

# PROCUREMENT SOP

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



# GOODWILL

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# PROCUREMENT OVERVIEW

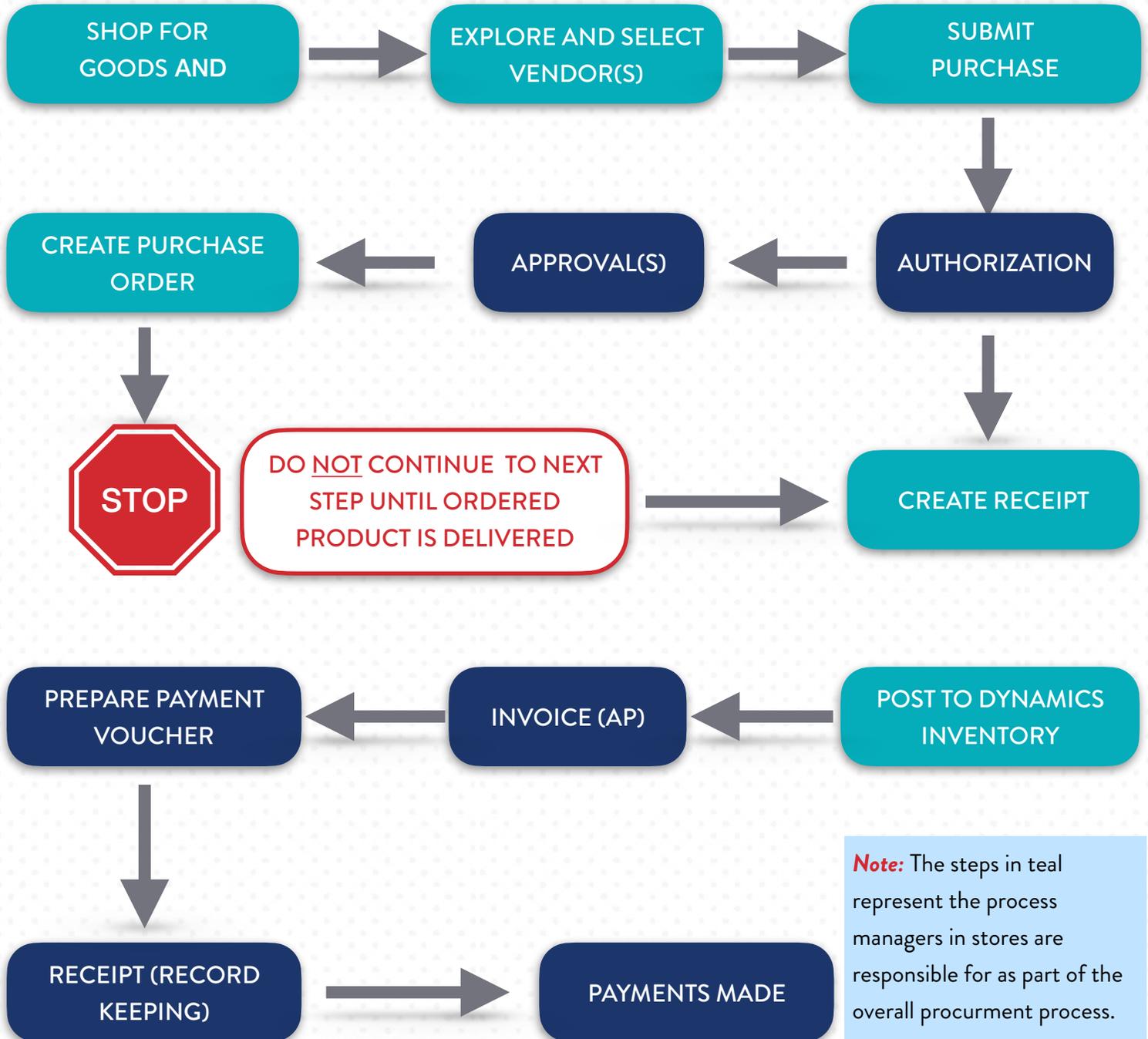
**PURCHASES:** The Workday Purchases Application contains links to purchasing-related tasks and information. The application allows users to perform the following tasks:



## Purchases

- 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.



**Note:** The steps in teal represent the process managers in stores are responsible for as part of the overall procurement process.

# GETTING STARTED

## GETTING STARTED:

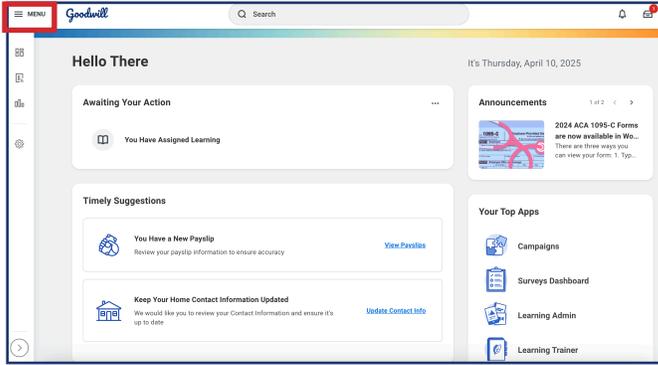
To purchase items, you begin with a requisition. A requisition is a request that lists the items (e.g., goods/services) you want to purchase. To get started, review the decision tree below and follow the steps.

