

# How to Access the Supplier Portal

**Description:** This Quick Guide describes the steps necessary to access supplier data in order to check the status of your Purchase Orders and Invoices or check the status of your Payments. Users can also review the supplier contact and banking information.

**Initiator:** Workday Supplier Portal User

**Approver(s):** Not Applicable

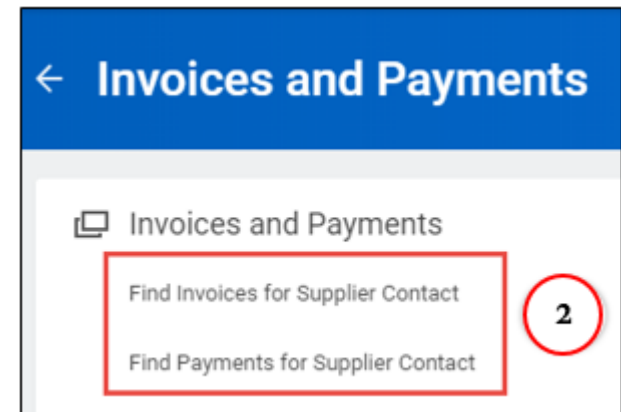
**Note:** Prior to completing this process, access the Supplier Portal first. Log-in instructions:

- **Web Address:** the URL is provided on an individual basis once the access is granted.
- **User ID:** Enter your email address.
- **Password:** Once you enter the initial password provided, you will be prompted to create a new password.
- If you need assistance with your username or password, contact [supplier.change@yale.edu](mailto:supplier.change@yale.edu).

# How to Access the Supplier Portal (cont.)

Steps to view your invoices and payments:

1. Click on **Invoices and Payments** worklet.
2. On the **Invoices and Payments** screen, choose **Find Invoices for Supplier Contact** or **Find Payments for Supplier Contact**. User can also open individual worklets: **Most Recent Invoices** or **Most Recent Payments**.
3. The following screen appears if **Find Invoices for Supplier Contact** is chosen:
4. The following screen appears if **Find Payments for Supplier Contact** is chosen ([go to step #8](#)):



# How to Access the Supplier Portal (cont.)

5. For **Find Invoices for Supplier Contact** – Enter search criteria and click **OK**. If searching for a specific invoice number, enter it as the Supplier Reference Number.
6. Click on the **Supplier Invoice Number** (highlighted in blue) to open Supplier Invoice. User can also hover the mouse next to the Invoice Number and click on **Related Actions** icon to view invoice details without navigating away from the screen.

← Find Invoices for Supplier Contact

Invoice Due Date On or After 07/21/2018

2154 items

Invoice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
SI-00491323	9954091802	35.55	USD	07/30/2018	Approved	Paid
SI-00491324	9954091804	3.95	USD	07/30/2018	In Progress	Unpaid

7. User can click on any invoice number to open the Invoice record in full screen.

View Supplier Invoice

Supplier Invoice: SI-0004804 Status: Approved

**Invoice Information**

Company: Yale University

Supplier:

Invoice Number:

Invoice Date: 06/02/2018

Invoice Received Date:

Total Invoice Amount: 125.76

Line Total Amount: 123.24

Freight Amount: 2.50

Payment Practices: No

**Terms and Taxes**

Payment Terms: 2% 10, Net 30

Due Date: 06/01/2018

Reference Type:

Reference Number:

Tax Amount: 0.00

Tax Option:

Default Tax Code:

**Invoice Reference Information**

Ship To Address:

Supplier's Invoice Number: 9079804230

Invoice Lines: 1 item

Company	Item	Item Description	Supplier Item Identifier	Related Purchase Item	Purchase Order Line	Spend Category	Ship To Address	Ship To Contact	Tax
Yale University		N75000N-PND-LIG-238L7-23PS			PO-7198109 - Line 1	Supplier: Research (06423)	<input type="text"/>	<input type="text"/>	Tax Applicability

# How to Access the Supplier Portal (cont.)

8. For **Find Payments for Supplier Contact**: Enter search criteria and click **OK**; a list of payments will appear with details.

Payment	View	Payment Amount	Currency	Payment Date	Payment Type	Transaction Reference	Payment Status	Reconciliation Status	Invoices	Remittance File
Supplier Payment: [redacted] 08/02/2018	View	237.12	USD	08/02/2018	ACH	2846095 (ACH)	Complete	Unreconciled	1	
Supplier Payment: [redacted] 08/01/2018	View	2,409.10	USD	08/01/2018	ACH	2832219 (ACH)	Complete	Reconciled	27	

9. User can click on the number in the **Invoices** column to see invoices that are included in the specific payment.

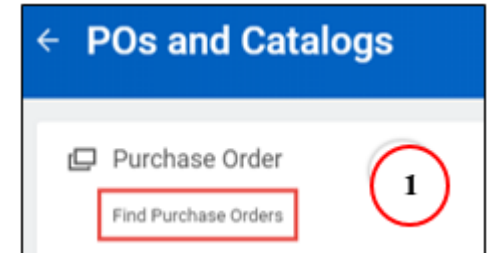
10. User can also click on **View** for a specific payment in the payments list. That will present details of specific Invoices being paid via the payment:

Invoice	Invoice Date	Supplier's Invoice Number	Invoice Amount	Discount Due Date	Invoice Due Date	Discount Taken	Payment Amount
1	07/05/2018	9078000798	237.12	07/15/2018	08/04/2018	0.00	237.12

# How to Access the Supplier Portal (cont.)

Steps to view your purchase orders:

1. Type **Find Purchase Orders** in the **Search** box or click on the **POs and Catalogs** worklet.
2. Enter the following information to narrow down your search:
  - Date On or After; or
  - Purchase Order number
  - **Note:** Purchase Orders created prior to July 1, 2017 were converted to a new PO Number. Only the remaining balance was converted. To search for those POs, you may want to base your search on a date range (i.e., Document Date On or After MM/DD/YYYY and On or Before MM/DD/YYYY). If search criteria is not entered, all POs will be returned.
3. Click **OK** on the bottom of the screen.
4. Click on **specific PO** to view details.



Purchase Order	Document Date	Status	Amount
PO-7180351	08/03/2018	Issued	8.30
PO-7180226	08/03/2018	Issued	69.52