Suppliers

Product Summary

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This content is not part of the Workday Administrator Guide and is subject to further change.

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Supplier Account Setup

Sign up for Strategic Sourcing with Authenticator App

Prerequisites

- You can access Strategic Sourcing by email invitation only.
- Ensure your team enables the **amazonses.com** domain.
- Create a Workday Central Login (WCL) Account.

Context

Workday Strategic Sourcing is a cloud-based sourcing tool that you can use to streamline your procurement process. You register through Workday Central Login (WCL) which enables you to access Workday's suite of products from a single account. To create an account, you need to verify your email, set up a strong password, and pair your authenticator app. You can also sign up for Strategic Sourcing with SMS authentication see Sign up for Strategic Sourcing with SMS Authentication.

Note: As a supplier, you must register your account on a desktop.

Steps

1. In the email, select **Sign up and View this RFP**.

   If you're expecting an email but don't receive it, ensure it's not in your Spam folder.
2. Click **Send a Verification Code** to send a 6-digit one-time password to your email address. This email will be the username you use to log into WCL.
3. Once you've verified your email address, enter your name, create a new password, and click **Create Account**.
4. Scan the QR code using your authenticator app and enter a 6-digit code from your app.
5. Click **Connect Authenticator App**.

   Note: If you stop the account creation process for WCL, your account will be locked. If you delete your authenticator app after you set up your account, you'll be locked out of your account.
6. Select the **Accept Terms of Service** check box.
7. (Optional) Enter these fields:
   - Job Title
   - Phone Number
   - Language
   - Timezone
8. Click **Save & Finish**. You can now review the event that you've been invited to.

   You can view the event in the **Responses** section of the **Dashboard**.

   If you're unable to sign in, see FAQ: Supplier Sign In and Account Security.
9. Select the title of the event to review and respond to the sourcing team.

   When you're reviewing the event, pay particular attention to the conditions of participation and statement of requirements.

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10. (Optional) You can invite teammates to collaborate with you on the event by entering their name and email in the **Invite Team Members** section, and clicking **Add**.

    If your colleague registered in Strategic Sourcing previously, they can sign in and access the bid immediately. Otherwise, they receive an email invitation with a link to create an account on Strategic Sourcing.

    If you can't add them, it might be because they're already registered in Strategic Sourcing under a different company name. To fix, contact the sourcing manager and request that they put you and your teammate under the same company name in their directory.
11. (Optional) You can submit questions and view other messages from the sourcing manager using the **Message Center**.

    Your questions are confidential.
12. (Optional) You can access help and support by selecting the **Contact Support** option from the **Support** tab in the top navigation bar.

Result

You and your teammates are signed up. You can sign into Strategic Sourcing at any time. Once registered with Strategic Sourcing, the next time you sign in, WCL will prompt you to **always trust this browser**. Mark a browser as trusted only for a computer you regularly sign in to.

Example

Watch the video: 1m 53s

Next Steps

You can now set your time zone and manage deadlines.

Sign up for Strategic Sourcing with SMS Authentication

Prerequisites

- You can access Strategic Sourcing by email invitation only.
- Ensure your IT team enables the amazonses.com domain.
- Create a Workday Central Login (WCL) Account.

Context

Workday Strategic Sourcing is a cloud-based sourcing tool that you can use to streamline your procurement process. You register through Workday Central Login (WCL) which enables you to access Workday's suite of products from a single account. To create an account, you need to verify your email, set up a strong password, and add your mobile number. You can also sign up for Strategic Sourcing with an authenticator app see Sign up for Strategic Sourcing with Authenticator App

Note: As a supplier, you must register your account on a desktop.

To view a list of supported phone codes and countries, see FAQ: Workday Central Login (WCL) Security Settings.

Steps

1. In the email, select **Sign up and View this RFP**.

   If you're expecting an email but don't receive it, ensure it's not in your Spam folder.
2. Click **Send a Verification Code** to send a 6-digit one-time password to your email address. This email will be the username you use to log into WCL.

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3. Once you've verified your email address, enter your name, create a new password, and click **Create Account**.
4. On the **Set Up Authentications Methods** page, click **Set Up** to configure your preferred form of authentication.
5. Enter your phone number on the **Add a Mobile Number** page and click **Add your Mobile Number**. Once you receive a 6-digit verification code on your mobile number, enter it on the **Let's Verify Your Mobile Number** page.
6. Select the **Accept Terms of Service** check box.
7. Click **Save & Finish**.

   If you're unable to sign in, see FAQ: Supplier Sign In and Account Security
8. (Optional) You can invite teammates to collaborate with you on the event by entering their name and email in the **Invite Team Members** section, and clicking **Add**.

Result

You and your teammates are signed up. You can sign into Strategic Sourcing.

