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.
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**):

For help contact the Finance Support Center at 432-5394 or sharedservices@yale.edu.
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.

7. User can click on any invoice number to open the Invoice record in full screen.
8. For **Find Payments for Supplier Contact:** Enter search criteria and click **OK;** a list of payments will appear with details.

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:
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.

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