# Maintaining your TNC Supplier Account

Description: This article will explain how a TNC Supplier can use the Supplier Portal in Workday to manage and update their information with The Nature Conservancy.

**Audience: TNC Suppliers**

**Table of Contents:**



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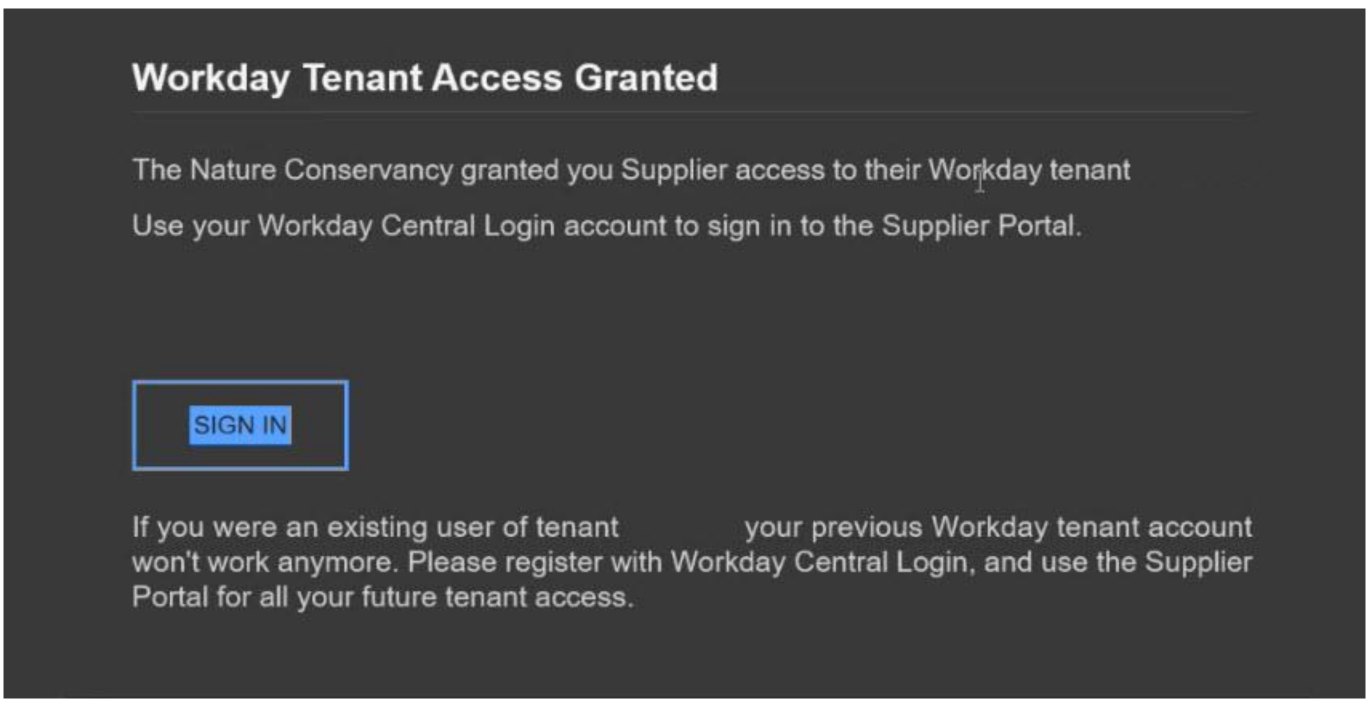
## Registering for a Workday Supplier Account

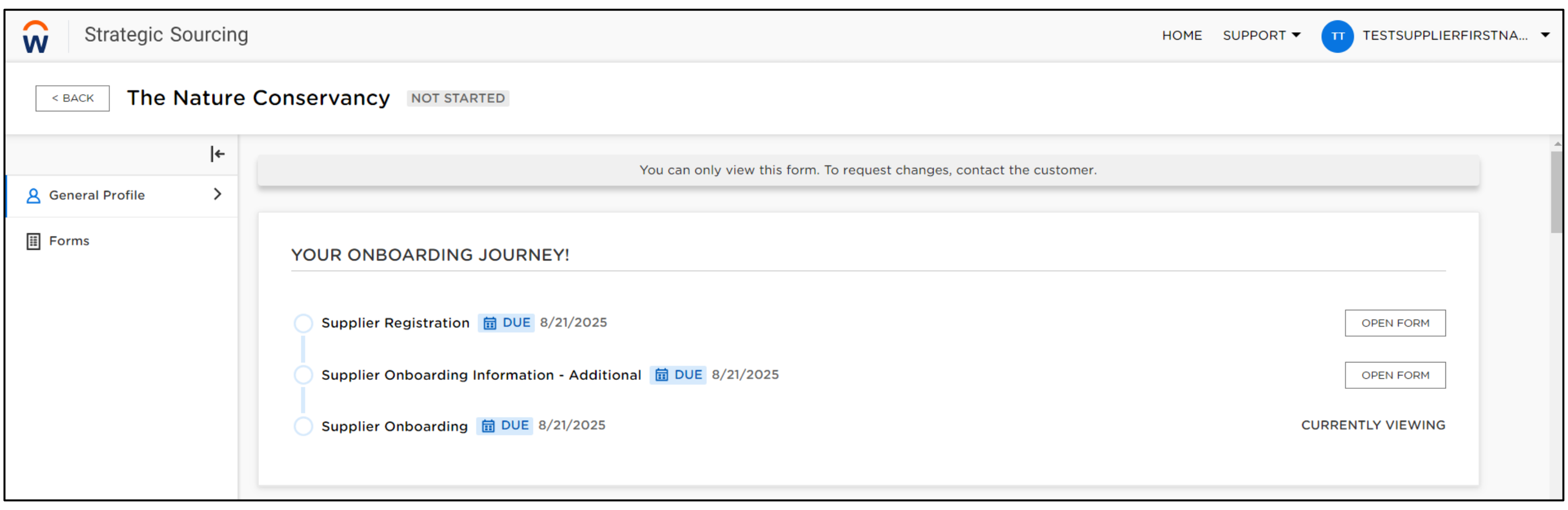
Once you have been approved by TNC as a Supplier, your record will become active in the Workday Supplier Portal.

