

External Services How to Guide

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External Services

All requests for External Services must be **submitted at least two weeks prior** to the date of service regardless of payment.

No Payment / Volunteer

1. If no payment will be made to the individual providing services submit a [Volunteer Application](#) to externalservices@andersonuniversity.edu
2. The Business Office will review the application, and you will be contacted with a decision or any questions.

Payment Involved

1. Submit a supplier request if the individual/company is not already set up in Workday.

Creating a Supplier Request

1. Search 'Create Supplier Request' in your Workday search bar and select the task as shown below.

Tasks and Reports

Create Supplier Request

Task

2. Input the supplier's name and address and any additional contact information.
3. Choose the supplier category: **Contingent Worker**.

Create Supplier Request

Supplier's W-9 form must be attached.
If Contingent Worker, you must also attach this form:
[Supplier Request for a Contingent Worker](#)

Worker * Jones, Abbie D

Supplier Name *

DUNS Number

Unique Entity Identifier

Restricted to Companies

Supplier Category

Parent

Tax Authority Form Type select one

TIN Type

Tax ID

Justification

Contact Information Classification Attachments Supplier Contact

Phone

Address

Cancel Save for Later OK

Worker * Jones, Abbie D

Supplier Name *

DUNS Number

Unique Entity Identifier

Restricted to Companies

Supplier Category

Parent

Tax Authority Form Type

TIN Type

Tax ID

Justification

Contact Information Classification Attachments Supplier Contact

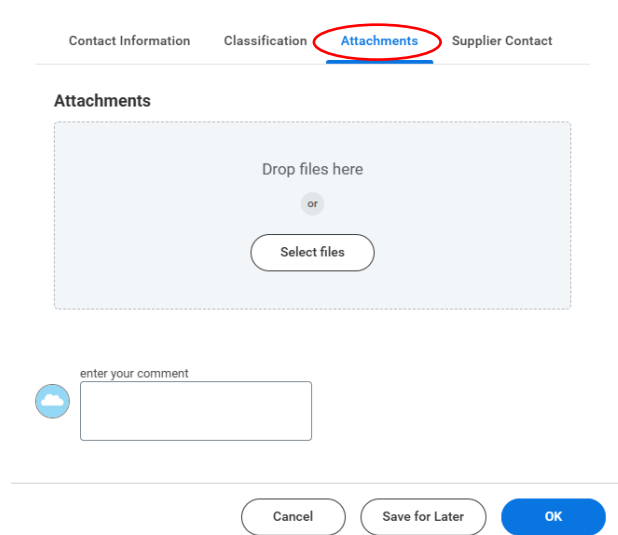
4. Click on the 'Attachments' tab to upload or drag and drop attachments. All forms can be found [HERE](#).

Required:

- a. W-9
- b. Supplier Request for Contingent Worker

Potentially Needed: Please refer to [Fiscal Policy & Procedures](#) Pages 17-18 to determine if these are needed.

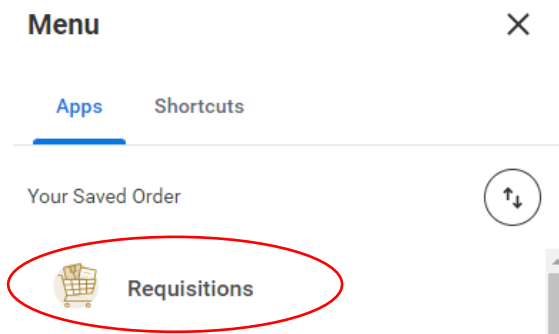
- c. COI (Certificate of Insurance) – required for work on campus. Example: Business Performing Maintenance, Repairs to Equipment, Photography, Party Rentals, etc.
- d. Background Check – required if close interaction with students.



Once you have submitted your Supplier Request it will be routed to the appropriate departments for review and approval. If approved, you will receive a notification in Workday. You can also check the status of your request by viewing the 'My Supplier Request' report. This can be found by searching for it in the search bar at the top of your screen in Workday.

Requisition for External Service Provider (Requesting Payment)

- 1. Select **Menu** (top left) to View All Apps
- 2. Select Requisitions App



3. Select Request Non-Catalog Items OR “Start Requisition”

Requisition Details

Edit Requesting for, Ship-to Address, Worktags, and more.

Requesting for
Morgan, Darlene

Company
Anderson University

Start Requisition

Ordering Methods

- [Request Non-Catalog Items](#)
- [Connect to Supplier Website](#)
- [Add from Templates and Requisitions](#)

- Description (Required):** Give a good description of what the payment is for.
- Spend Category (Required):** Select ‘External Services’
- Select ‘Services’**
- Supplier (Required):** Select the Contingent Worker who is providing services.
- Start/End Dates (Required):** Select the relevant start and end dates for the services being provided.
- Price (Required):** Enter total amount to be paid for services.
- Memo (Optional):** Enter information applicable to the charge.
- Click the blue ‘Add to Cart’ button in the lower left corner.