## REQUISITION DECISION TREE

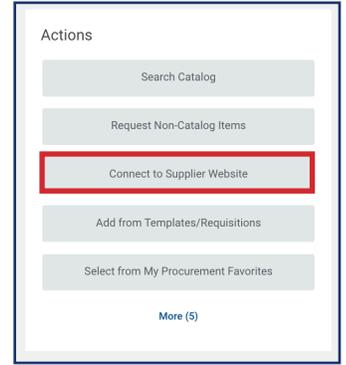
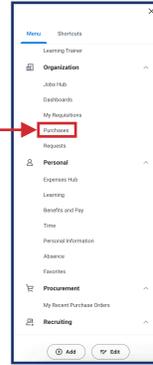
1. Are you attempting to create a requisition to purchase Goods and/or Services from a new Supplier?
  - A. If yes, refer to the **Workday Request a New Supplier Guide**. Continue with Question #2 after the new Supplier is added.
  - B. If no, proceed to Question #2.
  
2. Are you attempting to create 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 [page 9](#) for steps on **How to Create a Requisition for Catalog Items**
  - B. If no, see [page 11](#) 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



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 \*

Company \*

Currency \*

Requisition Type

Deliver-To

Ship-To \*

Cost Center

Grant

Project Task

Additional Worktags

Search

- Capital Expenditure
- Goods & Services
- Goods Only
- Requisition for Blanket Purchase Order
- Requisition for Legal Contractual Agreement Expense
- Services Only

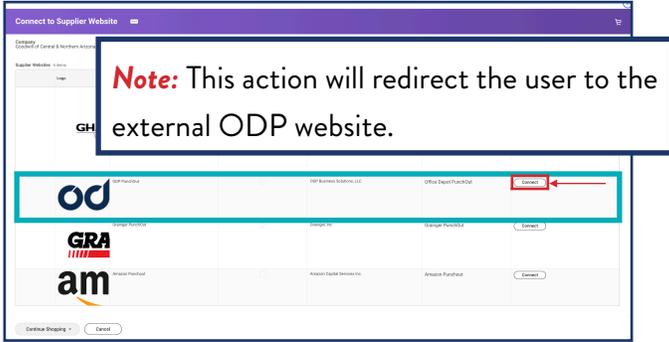
**Note:** The cost center auto-populates. If the cost center needs to be changed, click the stacked bars icon and select the appropriate option.

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

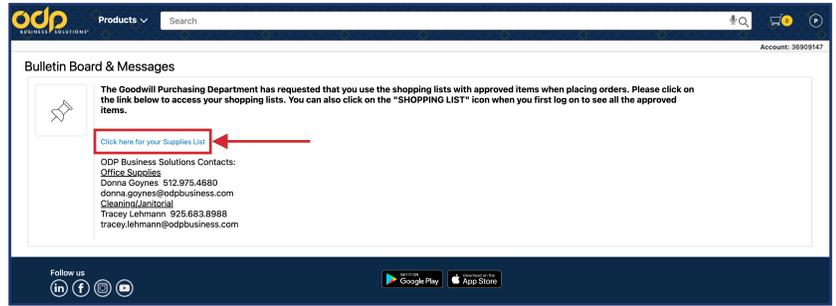
**Note:** If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option.

# HOW TO CREATE A PUNCH OUT REQUISITION FOR ODP ITEMS

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



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

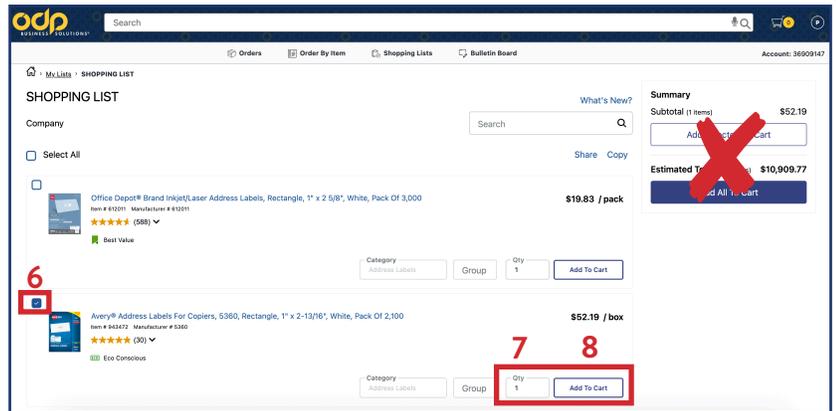


6. Select the checkbox to the left of the desired item

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

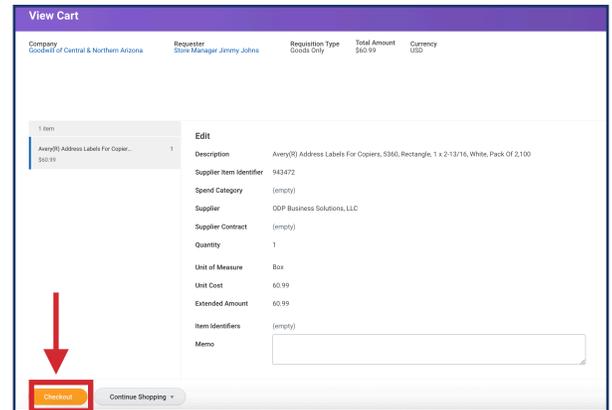
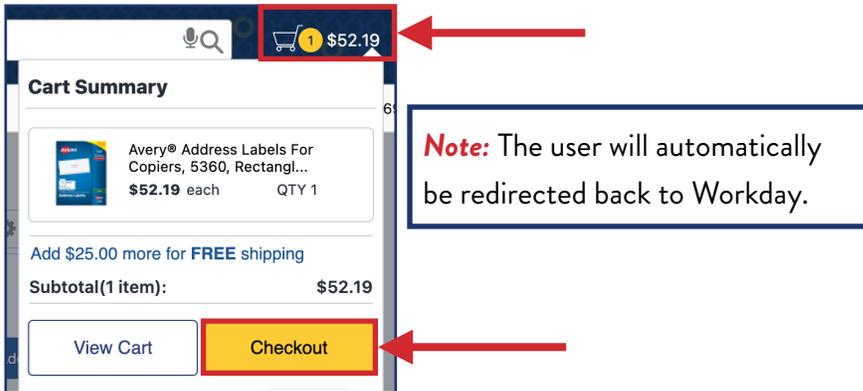
8. Click **Add To Cart**