Next Steps

Enable SMS Authentication to Sign in to the Strategic Sourcing Supplier Portal

Prerequisites

- Create a Workday Central Login (WCL) Account - contact your buyer to receive an invitation.
- Sign up for Strategic Sourcing with SMS Authentication.

Context

Suppliers can sign in to the Strategic Sourcing Supplier Portal with SMS Authentication by enabling it in Workday Central Login (WCL).

To view a list of supported phone codes and countries, see FAQ: Workday Central Login (WCL) Security Settings.

Steps

1. Sign In to Strategic Sourcing Supplier Portal.
2. Go to your user account.
3. Click **Account Settings**.
4. On the WCL home page, click **Manage WCL Settings**.
5. In the **Authentication Methods** section of the **Security Settings** tab, click **Set Up SMS Phone Number**.
6. Enter your password and click Verify Password.
7. Enter your mobile number and click **Add Your Mobile Number**.
8. Once you receive a 6-digit verification code on your mobile number, enter the code and click **Verify Code**.
9. You can now select the verified mobile number as an authentication method.

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Result

Each time you sign in to the Strategic Sourcing Supplier Portal, you'll receive a verification code to your mobile number.

Self Register

Context

You can register with a buyer without using an event invitation when the buyer has supplier self-registration set up. You can self-register:

- By using a link that a buyer provided to you.
- Through a public bid site.

Steps

1. Access supplier self-registration.
2. Enter your email address, create a password, and click **Continue**.

   If you already have an account, you can click **Sign In**.
3. On the **Register New User** page, enter your name and accept the Terms of Service.

   When you click **Save & Finish**, you'll receive an email to complete your registration.
4. Enter the name of your company.

   When the buyer has similar company search enabled, Strategic Sourcing might prompt you that your company is already registered. If your company name matches any of the companies listed, contact an administrator at your company to gain access to Strategic Sourcing.

   To continue if there isn't a match, select **My company doesn't match any similar companies found**.
5. Complete the self-registration form.

   You must complete all required fields requested by the buyer to finalize your submission.

   When you save the form as a draft, you have to sign out and return to Strategic Sourcing with the buyer self-registration link to access your draft. Contact Support through the **Support** tab if you can't access your draft.

Result

You're added to the supplier directory of the buyer. You can:

- Access the supplier portal.
- Register another supplier.
- Return to the public bid site you registered from.

Set Up Supplier Profile for Autofill

Prerequisites

- A buyer sends you an invitation to complete an onboarding form or you have completed self-registration for a buyer.
- You've signed up for Strategic Sourcing.

Context

You can set up your supplier profile to:

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- Autofill onboarding forms sent by buyers.
- Complete self-registration for a buyer.

When you select the consent check box and add additional supplier contacts to your supplier profile, those added contacts can use your supplier profile to autofill onboarding forms. Added contacts can view all the information on your form, but they can't edit it.

In your supplier profile, you can add this information:

- Supplier Name
- Website
- Description
- Addresses
- Phones
- Tax information
- Bank accounts
- Payment information
- Contacts

Note: Workday recommends keeping your supplier profile updated. When you use autofill, Strategic Sourcing overwrites any input data in the onboarding form with data from your supplier profile. For any data not entered in the supplier profile, Strategic Sourcing removes entered data in the onboarding form. This only applies to fields on the supplier profile.

Steps

1. After you sign in to Strategic Sourcing, click **Your Supplier Profile** on your **Dashboard**.

   You must have an onboarding invitation to fill out your supplier profile.

   You can also access your supplier profile from the onboarding form while you're editing the form.
2. Fill out the supplier profile.

   In the **Contacts** section, to save entered contacts, you must select the consent check box. Added contacts can view your profile, including added banking information.
3. Click **Save** to save the supplier profile.

   When you update your supplier profile, the information doesn't automatically update in submitted forms. Ensure you update any forms previously submitted.

Concept: Customer Directory

You can access the Customer Directory from the Strategic Sourcing Supplier Portal. This directory displays the Strategic Sourcing customers that you have access to. You can only view data that the customer has granted you access to.

In the Customer Directory, you can search to find a Customer Profile by:

- Customer Company Name
- Contract Name
- Event Name
- Form Name
- Supplier Company Name

Each column displays the total number of events that you're invited to for each customer.

You can access these Strategic Sourcing tabs in a Customer Profile:

- Action Items
- Contracts

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- Events
- Forms
- General Profile
- Performance Reviews

Your customers can give you access to the Unified Supplier Portal (USP) and more procurement information. If you have access to the USP for a customer, you can view these tabs:

- Catalogs
- Invoices
- Payments
- Purchase Orders

Note: Not all customers have the USP. Not all supplier contacts will receive access to the USP.