What do you need to order?

Description *

Chapel Speaker on 10/30/2024 Payment - Clayton King

What type of order is it?

Spend Category *

External Services

Is this a goods item or a service?

Goods

Service

Other details to add

Supplier

Clayton King

Supplier Contract

Start Date

10/30/2024

End Date

10/30/2024

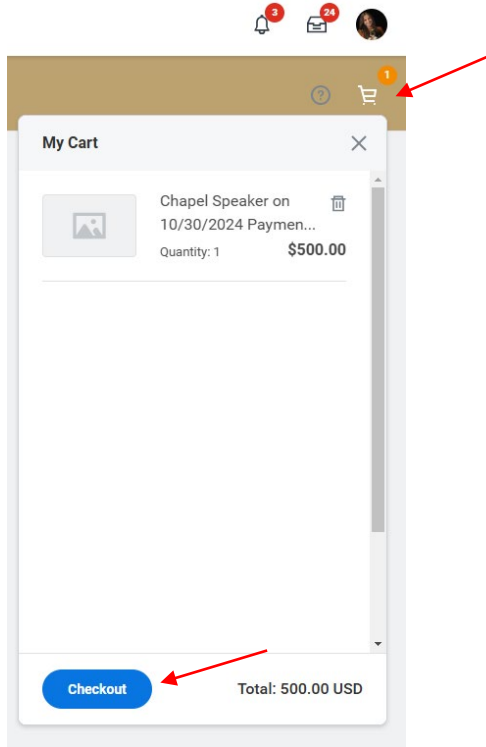
Price

500

Memo

Campus Prayer Breakfast/Chapel Speaker on 10/30/2024 Payment

12. Click on the shopping cart in the top right corner and click checkout.



13. In your checkout screen you will be able to review your service line. Click 'Edit More Details' to complete the required information. You may also utilize 'Access Advance Checkout' (top right blue link) if you prefer this layout.

[Access Advanced Edit](#)

Requisition Details ATTENTION REQUIRED



Requesting for: Jones, Abbie D
Company: Anderson University
Ship-To: 316 Boulevard, Anderson, SC 29621, United States of America

[Edit More Details](#)

Requisition Summary

Subtotal	500.00
Freight	0.00
Other Charges	0.00
Total	\$500.00 USD

Requisition Items (1)

Item	Price	Quantity *	Worktags *	Actions
 Chapel Speaker on 10/30/2024 Payment - ...	500.00	1	<p>Cost Center x Cost Center: CC00002616 Business Office</p> <p>Grant</p> <p>Gift</p> <p>Project</p>	Edit More 

> [Attachments](#)

14. Once you have clicked 'Edit More Details' you will see the screen below. **Change the Requisition Type to 'External Services'**. This is required – your requisition will not go through without this change. Once you have made this change, click the blue 'Save' button at the bottom of the screen.

Edit Details Edit Requisition

Attachment is Required for External Services or if Goods or Services Requisitions >\$500

Requesting for	Submitted by	Company	Currency	Request Date
Jones, Abbie D	Jones, Abbie D	Anderson University	USD	10/28/2024

Requisition Type

External Services

Deliver-To

Changes will apply to all items

Main Campus

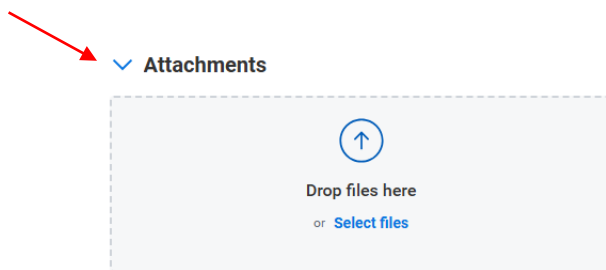
Ship-To*

Changes will apply to all items

316 Boulevard, Anderson, SC 29621, United States of America

15. Click the blue arrow next to Attachments to expand the area to allow files to be uploaded or dragged and dropped.

- a. **Independent Contractor Attachments (Individual/Company Set Their Price)**
 - i. Agreement for Services
 - ii. Independent Contractor – Waiver and Release
 - iii. W9 (if updates to address/tax information)
- b. **Honorarium Attachment(s) (Anderson University Set the Price)**
 - i. Honorarium Form
 - ii. W9 (if updates to address/tax information)