1. You will receive an invitation email from Workday to register for a Workday Supplier Account. Click **Sign In** to proceed.



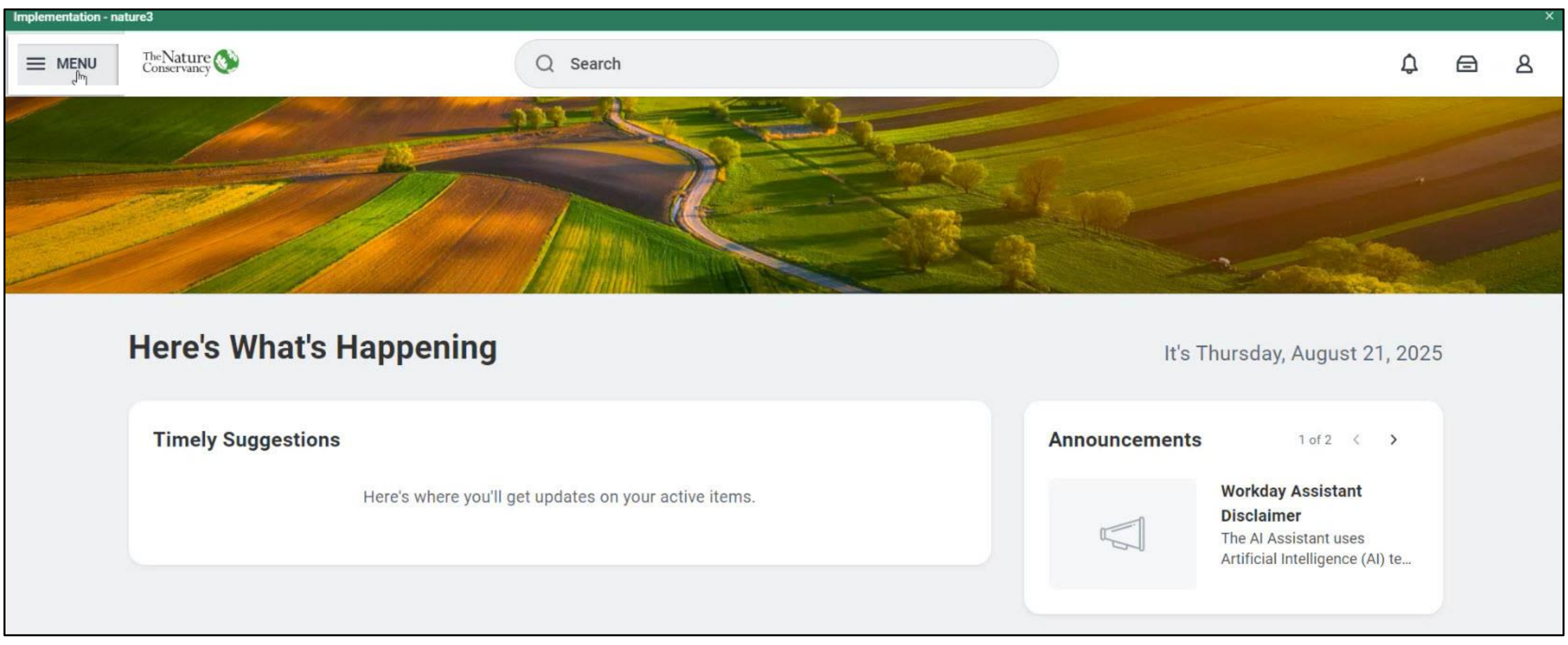

**Important:** You must use the link in the invitation email to initially access the Workday Supplier Portal. If you do not receive the email, contact your TNC representative for assistance. If you can't locate the invitation or need to reset your password, use this link – Click Here

2. You will be prompted to create a password for the Workday Supplier Portal. Password requirements are the following: 8 characters, 5 or more unique characters, 1 uppercase, lowercase, numeric and special character.
   a. An authenticator application is required to complete your set up.
   b. For suppliers in the United States and Canada, a phone number will also be required.
3. When you log in, you will see the **Workday Strategic Sourcing** (WSS) homepage. Here you can view and edit your general profile information, see any forms waiting for you to complete, and access your purchase orders. See Completing Forms section for more details.

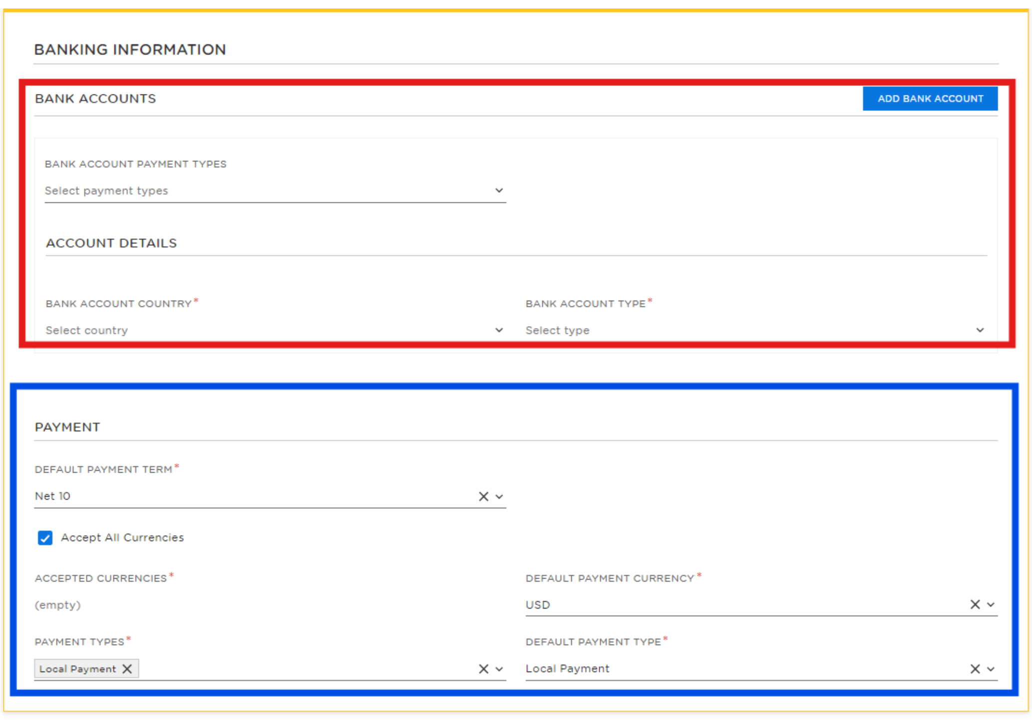



4. Once granted access to the Workday tenant, access your account details by clicking **Procurement Portal** in the upper right corner of the window.