Concept: Unified Supplier Portal for Suppliers

When a customer grants you access to the Unified Supplier Portal (USP), you receive an email where you can sign up with Workday Central Login or sign in if you already have an account.

You use the same Workday Central Login account to sign in and access Strategic Sourcing and procurement information across multiple customers securely. Your primary work email used with multiple customers should be the same, and you must use Workday Central Login to create your account.

To receive access to the USP for different customers, contact each respective customer.

Additional Authentication for USP

A customer can require additional verification when you click **Procurement Portal** or the links in these tabs:

- Catalog
- Invoices
- Payments
- Purchase Orders

The additional verification requires you to enroll with email verification. A six-digit passcode will be emailed to you. After you enter the passcode and click **Verify Code**, you can access the Procurement Portal.

Note: Not all customers require the additional authentication.

Procurement Information and Tasks

You can receive access to these procurement apps:

- *Contacts and Banking*. You can change and view contact and settlement bank account information related to suppliers. To access the Contact and Banking procurement app from Strategic Sourcing:
    1. In the customer profile, click **Procurement Portal**.
    2. In the side menu in the Procurement Portal, click **Contact and Banking**.
- *Invoices and Payments*. You can view the **Most Recent Invoices** and **Most Recent Payments**.

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- *POs and Catalogs*. You can view **Most Recent Catalog Loads** and **Most Recent Purchase Orders**. You can also access these tasks:
  - **View All Catalog Loads**, that you can use to search for catalog loads.
  - **Catalog Load Request for Supplier**, that you can use to add new items, update existing items, and load items to a catalog on Workday.
  - **Find Purchase Order**, that you can use to search for purchase orders by date, and name.
  - **Create Invoice from Purchase Orders**, that you can use to create an invoice request from a purchase order.
  - **Log Time and Tasks**, that you can use to log time worked by contingent workers on a purchase order.

You can only access procurement information in the USP for customers who grant the access. If you have other customers who have chosen not to uptake the Unified Supplier Portal, you can still access their Supplier Portal using the same login process you do today. You can't view them in the USP.

Example: Global Modern Services grants you access to the USP, but ProTech, Inc. doesn’t grant access. In the Global Modern Services customer profile, new tabs display for the information you’ve been granted access to. You can also click the **Procurement Portal** button from the Global Modern Services customer profile. No changes occur to the ProTech, Inc. customer profile.

Note: Not all customers enable access to all apps in the USP.

Email Updates in the Unified Supplier Portal

Email updates made in Workday Central Login don’t update your primary work email in the USP. The email update will be reflected in the user profile in Strategic Sourcing, but this update won’t reach the Supplier Profile in Strategic Sourcing. The customer can’t sync the update.

To update your email address in the USP, Workday recommends that you reach out to your customer to update your primary work email to ensure both Workday Central Login email and verification email remain the same.

Access Supplier Invoice Requests in the Unified Supplier Portal

Context

You can view supplier invoice requests and non-purchase order invoices in the Unified Supplier Portal (USP).

Steps

1. Access your customer from the **Customer Directory**.
2. Select the **Invoices** tab.
3. Click **View Invoices**.

   You can also click **Procurement Portal** and enter **Find Supplier Invoice Request** in the search bar.

Result

Your invoice requests display in the USP.

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Password Reset for Suppliers

Prerequisites

Set up your Workday Central Login account.

Context

You can reset your password for your Workday Central Login account if you've forgotten your password or need to reset it for security reasons.

Steps

1. On the **Workday Strategic Sourcing Sign In** page, click **Sign In**.
2. On the **Supplier Login** page, enter your email address and click **Continue**.
3. On the **Password** page, click **Forgot Your Password?**
4. Click **Reset Your Password**.
5. Enter the 6-digit code from your authenticator app.
6. Enter the 6-digit password sent to your email address.

   If you've added your mobile phone number to your account, click **Try With SMS** and enter the 6-digit code sent to your mobile phone.

   Note: **Try With SMS** is only available after you verify your phone number in Workday Central Login.
7. Enter and confirm your new password.

Next Steps

Sign in with your new password.

Account Recovery for Suppliers

Context

You can reset your account when you meet all of these criteria:

- Forgot your password.
- Unable to access your authenticator app.
- Have no phone number added to your account. This is applicable only to the U.S. and Canada.

Steps

1. On the **Workday Strategic Sourcing Sign In** page, click **Are you a supplier - sign in here** link.
2. On the **Workday Central Login** page, enter your email address and click **Continue**.
3. On the **Password** page, click **Forgot Your Password?**
4. Click **Reset Your Password** on the **Forgot Your Password** page.
5. Click **Recover Account** on the **Let's Verify It's You** page.
6. In the **Account Reset** pop-up, select the acknowledgement check box and click **Reset**.
7. Click **Send Code**.
8. Enter the six-digit, one-time passcode sent to your email address.
9. Set up your authenticator app. See Sign up for Strategic Sourcing.
10. Enter and confirm a new password. Click **Reset Your Password**.