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



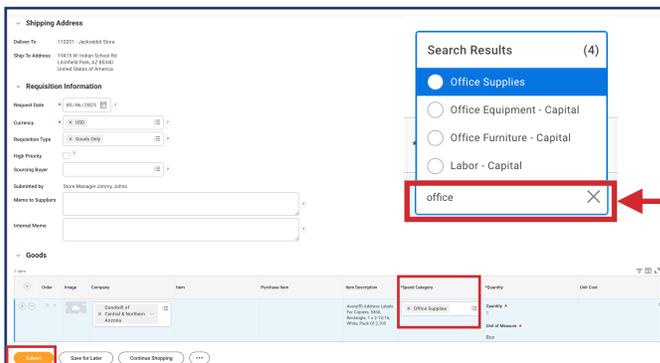
9. Hover over the shopping cart icon > Click **Checkout**

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



11. Under *Spend Category*, Select either **Office Supplies** **OR** **Janitorial Supplies** > Click **Submit**

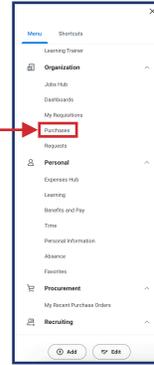
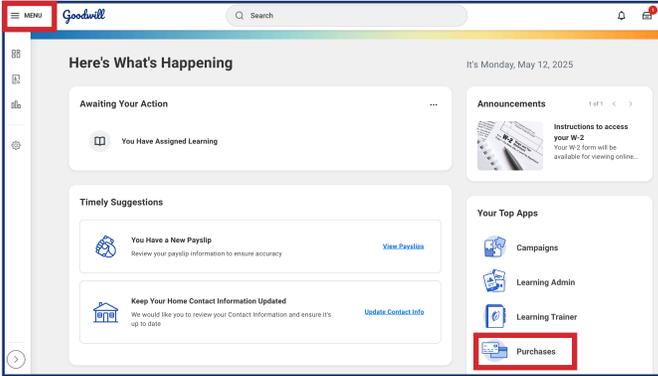
**IMPORTANT!** Team members need to add the spend category to every requisition line.



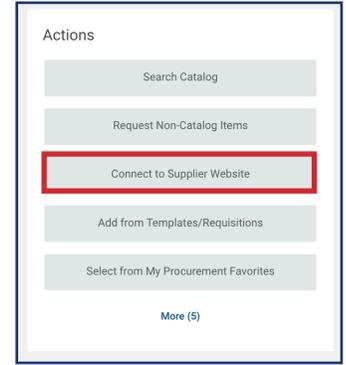
**Note:** Use the search feature to easily locate spend categories.

# 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



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

### Connect to Supplier Website

Requester \*

Company \*

Currency \*

Requisition Type \*  **3**

Deliver-To

Ship-To \*

Cost Center

Grant

Project Task

Additional Worktags

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

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

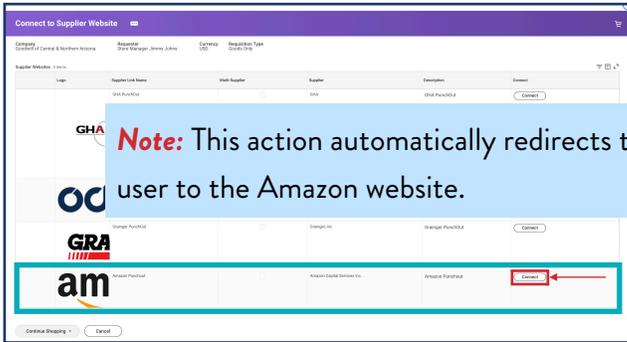
**Note:** If the purchase is associated with a capital project and will be capitalized, click the stacked bars icon and select the appropriate option.

Search

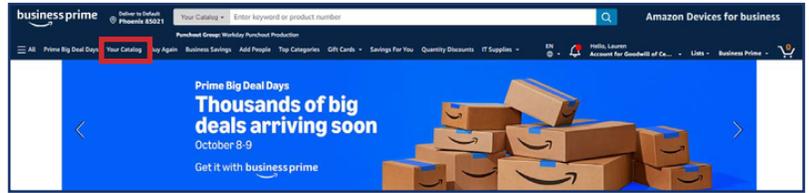
- Capital Expenditure
- Goods & Services
- Goods Only
- Requisition for Blanket Purchase Order
- Requisition for Legal Contractual Agreement Expense
- Services Only