This will take you to the **Workday Supplier Portal** where you can update secure information such as your contact details and payment information.




# Completing Forms in Workday Strategic Sourcing (WSS)

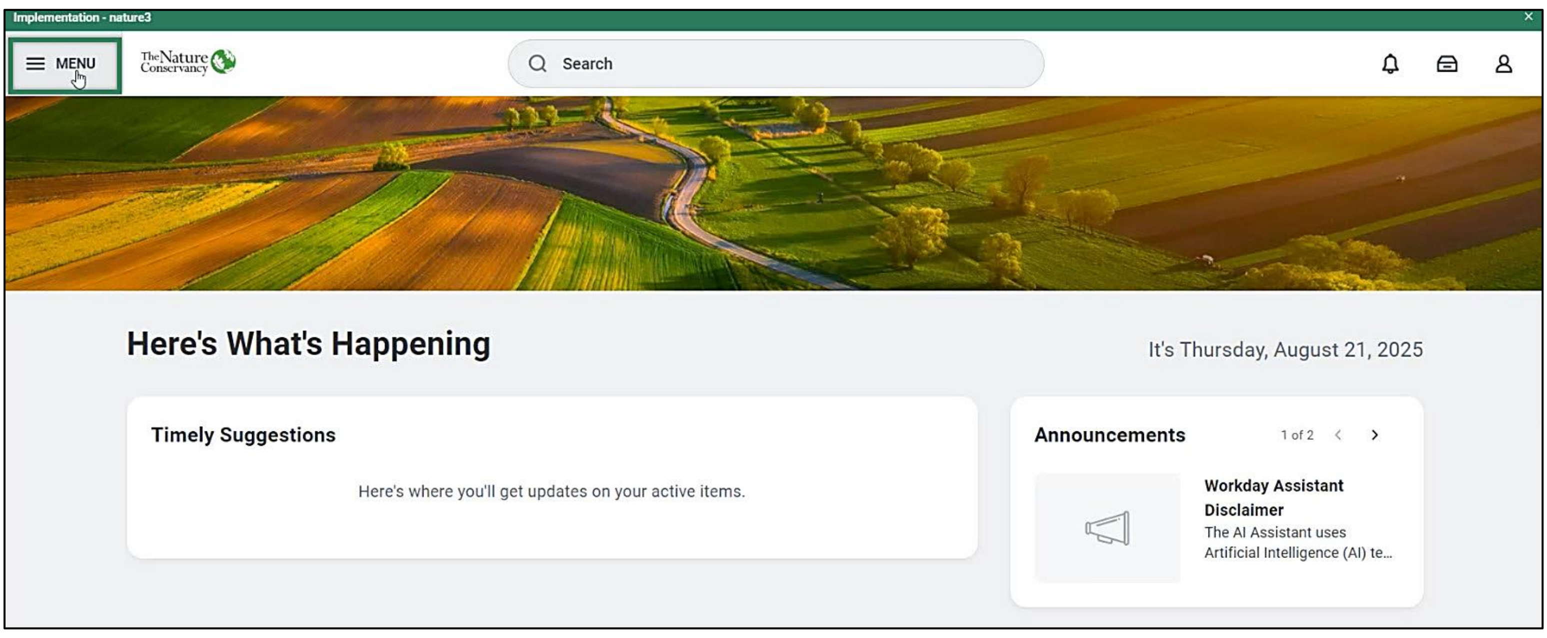
1. Supplier Onboarding Form
    a. Section - Supplier Information
        i. Supplier Name: Preferred name or doing business as name
        ii. Website: Optional
        iii. Supplier Category: Choose the best option closest to the services your organization provides
    b. Section – Commodity Codes
        i. Commodity Codes: Choose at least one (1) from the list of United Nations Standard Products and Services Codes that best/closest represents your goods/services
    c. Section – Business Information
        i. Addresses: Add address(es) associated with your business with TNC
            1. Address Country
            2. Usage: If address(es) have specific purpose, you can identify them here
        ii. Phones
        iii. Tax Information
    d. Section – Banking Information
        i. For payments made to banks in the United States of America or Australia, complete the Bank Accounts section
            1. Bank Account Payment Type
            2. Section - Account Details
                a. Bank Account Country
                b. Bank Account Type
                c. *Additional fields may appear depending on your payment type and Bank Account Country or Payment Type*
        ii. **<u>For payments made outside of the United States of America & Australia</u>**, in the Banking Information section, skip the 'Bank Accounts' section by **leaving it completely blank.**
            1. Complete the Payment section
                a. Default Payment Term
                b. Accepted Currencies
                c. Payment Type: Use value 'Local Payment'
        iii. 

    e. Section – Contacts
        i. Contact Information: You can add multiple contacts associated with your business with TNC
        ii. Contact type: If contact(s) have a specific purpose, you can identify them here
    f. Section – Attachments
        i. Include your W9/W8 BEN or equivalent tax form
        ii. For ACH enrollment where applicable, attach either a voided check image or bank letter with payment instructions