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11. Sign in on the **Supplier Login** page with your new password and authenticator app.

    Note: After you recover your account, you lose access to customer procurement information in the Unified Supplier Portal. Contact customers to re-enable your access.

Result

You can access Strategic Sourcing by clicking the link Are you a supplier - sign in here.

Complete an Onboarding Form

Prerequisites

- A buyer sends you an invitation to complete an onboarding form.
- You've signed up for Strategic Sourcing.

Context

You can complete an onboarding form that buyers invite you to, which enables them to gather critical business and banking information.

When enabled by the buyer, you can login and edit at any time. If the **Edit** button doesn't display, contact the buyer to determine if your profile is going through an approval process.

Steps

1. Access the onboarding form in the **Profile** section by clicking **Manage**.
2. Click **Edit** to make changes to the form and input the requested information.

   When you have a supplier profile filled out, you can autofill the onboarding form for a buyer with information from your profile. When you autofill, any information already enter is overwritten. See Set Up Supplier Profile for Autofill.

   The buyer can add help text at the start of the form for you to review.

   You can add Contacts to this form so that the buyer company has the correct contact information for you and colleagues at your organization. Contact the sourcing manager through the **Message Center** to enable access for new contacts to your profile.

   Your Onboarding Journey displays at the top of the form if the buyer requires you to complete additional custom forms as part of the onboarding process.
3. (Optional) You can submit questions and view other messages from the sourcing manager using the **Message Center**.
4. Once completed and ready to submit, click **Submit**.

   You can click **Save Draft** to save your incomplete form and return to finalize it later.
5. (Optional) To revise the submission, click **Edit**. Ensure you submit the profile once you finish making changes.

Result

The form information that you submit to the buyer ensures a quick and accurate setup for your company.

FAQ: Supplier Sign In and Account Security

I already have a Strategic Sourcing account. How do I register for Workday Central Login?	1. Navigate to the Workday Strategic Sourcing **Sign In** page.

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	2. Sign in to Strategic Sourcing with your current credentials. 3. Sign out of the supplier portal. 4. On the **Sign In** page, click **Are you a supplier - sign in here** link and sign in with the credentials you used for Strategic Sourcing. You can no longer sign in to Strategic Sourcing directly and must go through Workday Central Login (WCL). 5. Follow steps 2 through 9 in Sign up for Strategic Sourcing to finish your WCL registration.
What if I don't have a mobile device?	If you don't have a mobile device, you can use a browser-based option, like 1Password, for multifactor authentication. Browser-based options can scan QR codes in WCL.
If I get a new phone, do I need to reset my authenticator app?	Yes. To reset your authenticator app and pair it with a new device: 1. When WCL prompts you to enter a 6-digit verification code from your authenticator, click **Reset Authenticator** below the prompt. 2. Enter the 6-digit password sent to your email address before synching the authenticator on your new device. 3. Scan the QR code with your new device to sync your authenticator app.
Will my password expire?	No, your password won't expire with Workday Central Login.
How do I reset my password?	See Password Reset for Suppliers.
How can I change the email address for my Strategic Sourcing account?	1. Hover over your name and click **User Profile**. 2. Click **Change Email**. 3. Enter your email address in the **Email** field. 4. Save the change. 5. Access your old email and follow the instructions in the email you receive. Note: Users can't change their email address if your company uses a SSO (Single Sign-On) integration. If your company doesn't use SSO, changes to a user's email address are automatically reflected for any other company they work with in Workday Strategic Sourcing.
How can I change the email address for my Unified Supplier Portal account?	When you need to change your email address for WCL, contact your customers to update the primary work email in Workday to ensure both the WCL email address and the verification email address are the same. For more information, see Concept: Unified Supplier Portal for Suppliers.

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How do I keep my account safe?	• Create a strong password with at least:
	  • 8 characters.
	  • 5 or more unique characters.
	  • 1 uppercase, lowercase, numeric, and special character.
	• Avoid creating passwords that:
	  • Contain spaces.
	  • Use common words, abbreviations, or acronyms.
	  • Are compromised or previously used.
	• Monitor any suspicious account activity by checking your email for security notifications or accessing **Manage Your Account > Security Settings > Show logged in sessions**.
	• Maintain multiple methods of account or password recovery.
	If you think your password is compromised, reset it as soon as possible.