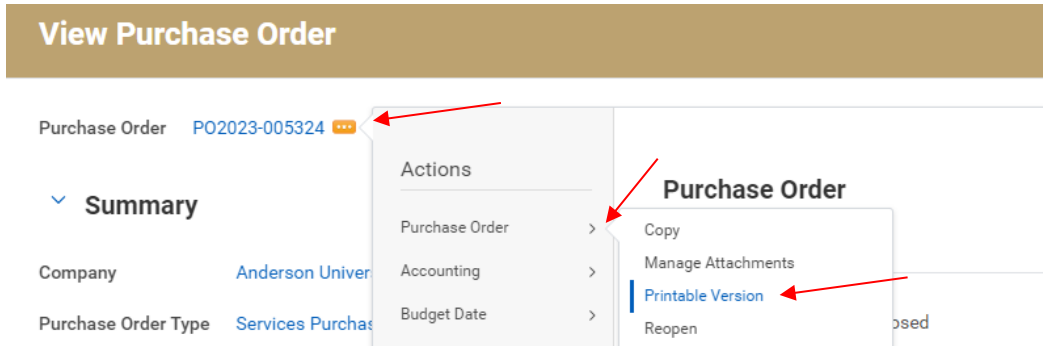


16. Click 'Submit' for the requisition (payment request) to be routed to the appropriate departments for approval.

Obtaining your Purchase Order

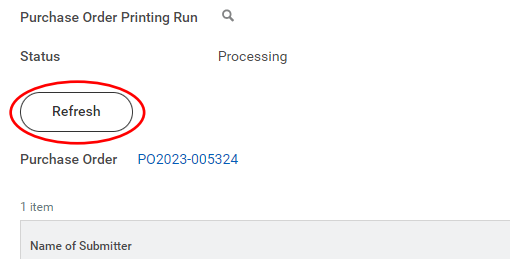
After a requisition has been fully approved, the purchase order will automatically be created and issued overnight. At this time, the requestor will receive a notification in Workday that the purchase order is available. From the related actions on the purchase order, a printable version of the PO may be obtained to be sent to the supplier by the requestor (email or mail). It is up to the requestor to send the purchase order to the supplier if needed. The Business Office will not be sending purchase orders to suppliers.

1. Click on the Related Actions, Printable Version and OK.



2. Click on Refresh Button until 100% and a PDF Version has been uploaded. This is the PO that can be sent to the supplier.

Print Purchase Order

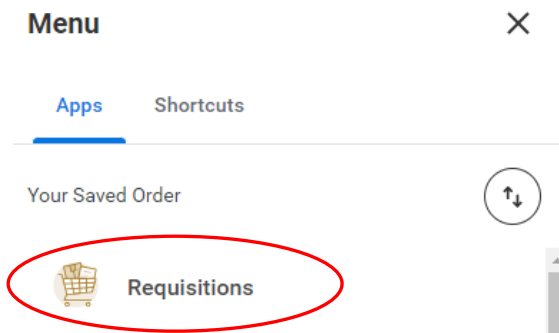


View Progress of Requisition/Create Receipt

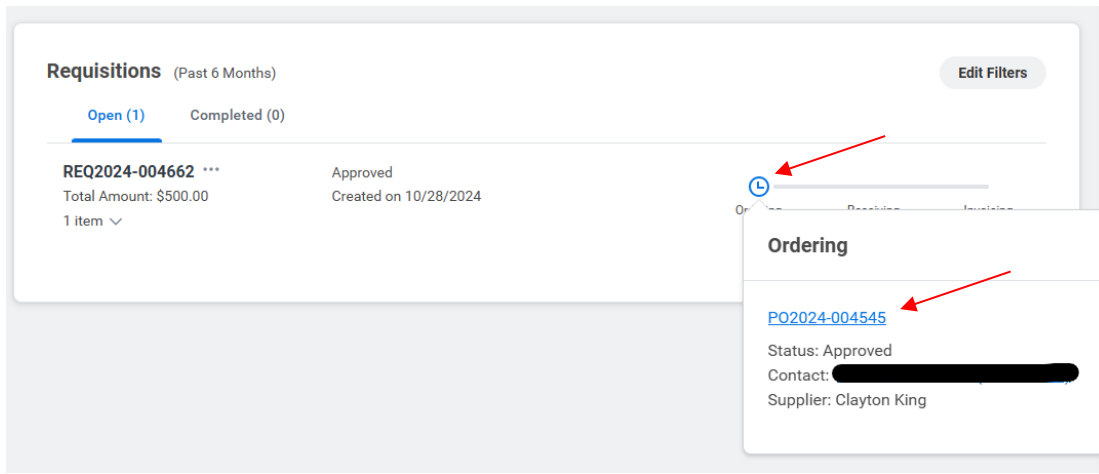
After the purchase order has been created, it MUST be issued before a receipt can be created. PO issuance will occur every night. Therefore, the receipt may be submitted the next day.