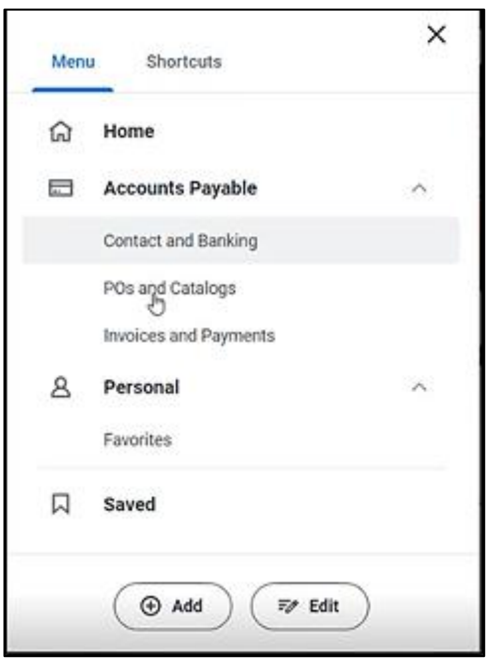
2. Supplier Onboarding – Additional Information
    a. Doing Business As (DBA) name
    b. DBA effective date
    c. Parent Company name
    d. Ownership type
    e. Entity type
    f. Contact email address if not already provided on the Supplier Onboarding form
    g. Unique Entity ID: United States federal government issued 12-character alphanumeric code
    h. Work location: Primary location where good(s)/service(s) are being delivered for TNC