How do I set up different methods of password recovery?	1. On your profile page in Workday Central Login, select **Manage Your Account**.
	2. In the **Personal Info** tab, you can:
	  • Add a mobile number for password recovery with the **Edit Mobile Number**button.
	  • Substitute your current primary email with another email to verify and recover your account with the **Add Email address** button.
	Workday recommends activating both methods of recovery, in case you lose access to either your phone or email.

What if I can't access Workday Central Login or any related links on the site?	If you can't access WCL, delete your browser history, contact your customer administrator, and sign in again. If you tried clicking the **Forgot Your Password?** link on the sign-in page, and it didn't work, clear the cookies and cache of your web browser and try again. Note: Workday collects cookies and other information about your activity on WCL.
What if I have a supplier account and a buyer account?	If you have both account types, you'll be required to sign in through WCL when you select **Supplier portal** on the **Select Company** page. You are required to sign in to the Supplier Portal with MFA even if you have SSO set up.

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I forgot my password and don’t have access to the authenticator app. What should I do?	You can reset your account. See Account Recovery for Suppliers.
How do I contact Workday Strategic Sourcing if I'm still unable to sign in?	Contact Workday's support team for assistance at scoutsupport@workday.com if you: • Are unable to login after reviewing all documentation. • Lost your authenticator app. • Lost your authenticator app and your password.

FAQ: Contacting Strategic Sourcing

How do I contact Workday Strategic Sourcing if I'm unable to sign in?	If you're still unable to login after reviewing documentation, you may contact Workday's support team for assistance at scoutsupport@workday.com.
How do I contact the sourcing manager?	Access the event and click the **Message Center** button in the **Message Center** section. You can: • Ask the sourcing manager a question. Enter a question in the box, attach a file if applicable, and click **Send Question**. • Chat with the sourcing manager. If the sourcing team sends you a question using **Chat**, click the chat icon and enter your answer. • View questions you've asked and the answers that you've received from the sourcing team. When the sourcing team replies to your questions, you receive an email notification. • View questions and answers from other suppliers that the sourcing manager shares and general messages.
How do I get help before an auction?	Select the **Contact Support** option from the **Support** tab in the top navigation bar.
How do I get help during an auction?	Select the **Contact Support** option from the **Support** tab in the top navigation bar. Strategic Sourcing pays close consideration to support tickets during auctions and you can expect a rapid response.

Reference: Supplier Profile Update Emails

You can receive an email when updating your profile for these reasons:

- Approved
- Blocked
- Failed

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- Overridden
- Rejected

If you don’t receive any of these emails and don’t see the **Edit** button, contact Strategic Sourcing Support or the buyer for more information.

Profile Update Approved

Your update was successful. You can log back in and manage your profile by clicking **Edit**.

Profile Update Blocked

Workday blocks the update you made in Strategic Sourcing because of an in-progress process. Try to make the update again later.

Profile Update Failed

Workday didn’t receive the update you made in Strategic Sourcing. This can occur when:

- A change comes from Workday at the same time as you have made a change in Strategic Sourcing.
- The buyer is editing your profile at the same time and attempts to push their edit to Workday.
- The integration service is down.

Try to make the update again later when the **Edit** button is active.

Profile Update Overridden

A change was already in progress and Workday didn’t receive the latest update you made in Strategic Sourcing. Review your profile, and try to make the updates again.

Profile Update Rejected

A change to your profile was rejected in Workday. To resolve the issue, contact the sourcing manager in Strategic Sourcing through email or the Message Center.

Proposal Events

Complete a Supplier Form

Prerequisites

- A buyer sends you an invitation to complete a form.
- You've signed up for Strategic Sourcing.

Context

You can complete required forms containing questionnaires that buyers send you.

Steps

1. Access the form you want to complete.
2. (Optional) To invite colleagues to edit the form, enter their name and email address in the **Invite Team Members** section and click **Add**. Your colleague receives an email invitation to access the form.

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3. To answer questions, click into the sections of the form under **Fill Out Your Form**.

   Forms can have multiple sections of questions for you to complete. Strategic Sourcing automatically saves your question responses. Questions marked with an asterisk are required. At the top of each section, Strategic Sourcing lists the number of:

   - Questions in a section.
   - Required questions in a section.

   If you don't complete required questions, you can't submit the form.

   Forms can also have conditional sections and questions. When your answers meet a condition, a new section or new questions display for you to respond to.

   You can take your form offline in the **Export or Import Your Form** section once you've accessed the form in Strategic Sourcing. When only the *Export* option is available, click **Revise Form** to import the form after you've updated the exported Excel file.
4. (Optional) To contact the buyer, you can click **Message Center** or email the primary contact.
5. Click **Submit** to send your completed form to the buyer. The form **Status** updates on your homepage.
6. (Optional) To revise the submission, click **Revise Form**. After revising the form, click **Resubmit Form** to send your updates to the buyer.

