Whole Foods Market on Workday
Instructional Guide

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Audience : Suppliers

Overview

This guide will help you navigate your home page, applications, inbox, quick access menu, notifications, profile, and search field tools. It also provides step-by-step instructions to view and search invoices and payment details, and instructions to update contact and bank details.

Note: Please note that the color scheme of the images on this guide differ from Workday.

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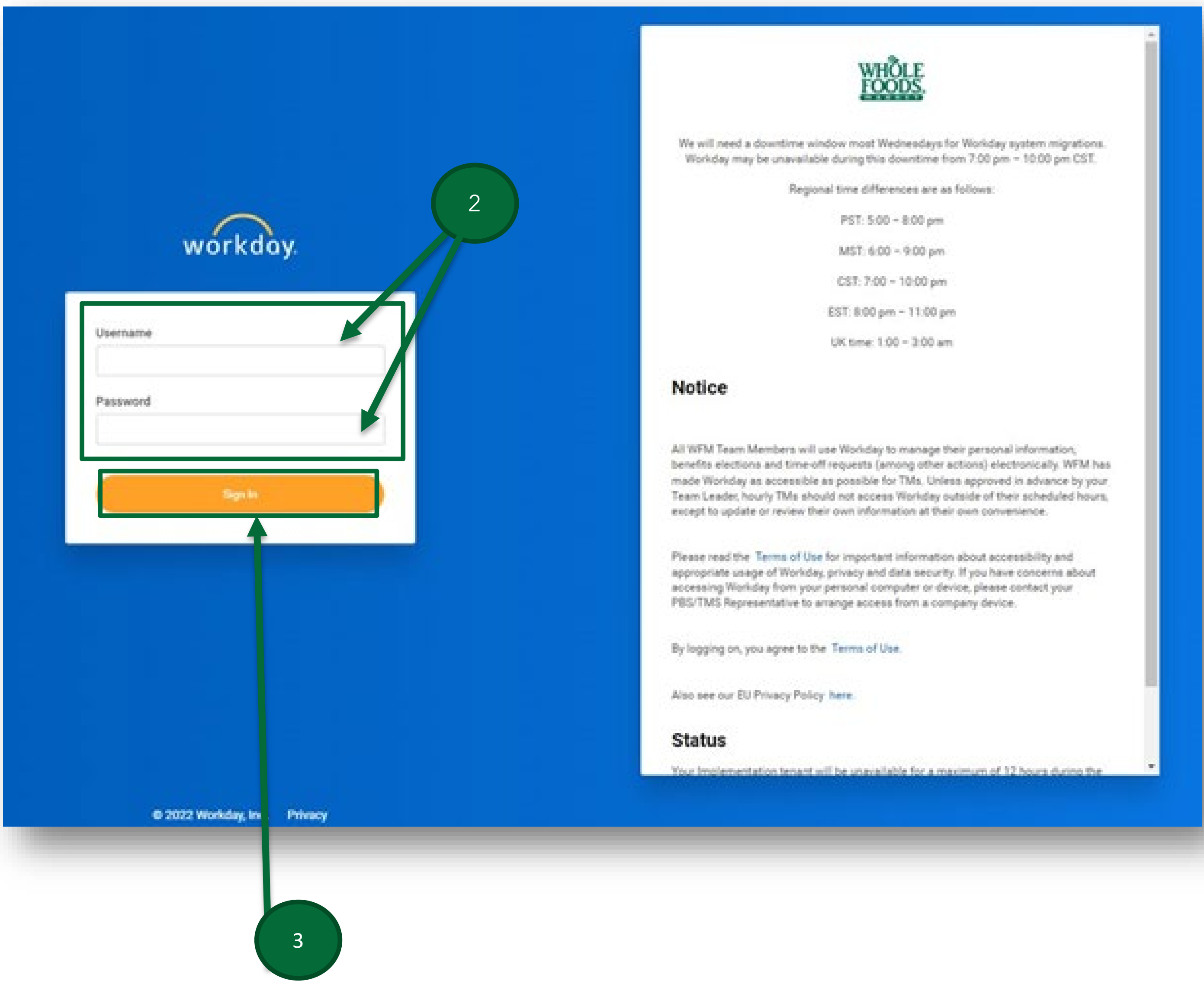
Getting Started

Verified suppliers will receive an email from Workday with the link to access Workday. The email will include your log-in name and temporary password. Once you log in for the first time, you can change your password for future access. It is recommended that you bookmark the website for easy access!

Log in to Workday

1. From the email, click the website link for Workday.
2. Enter the log-in username and password provided.
3. Click **Sign In**.



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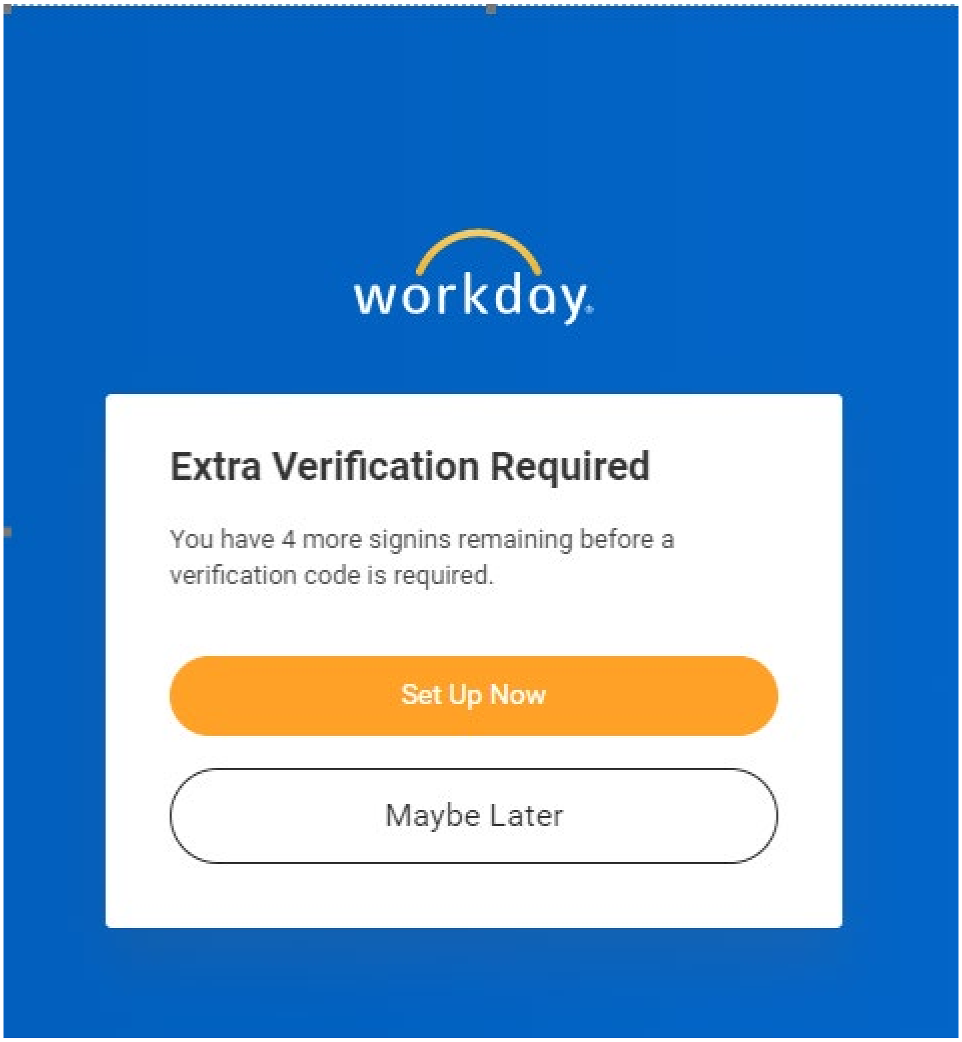
MFA: Multi Factor Authentication

1. Once signed in for the first time, you will see the message below notifying you that extra verification is required.
2. Click Set Up Now and complete the steps .

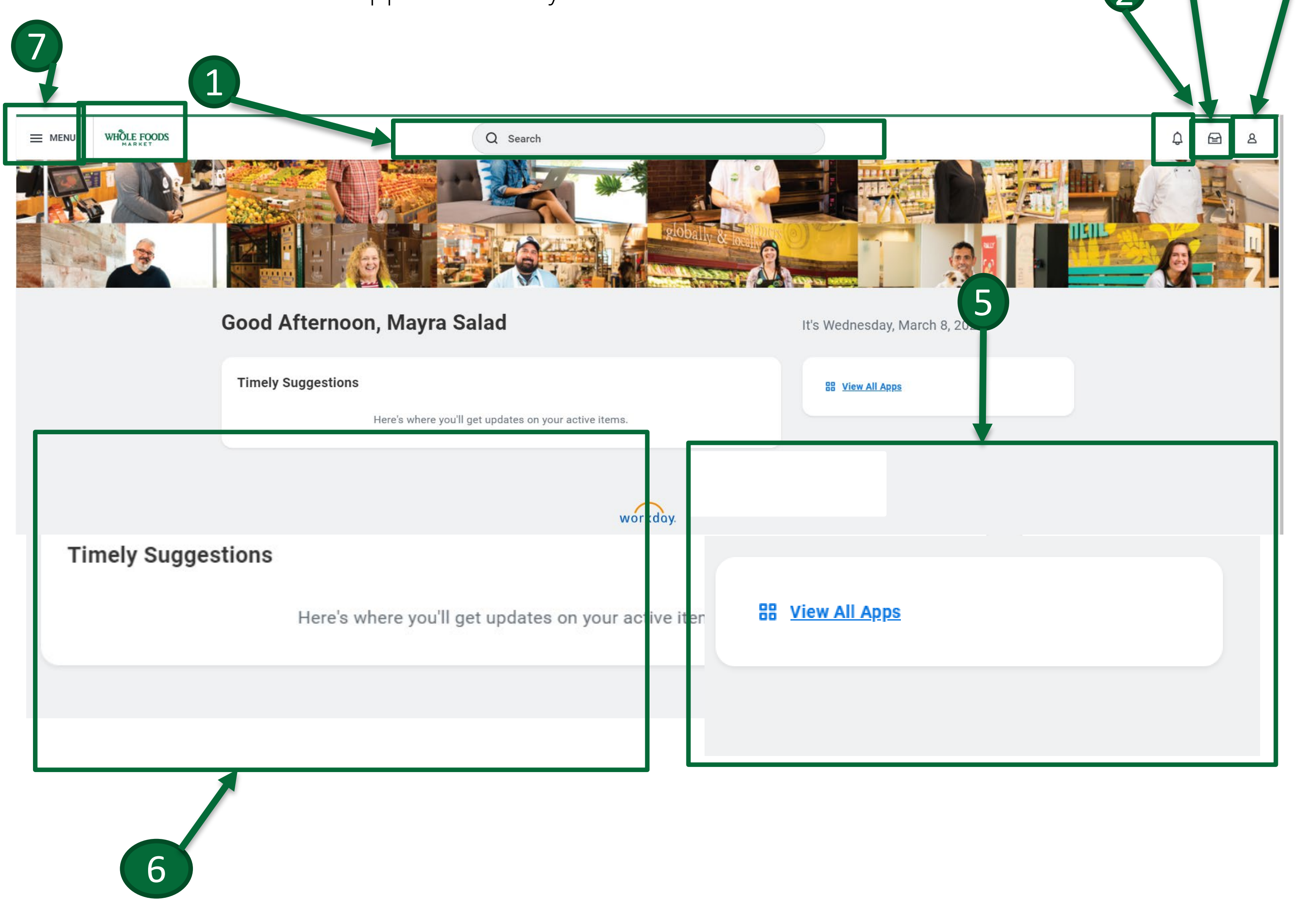


Navigating Your Home Page

Once you log in to Workday, the home page will display the following tools:

1. Search Field
2. Notifications
3. Inbox
4. Profile
5. Applications
6. Timely Suggestions
7. Menu
8. Whole Foods Market Home button

Note: Applications are visible throughout Workday on the top bar of the screen. The color scheme of the applications may differ.



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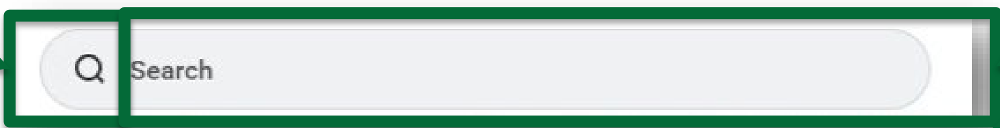
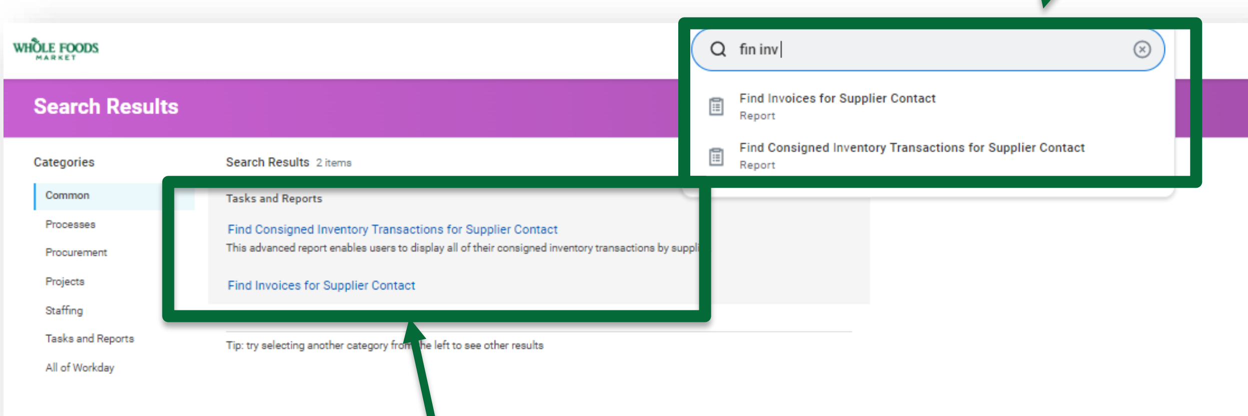
Search Field

The search field can be found on the top bar of the screen and will be visible throughout the site. The search bar finds exact information. Shorten to the first three letters of the keyword to find more results.



1. **Enter** a keyword in the search field.
2. Click the **magnifier icon** to display results.
3. Click on the **search result** to view more.



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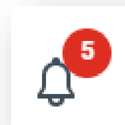
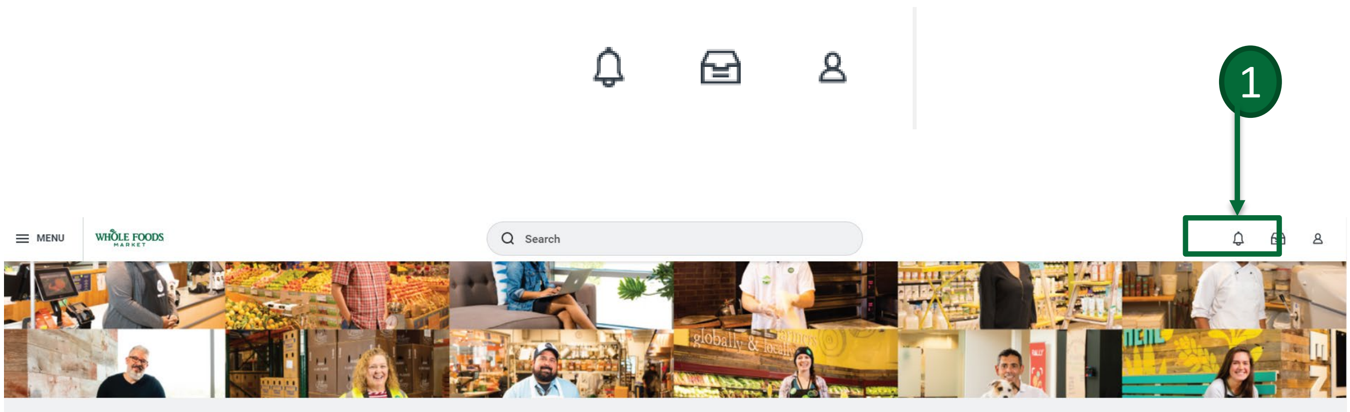
Notifications

The Notifications icon is on the right side of the screen, illustrated by a small bell. A number next to the bell will indicate the number of unread notifications. Notifications display for the last 30 days.



1. To view Notifications, click the **Notification icon** on the top right of the screen.



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Notifications

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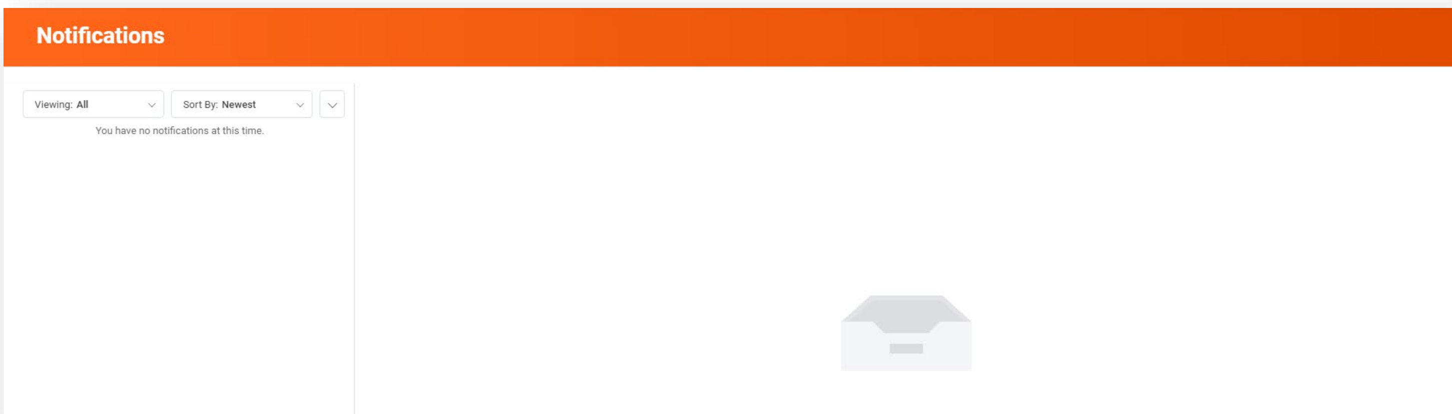
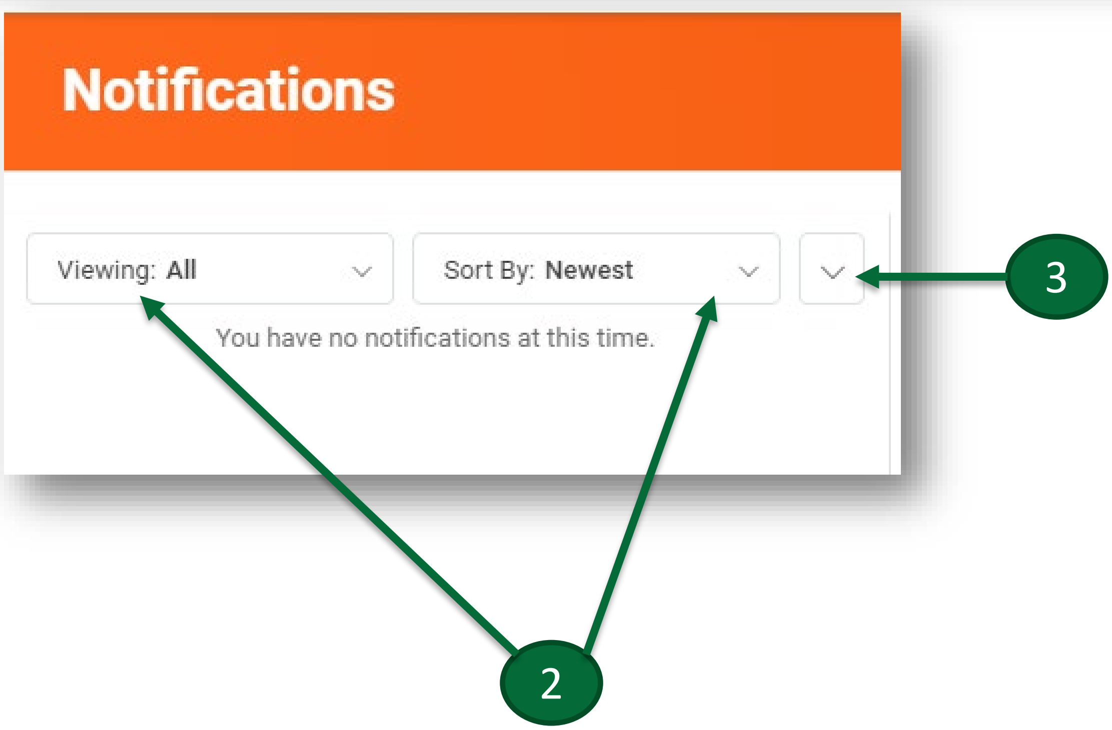
2. Filter notifications from newest to oldest and view all or unread. Notifications display from the next 30 days.

3. To refresh notifications, click the **down arrow** next to the Sort By drop-down menu.

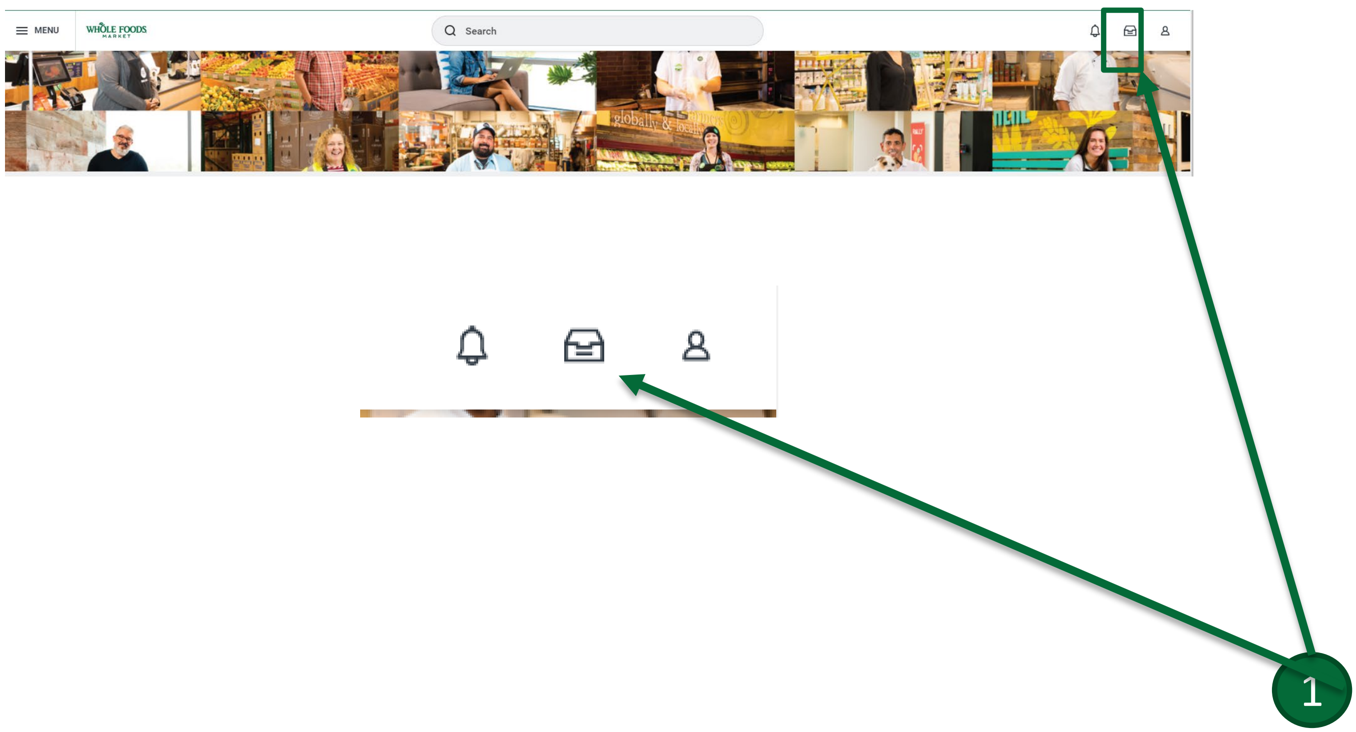




Workday Inbox

The Inbox icon is on the right side of the screen, illustrated by a box. A number next to the Inbox icon indicates the number of unread messages. Messages display for the last 30 days.

