</u> for steps on How to Create a Requisition for Catalog Items
  - B. If no, see <u>page 11</u> for steps on How to Create a Requisition for Non-Catalog Items



# HOW TO CREATE A PUNCH OUT REQUISITION FOR ODP ITEMS

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

≡ menu	Goodwill	Q Search			Φ	₽
88 E	Hello There			It's Thursday, A	pril 10, 2025	
alı O	Awaiting Your Action	9		Announceme	ants 1 of 2 < > 2024 ACA 1095-C Form are now available in Wo There are three ways you can view your form: 1. Type	18 
	Timely Suggestions			Your Top App	ps	
	You Have a New Payslip Review your payslip informe	tion to ensure accuracy	View Paysips	Can	npaigns veys Dashboard	
_	We would like you to review up to date	t Information Updated your Contact Information and ensure it's	Update Contact Info	Lea	rning Admin	

### 2. Click Connect to Supplier Website

Actions
Search Catalog
Request Non-Catalog Items
Connect to Supplier Website
Add from Templates/Requisitions
Select from My Procurement Favorites
More (5)

3. Under Requisition Type, Click to select Goods Only > Review the form > Click OK

Connect to Supplier Website							
Requester * > Company * ,	× Store Manager Jimmy Johns ··· I≡ × Goodwill of Central & I≡ Northern Arizona	? ?		Search :=			
Currency *	× USD :≡ ( × Goods Only :≡ (	?)	3	Goods & Services Goods Only Requisition for Blanket Purchase Order			
Deliver-To	× 110201 - Jackrabbit Store ··· 19415 W. Indian School Rd × Litchfield Park, AZ 85340 United States of America	?		Requisition for Legal Contractual     Agreement Expense     Services Only			
Cost Center Grant	× 110201 Jackrabbit Store …		Note: The cost cer → be changed, click t option.	nter auto-populates. If the cost center needs to the stacked bars icon and select the appropriat			
Project Task Additional Worktags	X Business Unit: Retail		Note: If the purchase is asso stacked bars icon and select	se is associated with a grant, click the nd select the appropriate option.			
			Note: If the purchas be capitalized, click appropriate option.	se is associated with a capital project and will the stacked bars icon and select the			
ок	Cancel						



# HOW TO CREATE A PUNCH OUT REQUISITION FOR ODP ITEMS

Click Connect under the ODP Punchout row

Connect to Supplier Website = 문									
Note: This action will redirect the user to the external ODP website.									
00	PPw/204		00P Buriness Solutions, LLC	Office Depot PuechOut					
GRA	ange PurchOut		Grainger, the	Dianger Penolitik	( Connect )				
am	nauer Pendone		Alwacon Dajolal Services Inc.	Amazon Puncheut	Connet				

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



Co Sh

🗔 Bu

Search

Group 1

Add To Cart

\$52.19 / bo

8

Add To Cart

- 6. Select the checkbox to the left of the desired item
- 7. Adjust the quantity (Qty) 1 to the desired number
- 8. Click 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

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

10

<b>₽</b> Q		View Cart Company Command Control & Northern Arbons Becautifier South Manager Jamey Johns Becautifier Type Ecology Control & Control Contro Control Control Control Control Control Co	
Cart Summary			
Avery® Address Labels For Copiers, 5360, Rectangl \$52.19 each QTY 1	<b>Note:</b> The user will automatically be redirected back to Workday.	1 term  AveryPE Address Labels For Copiers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Suppler term before  92427  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coopers, S345, BecSangle, 1 x 2 13/16, White, Pack Of 2,102  Seed Coo	
Add \$25.00 more for FREE shipping Subtotal(1 item): \$52.19 View Cart Checkout		Continue States (****)	

C · My Lists · SHOPPING SHOPPING LIST

Company

6

Select Al

\*\*\*\*\* (588)

11. Under Spend Category, Select either Office Supplies <u>OR</u> Janitorial Supplies > Click Submit





**\$** 

\$52.19

# HOW TO CREATE A PUNCH OUT REQUISITION FOR AMAZON ITEMS

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



### 2. Click Connect to Supplier Website

Actions
Search Catalog
Request Non-Catalog Items
Connect to Supplier Website
Add from Templates/Requisitions
Select from My Procurement Favorites
More (5)