# Updating Contact and Banking Information

1. In the Workday Supplier Portal, click the **Menu** icon in the upper left corner of your screen.

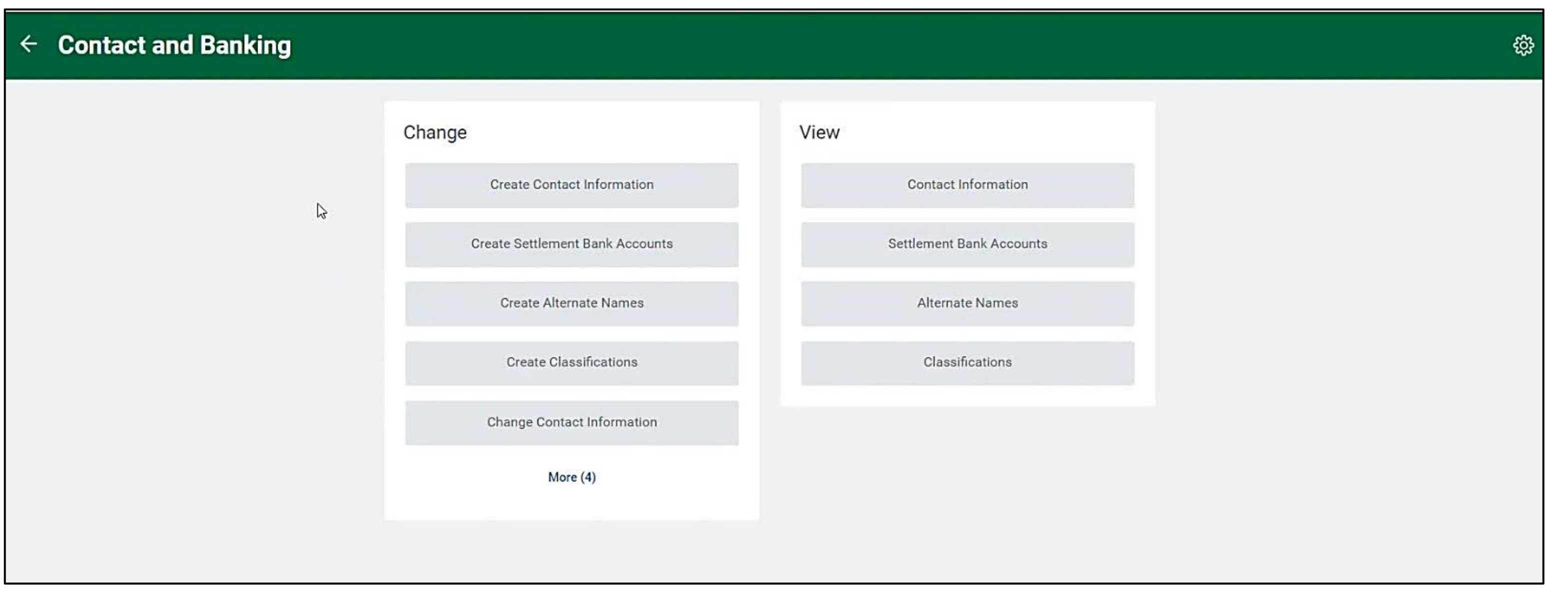



2. From the **Accounts Payable** Menu, you can access both your account information and your contact information.

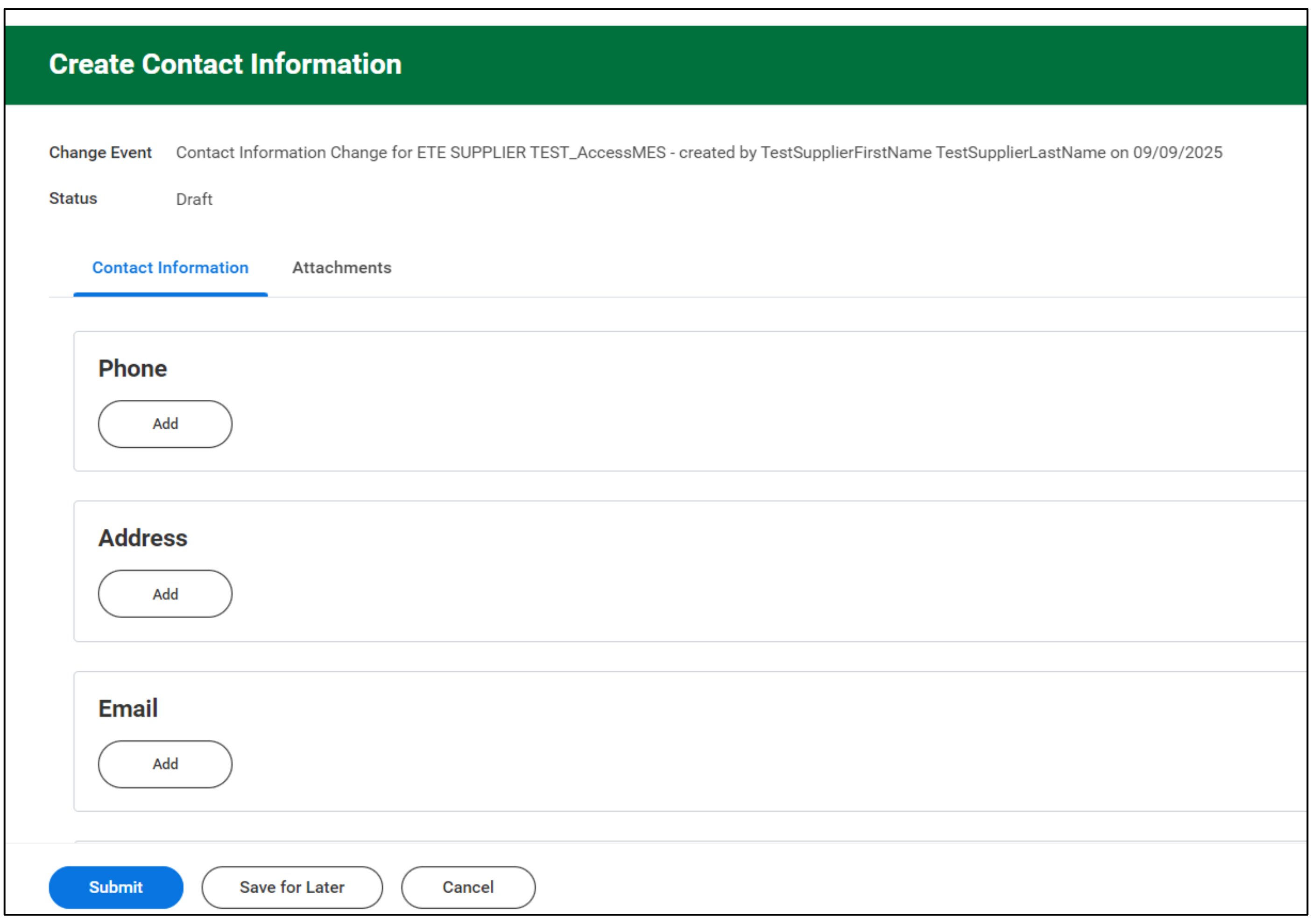



3. To edit your information, select **Contact and Banking**. Options are available for creating, changing, and viewing information.

**Note:** **Create Classifications** is not a function currently in use by TNC.

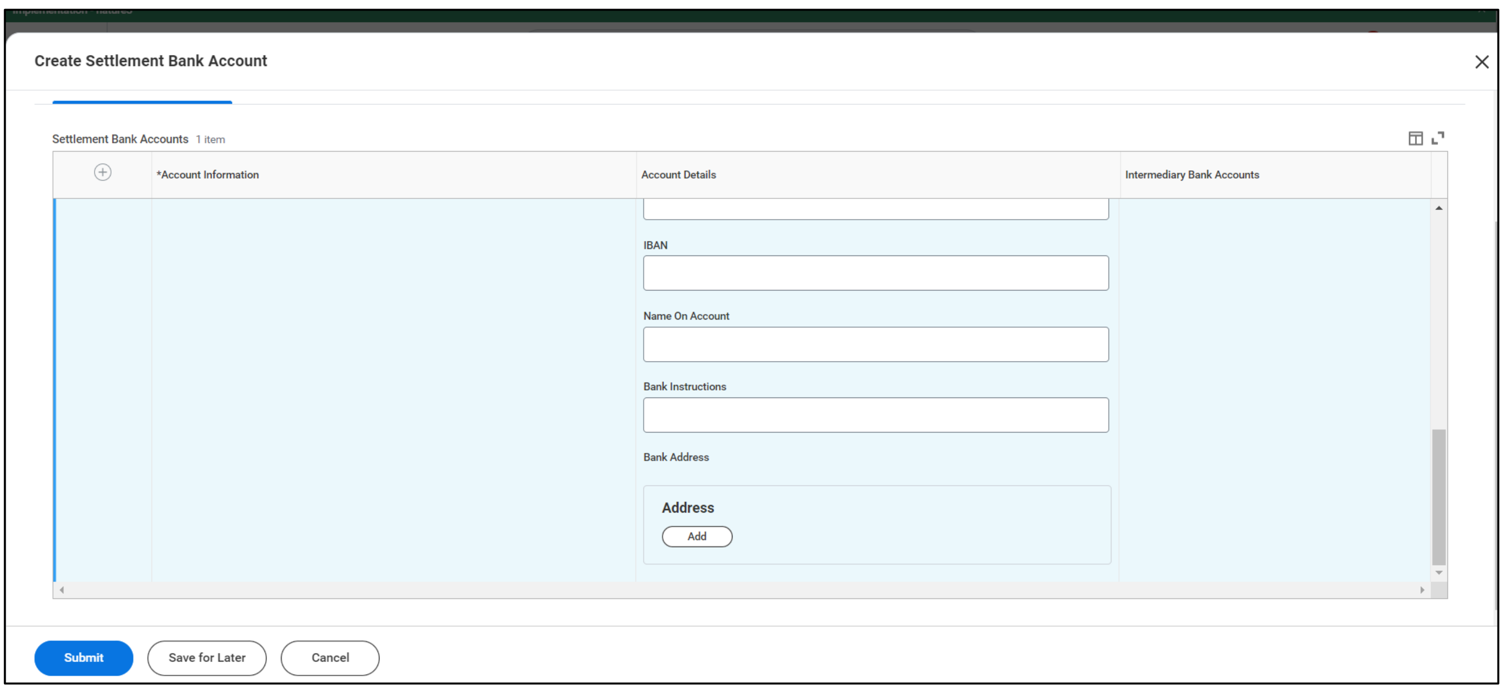



4. To add additional contact information for your organization, such as email addresses or remit-to, and work locations, click **Create Contact Information**. In the pop-up, click **OK** to create a request. Complete the applicable sections, then click **Submit**.