1. To view your messages, click the **Inbox icon** on the top right of the screen, or click **Go to Inbox** on the home page.



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Workday Inbox

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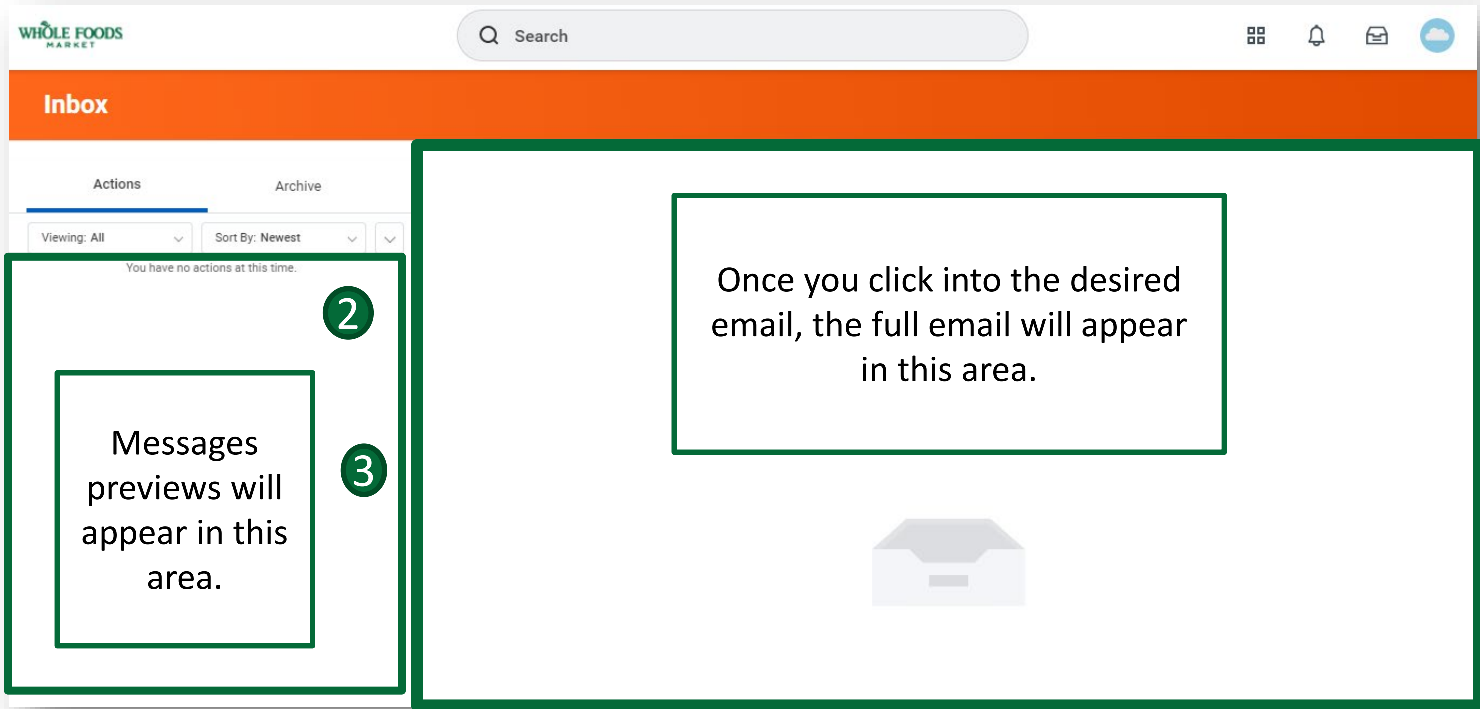
2. Messages can be previewed to the right of the inbox screen. Click any message to expand.

3. To remove a message, click the circle to the right of the message in the preview section.



Workday Inbox

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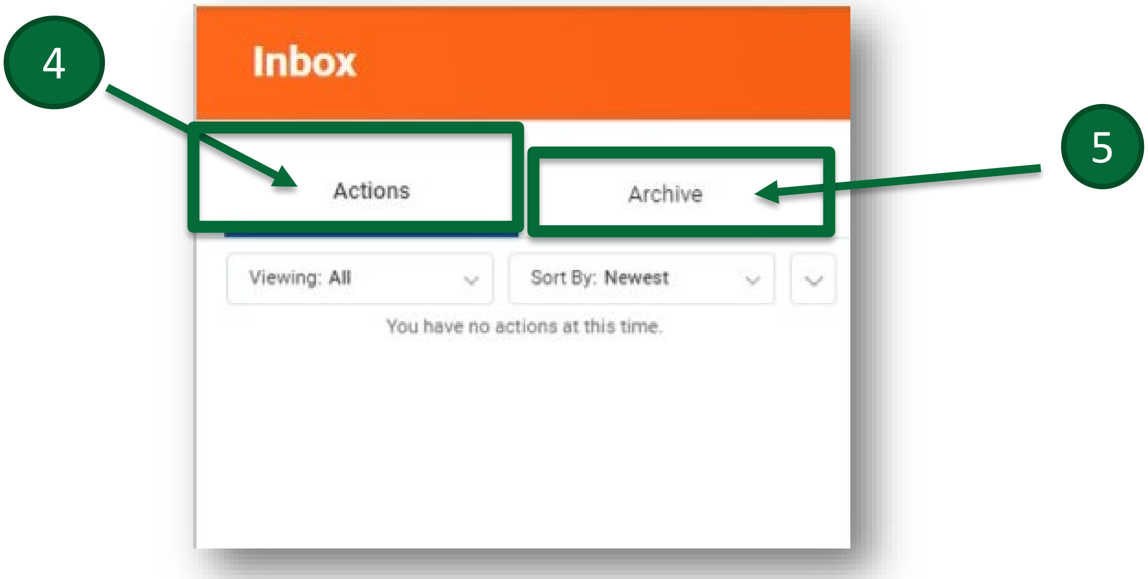
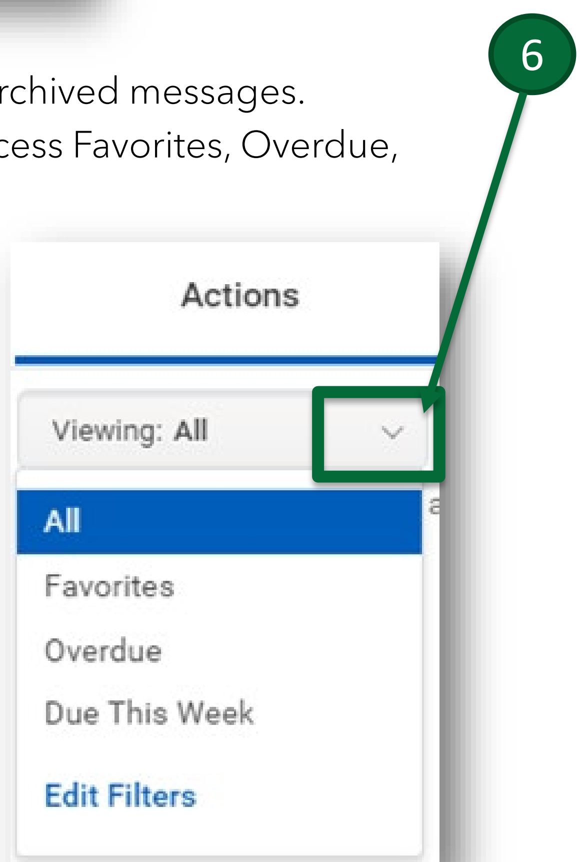
The inbox holds current and archived messages.

4. Click the **Actions** tab to display unarchived actions messages.



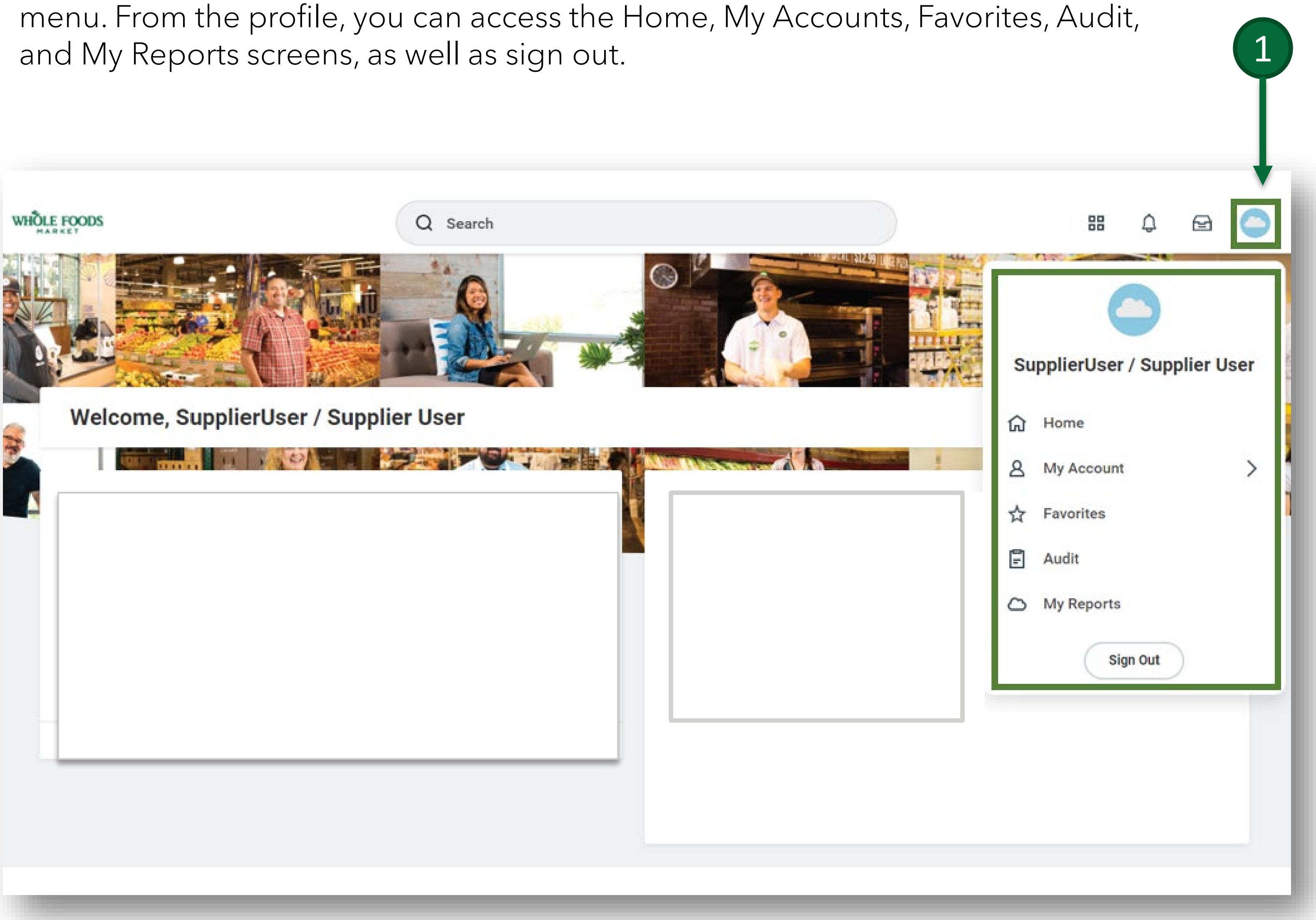
5. Click the **Archive** button to display the event or view archived messages.
6. Use the drop-down arrow under the Actions tab to access Favorites, Overdue, and Due This Week items and to edit filters.



Profile

Your profile is to the right corner of the screen, illustrated by a cloud. You can quickly access the home page, accounts, favorites, audits, and reports, and sign out from anywhere in Workday by clicking the profile icon.

1. To view the profile, click the **Cloud icon** to view the corresponding drop-down menu. From the profile, you can access the Home, My Accounts, Favorites, Audit, and My Reports screens, as well as sign out.



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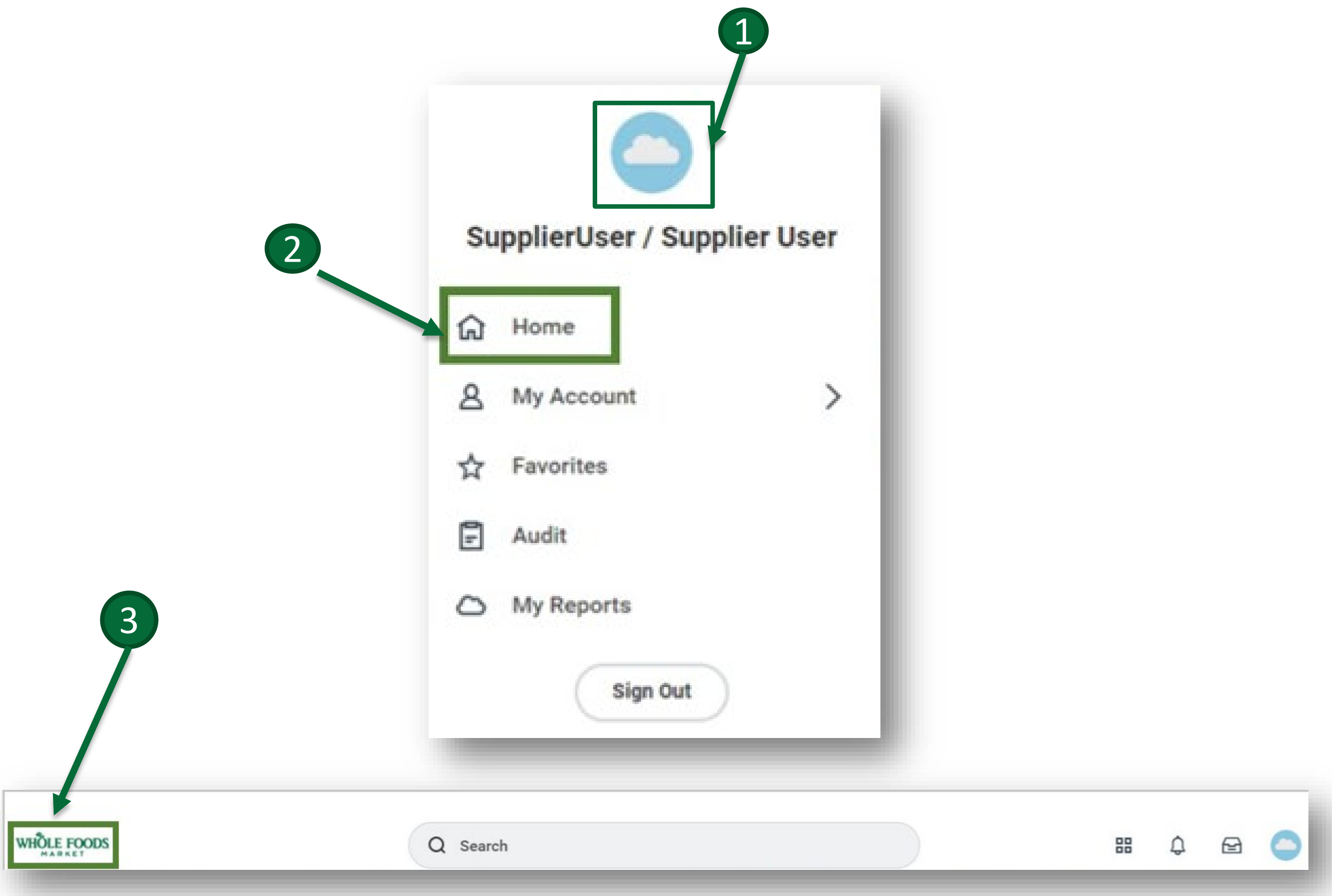
Home

1. Click the **Profile** icon in the top right of the Workday screen.
2. Click the **Home icon** to navigate to the home screen from anywhere in Workday.
3. You can also navigate to your home page from anywhere in Workday by clicking the Whole Foods Market Icon from the upper left of the screen.



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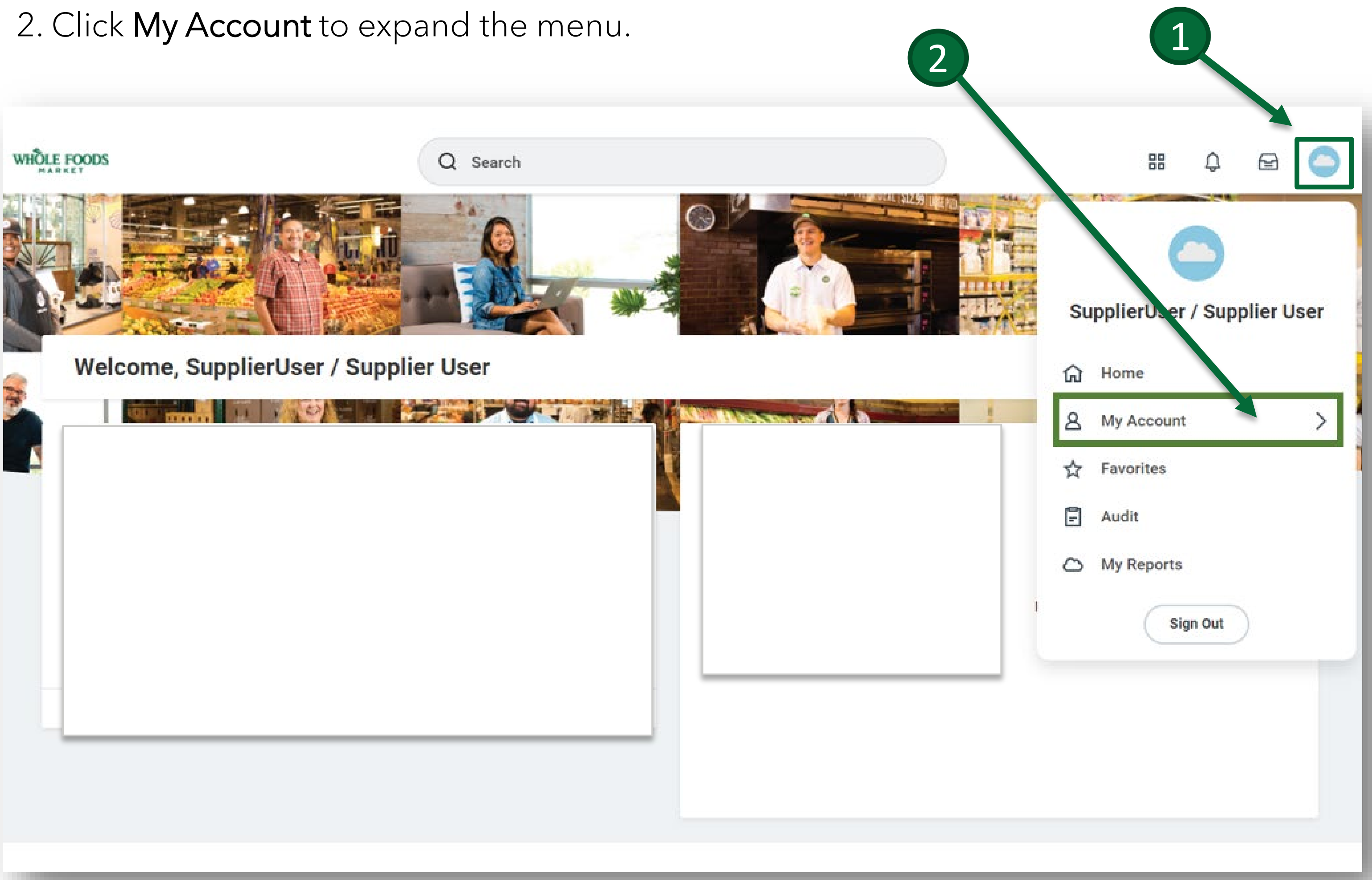
My Account

You can view the Organization ID, Change Preference and Manage Trusted Devices.

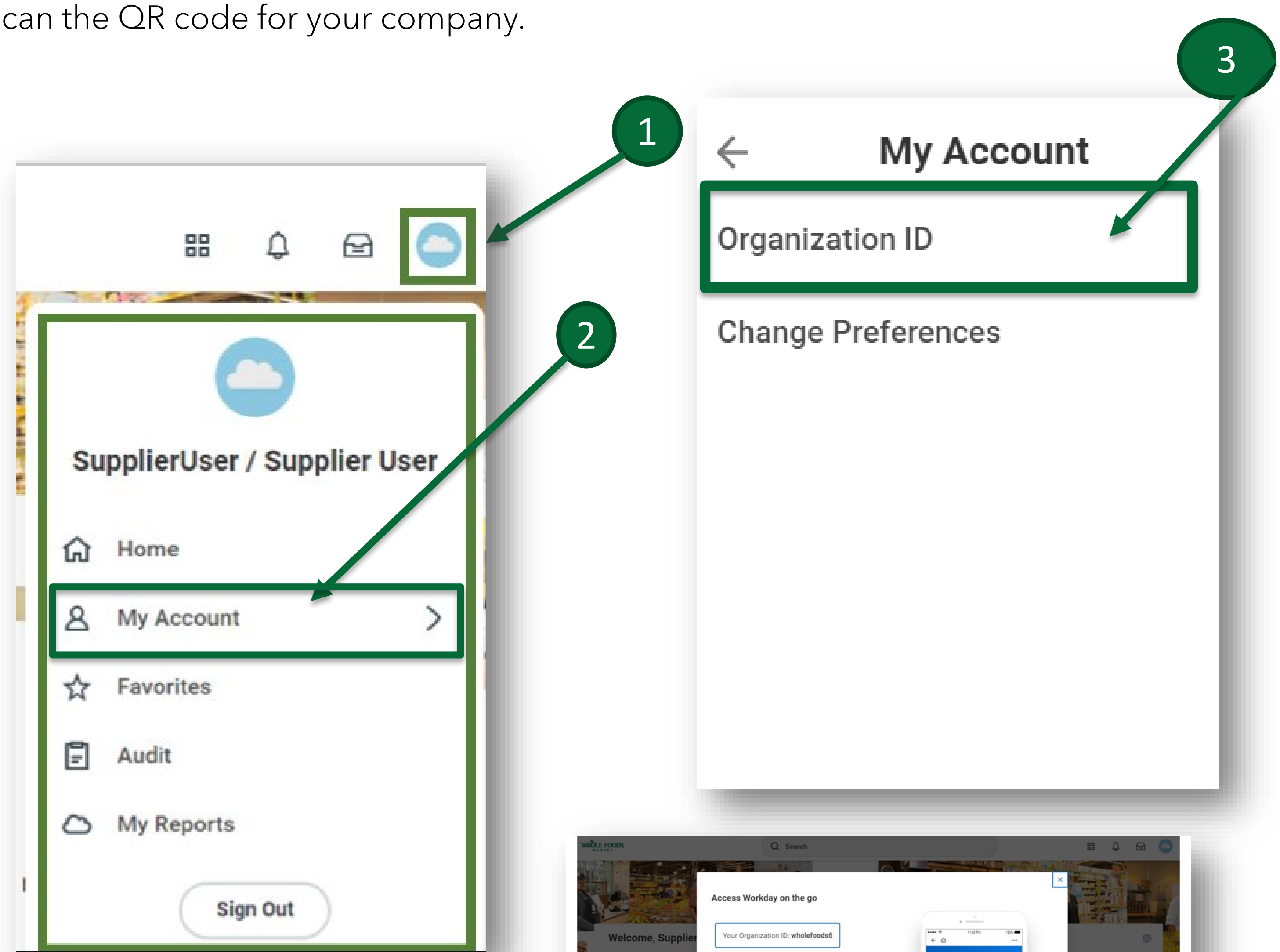
1. Click the **Profile icon** in the top right of the Workday screen.
2. Click **My Account** to expand the menu.