3. Under Requisition Type, Click to select Goods Only > Review the form > Click OK

Connect to S	Connect to Supplier Website							
Requester * Company * Currency *	× Store Manager Jimmy Johns ··· i≡ × Goodwill of Central & i≡ × Northern Arizona ··· i≡ × USD ··· i≡	? ? ?	3	Search := Capital Expenditure Goods & Services Goods Only				
Deliver-To Ship-To *	× 110201 - Jackrabbit Store … ∷≡ 19415 W. Indian School Rd × Litchfield Park, AZ 85340 United States of America × 110201 Jackrabbit Store …	? ?	Note: The cost center to be changed, click	Requisition for Blanket Purchase Order Requisition for Legal Contractual Agreement Expense Services Only er auto-populates. If the cost center needs the stacked bars icon and select the				
Grant Project Task			Note: If the purchas stacked bars icon an	e is associated with a grant, click the d select the appropriate option.				
Additional Worktags	X Business Unit: Retail     Region: Retail District 11	=	<i>Note:</i> If the purchas be capitalized, click appropriate option.	e is associated with a capital project and will the stacked bars icon and select the				
ок	Cancel							



# HOW TO CREATE A PUNCH OUT REQUISITION FOR AMAZON ITEMS



4	Payment method	Pay by Invoice		
3	Shipping address	Default Address - Choose your address in WorkDay 2626 W BERYL AVE PHOENIX, AZ 85021-1668	Note: The shippin	g address defaults to Beryl
	information			

13. Change the shipping address to the appropriate location in Workday

14. Click Checkout

Checkout

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



# HOW TO CREATE A REQUISITION FOR CATALOG ITEMS

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

# More Second Contract Information updated Work Second Contract Information and ensure (1) Work Second Contract Information Updated Work Second Contract Information and ensure (1) Work Second Contract Information Updated W

Actions

Search Catalog

Request Non-Catalog Items

Request Non-Catalog Items

Connect to Supplier Website

Connect to Supplier Website

Add from Templates/Requisitions

Select from My Procurement Favorites

More (5)

3. Under Requisition Type, Click to select GoodsOnly > Review the form > Click Search

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

### Search Catalog 44 Results 1 selected **Current Search** Search := × Store Manager Jimmy Johns … 🗵 🤉 Requeste Save Clear All Capital Expenditure **B8 Stanley Bostick Plier Stapler** Compan × Goodwill of Central & ... 😑 🤊 Fixture Zone | \$27.77 | USD | Each | Fixtures (non-capitalized) Category Goods & Services \* × USD 10 Currency Taging gun Mark III Supplier $\equiv$ Goods Only Requisition Type × Goods Only Fixture Zone | \$15.85 | USD | Each | Fixtures (non-capitalized) Shamrock Foods Company (53) × 110201 - Jackrabbit Store … Deliver-To :**=** ( Requisition for Blanket Purchase Order Fastener 1-1/2" Hook box/5000 Frito-Lay Sales (46) 19415 W. Indian School Rd × Litchfield Park, AZ 85340 United States of America Ship-To := Requisition for Legal Contractual Fixture Zone | \$28.75 | USD | Each | Fixtures (non-capitalized) Willard Packaging Co, Inc (45) Agreement Expense Fixture Zone (44) Services Only × 110201 Jackrabbit Store Cost Cente := Boot/Hercules Clip w/S hook (must be ordered in increm Fixture Zone | \$0.35 | USD | Each | Fixtures (non-capitalized) Nackard Pepsi-Cola Bottling... (38) Grant := O More := Project Task Red Listo Refill (72/box) > Catalog Fixture Zone | \$5.74 | USD | Each | Fixtures (non-capitalized) Additional Worktags × Business Unit: Retail := × Region: Retail District 11 ... Note: Click the checkbox to Flat rate freight Fixture Zone | \$12.50 | USD | Each | Fixtures (non-capitalized filter the catalog by Supplier. Compare Search Cancel