# HOW TO CREATE A PUNCH OUT REQUISITION FOR AMAZON ITEMS

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



5. Click **Your Catalog** in the upper left corner of the screen

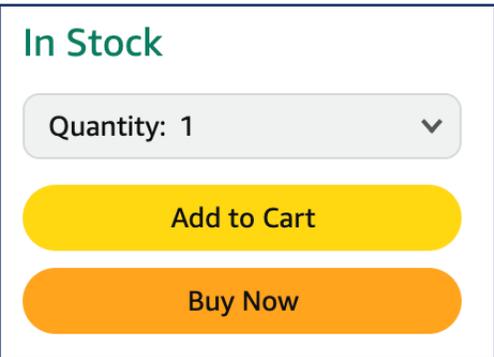


6. Scroll to the bottom of the page > Click **See All Results**

7. Click on an item to select it for purchase

8. Adjust the **Quantity** to the desired number

9. Click **Add to Cart**



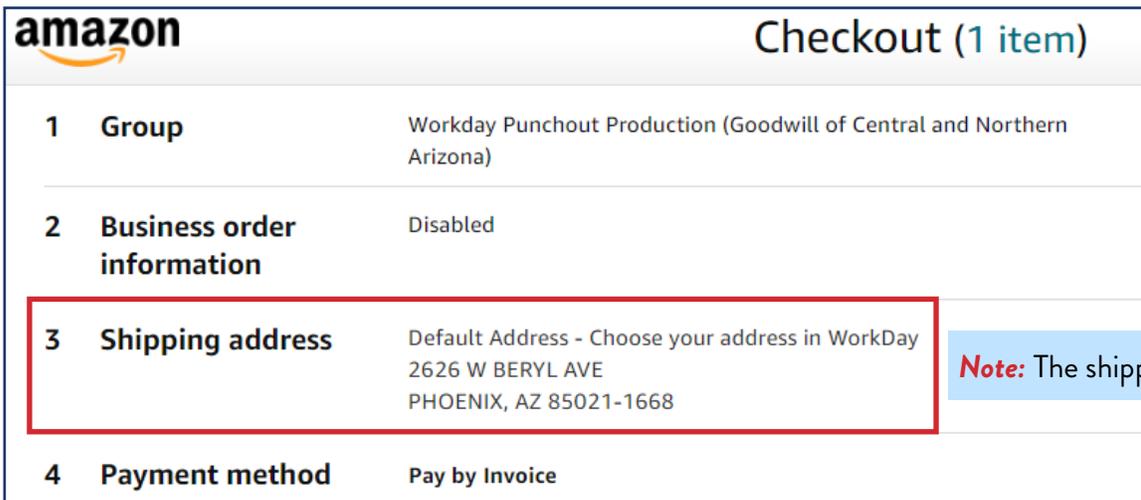
10. Click the shopping cart icon > Review the cart > Make changes, if necessary

11. Click **Proceed to checkout**

Proceed to checkout

12. Submit the order for approval

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



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

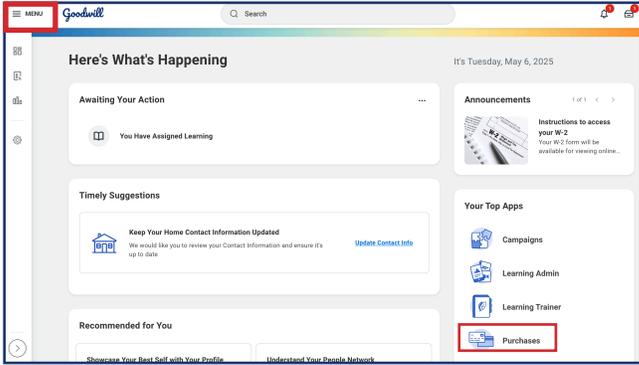
14. Click **Checkout**

Checkout

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

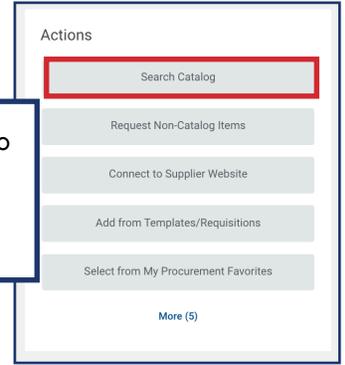
# HOW TO CREATE A REQUISITION FOR CATALOG ITEMS

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

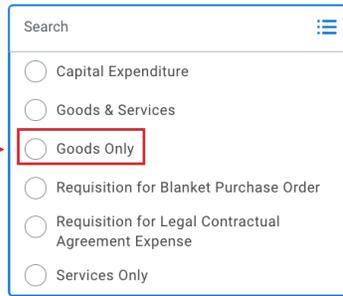
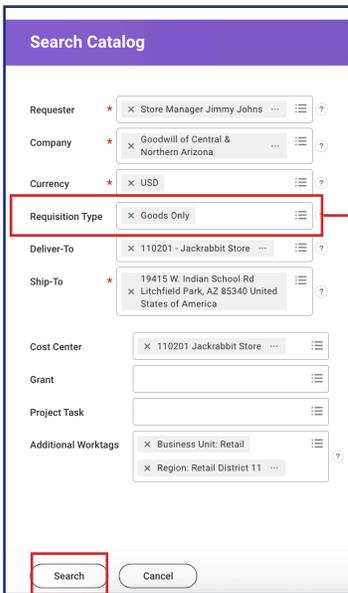