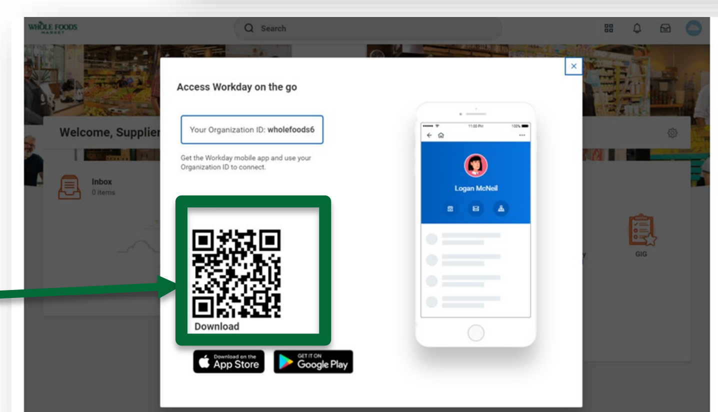


Organization ID

Use the Organization ID to download the Workday mobile app and connect to your Workday account.

1. Click the **Profile icon** in the top right of the Workday screen.
2. Click **My Account**.
3. Click **Organization ID**.
4. Scan the QR code for your company.

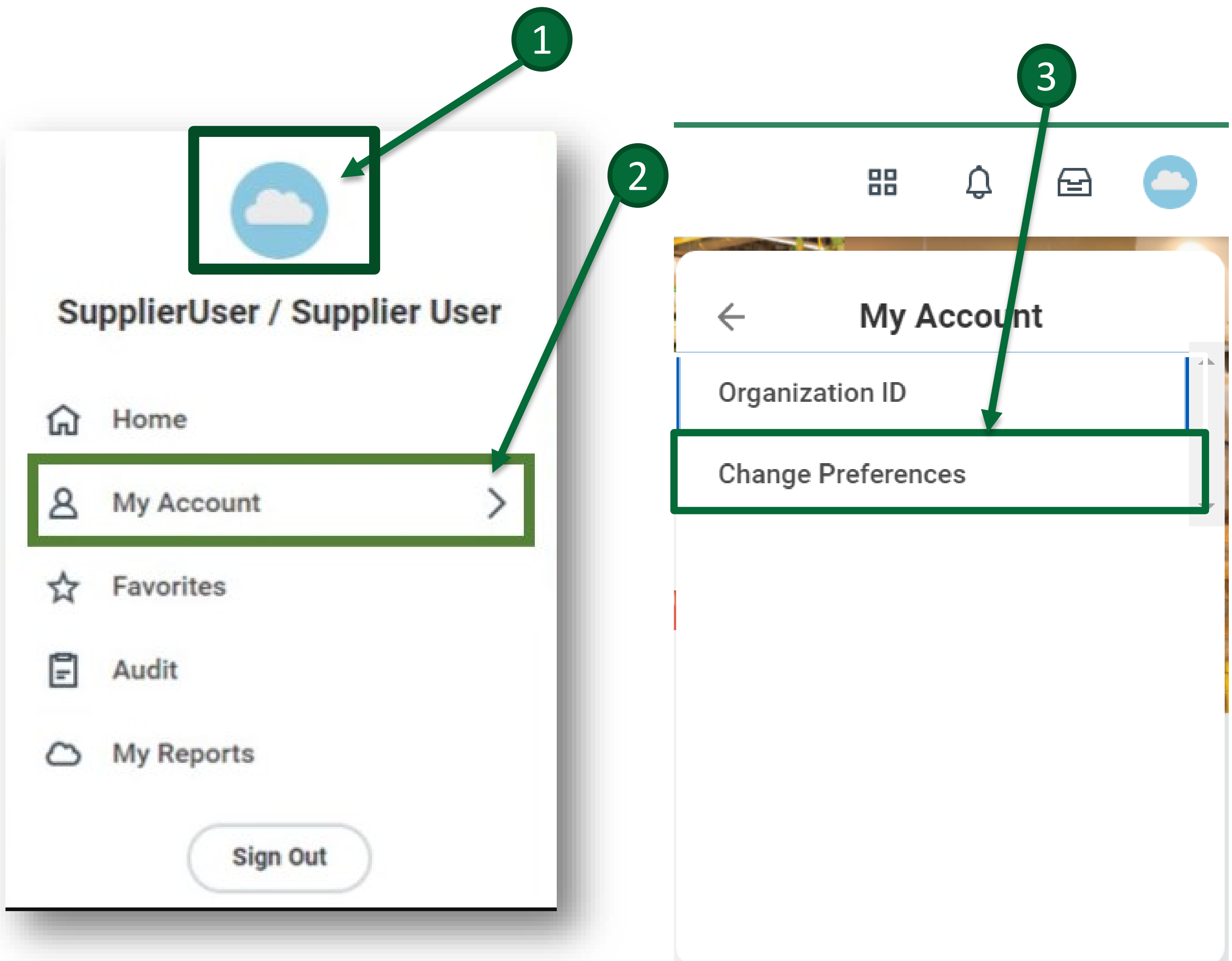




Change Preferences

You can edit your preference for preferred locale, default display language, default time zone, default hour clock and more. You can also access your notification settings.

1. Click the **Profile icon** in the top right of the Workday screen.
2. Click **My Account**.
3. Click **Change Preferences**.



Change Preferences

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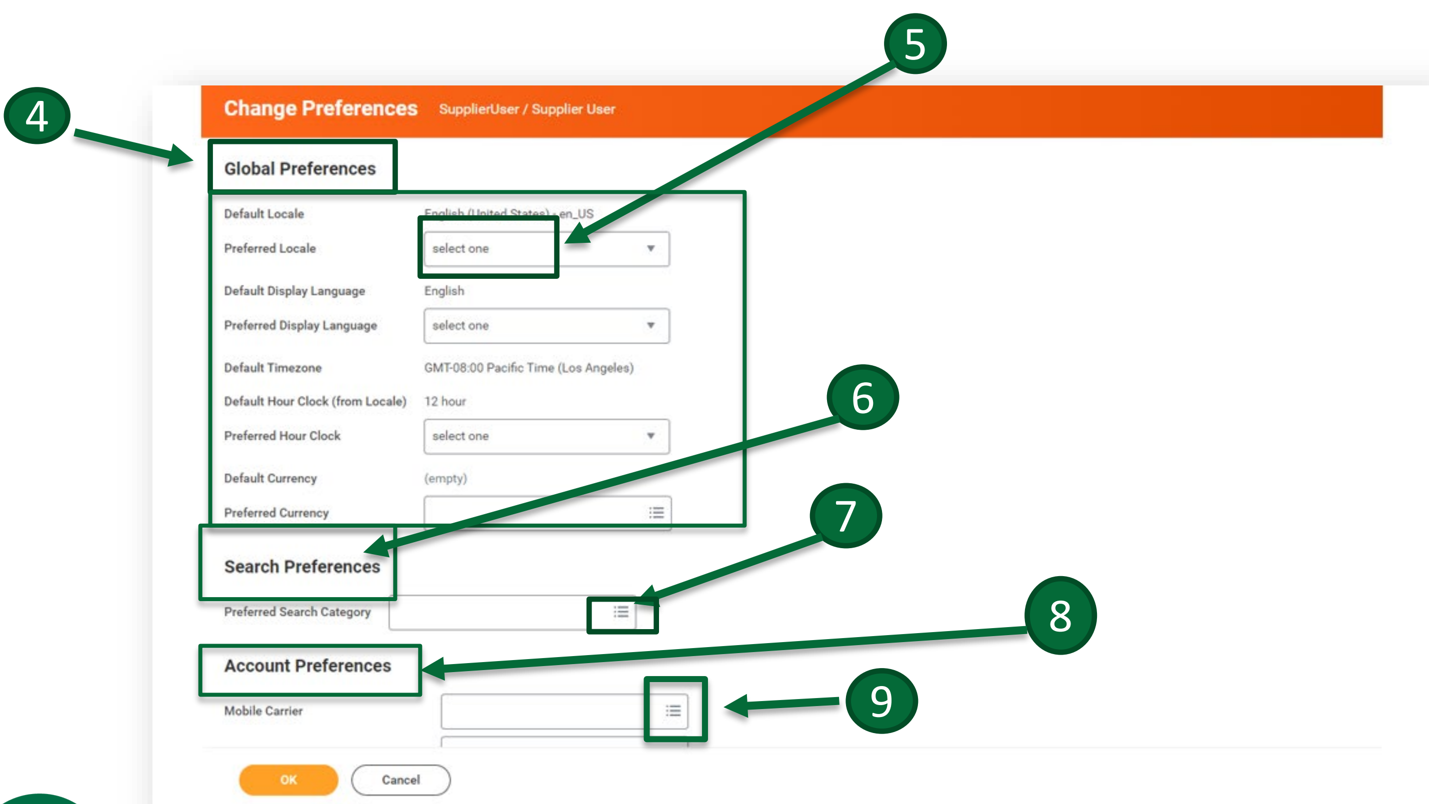
4. Under **Global Preferences,** you can edit :
    - Preferred Locale
    - Preferred Display Language
    - Preferred Hour Clock
5. To make the selection, click drop-down menu.
6. Under **Search Preferences**, uses can select:
    - Preferred Search Category
7. Click on the **Menu icon** to search for available categories.
8. Under **Accounts Preferences**, you can select:
    - Mobile Carrier
    - Preferred Home Page
    - Simplified View and Show responsive layout for prompts
9. Click on the **Menu icon** to search for available categories.



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Change Preferences

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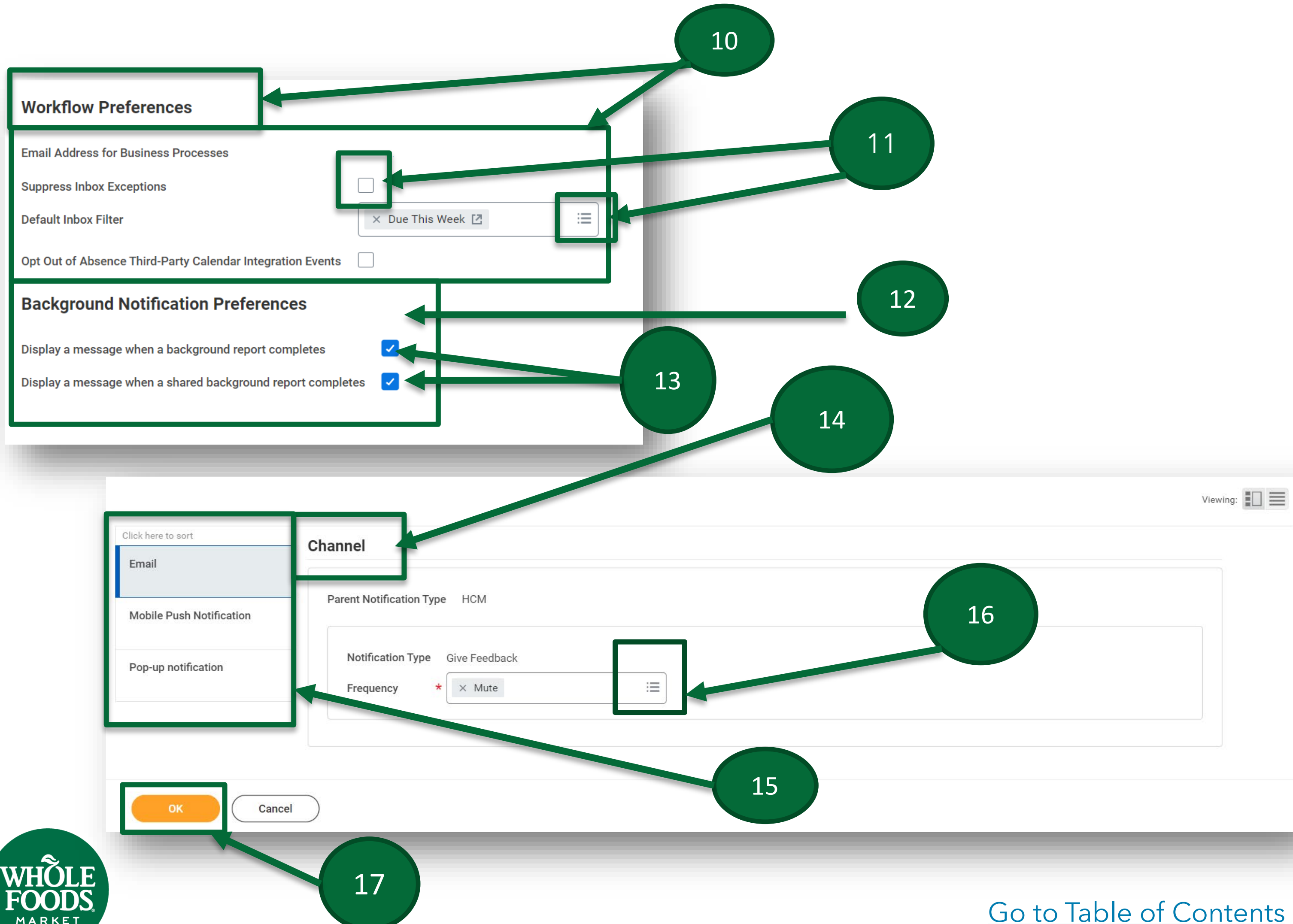
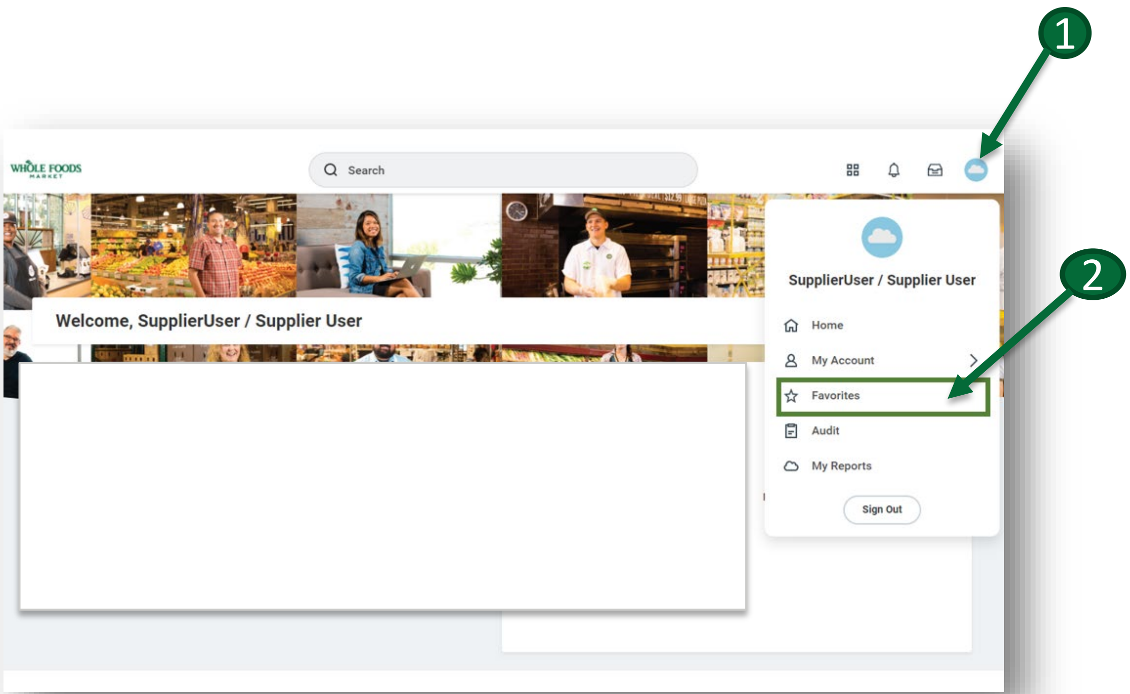
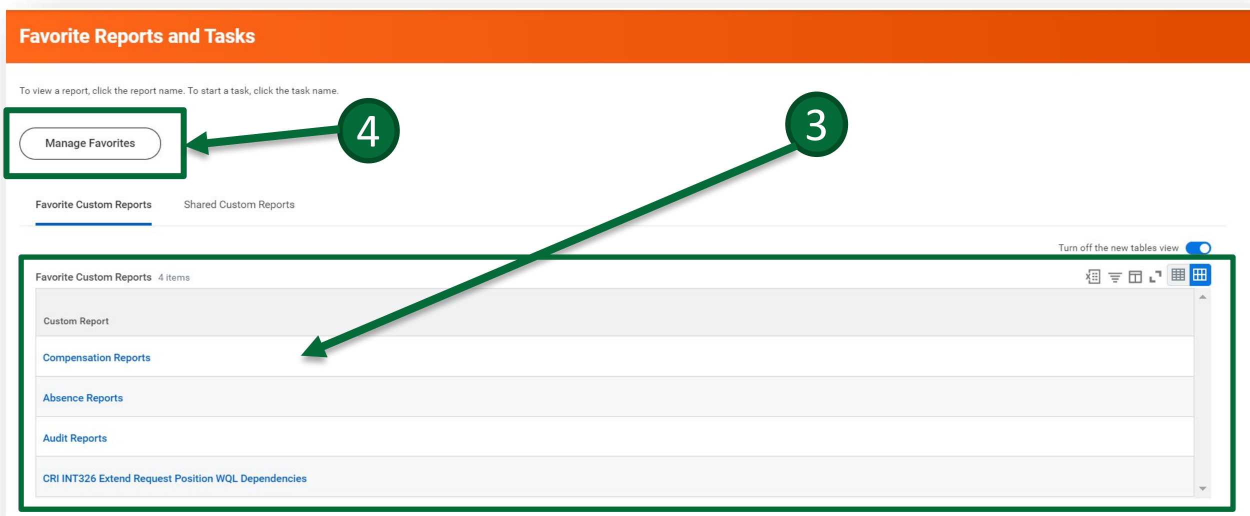
10. **Workflow Preferences** show your email address for Business Processes, Suppress Inbox Exceptions, and Default Inbox Filter.
11. Click the **Menu icon** to make the selection or click the box to mark or unmark.
12. Under **Background Notification Preferences**, you can choose whether the system displays a message when a background report completes and if a message is displayed when a shared background report completes.
13. Check or uncheck depending on your preference.
14. Under **Channel**, you can choose preferences for Email, Mobile, Push Notifications and Pop-Up notifications.
15. Click the different tabs under **Channel** to view preferences.
16. Click menu icon in the different tabs to choose preference.
17. Once the selections have been made, click **Submit**.



Favorites

1. Click the **Profile icon** in the top right of the Workday screen.
2. Click on **Favorites** to view favorite reports and tasks.
3. View your saved reports and tasks.
4. Click **Manage Favorites** to add or remove reports and tasks.





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Favorites

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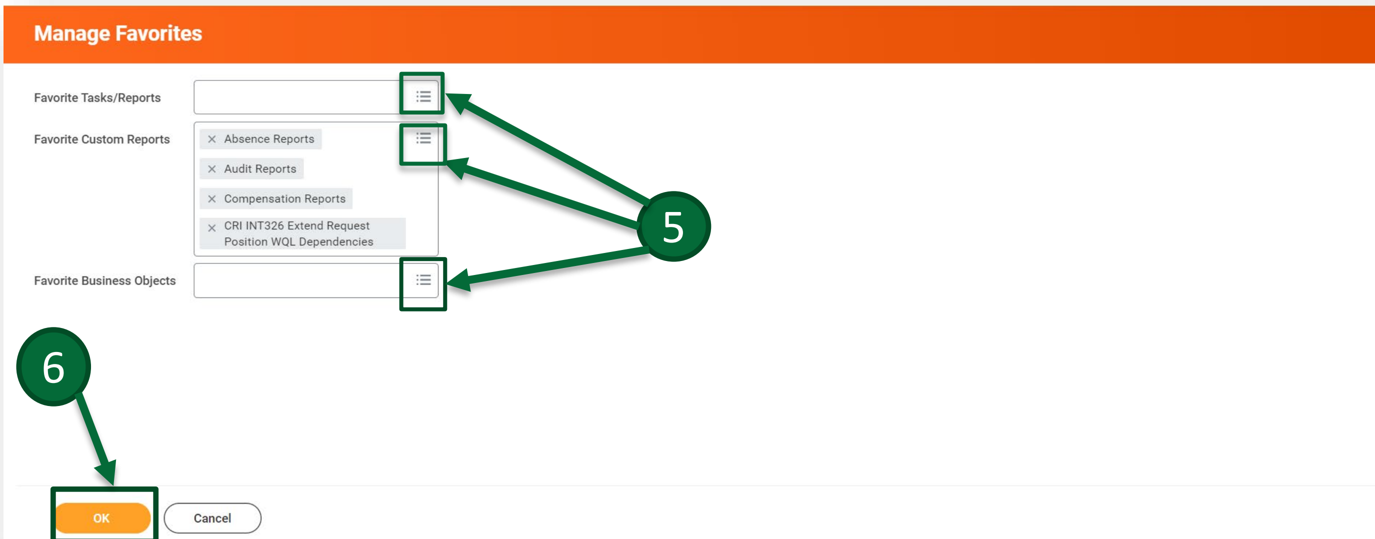
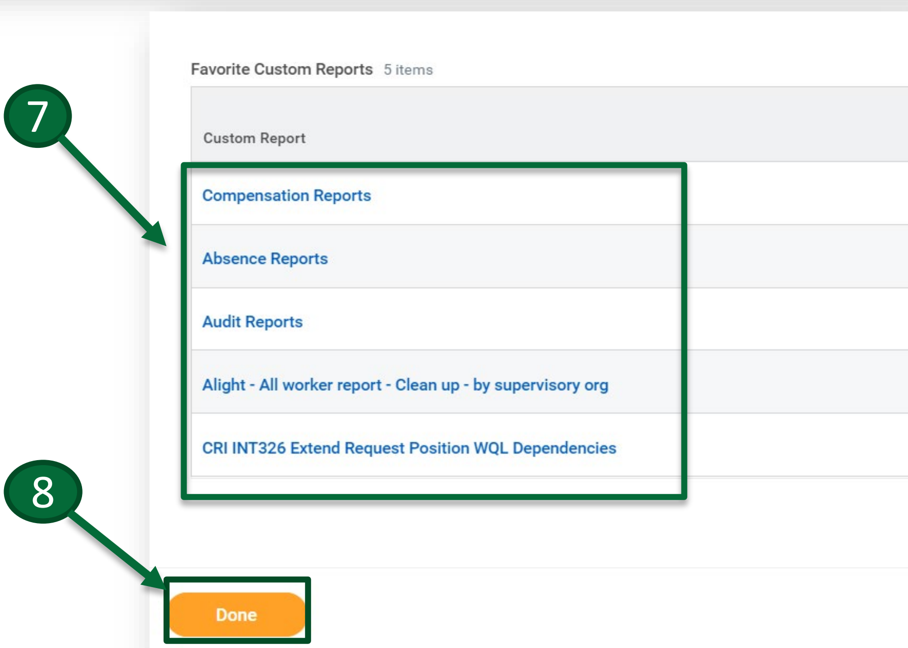
5. Click on the **Menu icon** to select from available Task/Reports.
6. Click **Ok** to save your selection.
7. After clicking OK, selected tasks and/or reports display on the Manage Favorites page.
8. Click **Done**.