Related Information
Tasks
Sign up for Strategic Sourcing with Authenticator App

Manage Deadlines

Prerequisites

You've signed up to Workday Strategic Sourcing.

Context

The sourcing manager determines the event timeline that consists of these possible deadlines:

- **Supplier RSVP Deadline**
- **Supplier Question Deadline**
- **Bid Submission Deadline**

Steps

1. To ensure you submit information to the sourcing manager on time, set your time zone in your **User Profile** that you can access under your user name on the **Home Page**.
2. When you receive a **Supplier RSVP Deadline**, you can inform the sourcing manager that you plan to bid by selecting **I Intend to Submit** on the invitation before the set time and date. As you decide if you want to participate in a bid event, consider:

Option	Action
You don't receive and invitation.	Either: • You or 1 of your team have already responded to the invitation. • There's no requirement for you to respond.

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Option	Action
You're not going to accept the invitation.	Select **I Do Not Intend to Submit** and you can either: • Select a reason why you don't want to participate, as well as provide additional comments. • Select **Submit RSVP**.
You decide you intend to participate in a bid event.	You can select **I Intend to Bid** as long as the invitation hasn't expired.
The deadline passed but you want to bid in the event.	You can submit a ticket to support by clicking **Support**, and they can help you change your response to the invitation.
You no longer intend to participate in a bid event.	No action is needed.

If the deadline has passed, you can submit a ticket to support by clicking **Support**, and they can help you change your response to the invitation.

3. If you receive a **Supplier Question Deadline** event, you can't submit questions to the sourcing manager from the **Message Center** after the deadline date and time.

   You can continue to view the questions and answers that you or your team submitted before the deadline.

   If you don't see the deadline, you can submit questions to the sourcing team at any time during the RFx process.
4. To submit a bid on the RFP to the sourcing manager, check the due date and time on the **Submission Deadline**, and click the **Submit Bid** button.

   The sourcing manager can set the submission deadline so that you can submit your response after the deadline.

Next Steps

You can start submitting your bid and invite team members to collaborate with you on the bid proposal.

Create Bid Proposals

Prerequisites

You've been invited to submit a bid proposal by the sourcing manager.

Context

You create bid proposals to submit to the sourcing team. Sourcing teams request suppliers to provide pricing and line item quotes.

Steps

1. Navigate to the **Build Your Proposal** section on your bid.
2. In the **Response Sheets** section, click **Edit** and answer questionnaire questions, if applicable.

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3. In the **Worksheets** section, click **Edit** to start creating your bid proposal.

   You can view details of any worksheets in the panel on the left.

   To view worksheet instructions and notes from the sourcing manager, click the **Supplier Instructions** button.
4. Enter bids on the highlighted rows of the worksheets. To identify what you need to do to submit your bid, you can select **Validate** to highlight the cells you must complete. A side panel also displays showing the line items and columns that need information. When you complete all highlighted cells, *Worksheet Valid* displays when you select **Validate**.

   You can apply filters to view the items you want to bid on by clicking the 3 horizontal lines in the column header, selecting the conditions and values, and clicking **Apply Filter**. Calculated totals change as you apply filters.

   You can also display or hide columns using **Show/Hide Columns** and clicking **Update View**.
5. In the **Requested Document** section, select the **Browse for File** button.

   Attach requested documents to submit your bid proposal.
6. In the Additional Documents section, drag and drop files from your PC to the box, or click the **Browse for Files** button.

   Attach additional documents for the attention of the sourcing manager.

   You can attach as many files as you want and each file can be up to 5GB.

   Wait for the upload to complete before navigating away from the page.
7. (Optional) Click **Preview** to view your event submission in a read-only view that the buyer will see.
8. To finalize your bid submission, select **Submit Bid** on the bid event.

Result

The sourcing manager receives an email to notify them that you've submitted your bid. You can submit incomplete bids, however, it's up to the sourcing manager to determine whether to accept an incomplete proposal.

In the **Responded** tab, you can view the status of your submission on the bid event, including the date and time of the submission.

Next Steps

- If you want to change your bid and it's before the bid submission deadline, change your bid by clicking the **Revise Bid** button on the event. After you make your revisions, click the **Resubmit Bid** button.
- If you want to revise the bid proposal but it's after the deadline, contact your sourcing manager directly.
- Respond to requests from the sourcing manager.

  Depending on the bid proposal, the sourcing manager can request, by email or chat, further clarification on your bid submission. Use the **Revise Bid** button on the bid event to edit the proposal and respond to the update request.

Steps: Submit a Bid on a Public Sourcing Site

Context

You can submit a bid proposal to an event on the public bid site of a buyer. You can also use commodity codes to receive information about public events that are related to your organization. Sourcing teams request suppliers to provide pricing and line item quotes.