**Note:** The user might have to scroll down on the menu to locate the *Purchases* option.

## 2. Click Search Catalog

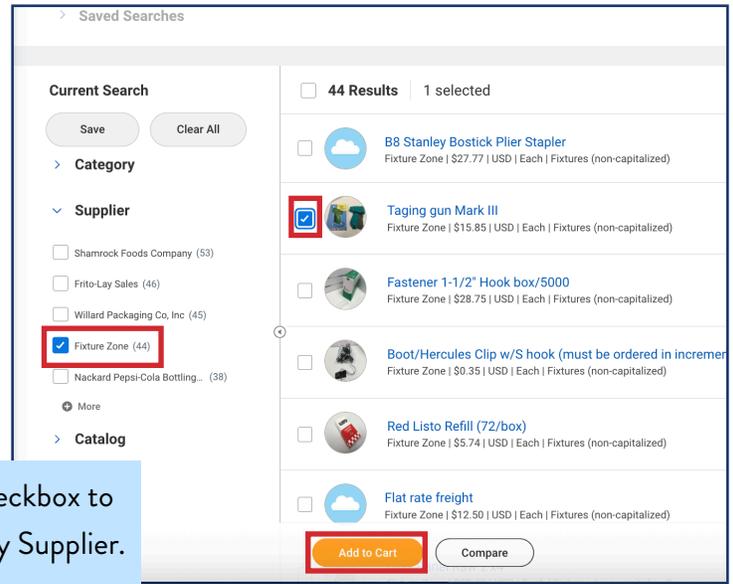


## 3. Under *Requisition Type*, Click to select *Goods Only* > Review the form > Click *Search*

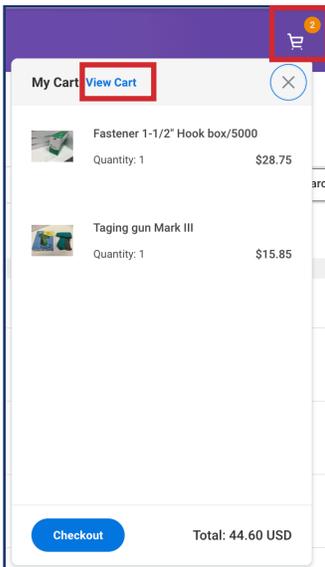


**Note:** Click the checkbox to filter the catalog by *Supplier*.

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

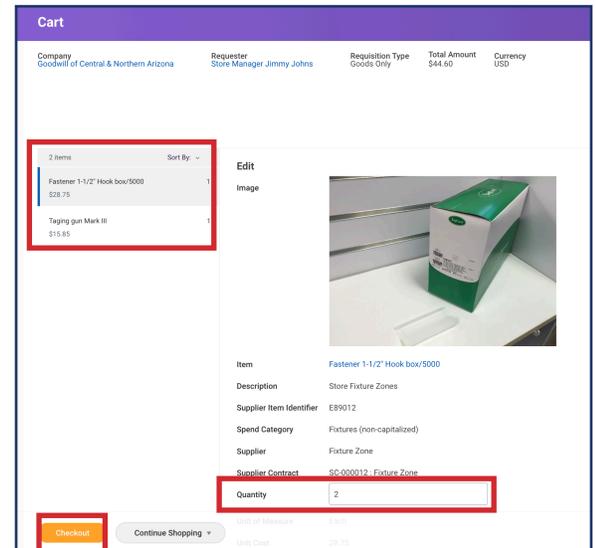


## 5. Click the shopping cart icon > Click *View Cart*



**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*



# HOW TO CREATE A REQUISITION FOR CATALOG ITEMS

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

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



9. Enter the desired Delivery Date (Optional)

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

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

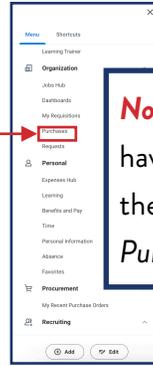
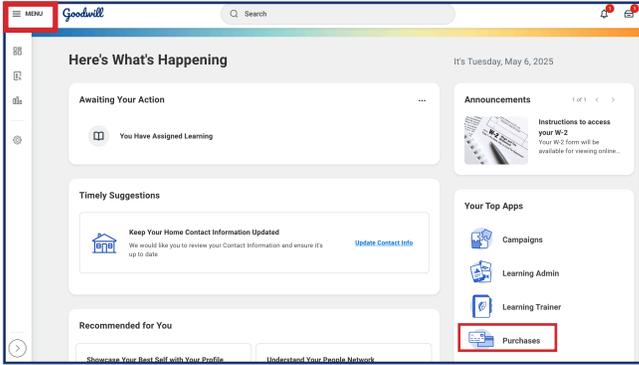
11. If the purchase is associated with a grant, click the stacked bars icon and select the appropriate option.