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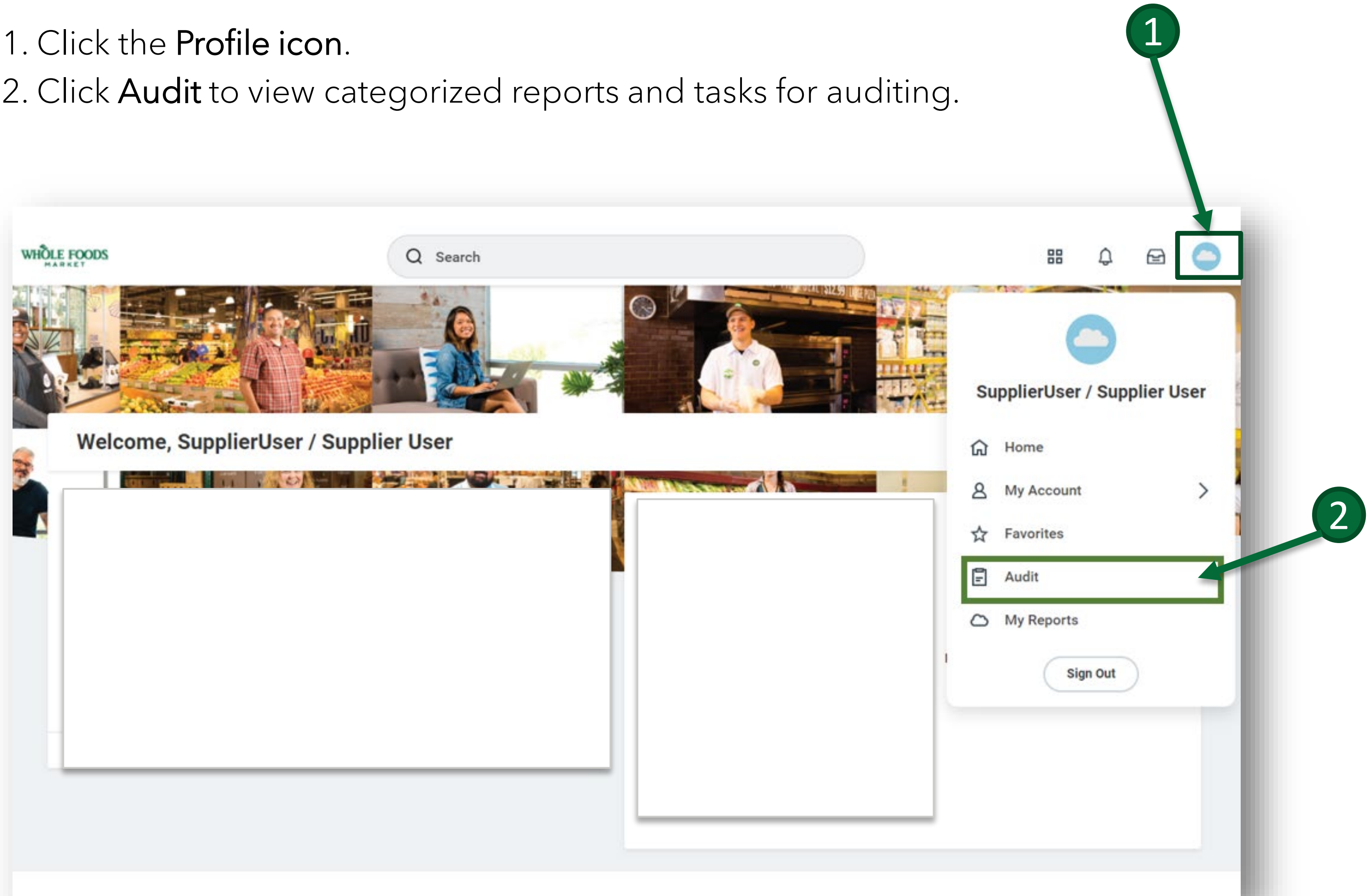
Audit

You can view Categorized Reports and Tasks for auditing data in Workday.

1. Click the **Profile icon**.
2. Click **Audit** to view categorized reports and tasks for auditing.



Audit

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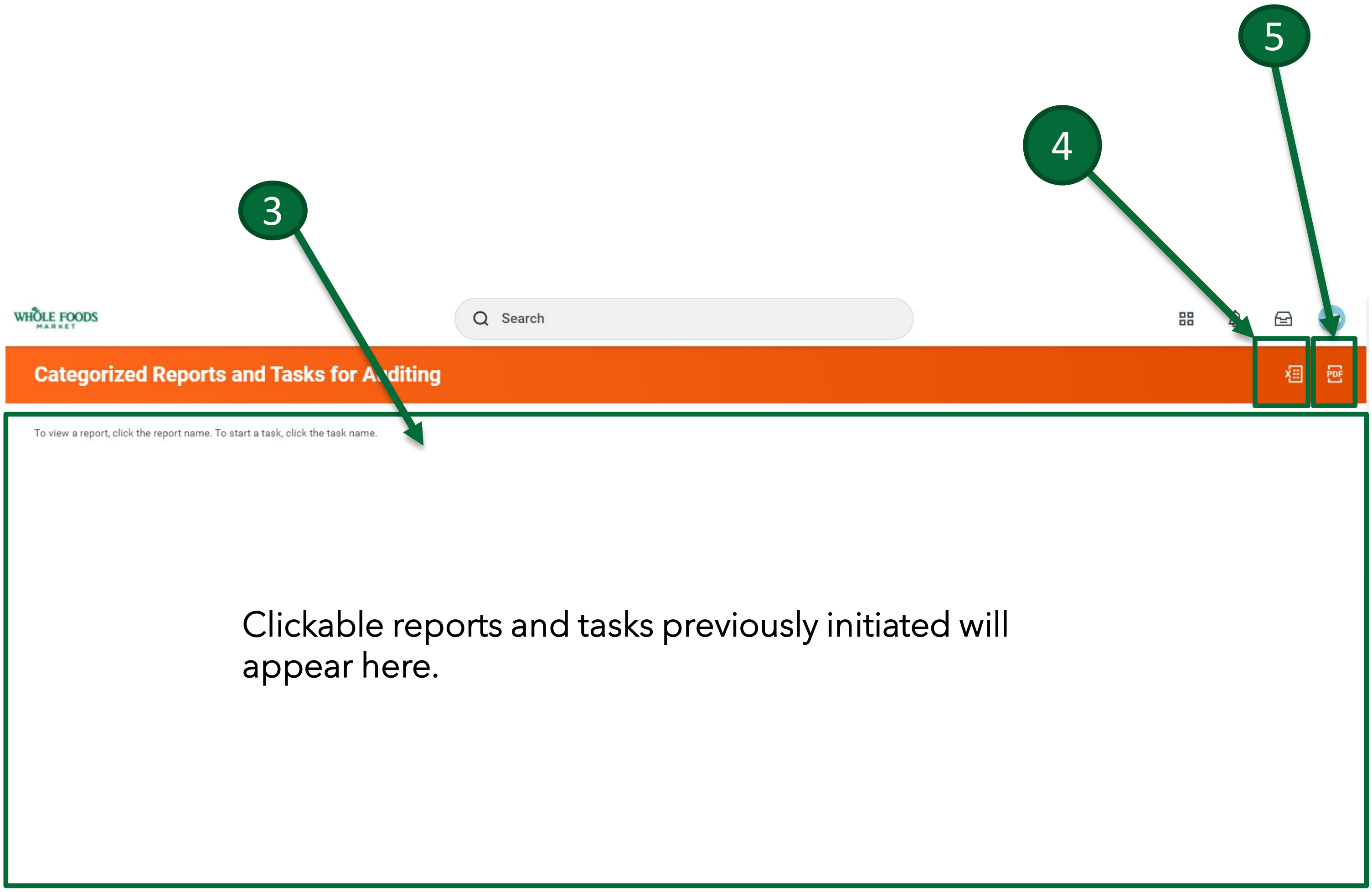
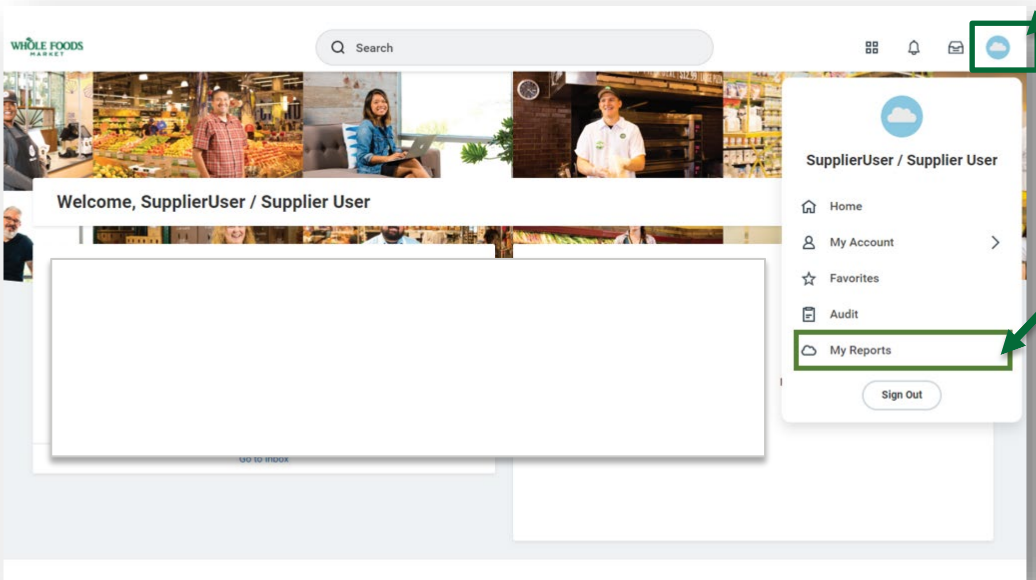
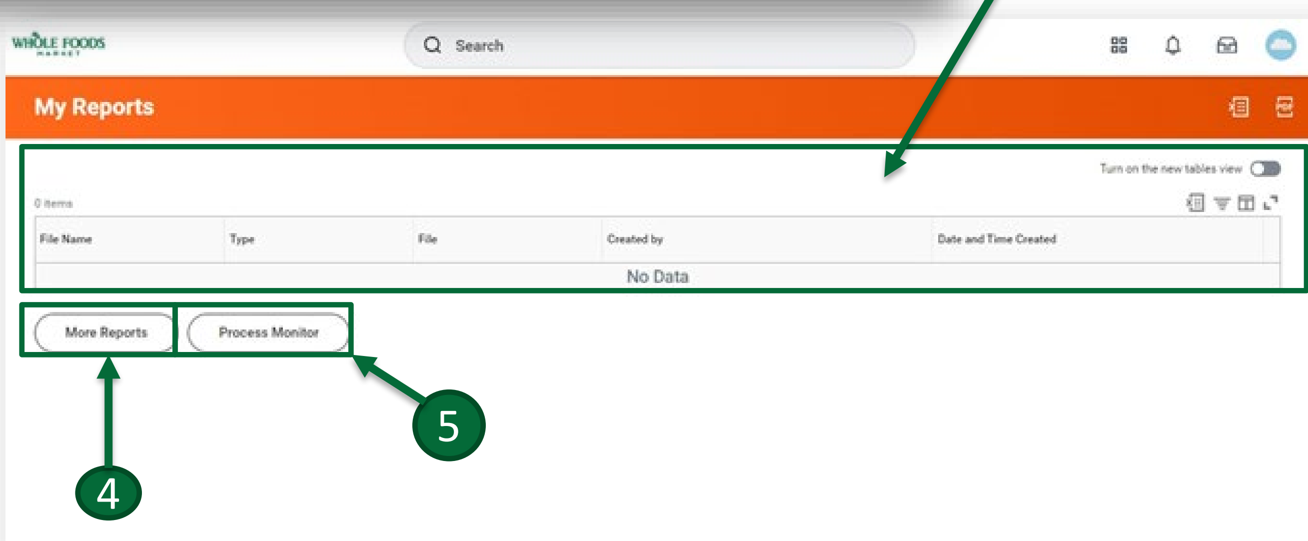
3. To view a report, click the report name. To start a task, click the task name.
4. Click the **Export to Excel icon** in the top right to export the report to Excel.
5. Click the **PDF icon i**n the top right to view the report in a printable version.



My Reports

1. Click the **Profile** icon in the top right of the Workday screen.
2. Click **My Reports.**
3. View the available reports and process monitor.
4. To view additional reports, click **More Reports.**
5. To view additional process, click **Process Monitor.**





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My Reports

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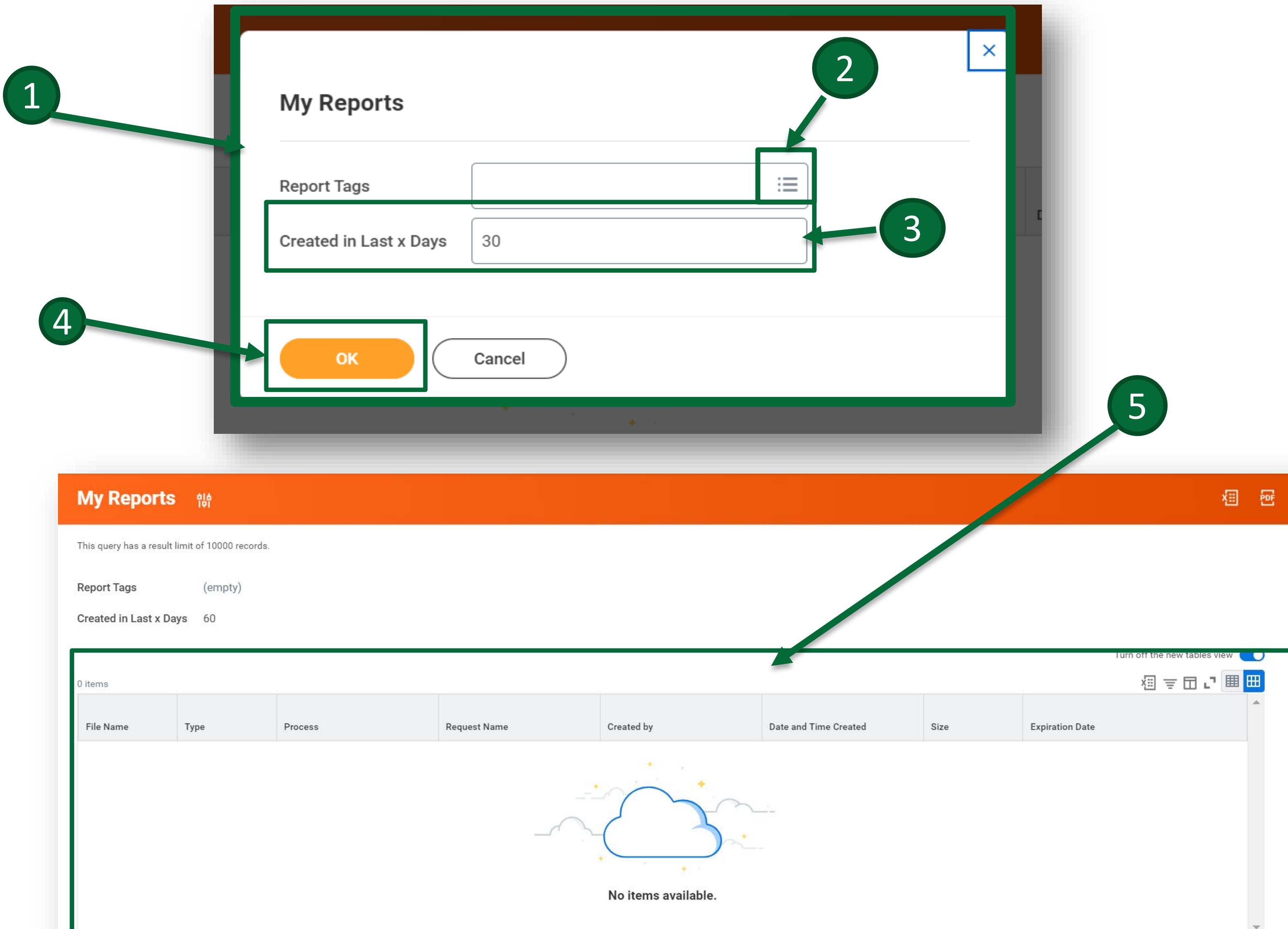
More Reports Search Box

1. Click **More Reports** to view the search window box.
2. Search for a report by clicking the **Menu icon** in the Report Tags field.
3. Keep or update the Created in Last x Days.
4. Click **OK**.
5. Review search results.

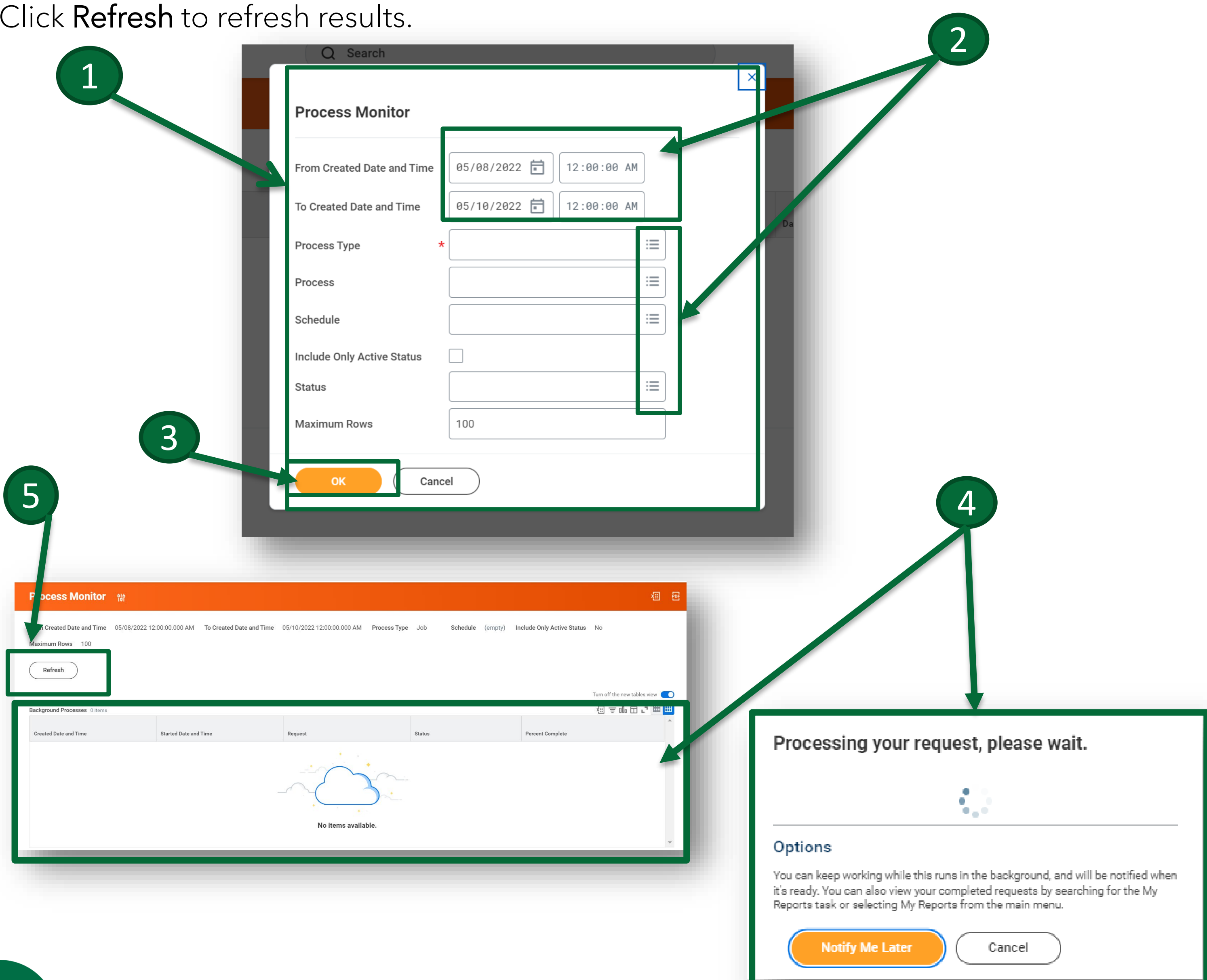


My Reports
continued

Process Monitor Search Box

Check the status and results of a recent job, task, report, or integration in Workday using Process Monitor.