Saved Searches

5. Click the shopping cart icon > Click View Cart

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





### 2. Click Search Catalog

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

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



9. Enter the desired Delivery Date (Optional)

**10.** Confirm and/or change the Cost Center, if necessary

**Note:** The cost center auto-populates.

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

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

13. Review the entire form for accuracy > Click Submit

~	Goods																
2 item:	;																⊽ E J
Reque	sted Deliv	ery Date	Supplier		Supplier C	ontract	Supplier It	em Identifier	Item Identifiers	RFQ Required	Memo	*0	Cost Center	Grant		Project Tas	k
MM	DD/YYY	Y 🖬	Fixture 2	Zone	SC-0000	12 : Fixture Zone	E89012						× 110201 Jackrabbit :=		:=		
	7												10		11		12
			Fixture	Zone	SC-0000	12 : Fixture Zone	E106510						× 110201 Jackrabbit ≔ ∷≡		:=		
~	Servic	es															
0 item																	□."
	D or	der	Image	Company		Item		Description	*Spend Category		Ext Am	tended nount	Date		Deliver-To		*Ship-To Address
									No Data								
> .	> Attachments																
•		' <b>O)</b> nent ıg someor	ne.														
	Submit Save for Later Continue Shopping																



# HOW TO CREATE A REQUISITION FOR NON-CATALOG ITEMS

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

### 2. Click Request Non-Catalog Items



3. Under Requisition Type, Click to select the appropriate option > Review the form > Click OK at the bottom of the form

Request Non-	Catalog Items			
Requester *	Store Manager Jimmy Johns … 🛛 🗄	0	Search	
Company *	Goodwill of Central & :=	9		_
Currency *	USD :=	?		
Requisition Type	Goods Only :=		Goods & Services	
Deliver-To	110201 - Jackrabbit Store … 📰	?	Goods Only	
,	<ul> <li>Litchfield Park, AZ 85340 United States of America</li> </ul>	<u>(</u>	Requisition for Blanket Purchase Order	
Cost Center	× 110201 Jackrabbit Store …			
Grant			Requisition for Legal Contractual Agreement Expense	
Project Task		=		
Additional Worktags	× Business Unit: Retail		Services Only	
	× Region: Retail District 11 …	(9)		_

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



Request Non-Catalog Iter	ns 🚥	
Company Goodwill of Central & Northern Arizona	<b>Requester</b> Store Manager Jimmy Johns	Requisition Type Goods Only
Requisition Currency * × USD	:=	
Non-Catalog Request Type		
<ul> <li>Request Goods</li> <li>Request Service</li> </ul>		
Goods Request Details		
Item Description * 5		
Supplier Item Identifier		
Spend Category *	≣ 6	
Supplier		
Supplier Contract (empty)		
Quantity * 0	8	
Unit Cost 0.00	9	
Unit of Measure * select one	• 10	
Extended Amount 0.00		
Memo 1	1	
Continue Shopping 🔻 🛛 Add to	o Cart Cancel	

- 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



# HOW TO CREATE A REQUISITION FOR NON-CATALOG ITEMS

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

My Car View Cart	<b>Note:</b> Click View Cart to adjust the quantity and/or make additional changes.	<i>Note:</i> Click the trash can icon to delete the item from the cart.
Quantity: 1 \$2.00	1 mm       Edit         1 mm/m Cood       1         2 20       1         Edit       Description         Spend Category       Store Equipment - Capital         Spend Category       Imm         Unit of Measure       Roll         Unit of Measure       Roll         Extended Amount       2.0         Extended	