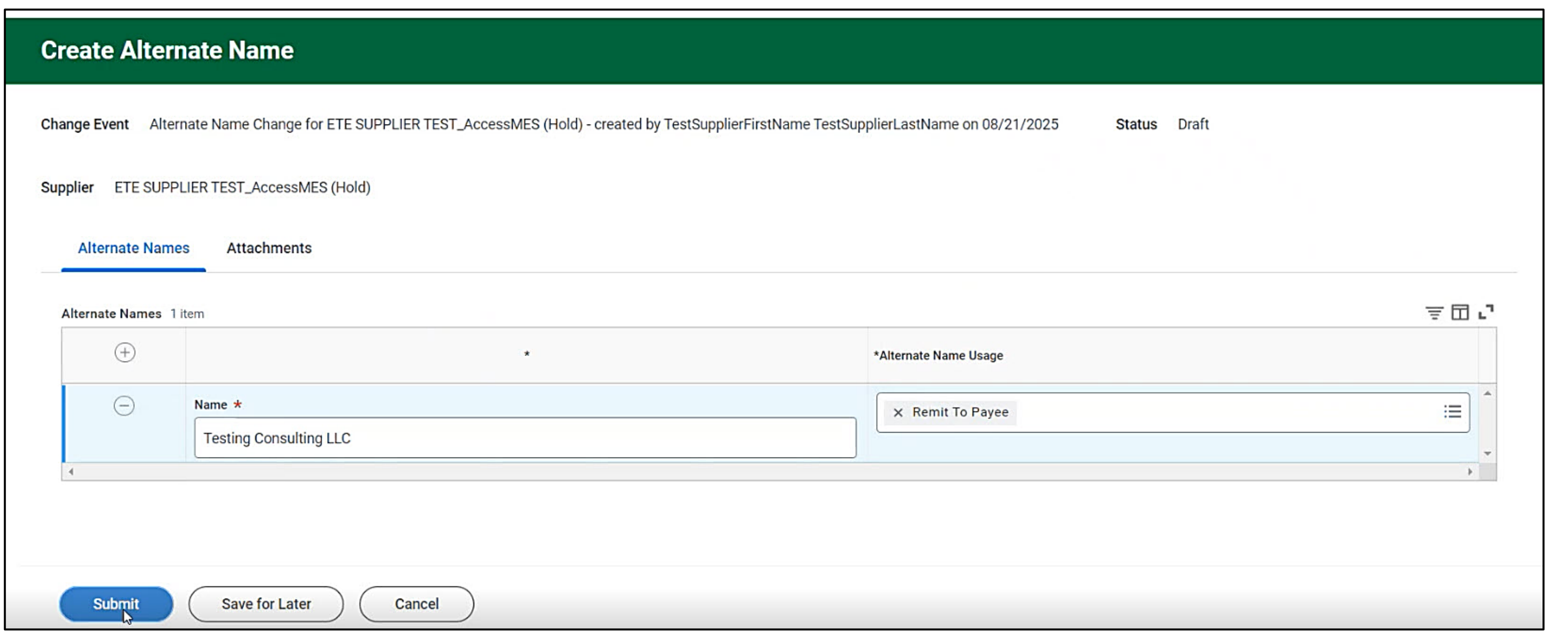



5. To update banking information, click **Create Settlement Bank Accounts**. Complete the necessary fields. Those marked with red asterisks are required fields. Include any relevant attachments, such as a bank letter or a copy of a voided check, then click **Submit.**

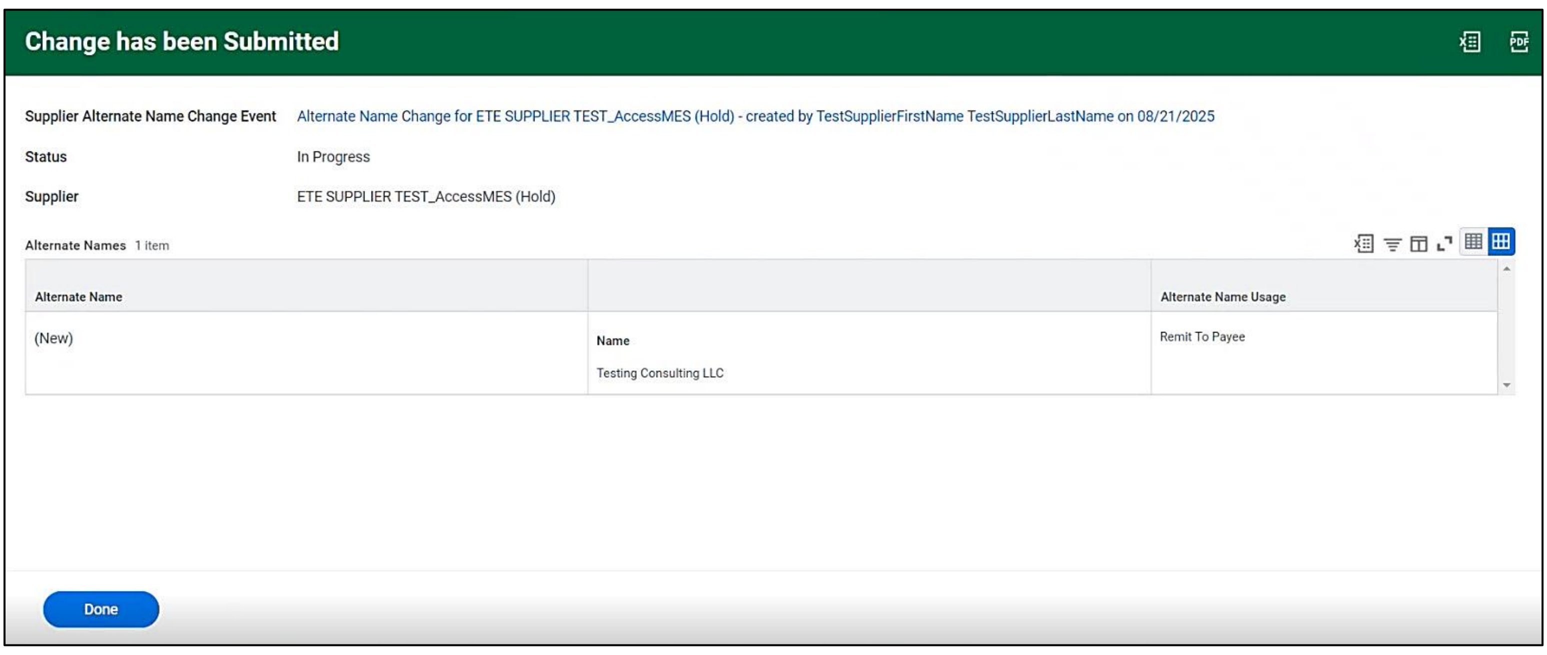
**Note: Requests for electronic payments that are missing sufficient attachment documentation will be rejected.**