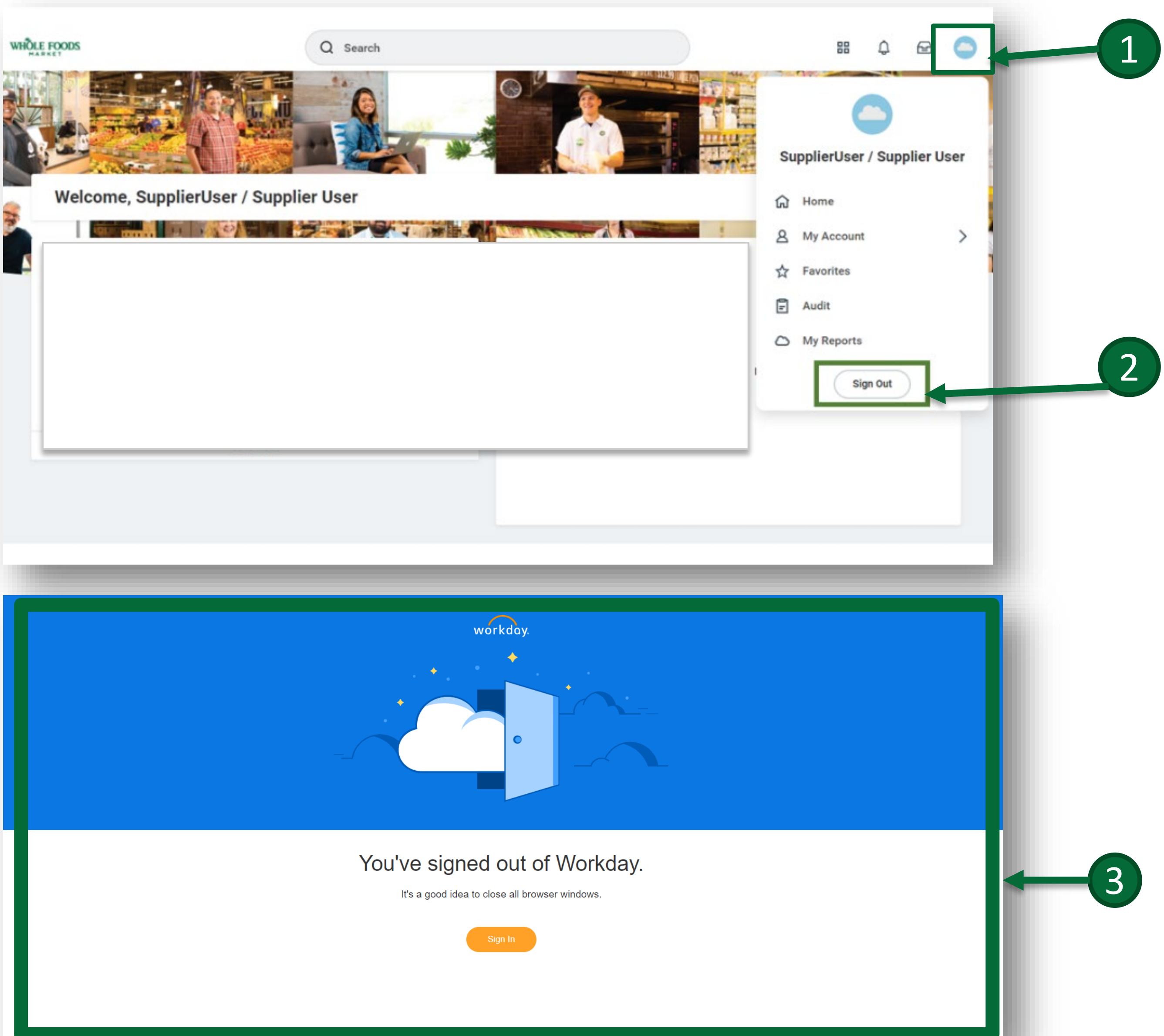
1. Click **Process Monitor** to view the search window box.
2. Enter the desired filters in the calendar or click the **Menu icon** to view options.
3. Click **OK**.
4. View the search results or click **Notify Me Later** to have the system notify the you when the results are ready.
5. Click **Refresh** to refresh results.



Sign Out

1. Click the **Profile icon** in the top right of the Workday screen.
2. Scroll down and click **Sign Out**.
3. View the sign-out screen.

Note: As an added security measure, it is highly recommended that you close your web browser after signing out to ensure you are completely logged out of Workday.



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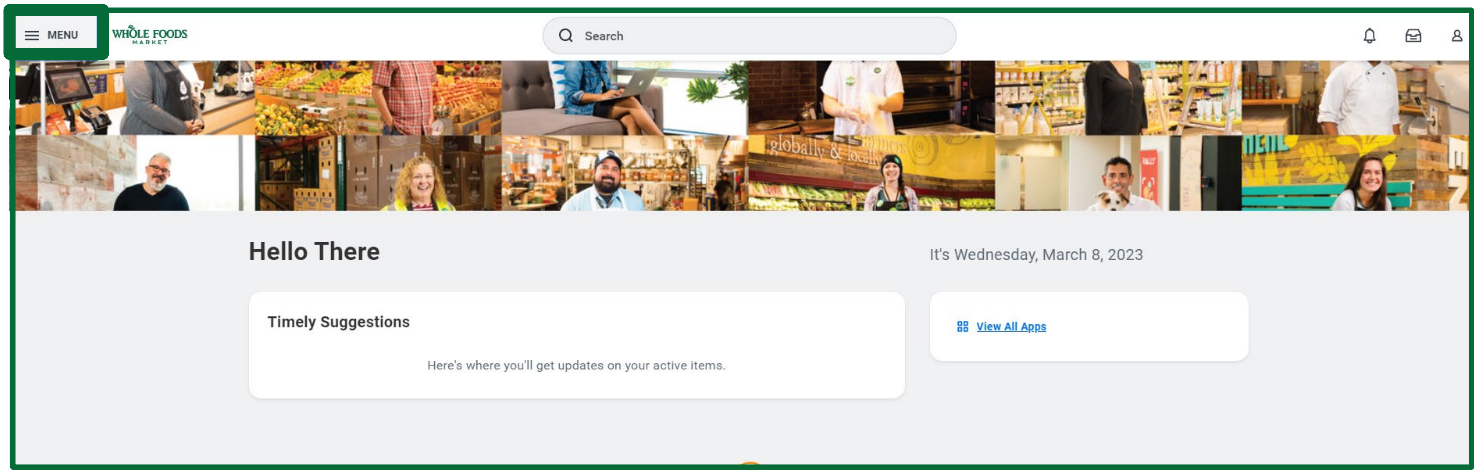
Navigating Your Applications

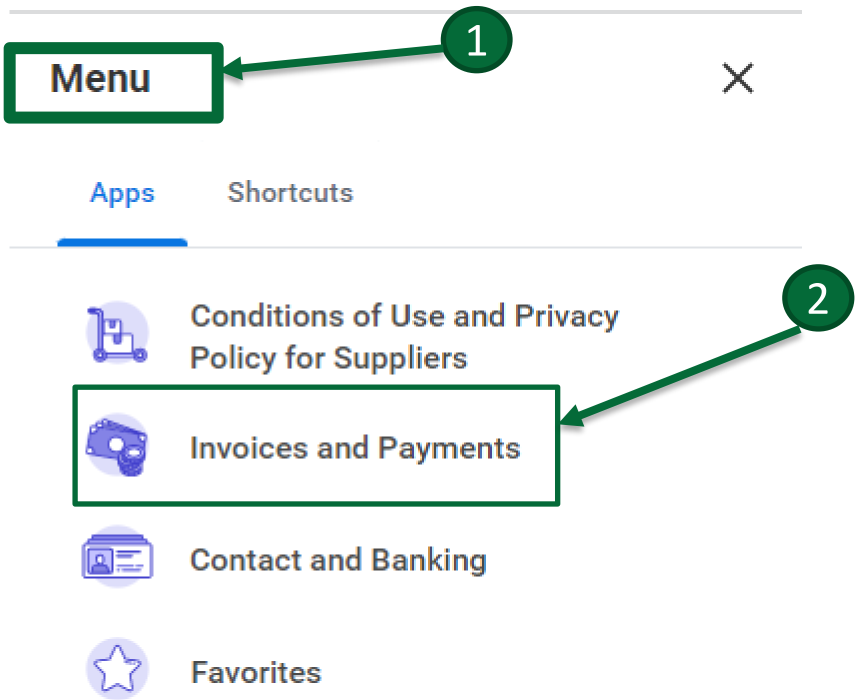
Your applications will be available on the left side of your screen where it says Menu. Once you click Menu the Apps will appear



View Most Recent Invoices and Payments

You can view your most recent invoices and payments.

1. Click the Menu icon on the left side of your home screen to view your most recent invoices and payments.
2. Click on the Invoices and Payments worklet.



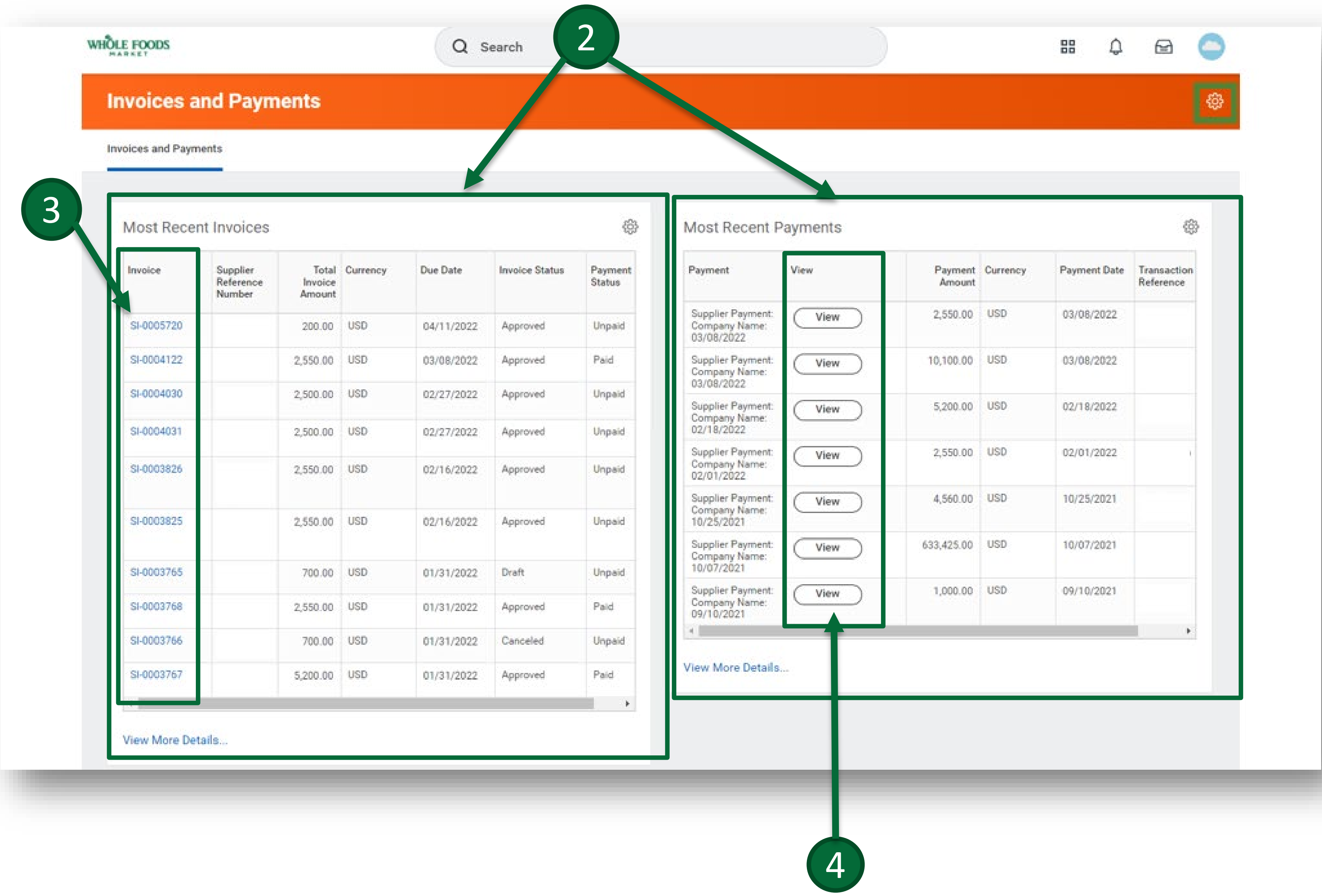
View Most Recent Invoices and Payments

continued

2. **Recent Invoices** and **Recent Payments** will display. To the **right** the **Most Recent Payments view box** will display, to the **left** the **Most Recent Invoices view box** will display.

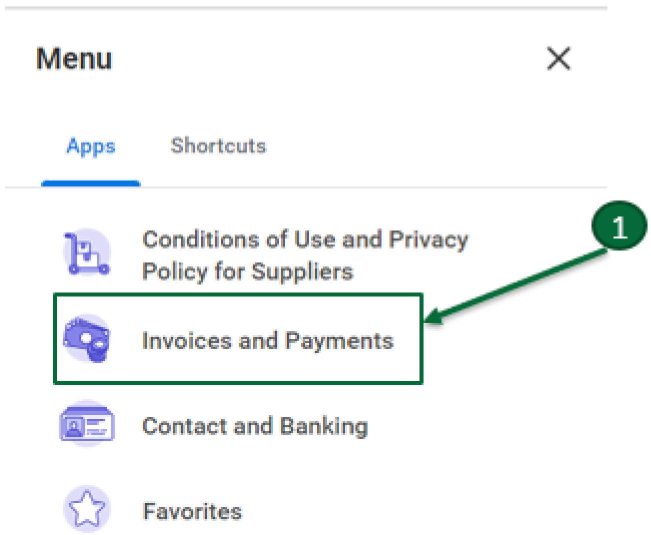
3. Click any blue **Invoice number** in the Invoice column to view more details about that specific invoice.

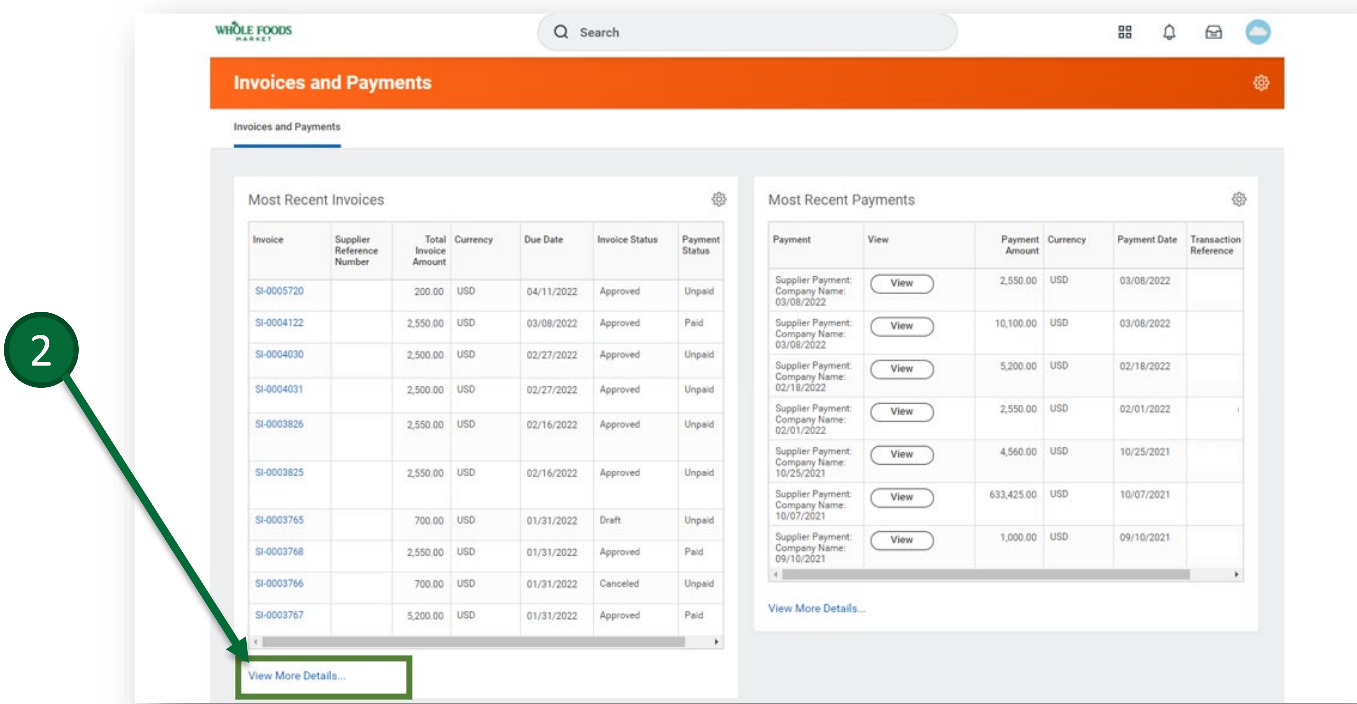
4. Click the **View button** in the View column to view more details about a specific payment.



Find Specific Invoices

1. Click the Menu drop-down on your home screen and select the Invoices and Payments worklet to search for a specific invoice.
2. On the left side of the screen, beneath the Most Recent Invoices view box, click View More Details.





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Find Specific Invoices
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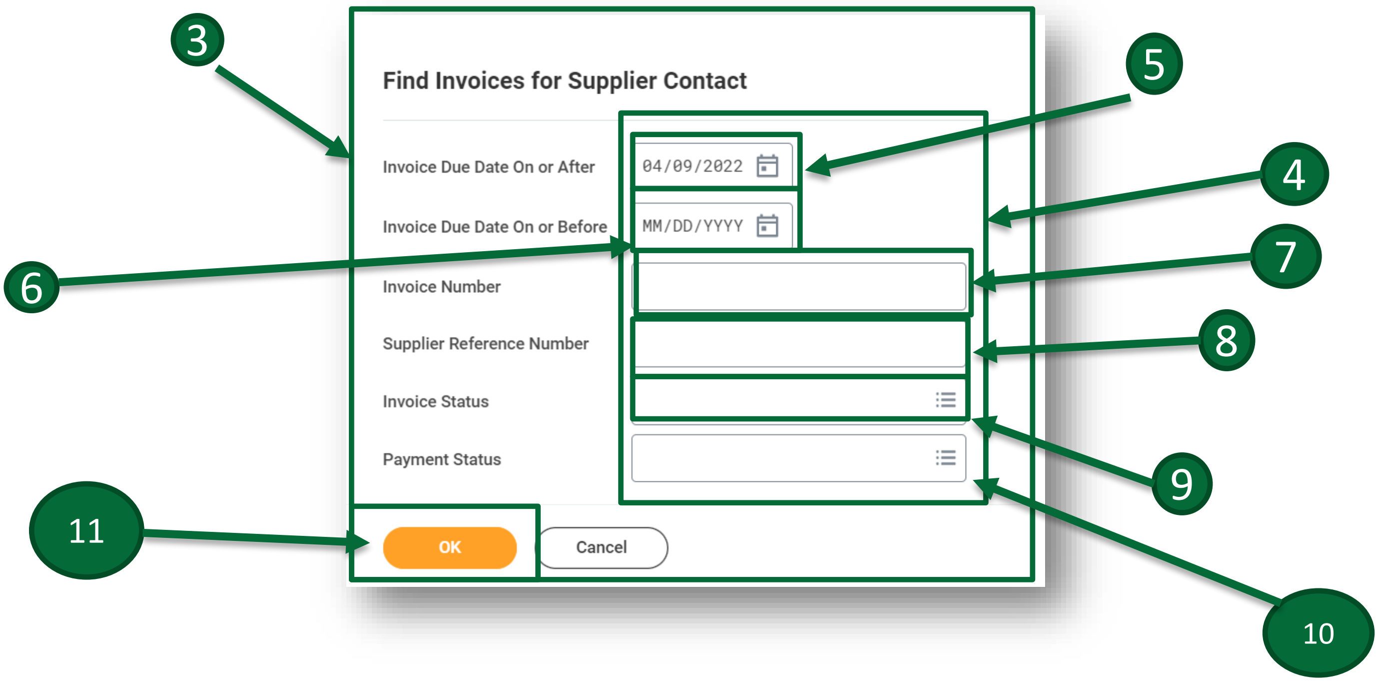
3. Click **View More Details**, to a view search box with open search fields.



4. **Enter** desired information on any open field(s) to find specific invoices.
5. To filter by Invoice Due Date On or After, enter a date in the **calendar fields**.
6. To filter by Invoice Due Date On or Before, enter a date in the **calendar fields**.
7. To filter by Invoice Number, enter the invoice number.
8. To filter by Supplier Reference Number, enter the Supplier Reference Number.
9. To filter by Invoice Status, click the **Menu icon** and select the desired status.
10. To filter by Payment Status, click the **Menu icon** and select the desired status.
11. Click **OK**.

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Find Specific Invoices

continued

13. Review the search results fields: Supplier Reference Number, Total Invoice Amount, Currency, Due Date, Invoice Status, and Payment Status.

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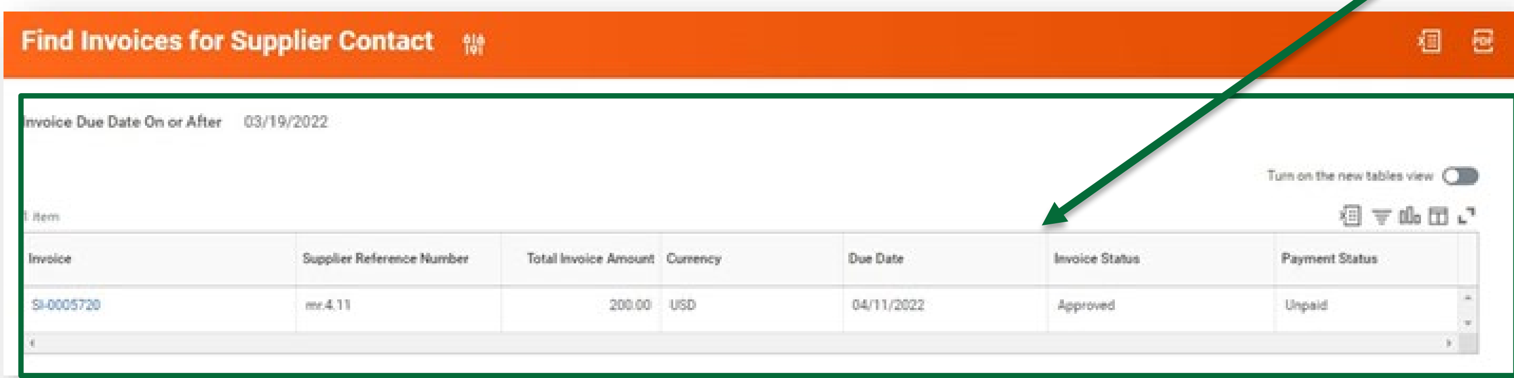
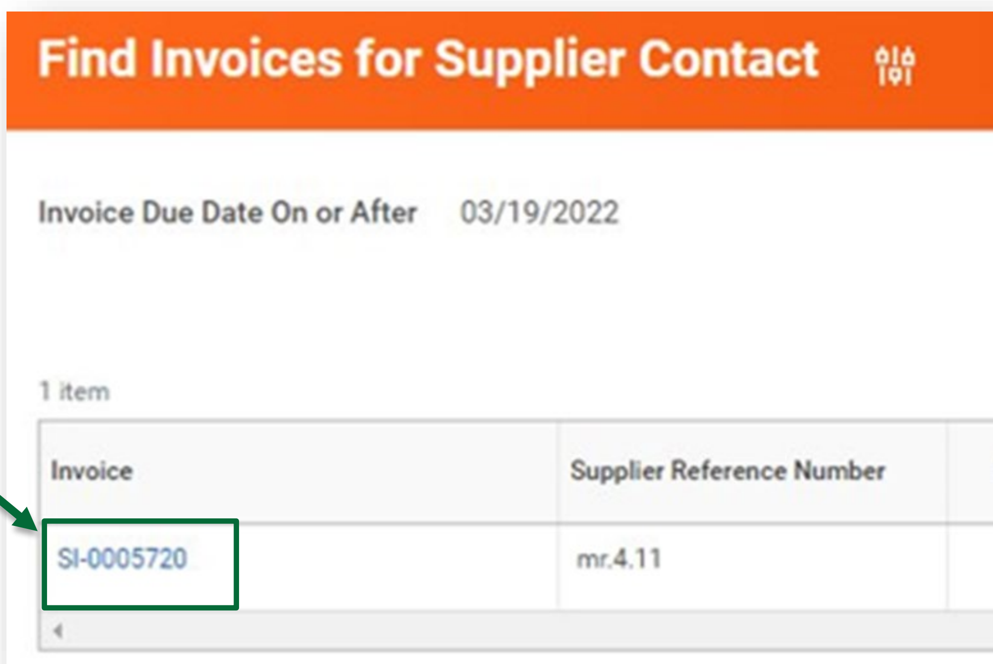


14. From the Find Invoices for Supplier Contact page, click the invoice number in blue (example: SI-0005720) to view more information about the invoice.