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

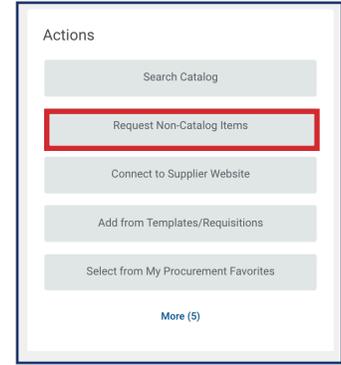
# HOW TO CREATE A REQUISITION FOR NON-CATALOG ITEMS

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

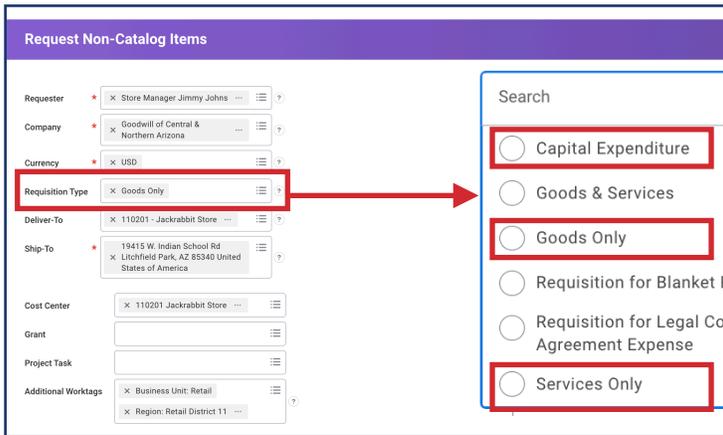


**Note:** The user might have to scroll down on the menu to locate the Purchases option.

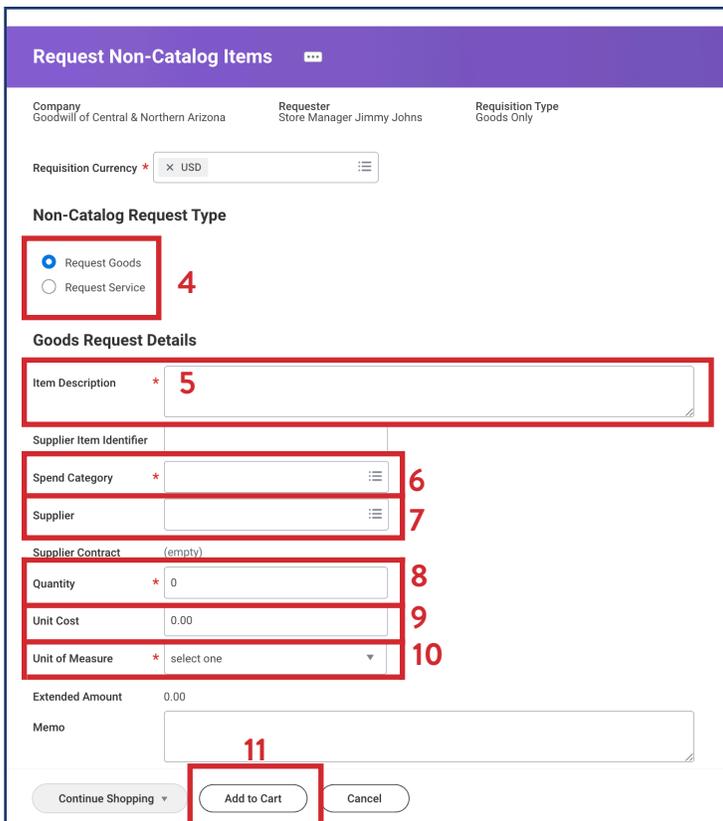
2. Click Request Non-Catalog Items



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



**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

# HOW TO CREATE A REQUISITION FOR NON-CATALOG ITEMS

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

The screenshot shows two parts of the shopping process. On the left, the 'My Cart' view displays 'Example Good' with a quantity of 1 and a price of \$2.00. A 'View Cart' button is highlighted, and a 'Checkout' button is at the bottom. On the right, the 'Edit' page for the item shows fields for Description, Spend Category, Supplier, Supplier Contract, Quantity (set to 1), Unit of Measure, Unit Cost, Extended Amount, Item Identifiers, and Memo. A 'Checkout' button is at the bottom left, and a trash icon is at the top right.

**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.

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

The screenshot shows the 'Checkout' page with the following sections:

- Requisition Information:** Company: Goodwill of Central & Northern Arizona; Requester: Store Manager Jimmy Johns; Requisition: RQ-062931; Status: Draft; Total Amount: 73.35 USD.
- Shipping Address:** Deliver-To: 110201 - Jackrabbit Store; Ship-To Address: 19415 W. Indian School Rd, Litchfield Park, AZ 85340, United States of America.
- Requisition Information:** Request Date: 05/06/2025; Currency: USD; Requisition Type: Goods Only; High Priority: unchecked; Sourcing Buyer: (empty); Submitted by: Store Manager Jimmy Johns.
- Optional fields:** Memo to Suppliers (empty); Internal Memo: Example memo.

**Note:** Review the Shipping Address.

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

**Optional:** Note to the Suppliers

**Optional:** Internal Note

**IMPORTANT!** Scroll down on the page.

# 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**

The screenshot shows the 'Goods' section of a requisition form. It features a table with columns for 'Requested Delivery Date', 'Supplier', 'Supplier Contract', 'Supplier Item Identifier', 'Item Identifiers', 'RFQ Required', and 'Memo'. Below the table are sections for 'Services' and 'Attachments'. Red boxes highlight specific fields: a date picker labeled '14', a dropdown menu for 'Cost Center' labeled '15', a dropdown menu for 'Grant' labeled '16', and a dropdown menu for 'Project Task' labeled '17'. At the bottom, there are buttons for 'Submit', 'Save for Later', and 'Continue Shopping'.

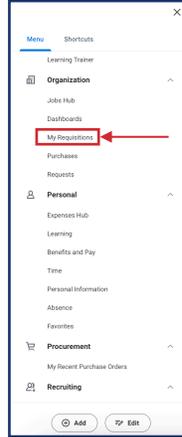
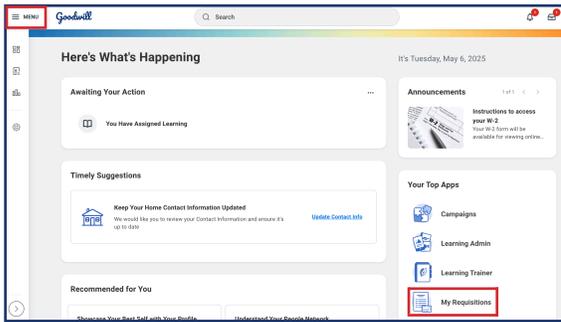
## SERVICES

- 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**

The screenshot shows the 'Services' section of a requisition form. It includes fields for 'Ship-To Contact', 'Supplier', 'Supplier Contract', 'Memo', '\*Cost Center', 'Grant', 'Project Task', 'Additional Worktags', and 'Splits'. Red boxes highlight the 'Memo' field labeled '14', the '\*Cost Center' dropdown labeled '15', the 'Grant' dropdown labeled '16', and the 'Project Task' dropdown labeled '17'. A red box labeled '18' highlights the 'Attachments' section at the bottom. At the bottom, there are buttons for 'Submit', 'Save for Later', and 'Continue Shopping'.

# HOW TO VIEW THE STATUS OF REQUISITIONS

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 requisitions

**Note:** Enter search criteria to narrow down specific requisitions such as:

- a. Requisition 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.