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

Constant a shorthern Arizona Requester Jimmy Johns Requisition Data Amount Store Manager Jimmy Johns Requisition Data Store Manager Jimmy Johns Request Date Barley Store Manager Jimmy Johns Note: Review the Shipping Address.	Chookout							
Company       Requester       Requester       Requisition       Requisition       Information         • Shipping Address         Deliver-To       110201 - Jackrabbit Store       Note: Review the Shipping Address.         • Requisition Information         Request Date       06/06/2025 © •       Company       Note: Review the Shipping Address.         • Requisition Information       Note: Review the Requisition Type. Appropriate options include:         Requisition Information       Note: Review the Requisition Type. Appropriate options include:         Requisition Type       © odds Only       © •         High Priority       •       © odds Only OR Services Only OR Capital Expenditure.         Sourcing Buyer       © •       Optional: Note to the Suppliers         Internal Memo       Example memo       © •       Optional: Internal Note         • Goods       MPORTANT! Scroll down on the page.       MPORTANT! Scroll down on the page.	Checkout						-	
Shipping Address  Beliver.To     110201 - Jackrabbit Store  Ship-To Address  Deliver.To     110201 - Jackrabbit Store  Ship-To Address Deliver.To     10201 - Jackrabbit Store  Ship-To Address Deliver.To     10201 - Jackrabbit Store  Ship-To Address Deliver.To     10201 - Jackrabbit Store  Note: Review the Shipping Address.  Note: Review the Requisition Type. Appropriate options include: Goods Only OR Services Only OR Capital Expenditure.  Subritted by     Store Manager Jimmy Johns  Memo to Suppliers  Coods  MPORTANT! Scroll down on the page.	Company Goodwill of Central & N	Northern Arizona	<b>Requester</b> Store Manager Jimmy Johns	Requisition RQ-062931	<b>Status</b> Draft	Total Amount 73.35 USD		Requisition Information
Deliver-To 110201 - Jackrabbil Store Ship-To Address Values and A 28540 Vinited States of America	<ul> <li>Shipping Ad</li> </ul>	ldress						
Ship-To Address Ship-To Address Ship-To Address Ship-To Address V Requisition Information Request Date + 05/06/2025 Currency + 1000 Requisition Type & Goods Only = + Note: Review the Requisition Type. Appropriate options include: Goods Only OR Services Only OR Capital Expenditure. Submitted by Store Manager Jimmy Johns Memo to Suppliers • Optional: Note to the Suppliers internal Memo Example memo • Optional: Internal Note Sources Control Contro	Deliver Te 11							
Supplex       Note: Review the Shipping Address.            · Requisition Information         Request Date         * @5/66/2025          · Ote: Review the Requisition Type. Appropriate options include:         Goods Only         · Currency         * USD         · Currency         * Oods         / Optional: Note to the Suppliers         / Optional: Internal Note         / Optional: Internal Note         // Optional: Internal Note	Ship-To Address 10	415 W Indian School Pd						
Requisition Information Request Date     * @5/66/2025      •     ·	Lite Un	chfield Park, AZ 85340 ited States of America	Note: Review 1	the Shipping	Address.			
Request Date * 05/06/2025 Currency * USD = Requisition Type X Goods Only = High Priority Sourcing Buyer = Submitted by Store Manager Jimmy Johns Memo to Suppliers Internal Memo Example memo Optional: Note to the Suppliers of the Suppliers Optional: Internal Note Carrency * Example memo Optional: Internal Note Constant Scroll down on the page.	<ul> <li>Requisition</li> </ul>	Information						
Currency * USD := Requisition Type Code Sonly := High Priority Sourcing Buyer := Submitted by Store Manager Jimmy Johns Memo to Suppliers Internal Memo Example memo Optional: Note to the Suppliers of Optional: Internal Note Codes IMPORTANT! Scroll down on the page.	Request Date *	05/06/2025 🖬 ?						
Requisition Type     Requisition Type     Kequisition Type     Sourcing Buyer     Store Manager Jimmy Johns     Memo to Suppliers     Keample memo     Keample memo     Keample memo <	Currency *	× USD	:= ?					
High Priority Sourcing Buyer Submitted by Store Manager Jimmy Johns Memo to Suppliers Internal Memo Coods	Requisition Type	× Goods Only	·····	Note: Revi	ew the R	equsitior	п Туре. Ар	propriate options include:
Sourcing Buyer := ? Submitted by Store Manager Jimmy Johns Memo to Suppliers Optional: Note to the Suppliers Internal Memo Example memo ? Optional: Internal Note Source Store Manager Jimmy Johns Memo to Suppliers Optional: Internal Note Memo to Suppliers Optional: Internal Note	High Priority	?		Goods On	ly <mark>OR</mark> So	ervices C	Only OR (	Capital Expenditure.
Submitted by Store Manager Jimmy Johns          Memo to Suppliers	Sourcing Buyer		:= ?					
Memo to Suppliers   Internal Memo Example memo     Optional: Note to the Suppliers   Optional: Internal Note   Goods   IMPORTANT! Scroll down on the page.	Submitted by	Store Manager Jimmy Joł	nns				_	
Internal Memo	Memo to Suppliers					?	i Opt	<b>ional:</b> Note to the Suppliers
Coods  IMPORTANT! Scroll down on the page.  Optional: Internal Note	Internal Memo	Example memo						
Goods IMPORTANT! Scroll down on the page.	internal memo					?		ptional: Internal Note
IMPORTANT! Scroll down on the page.	✓ Goods						_	
IMPORIANI! Scroll down on the page.								
		MPORTANT!	Scroll down on the p	age.				