14



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Find Specific Invoices
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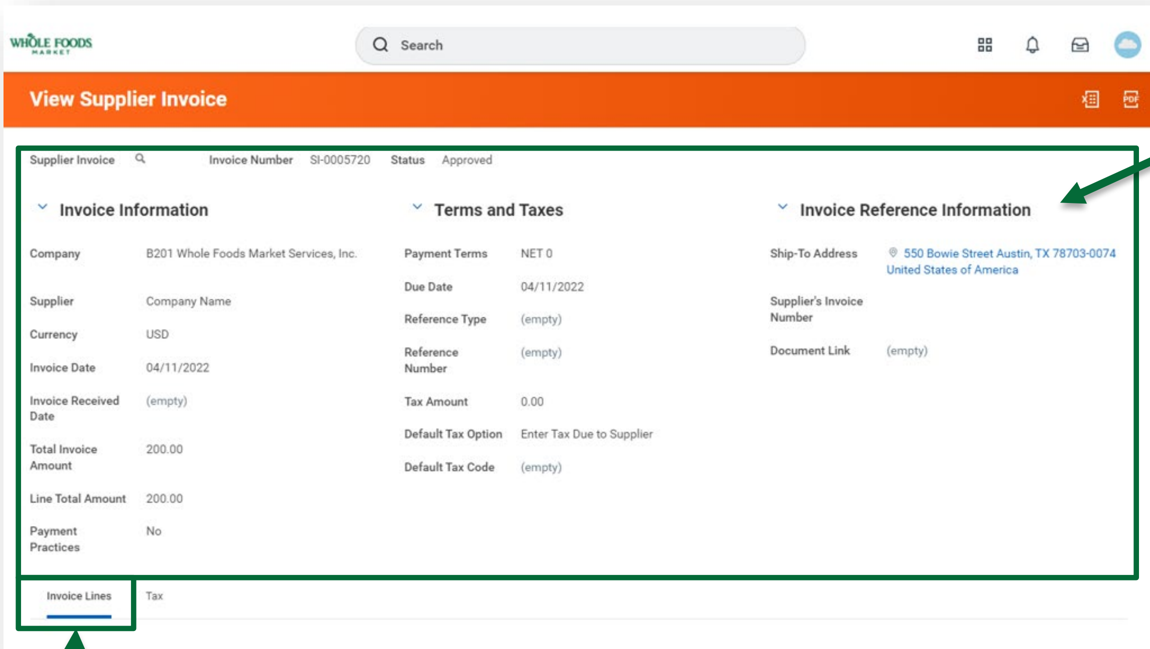
15. Under View Supplier Invoice, view Invoice Information, Terms and Taxes, and Invoice Reference Information.
16. View additional information about the invoice via Invoice Lines.

15



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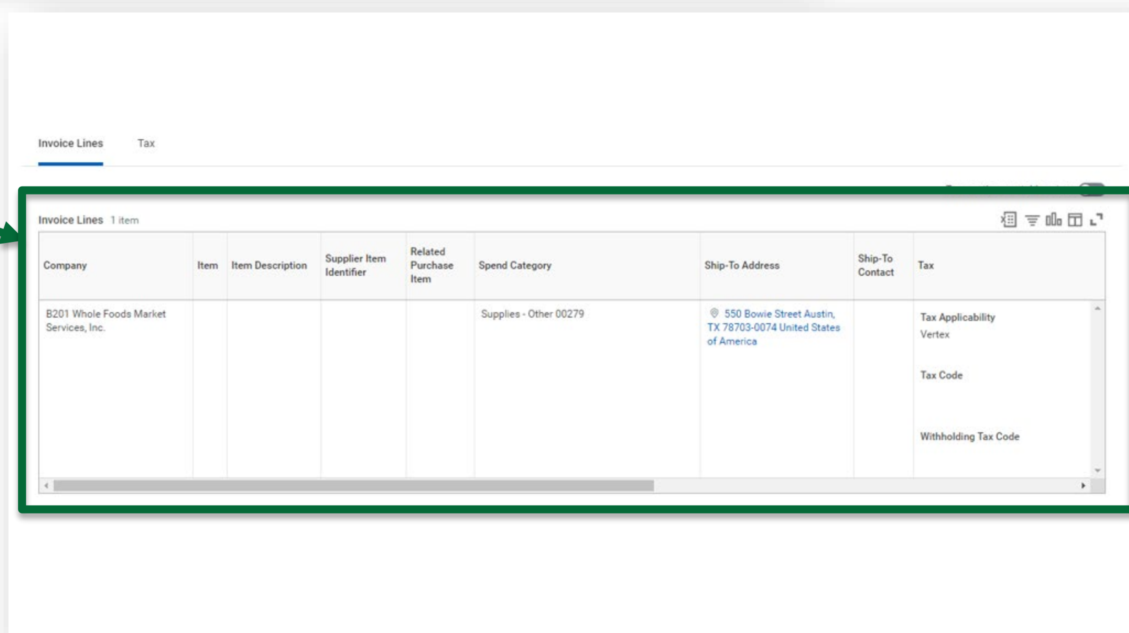

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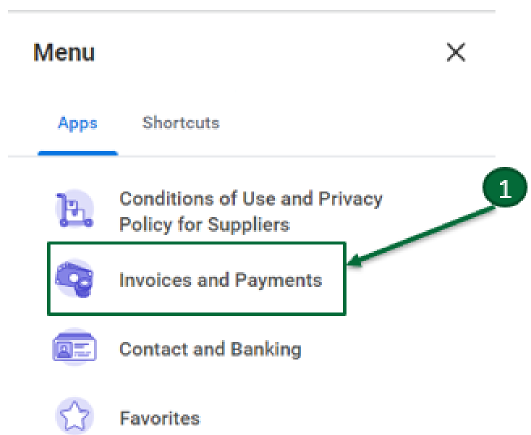
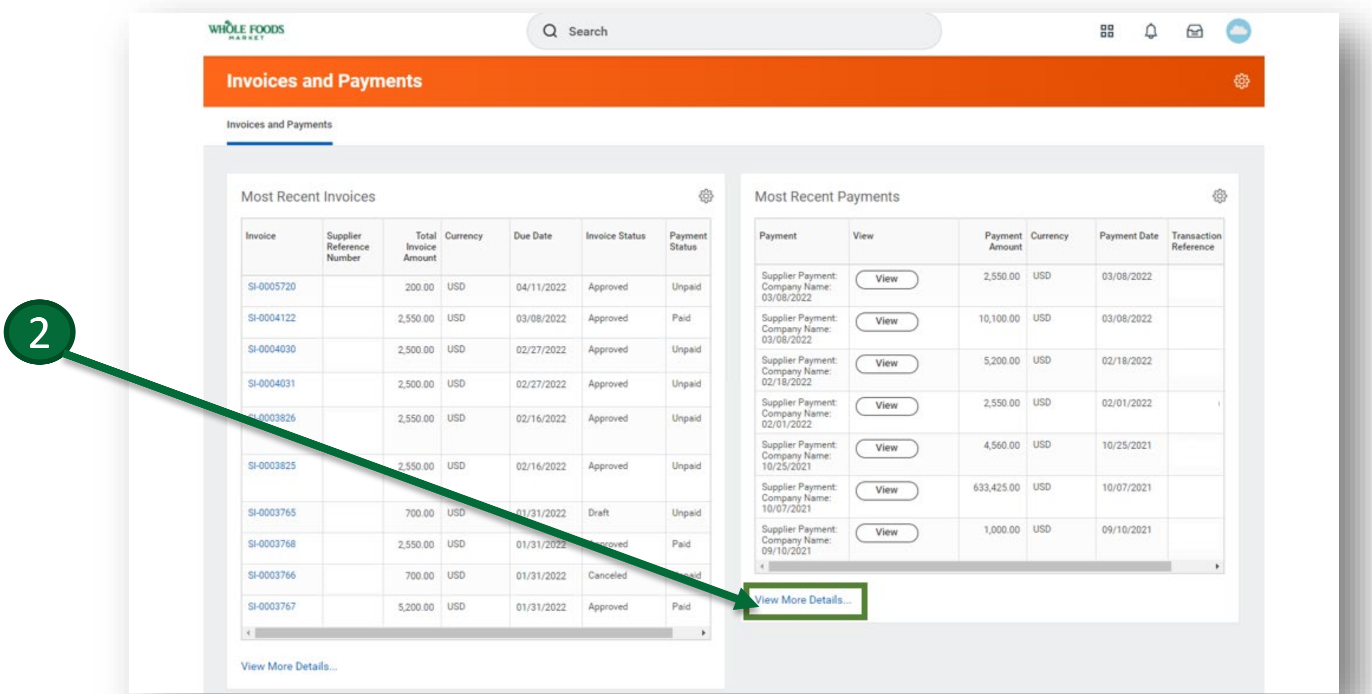
Find Specific Payment Information

1. Click the Menu drop-down on your home screen and select the Invoices and Payments worklet to search for a specific invoice.
2. To filter and find payments, click View More Details on the bottom right of the screen under the Most Recent Payments view box.





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Find Specific Payment Information

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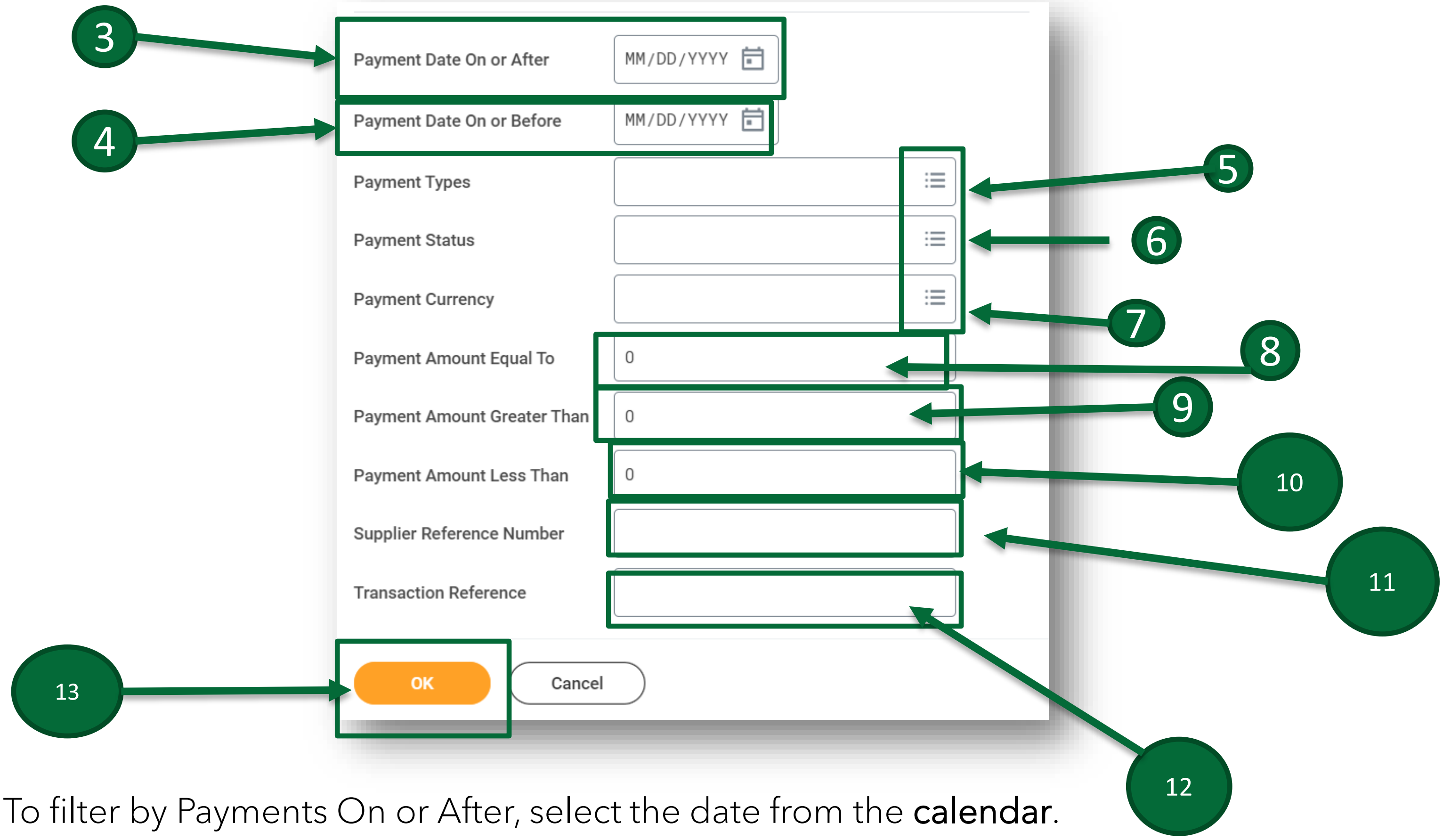
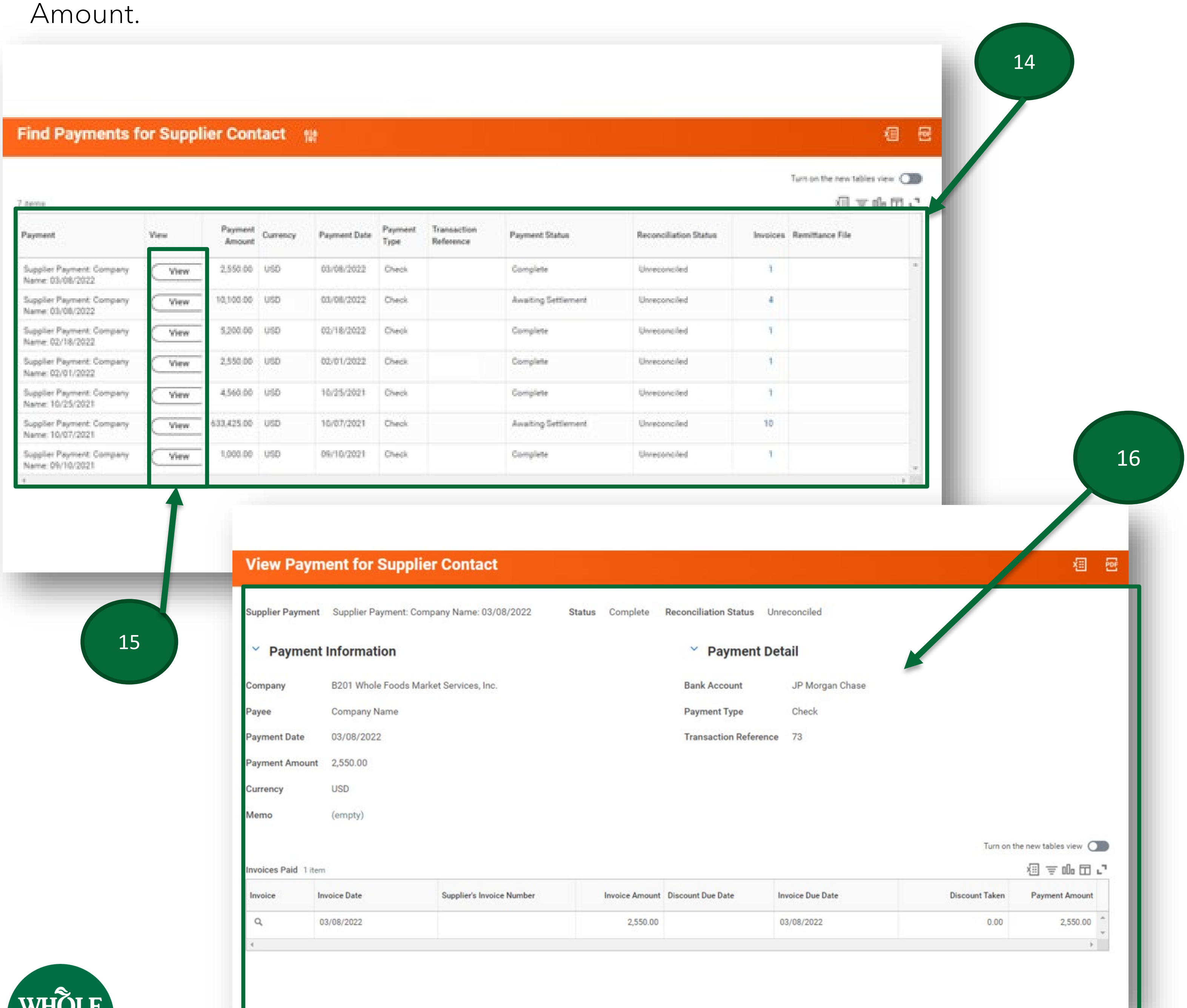


3. To filter by Payments On or After, select the date from the **calendar**.
4. To filter by Payments Date On or Before, select the date from the **calendar**.
5. To filter by Payment Type, click the **Menu icon** and select from the **drop-down menu**.
6. To filter by Payment Status, click the M**enu icon** and select from the **drop-down menu**.
7. To filter by Payment Currency, click the **Menu icon** and select from the **drop-down menu**.
8. To filter by Payment Amount Equal To, enter your information.
9. To filter by Payment Amount Greater Than, enter your information.
10. To filter by Amount Less Than, enter your information.
11. To filter by Supplier Reference Number, enter your information.
12. To filter by Transaction Reference, enter your information.
13. Click **OK.**

Find Specific Payment Information

continued

14. View the results on the **Find Payments for Supplier Contact** page.
15. Click **View** to view detailed information.
16. View the Payment Information and Payment Details. Payment information includes Company, Payee, Payment Date, Payment Amount, Currency, Memo, Bank Account, Payment Type, Transaction Reference, Invoice Date, Supplier's Invoice number, Invoice Amount, Invoice Due Date, Discount Taken, and Payment Amount.



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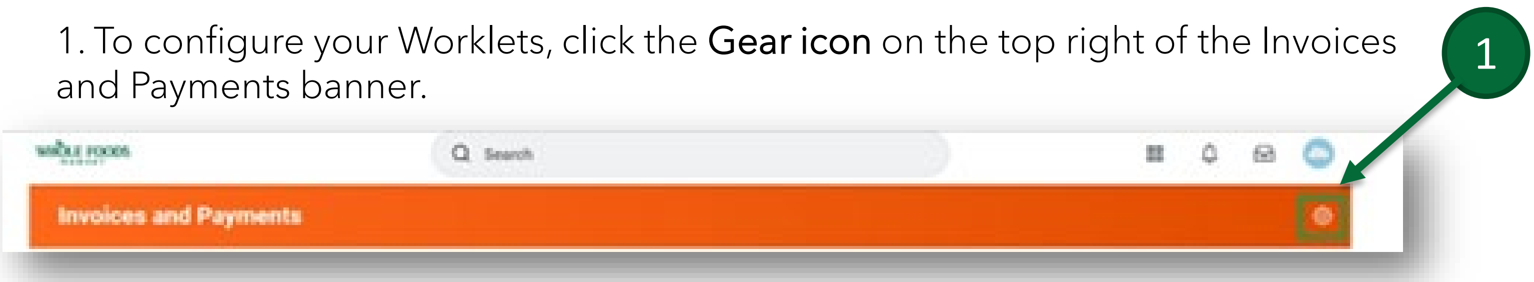
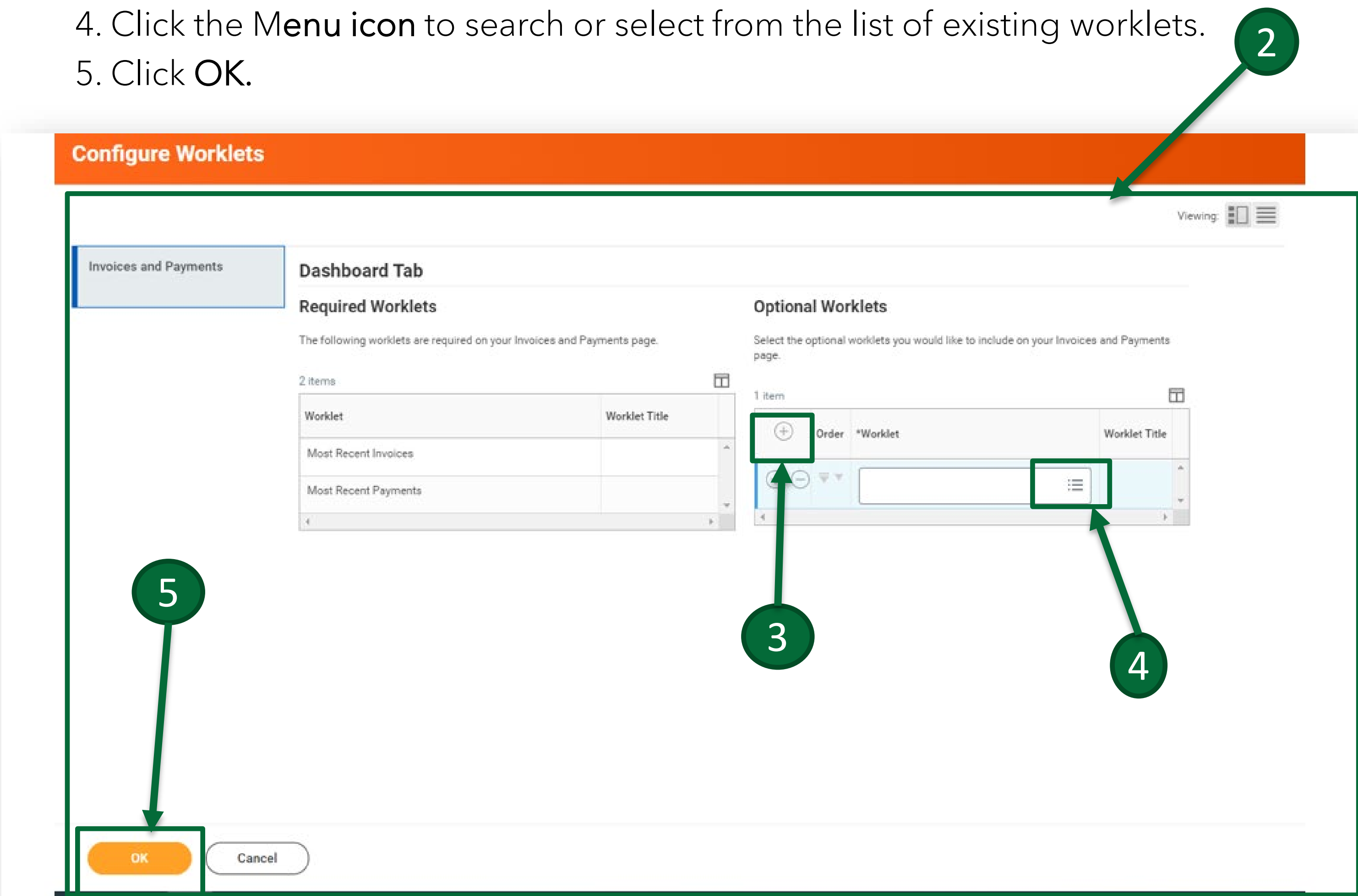
Configure Invoices and Payments Worklets

You can configure Invoices and Payments worklets to quickly access invoice and payment information needed on a routine basis.