****Receipts should not be submitted until services have been performed. Any exceptions needed should be addressed with the Business Office prior to creating the receipt.****

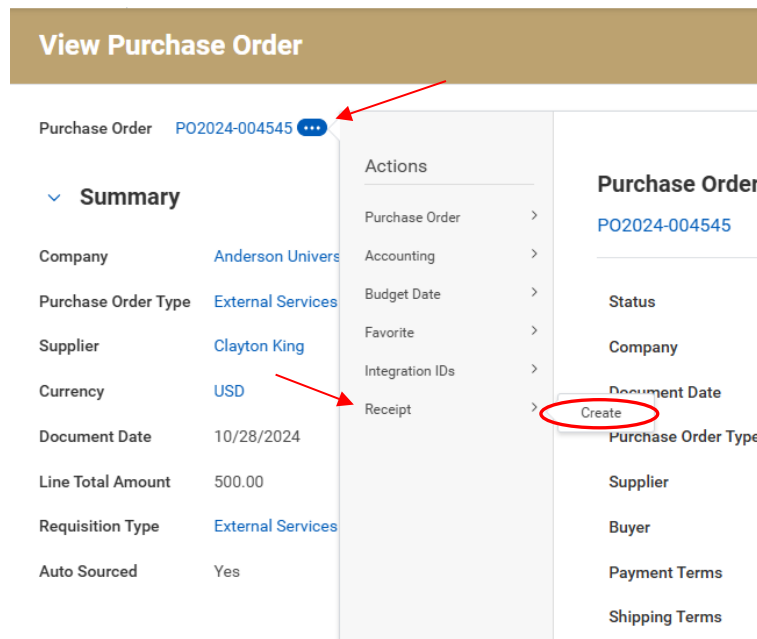
1. Select **Menu** (top left) to View All Apps
2. Select Requisitions App



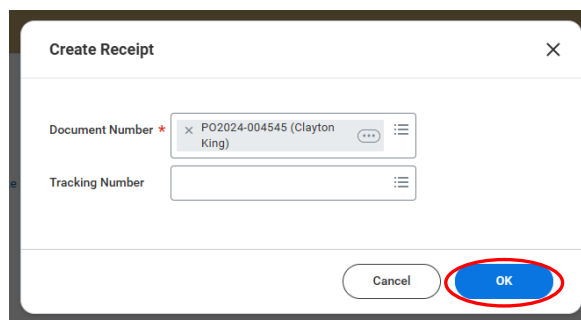
- From this requisition dashboard, you can view the progress of all requisitions by clicking the small icons that will appear above the words Ordering/Ordered, Receiving/Received, and Invoicing/Invoiced. The words will change, and icons will appear as the requisition moves along in process.
- Find the requisition number and above the word Ordered, click on the small icon to view the PO number. Click on the PO# to view it.



- Once the PO is open, click the related actions, hover over 'Receipt', and click 'Create'.



- A window will pop up where you will confirm the PO that you wish to create a receipt for. Click the blue 'OK' button to move to the next page.



- Review your purchase order information. The information from your Requisition will carry over to the Purchase Order and your Receipt. Enter the amount to be paid in the 'Amount to Receive' field.

Note:

If **one payment** is needed, enter the full amount due.

If **multiple payments** need to be made, **only** enter the amount to be paid at the time of the current receipt. You can create more than one receipt off the same P.O. until payment is made in full.

Create Receipt

 REC2024-005826 for PO2024-004545 ⋮

Purchase Orders PO2024-004545	Supplier Clayton King	Status Draft	Total Amount \$250.00	Currency USD
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Information Attachments **Lines**

1 item

Service Lines

Chapel Speaker on 10/30/2024 Pay...	250/500 USD
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Line Information

Item Description Chapel Speaker on 10/30/2024 Payment - Clayton King

PO Line PO2024-004545 - Line 1

Amount to Receive

Fully Receive

Amount Ordered 500.00

Ordered Amount Invoiced 0.00

Total Amount Already Received 0.00

Start Date 10/30/2024

End Date 10/30/2024

Memo

- In the attachment section, attach your Agreement for Services and Independent Contractor – Waiver and Release OR Honorarium Form for Accounts Payable to review. (File type cannot be .HEIC)

Attachments



Honorarium-Payment-Form-Fillable.pdf
✓ Successfully Uploaded!

Attachment Category

Comment

Upload

- Select Submit which will route your receipt to accounts payable for payment to be processed.