# HOW TO VIEW THE STATUS OF REQUISITIONS

4. View the status of the procurement requisition > Click the Requisition 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
<a href="#">RQ-062931</a>	Goods Only		05/06/2025	73.35	USD	Fixture Zone		In Progress		Example memo	<a href="#">Edit Requisition</a>

5. Click the **Process History** 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
<a href="#">Requisition Event</a>	Requisition Event	Step Completed
<a href="#">Requisition Event</a>	Approval by IT Asset Management	Not Required
<a href="#">Requisition Event</a>	Approval by Grant Manager	Not Required
<a href="#">Requisition Event</a>	Approval by Project Manager	Awaiting Action

# HOW TO CANCEL A REQUISITION THAT IS IN PROGRESS

**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

The screenshot shows the Workday user interface. On the left, the 'Menu' is open, and 'My Requisitions' is highlighted with a red box. On the right, a table lists requisitions. The first row, 'RQ-063202', is highlighted with a red box and has a status of 'In Progress'. Other requisitions are marked as 'Successfully Completed'.

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

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

The screenshot shows the 'Related Actions' menu for requisition RQ-063202. The menu is open, and the 'Cancel' option is highlighted with a red box. A blue callout box contains the text: 'Note: The Related Actions button appears when the user hovers over the requisition number.' Below the menu, a summary card shows the requisition details: Status: In Progress, Company: Goodwill of Central & Northern Arizona, Worker: Store Manager Jimmy Johns.

4. Click OK > Click Done on the next page

**Note:** The status of the requisition should show “Canceled”.

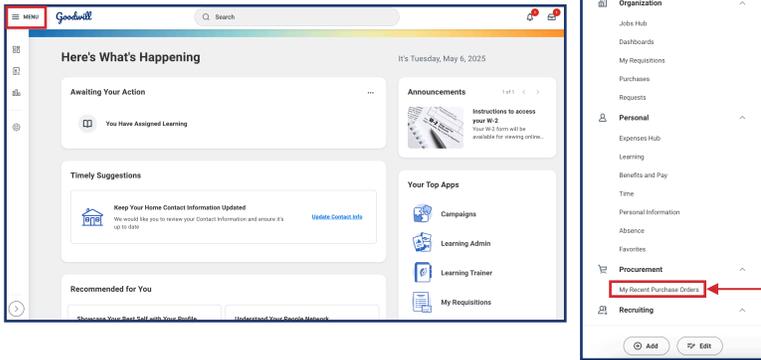
The screenshot shows the 'Confirm Requisition Cancel' dialog box for requisition RQ-063203. The dialog contains a 'Comments' field and a 'Requisition Information' section with the following details: Request Date: 05/12/2025, Currency: USD, Requisition Type: Capital Expenditure, High Priority: unchecked, Sourcing Buyer: (empty), Submitted by: Store Manager Jimmy Johns, Consolidate Requisitions on Purchase Orders: unchecked, Exclude Ship-To Address when Consolidating Requisition Lines: unchecked, Memo to Suppliers: (empty), Internal Memo: (empty). At the bottom, there are 'OK' and 'Cancel' buttons, with 'OK' highlighted by a red box.

The screenshot shows the requisition list after cancellation. The first row, 'RQ-063202', is highlighted with a red box and has a status of 'Canceled'. Other requisitions remain 'Successfully Completed'.

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

# HOW TO VIEW THE STATUS OF PURCHASES

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

Document Date On or Before

Due Date On or After

Due Date On or Before

Status

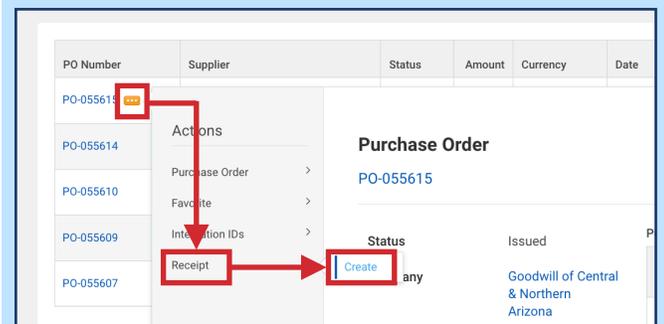
Issue Options

Contract

Cancel OK

**Note:** To quickly access the receipt function,

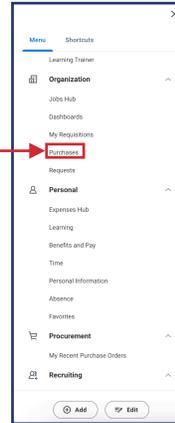
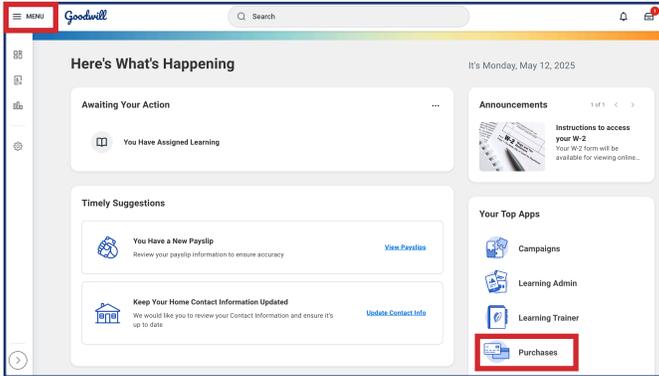
1. Hover over the Purchase Order number
2. Click the three-dot icon (i.e., *Related Actions*)
3. Hover over *Receipt*
4. Click **Create**