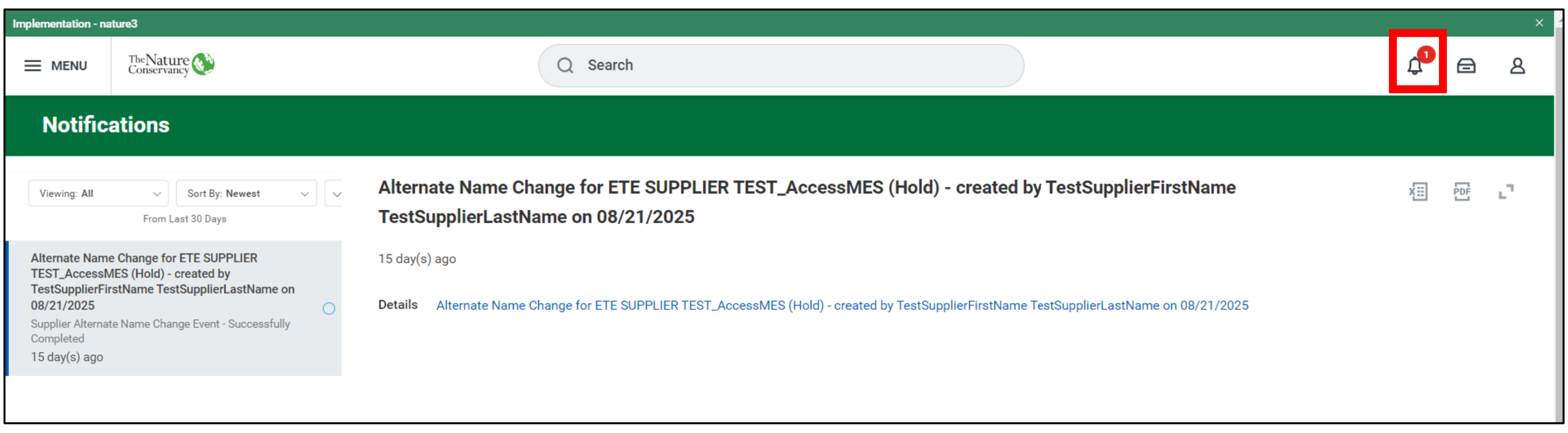

6. To enter alternate information for payment, such as a legal doing business as (dba) name, click **Create Alternate Names**. In the pop-up, click **OK** to create a request. Enter your **Alternate Name** and **Alternate Name Usage**. Use the **Attachments** tab to include relevant documentation such as a current tax form or Bank letter. Click **Submit.**




A confirmation window will appear with your alternate name request. Click **Done**. Your request will be forwarded to the TNC team for review and approval.

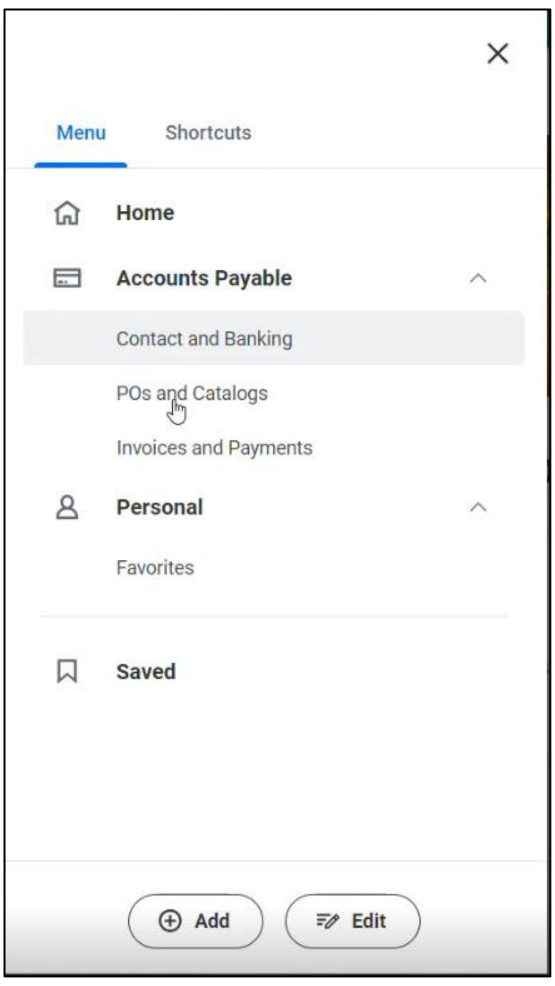



7. Once your request has been approved, you will receive a notification in your Workday Supplier Portal alerts, which is the bell icon at the top right of the screen.