# HOW TO CREATE A REQUISITION FOR NON-CATALOG ITEMS

### GOODS

14A. Scroll to view the right side of the form > Enter the desired Delivery Date (Optional)

**15A.** Confirm and/or change the Cost Center, if necessary **Note:** The cost center auto-populates.

**16A.** If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.

**17A.** If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option

18A. Review the entire form for accuracy > Click Submit

✓ Go	ods															
2 items													-		_	回日に
Requested	i Delivery Date	Supplier		Supplier	Contract	Supplier	Item Identifier	Item Identifiers	RFQ Required	Memo		*Cost Center	Grant		Project Task	с — —
MM/DD.	/ 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Fixture	Zone	SC-000	012 : Fixture Zone	E89012						× 110201 Jackrabbit :=		:=		
14	4											15	1	6		17
		Fixture	Zone	SC-000	012 : Fixture Zone	E106510						× 110201 Jackrabbit :=		:=		
✓ Set	rvices															
0 items																⊡ . <sup>-</sup>
÷	Order	Image	Company		Item		Description	*Spend Category		Ex Ar	ctended mount	Date	Deliver	То		*Ship-To Address
								No Data								
> Att		S														
Sub	mit	Save fo	r Later Continue	9 Shopping												

### SERVICES

- 14B. Scroll to view the right side of the form > Enter a memo (Optional)
- **15B.** Confirm and/or change the Cost Center, if necessary **Note:** The cost center auto-populates.
- **16B.** If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.
- **17B.** If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option
- **18A.** Review the entire form for accuracy > Click **Submit**

Services								Ξ.
Ship-To Contact	Supplier	RFQ Required	Memo	*Cost Center	Grant	Project Task	Additional Worktags	Splits
X Store Manager	Supplier       Supplier       Supplier Contract		14	× <sup>110201</sup> Jackrabbit … ≔ Store	 16	≡ 17	× Business Unit: Retail ∷≡ × Region: Retail … District 11 …	0
> Attachments								
<b>18</b> "								
Submit Save for L	ater Continue Shopping							



# HOW TO VIEW THE STATUS OF REQUISITIONS

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



	Menu	Shortcuts	
		Learning Trainer	
.	£	Organization	~
		Jobs Hub	
11		Dashboards	
Ш		My Requisitions	-
Ш		Purchases	
Ш		Requests	
Ш	8	Personal	~
		Expenses Hub	
		Learning	
		Benefits and Pay	
		Time	
		Personal Information	
		Absence	
		Favorites	
	Ä	Procurement	~
		My Recent Purchase Orders	
	鸟	Recruiting	~
		🕘 Add 🛛 🕫 Edit	

**My Requisitions** 

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

Requisition	Date	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
RO-060063	02/14/2025			Successfully Completed

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

Note: Enter search crite specific requisitions suc

- **Requistion Number** a.
- b. Status
- Document Date Ra c.
- Supplier d.

eria to narrow down	Status	
h as: r	Requisition Type	
	Requesting Inventory Site	
ange	Document Date On or After	04/06
	Document Date On or Before	MM/DE
	Supplier	
	Spend Category	
	ltem	

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	<ul> <li>Image: A set of the set of the</li></ul>	
Include Job Requisitions		
Results in Requisitions Worklet		
	Cancel	ок