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Steps

1. (Optional) Search for the event on the public sourcing site. You can use quotations to find exact matches for your keywords.
2. On the public sourcing site, click **Bid** next to the event you want to submit a bid proposal to.
3. Sign in to Strategic Sourcing.
4. Create Bid Proposals.

   Note: Buyers can label events as *Restricted* so that only invited suppliers can access them. When you click **Bid** for a *Restricted* event, you can't access the event unless you were invited.

Result

The sourcing manager receives an email to notify them that you've submitted your bid. You can submit incomplete bids, however, it's up to the sourcing manager to determine whether to accept an incomplete proposal.

Next Steps

You can view the status of your submission on the bid event, including the date and time of the submission.

- If you want to change your bid and it's before the bid submission deadline, change your bid by clicking **Revise Bid** on the event. After you make your revisions, click **Resubmit Bid**.
- If you want to revise the bid proposal but it's after the deadline, contact your sourcing manager directly.
- Respond to requests from the sourcing manager.

  Depending on the bid proposal, the sourcing manager can request, by email or chat, further clarification on your bid submission. Use the **Revise Bid** button on the bid event to edit the proposal and respond to the update request.

Use Excel to Submit Bids

Prerequisites

You've accepted the invitation from the sourcing manager to submit bids.

Context

You can create your bid proposal using Excel.

Steps

1. Access the bid event on your home page.
2. In the **Take Bid Offline** section, select **Export Bid**.

   A copy of your bid proposal downloads to an Excel spreadsheet and organized into multiple tabs. These tabs include questionnaires, worksheets, required documentation, and additional documentation. You can enter bids and information into any cells highlighted in blue.

   If you don't receive questionnaires or worksheets to complete, the sourcing team might ask you to submit specific documentation to complete your bid proposal.
3. Read the **Instructions** tab on the spreadsheet.

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4. Save the file when you've fulfilled all the bid proposal requirements.

   When naming the file, don’t include special characters in the name. Special characters can cause errors when uploading.

   Note: Strategic Sourcing can't unlock cells for editing as the format must match what is on the Strategic Sourcing platform. This is to ensure your information imports correctly. Only suppliers can edit the blue cells to provide details.
5. Click **Import Bid** from the **Take Bid Offline** section of your bid event, select your Excel spreadsheet manually using the **Browse for Files** button, or drag and drop the file into the box.
6. When the file finishes loading, click **Import Bid** again to complete the import operation.

Result

A Bid Import Successful message displays and you can view your bid using the **View My Response** button.

You can also view your responses on the Strategic Sourcing platform in their associated sections. Example: If you filled in a questionnaire on Excel, your responses populate in the questionnaire on the bid proposal.

The event now displays in the **Responded** tab on the Home page.

Next Steps

If you want to change your bid proposal, we recommend that you export the Excel file each time you update to ensure you are working from the most up to date copy of your bid proposal.

Note: If the sourcing team makes any updates to the structure of the bid event, you must export the bid again, because you won't be able to import it back into Strategic Sourcing if the format doesn't match.

Download Terms of Participation

Prerequisites

You've been invited to participate in a bid event.

Context

When responding to a bid event on behalf of your company, your legal department may want a copy of the **Terms of Participation** for their records.

Steps

1. Accept the invitation to participate in the bid event.
2. Access the **Take Bid Offline** section and click the **Export Bid** button.
3. Open the Excel worksheet and click the **Terms of Participation** tab.

   The terms of participation include signatures, names, email addresses and time stamps.
4. Print or take a copy of the **Terms of Participation**.

FAQ: Events

When I attempt to access an event from an email link, I get a Page Not Found error message.	The Page Not Found error message occurs when someone forwards you the event link and you have not been invited to the event by the buyer. You can

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	log into your account to find out if you have access to the event.
Why does the Submit button not display when I've completed my bid?	Ensure you remove all pop-up windows from the event page as they can hide the **Submit** button. Also, you must select an RSVP choice before you can submit your bid.
How do I add internal team members to an event I've been invited to?	You can add internal team members by: • You can invite teammates to collaborate with you on the event by entering their name and email in the **Team Members** section and clicking **Add**. If your colleague registered in Strategic Sourcing previously, they can sign in and access the bid immediately. Otherwise, they receive an email invitation with a link to create an account on Strategic Sourcing. If you can't add them, it might be because they're already registered in Strategic Sourcing under a different company name. To fix this issue, contact the sourcing manager and request that they put you and your teammate under the same company name in their directory. For more information, you can select **Walk me through it** located in the top right of the **Team Members** section. • Contacting the buyer and requesting that they add your team members to the event.
How do I update the primary contact of my company?	You can only update the primary contact once you've been onboarded with a buyer company. If the original primary contact is no longer available, contact Strategic Sourcing Support at **scoutsupport@workday.com**.
Why is the Total field empty in the Price section when I upload a bid?	The buyer uses the **Total** field, and it always displays as empty for suppliers.
How do I change an RSVP response or see if I've responded?	Access **Support > Contact Support** in Strategic Sourcing to reset your RSVP response.
What email address sends notifications from Strategic Sourcing?	Notifications come from: no-reply_strategicsourcing@workday.com.