1. To configure your Worklets, click the **Gear icon** on the top right of the Invoices and Payments banner.



2. Once you click the Gear icon, select optional worklets you would like to include on the Invoices and Payments worklet.
3. Click the **Add Row icon** to add a new worklet.
4. Click the **Menu icon** to search or select from the list of existing worklets.
5. Click **OK.**



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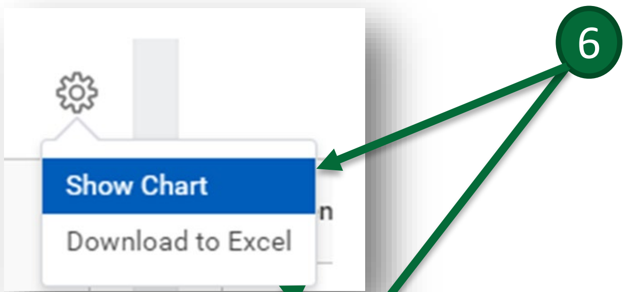
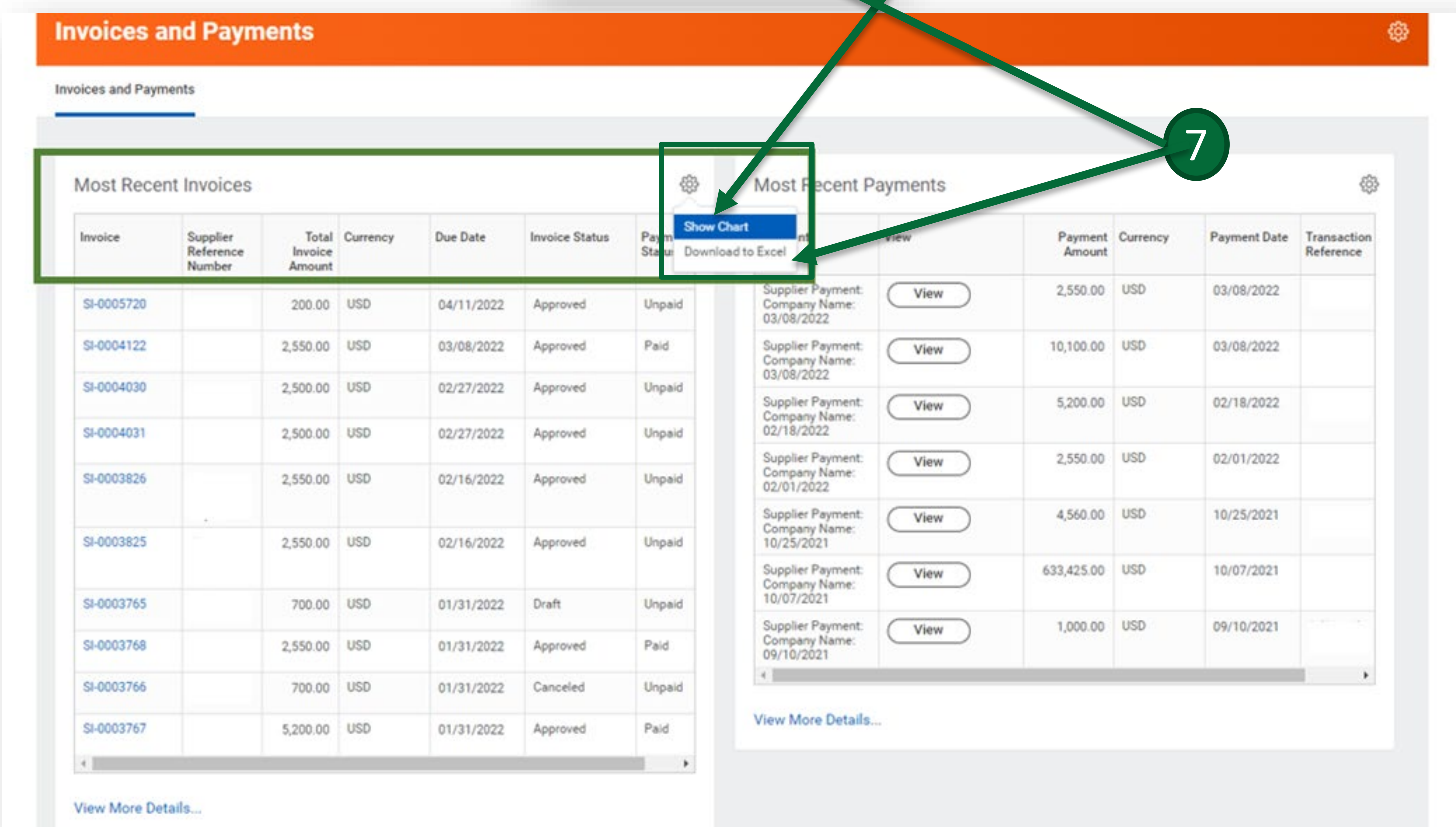
Configure Invoices and Payments Worklets

continued

6. To hide or show your Most Recent Invoices, click the **Gear icon** on the right side and click **Show Chart** or **Hide Chart**.
7. To download your chart, click **Download to Excel**.





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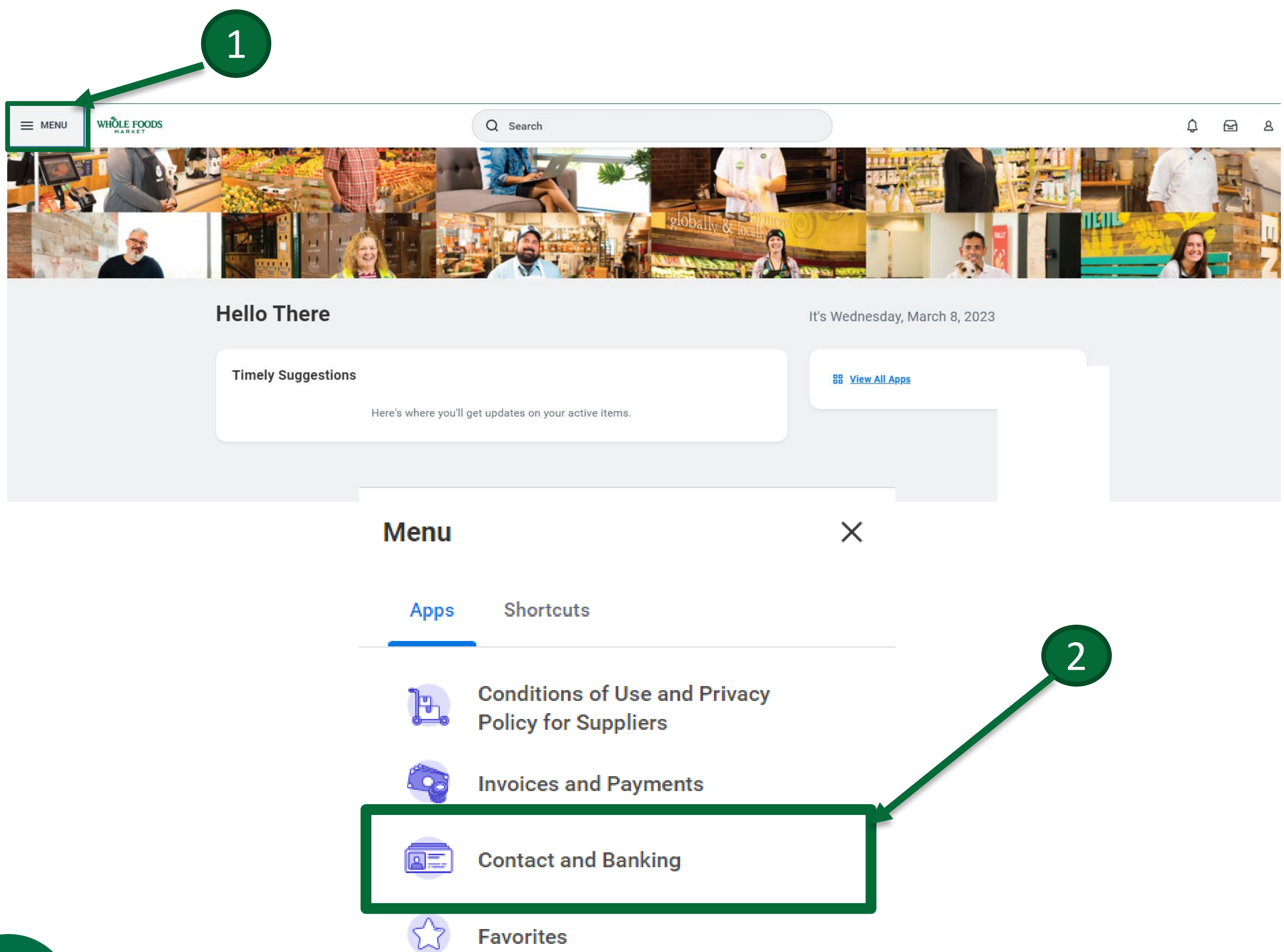
Contact and Banking

Contact and Bank Information on file can be accessed from the home page by clicking Menu on the left side of the screen. You can submit changes to you contact and bank information or enter bank information to enroll in ACH payments.

1. To view contact details, click the menu button.
2. Select Contact and Banking



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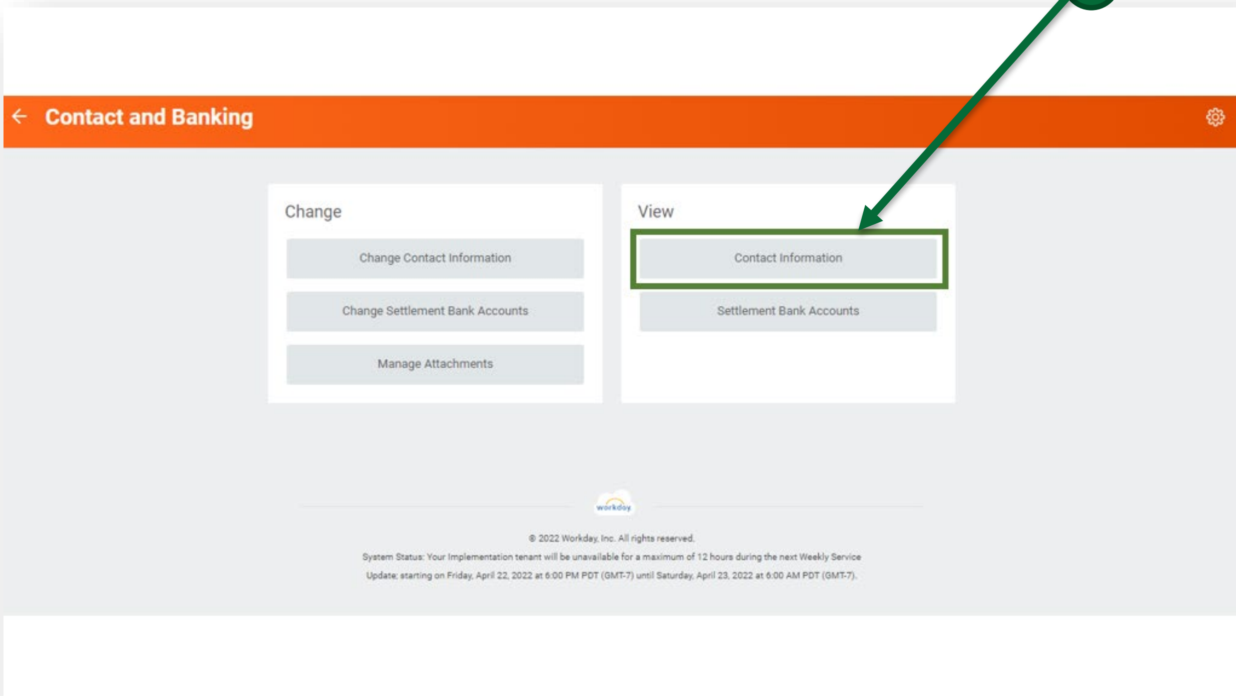
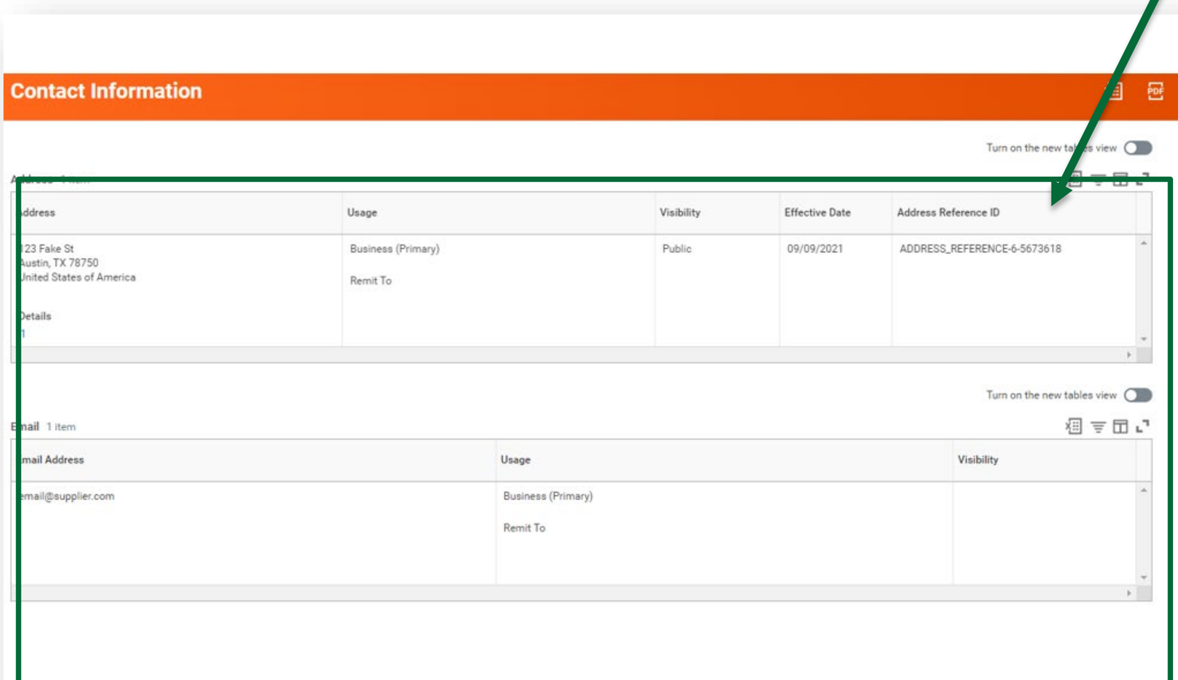
View Contact Information

2. After you click the Contact and Banking application icon, click the **Contact Information button** under the View box.



3. View the contact information.



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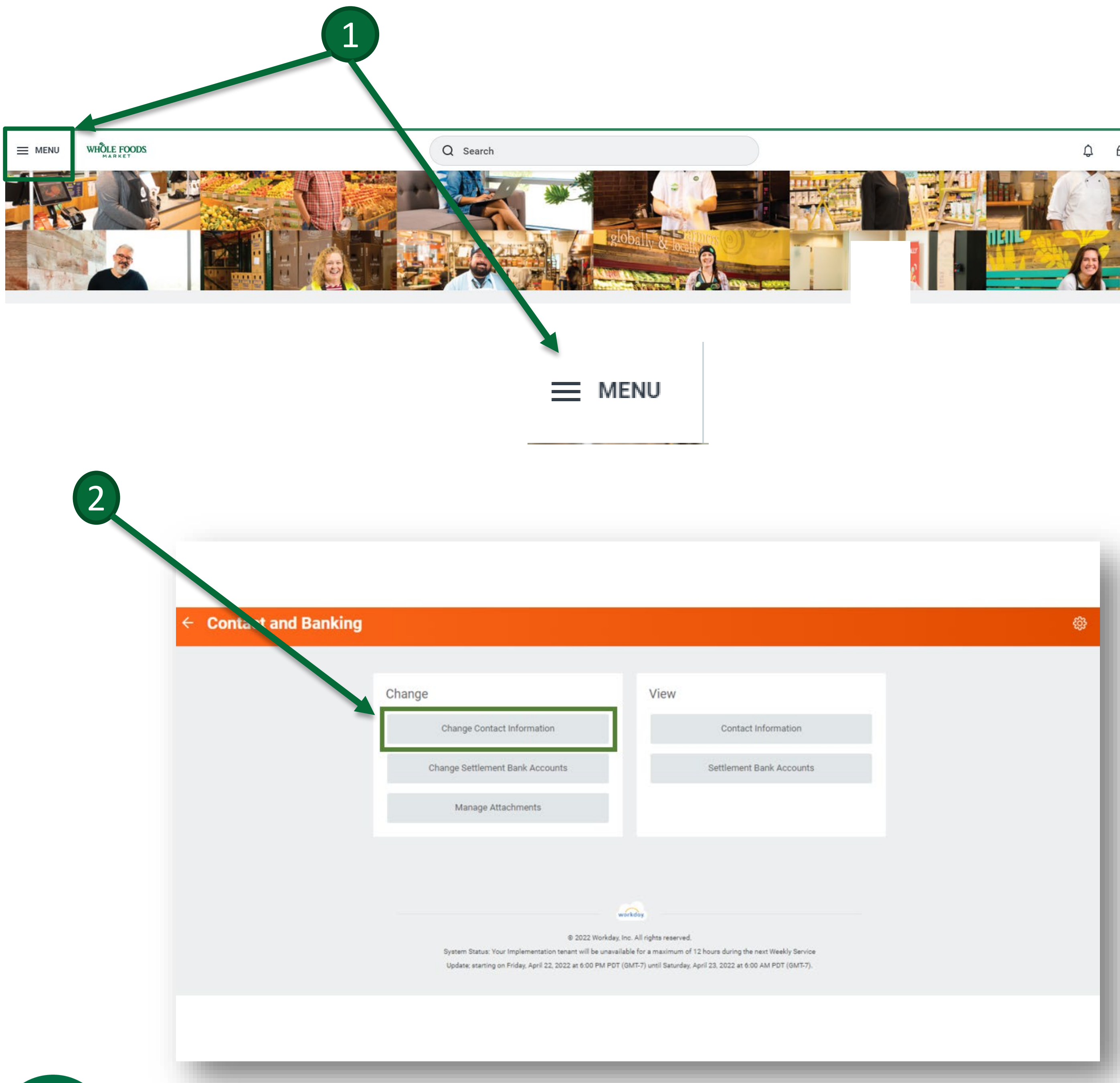
Change or Add Contact Information

1. To change your contact information, click the **Contact and Banking Iconfrom the Menu tab on the left side of your screen**.
2. Click the **Change Contact Information** tab.



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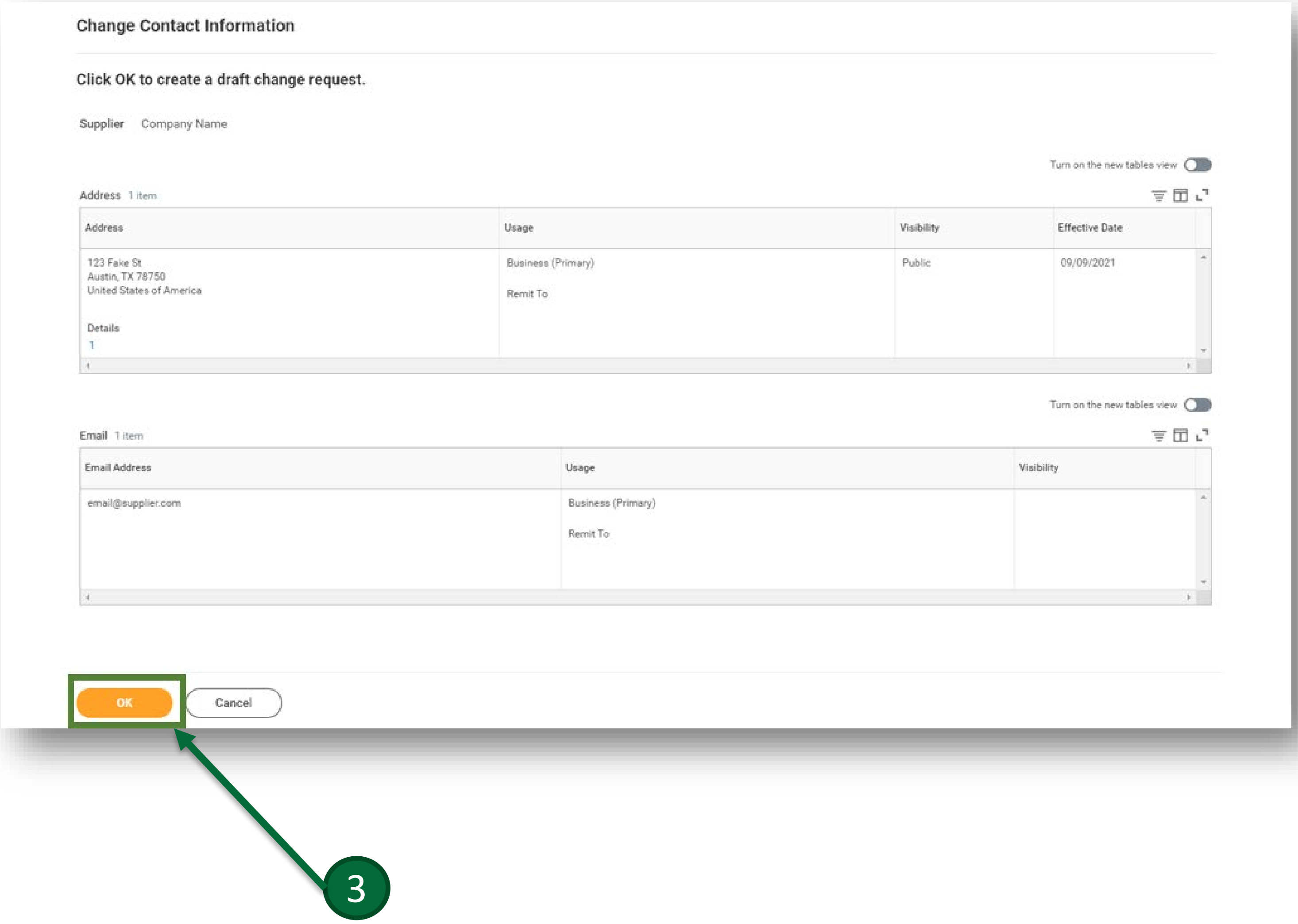
Change or Add Contact Information