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



 $\times$ 

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

My Requisitio	ons 👯										
Create Requisition											
<ul> <li>Selection Cri</li> </ul>	iteria										
Company	Goodwill of (	Central & Northern A	rizona								
Document Date On or A	After 04/07/2025										
Exclude Canceled Ye Exclude Closed Ye	ns Not	te: The re	equisition	num	ber		Note: T	he reque	st status		
<ul> <li>Procurement</li> </ul>	t Requisitions										
1 item								<b>↓</b>			ۃ װ ≂ ┉ ๓ ר ш ш
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 Requester Goodwill of Central & Northern Arizona Employee: Stor	e 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					
<ul> <li>Shipping Address</li> </ul>						
Deliver-To						
Ship-To Address 🛛 🕫 19415 W. Indian School Rd Litchfield Park	, AZ 85340 United States of Ame	rica				
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



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



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

Confirm Requisition Cancel RQ-063203	-		
Company Requester Goodwill of Central & Northern Arizona Employee: Stor	e Manager Jimmy Johns	Status In Progress	Total Amount 64.80 USD
Please confirm you wish to cancel the Requisition below			
Comments			
<ul> <li>Requisition Information</li> </ul>			
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)		
<ul> <li>Shipping Address</li> </ul>			
Deliver-To 110201 - Jackrabbit Store			
ОК Сапсе			

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

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



### 1. Log in to Workday > Click Menu > Select My Recent

### Purchase Orders

= MENU	Goodwill Q. Search	¢ 🕹	Æ	Organization
88	Here's What's Happening	It's Tuesday, May 6, 2025		Dashboards My Requisitions
s. sb. ⊕	Awaiting Your Action	Announcements 1rf1 C > Instructions to access year W-2 Year W-2 form will be Year W-3 fo	٨	Purchases Requests Personal Exception
	Timely Suggestions	Your Top Apps		Learning Benefits and Pay
	Keep Your Home Contact Information Updated We would like you to more syour Contact Information and ensure it's Update Contact Info Update Contact Info Update	Campaigns		Personal Information Absence Favorites
0	Recommended for You	Learning Trainer     My Requisitions	д р	Procurement My Recent Purchase Orders

**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		ок

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

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





# HOW TO CREATE A RECEIPT-ALL ITEMS RECIEVED

**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.

2. Click More > Click Create Receipt

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



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

Create Receipt		×
Please attach supporting documentati <u>Retail - New Goods</u> please remember t	on if receipt amount is different than what was included on the shi o Receive your items in Dynamic 365.	ipping documentation.
You are about to fully receive the remain <b>Document Number *</b> × PO-059145	ning quantities/amounts. This doesn't apply to Project Based Servic (Pepsi-Cola) :=	ce lines. Review your lines before you submit.
Fully Receive     Tracking Number		
		Cancel

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

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



# HOW TO CREATE A RECEIPT-MISSING ITEMS

**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



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 documentatio
Retail - New Goods please remember to Receive your items	s in Dynamic 365.
	<u>^</u>
Document Number * × P0-059145 (Pepsi-Cola) ···	
Fully Receive	
Tracking Number	
	Cancel



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

2. Click More > Click Create Receipt

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

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



*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

Vie	w
C	GCNA - Purchase Order Lines not Received
	Receipts
	Templates
	Business Assets
	Supplier Requests
	Requisitions Worklet

3. Click and select the appropriate store under Cost Center > OK

**GCNA - Purchase Order Lines not Received** Х  $\equiv$ District × 110039 Oak Store ...  $\equiv$ Cost Center  $\equiv$ Requester := Purchase Order **OPTIONAL:** Enter a date range to Supplier as Worktag narrow down the search for the Procurement Item appropriate purchase order(s). Spend Category as Worktag 12/01/2020 🖬 Purchase Order Date From Purchase Order Date To 05/13/2025 🖬 Purchase Order Due Date From \* 12/01/2020 🛱 Purchase Order Due Date To 05/13/2025 🛱 Goodwill of Central &  $\equiv$ Company Northern Arizona Filter Name Manage Filters Save Cancel

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



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

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