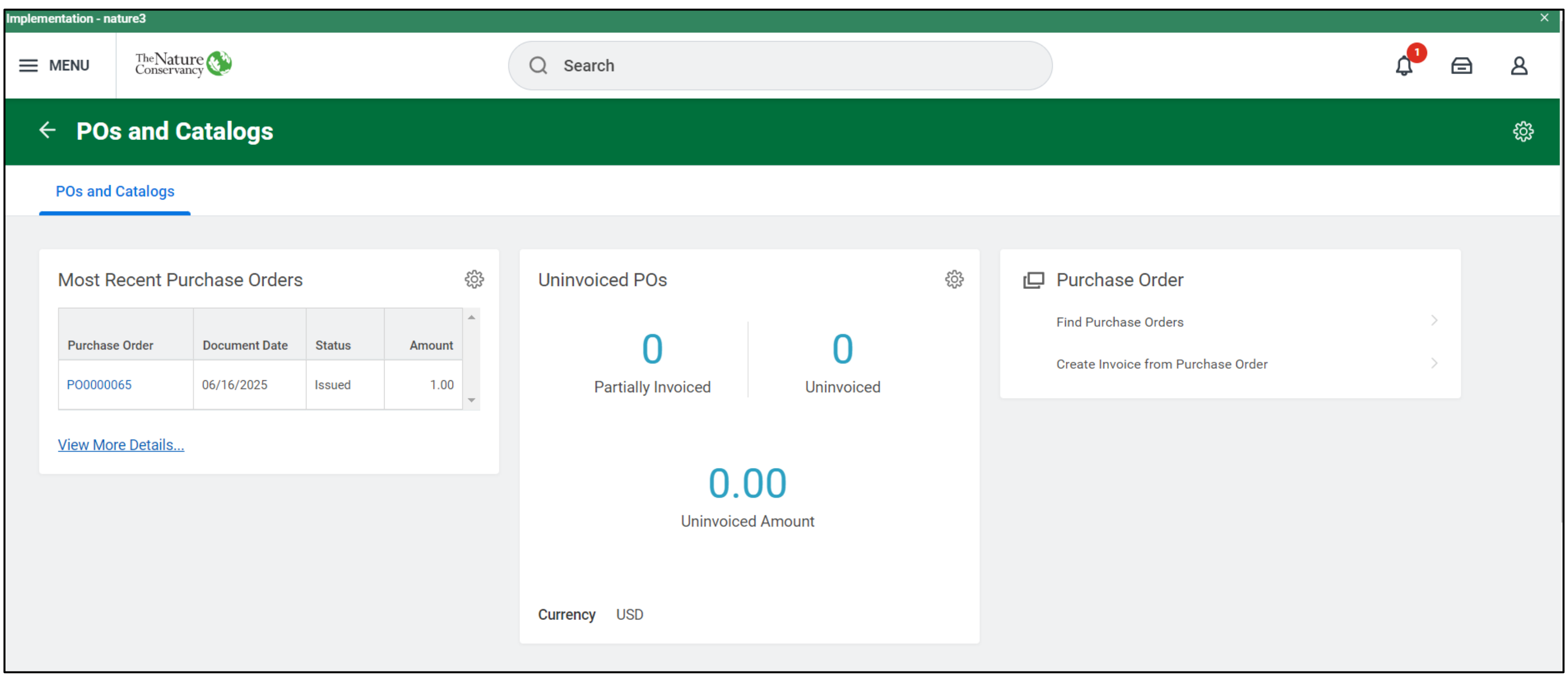



# Other Portal Menu Options

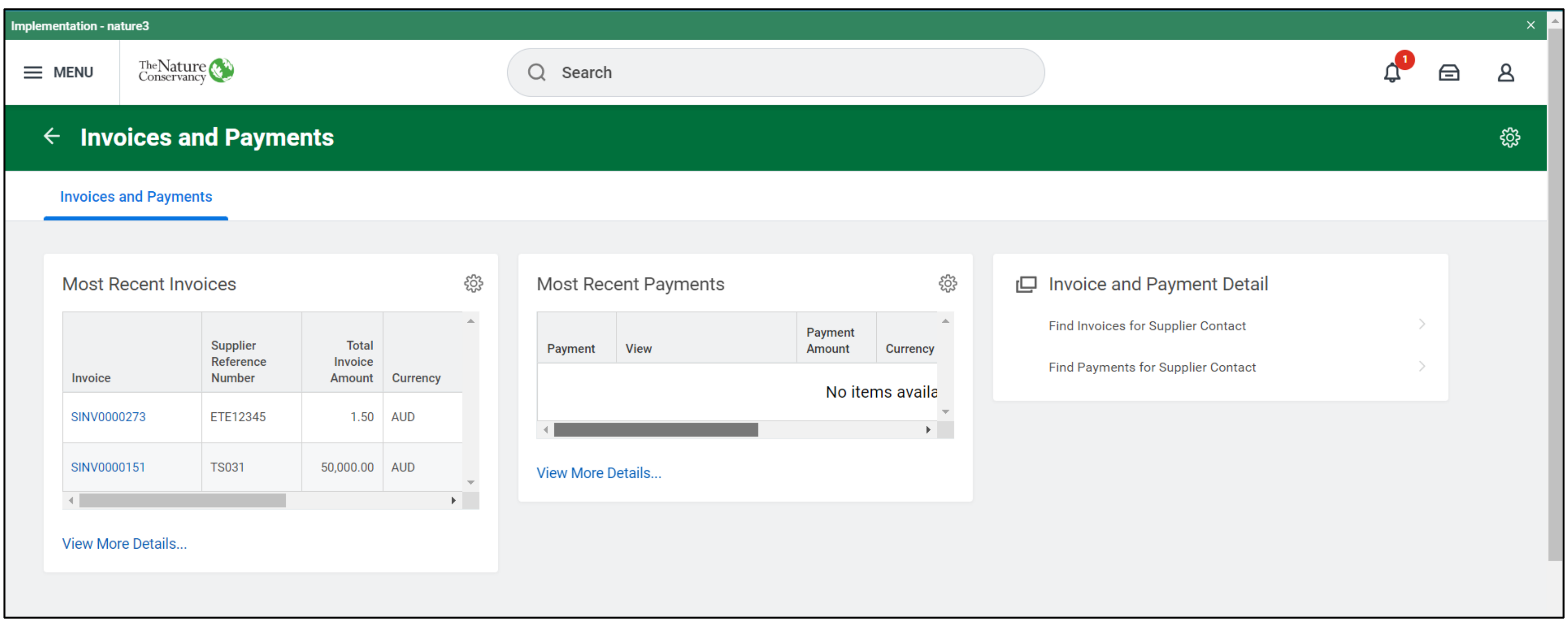
Other available menu options include:




- Click **POs and Catalogs** to view a dashboard related to your Purchase Orders and invoices against them.




- Click **Invoices and Payments** to view status on the most recent invoices and payments.




- **Personal: Favorites** is not currently being used.

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