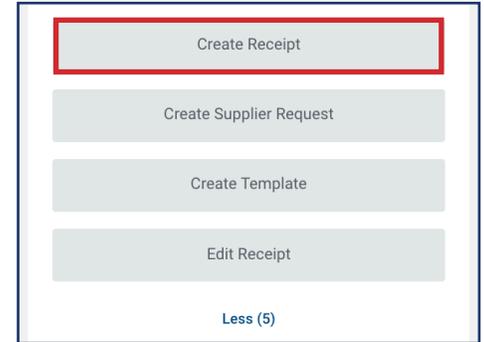
# HOW TO CREATE A RECEIPT—ALL ITEMS RECEIVED

**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

A screenshot of the 'Create Receipt' form. The 'Document Number' field is highlighted with a red box and contains the value 'PO-059145 (Pepsi-Cola)'. Below it, the 'Fully Receive' checkbox is checked and also highlighted with a red box. The 'Tracking Number' field is empty. At the bottom right, the 'OK' button is highlighted with a red box, while the 'Cancel' button is not.

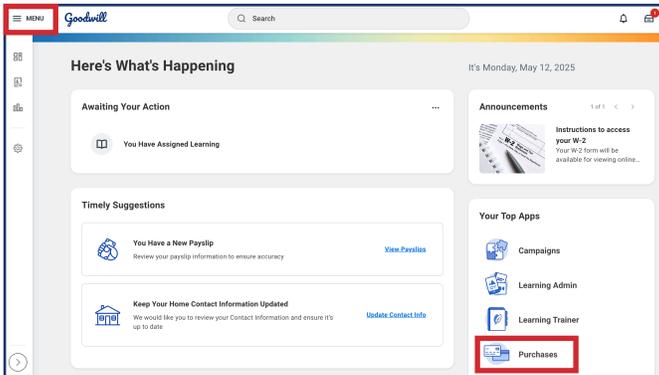
4. If all items from the order were received, check the box > Click **OK**

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

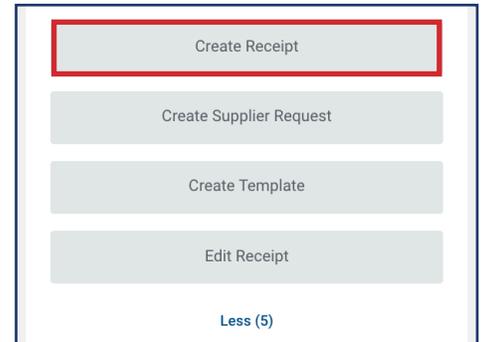
# HOW TO CREATE A RECEIPT—MISSING ITEMS

**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 steps 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 populate, contact Purchasing at [purchasing@goodwillaz.org](mailto:purchasing@goodwillaz.org).

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

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: -

Goods Lines

Item	Quantity	Unit of Measure
Bev - Aquafina Water 20oz 01215908	144/144	Each
Celsius Sprkl WHT PCH Vibe 88939201019	0/36	Each
Bev - Lifewater 012000161162	60/60	Each
Bev - Rockstar Original Energy 16 oz... 197779	24/24	Each
Bev - Rockstar Sugar Free - 16 oz Can 197257	24/24	Each
Bev - Mountain Dew Kickstart Black ... 012000043000	24/24	Each
Bev - Starbucks Mocha Double Shot	24/24	Each

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 x Each

Fully Receive

Quantity Ordered 36

Ordered Quantity Invoiced 0

Total Quantity Already Received 0

Supplier Item Identifier 88939201019

Memo

Submit Save for Later Cancel

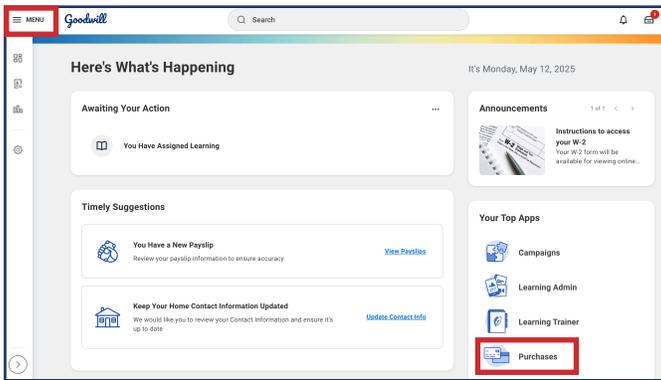
## 4. Click each line to review > Enter the quantity received from the vendor for each product under Quantity to Receive

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

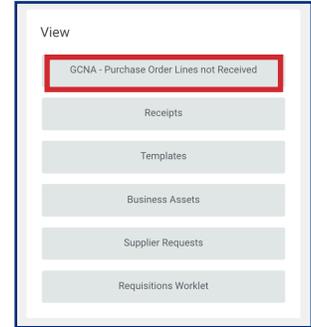
**Note:** In this example, the Quantity Ordered was 36, but the vendor only supplied 24 items.

**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**

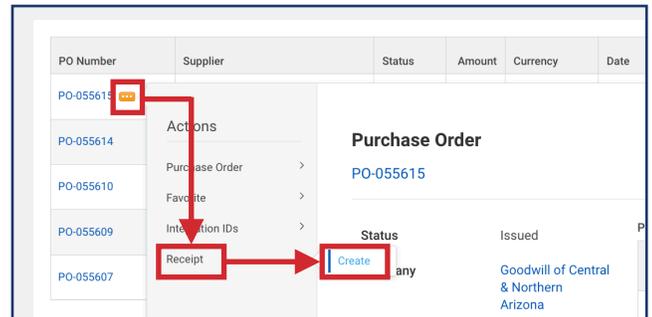


**2. Click GCNA—Purchase Order Lines not Received**



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

**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](mailto:purchasing@goodwillaz.org) for questions.