Reverse Auctions

Steps: Set Up Auction Participation

Prerequisites

You must receive an invitation to participate in an auction.

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Context

Workday Strategic Sourcing is a cloud-based procurement tool that you can use to easily and quickly streamline your procurement process.

When the sourcing manager invites you to an auction, in this case, a reverse auction, you can accept or reject the invitation, depending on whether your company meets the conditions of participation and statement of requirements.

A reverse auction is an auction where suppliers bid for the lowest prices they're willing to sell their goods and services.

Steps

1. Sign up for Strategic Sourcing with Authenticator App .
2. Manage Deadlines .
3. Create Bid Proposals .
   You can build a bid proposal online or using Excel.
4. (Optional) Set Auction Pre-Bids .
5. Participate in Auctions .

Result

You've competed in an auction.

Next Steps

If you won the auction, the sourcing manager will contact you to arrange payment for your goods or services.

Set Auction Pre-Bids

Prerequisites

The sourcing manager invites you to the auction and sets a start time and date.

Context

You can set up and enter initial bids before auctions, enabling you to concentrate on competing during the live auction.

Steps

1. Check the auction timer.
   If the timer displays the countdown to the auction starting, you can start drafting your bids.
2. Read the auction notes the sourcing manager posts on the auction event.
3. Enter your bids in the **New Bid** column.
   Your bids are your initial price offerings for each item in the auction. If the auction starts from a closed sourcing event, your starting price is the last submitted price on the sourcing event.

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Participate in Auctions

Prerequisites

The sourcing manager invites you to participate in an auction.

Context

You can participate in reverse auctions that the sourcing manager sets up in advance, or with no notice.

If it's a scheduled auction, you can:

- Read the auction notes that the sourcing manager provides.
- Familiarize yourself with the tool.
- Draft your bids.

Steps

1. On the **Events** dashboard, select the auction you want to participate in.

   You can't invite team members to join you in the auction.
2. Review the auction details in the left hand panel.

   The sourcing manager can decide the expected duration of the auction, or whether they want to extend the duration. You can always view how much time remains in the auction using the timer at the top of the page.

   See Concept: Auction Rules .
3. If your sourcing manager has already set a date and time, you can enter pre-bids using **Set Draft Bid**.

   See Set Auction Pre-Bids .
4. When the auction starts, enter bids on the items you want to bid on, and click **Place Your New Bid**.

   Strategic Sourcing can inform you of your rank. Ranking feedback displays if you submit bids. If you don't submit a bid for a line item, feedback doesn't display.
5. To apply a percentage discount to all your bids, enter a number in the **Decrease New Bid By** field. You can also manually reduce prices by line item.

   Reduce your prices to improve your competitiveness.

Result

When the auction ends, your sourcing manager notifies you of your final ranking based on your configuration.

Concept: Auction Rules

When the sourcing manager sets up an auction, they can configure auction rules:

Auction Rule	Description
Minimum decrement	The sourcing manager can set an amount by which you must decrease your total bid each time you submit a new bid during the auction.
Extension	The sourcing manager can set time extensions for the auction. They use time extensions to extend the auction when a new bid is submitted near the end of an auction, ensuring that all suppliers

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Auction Rule	Description
	have a fair chance to bid. Example: The sourcing manager extends the auction by 2 minutes if a new bid is received within the last 2 minutes of the auction.

Supplier Contracts

Contract Negotiation

Context

You can easily upload changes and collaborate with the buyer during the contract negotiation process.

Steps

1. In the **Contracts** section, select the document with the *Editing - Needs Attention* status.
2. Select the document that you want to edit and click **Download**.
3. When you finish making changes, select the document again and click **Upload New**.

   You can only upload .docx and .pdf file types.
4. Click **Send Changes**.
5. When the buyer sends the document back to you, review the latest updates by downloading the document again.

   You might need to download and update the document multiple times before both you and the buyer reach an agreement.
6. Click **Accept Terms** to accept the terms of the contract.

   When you click **Accept Terms**, you indicate to the buyer that you have no further edits to the contract

Result

When the buyer finalizes the contract after you accept the terms, the contract displays with the *Finalized* status.

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