

## Create Recurring Supplier Invoice Request

This Quick Reference Guide (QRG) is designed to walk a **Procurement Shopper** through the steps to create a recurring supplier invoice request in Workday. To kick off this process, you will need to initially create a supplier invoice request and then copy that supplier invoice request. For example, this would be where you want to set up 12 monthly payments for a stipend but want to set it up all at once rather than remembering to do it each month. To do this, you would create the supplier invoice request and copy it 11 times so that there are now 12 separate supplier invoice requests.

## Procedure: Create a Supplier Invoice Request

### To Start:

1. Create a supplier invoice request. Follow the steps outlined in the [Create Supplier Invoice Request QRG](#) for further guidance. This will serve as your foundation to create a recurring supplier invoice request (i.e., you want to set up a supplier invoice request for 12 months). If you already have a submitted supplier invoice request that you would like to use as your base, navigate to the next step.

Once this is submitted, you will need to copy your supplier invoice request.

On the **Workday Home** page:

2. Type **My Supplier Invoice Requests** and select the report from the **Search Results**.

On the **My Supplier Invoice Requests** prompt:

3. Filter the report by completing the optional fields to find the specific supplier invoice request you would like to set up as recurring.

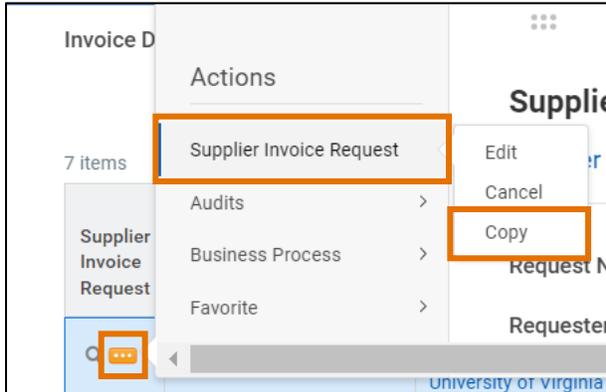


Specific criteria can be entered on the **My Supplier Invoice Requests** screen to narrow your search for the desired supplier invoice request.

4. Click **OK** to display the results.

On the **My Supplier Invoice Requests** screen:

5. Navigate to the appropriate supplier invoice request.
6. Select the **Related Actions (...)** menu next to the magnifying glass under the **Supplier Invoice Request** column for the supplier invoice request that you want to set up as recurring.
7. Select **Supplier Invoice Request > Copy**.



On the **Copy Supplier Invoice Request** screen:

8. Update the **Invoice Date**, **Invoice Received Date** and **Default Due Date** (i.e., update Payment Terms as needed) to reflect when you need the payment to be made for the next supplier invoice request.
9. Update the **Supplier's Invoice Number** field. This is a free form field used for departmental tracking purposes. The supplier invoice number should be a unique departmental tracking number and must not be a duplicate for that particular supplier. Develop a supplier invoice numbering system that has unique supplier numbers, using such items as name, department, date, etc. If a duplicate number is used, you will receive an on-screen validation notice that this supplier invoice number has already been used and that a unique number is required. This is a required field.

Primary Information	Additional Information
Invoice Date * 11/01/2022 <input type="text"/>	Ship-To Address <input type="text"/> 1001 Emmet Street N. Charlottesville, VA 22903 United States of America
Invoice Received Date <input type="text"/> MM/DD/YYYY	Payment Terms <input type="text"/> 1.5% Net 30
Company * <input type="text"/> The Rector & Visitors of the University of Virginia	Default Due Date 12/01/2022
Supplier * <input type="text"/> Jones, Amy	Reference Type <input type="text"/>
Remit-To Connection <input type="text"/> Home	Handling Code <input type="text"/> PMT_HNDL_HOLD FOR PICKUP
Currency * <input type="text"/> USD	Statutory Invoice Type <input type="text"/>
Control Total Amount 200.00	Freight Amount 0.00
Supplier's Invoice Number <input type="text"/> Test1234	Tax Amount 0.00



The fields in the supplier invoice request auto-populate (copy) based on the copied supplier invoice request. Make changes to the supplier invoice request as needed.

10. Click **Submit**.
11. You will need to repeat steps 7-9 in order to copy and submit the number of supplier invoices needed for recurring payment (i.e., for a monthly recurring supplier invoice request for 12 months total, you will copy the supplier invoice request 11 times).

You have successfully completed this task.