continued

3. Click **OK** to create a draft change request.



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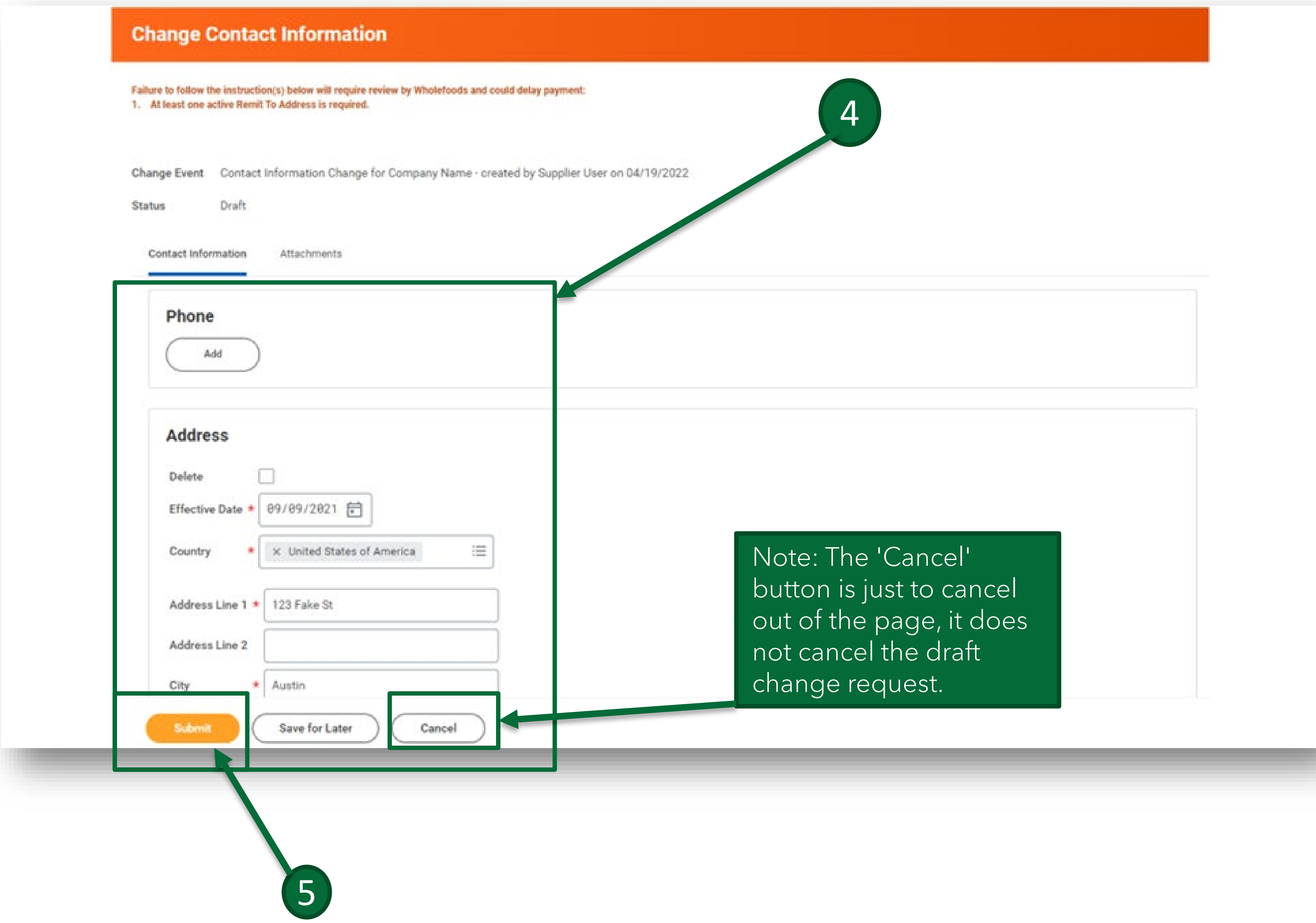
Change or Add Contact Information

continued

4. Enter new contact information; this can include new phone number, new address, new email, instant messenger, and web address.
5. Click the **Submit** button.

Note: The **Cancel** button is just to cancel out of this page; it does not cancel the draft change request. To view how to cancel the request, click here.

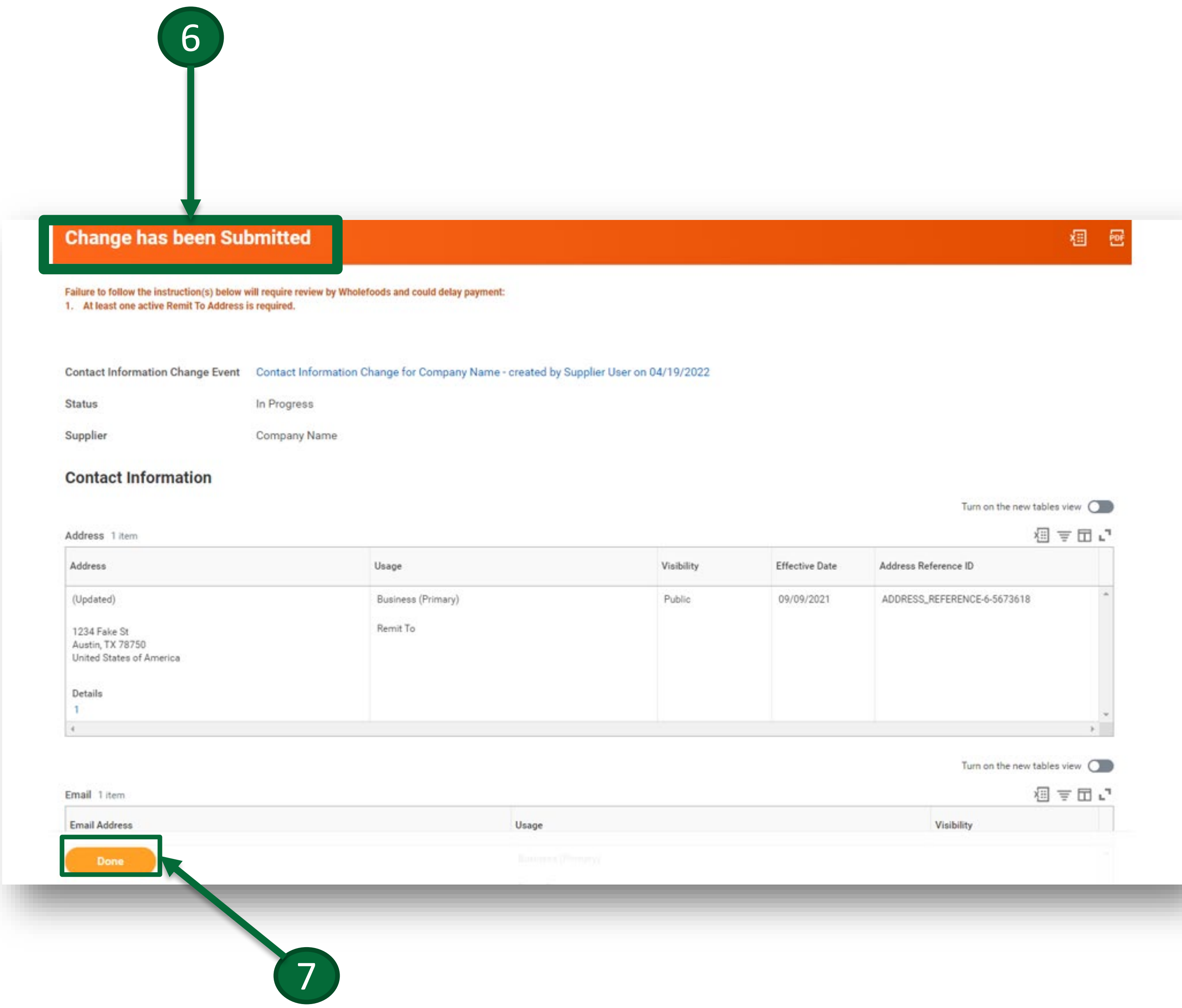


Change or Add Contact Information

continued

6. Once the contact information has been submitted, confirm that the banner with the words Change has been Submitted appears.
7. Click **Done** to submit a change request to Whole Foods Market.

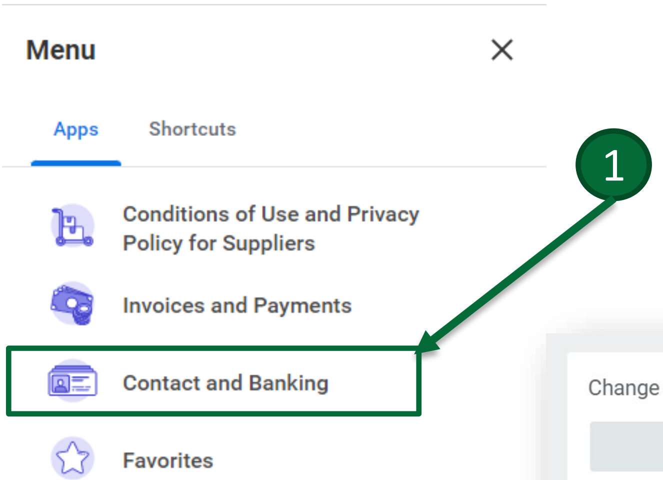
Note: The change will be approved by Whole Foods Market within 72 business hours. Instructions to view returned or denied requests can be found here.

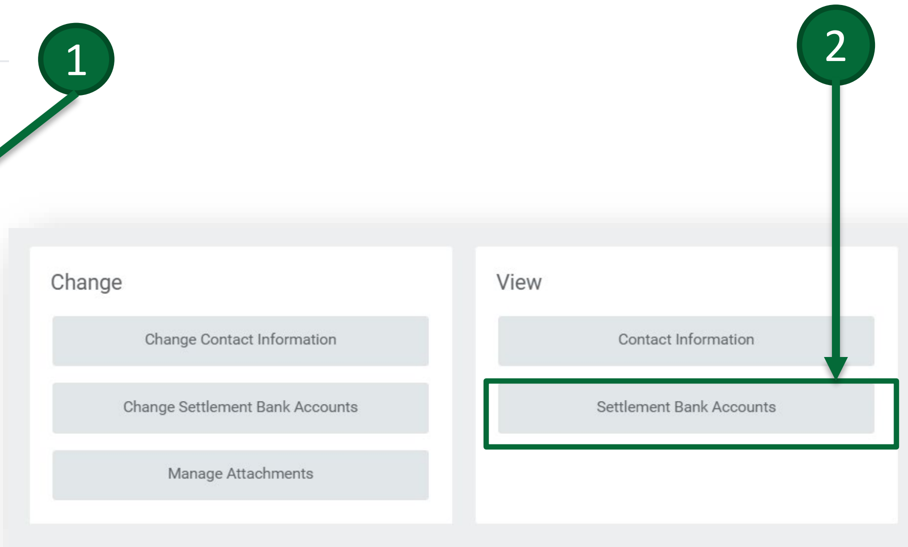


View Settlement Bank Information

1. To view Settlement Bank Information, click the Menu drop-down on the right side of your home screen, click on the Contact and Banking tab.

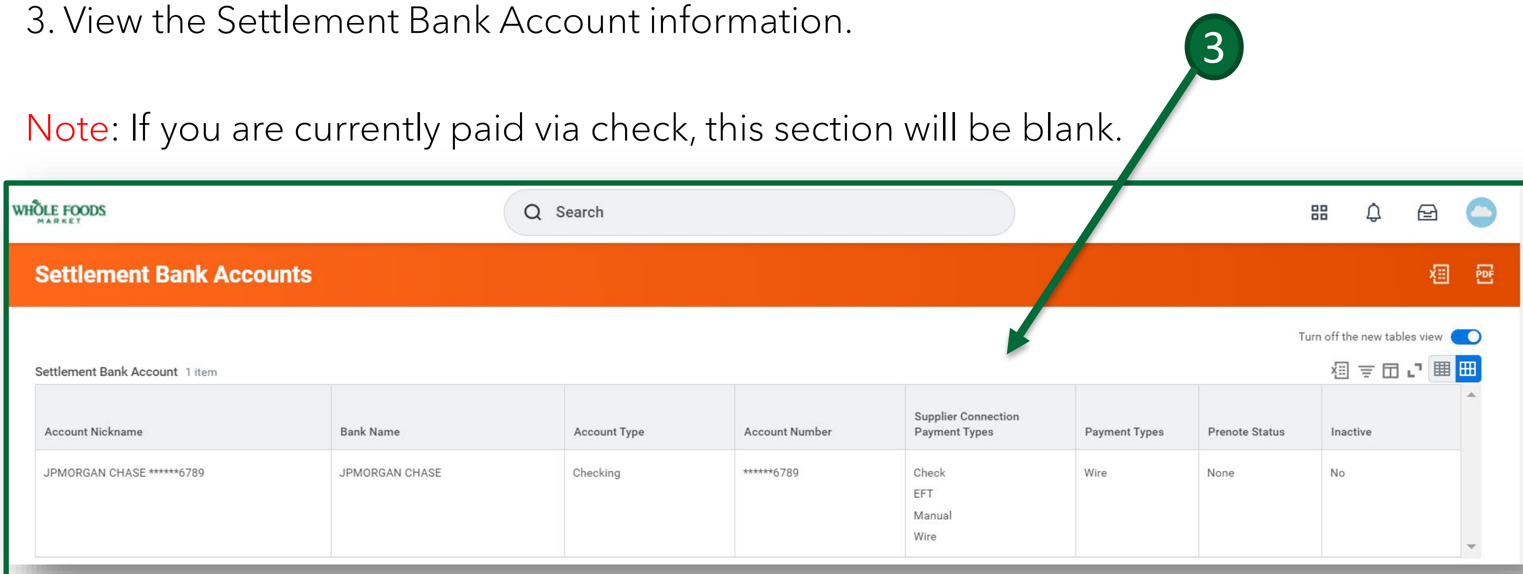
2. Click the **Settlement Bank Accounts** tab.





3. View the Settlement Bank Account information.

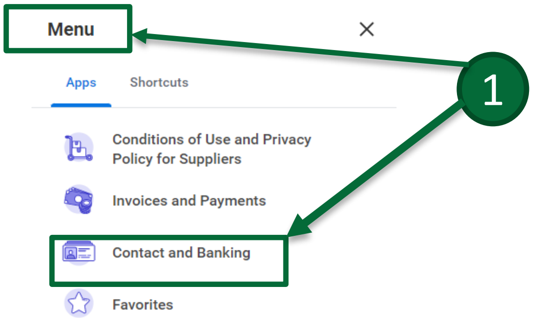
Note: If you are currently paid via check, this section will be blank.



Change or Add Settlement Bank Information

1. From the home page, click the Menu drop-down on the left side of your screen, click contact and Banking.

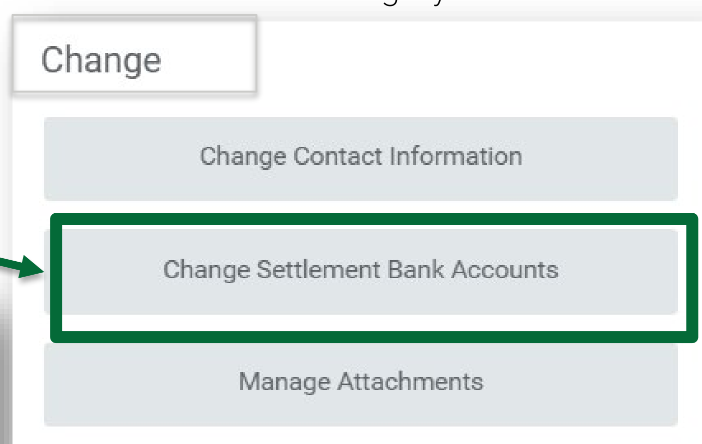
2. Click **Change Settlement Bank Accounts** button.

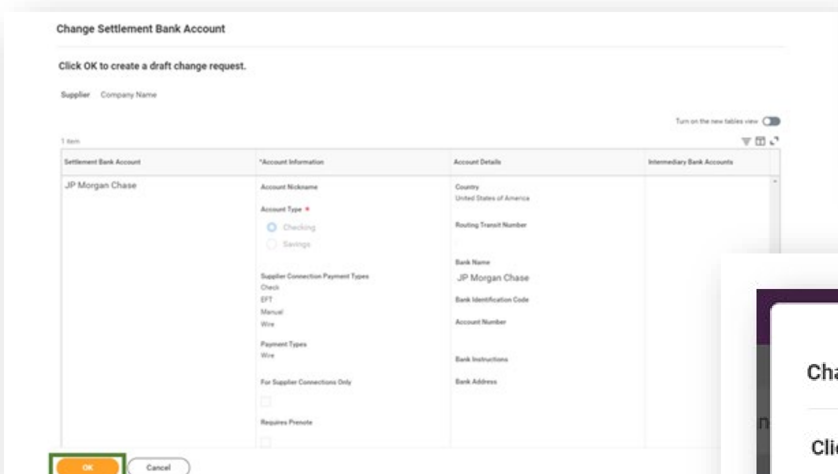


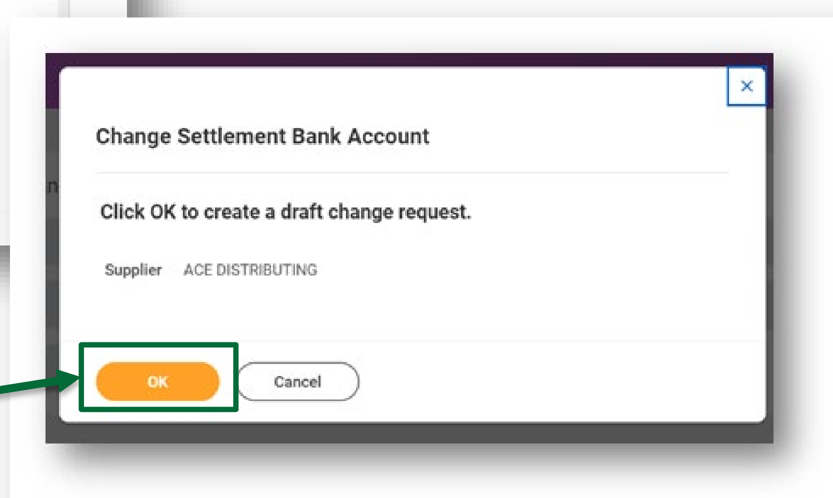
Important Note:
In-flight bank changes could affect payments until the change is approved by Whole Foods Market.

3. Click **OK** to create a draft change request.

3.5 If you are currently paid via check and are adding bank information, click the **Change Settlement Bank Account** button to enroll in ACH payments. The Change Settlement Bank Account screen will look slightly different since there is no previous bank information on file.







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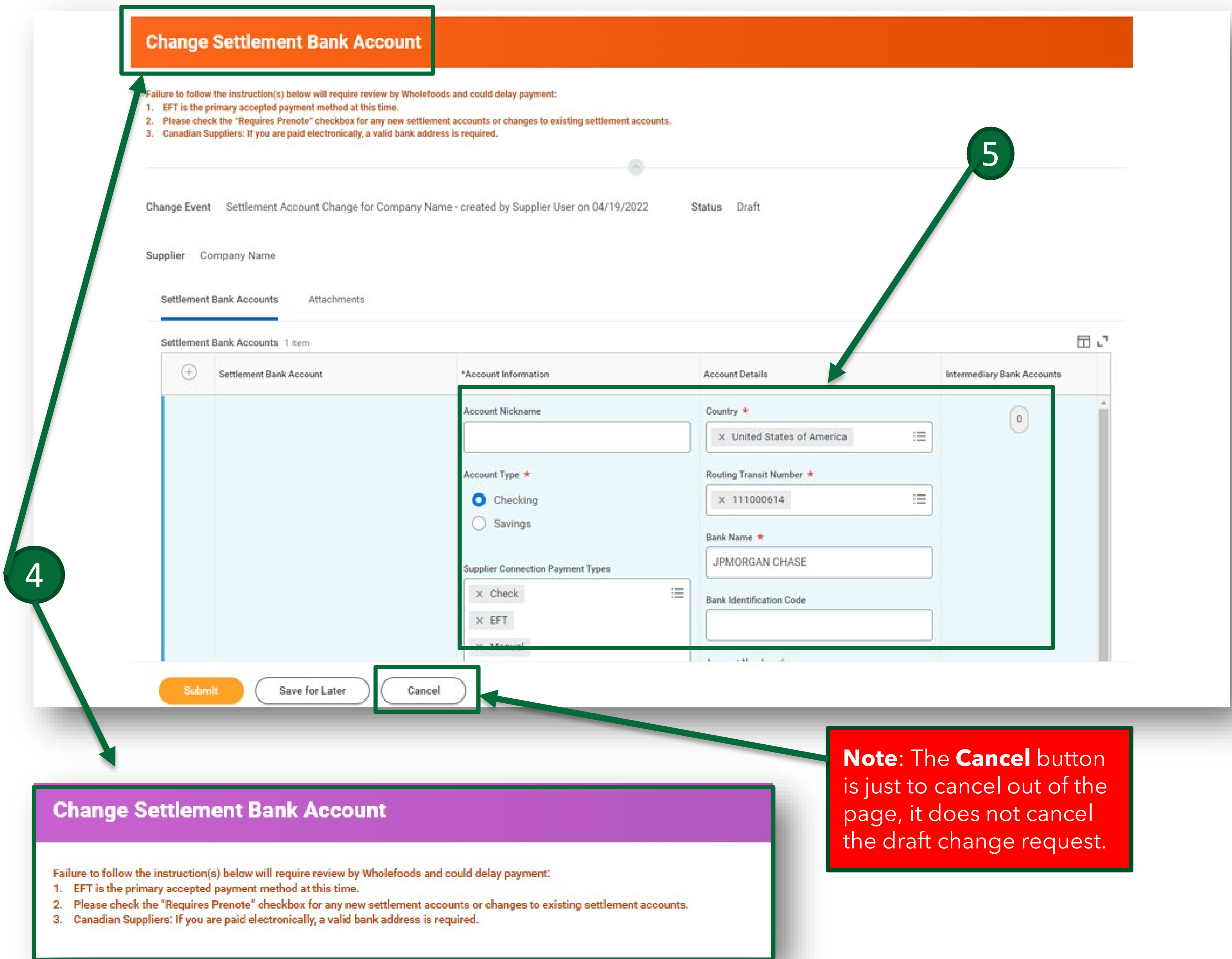
Change or Add Settlement Bank Information

continued

4. Confirm that a banner with the words **Change Settlement Bank Account** or a small window with Change Settlement Bank Account for first time ACH enrollments appears. Canadian Suppliers: If you are paid electronically, a valid bank address is required.

5. **Enter** the bank account information. Canadian Suppliers: If you are paid electronically, a valid bank address is required.

Note: The **Cancel** button is just to cancel out of the page; it does not cancel the draft change request. To view how to cancel the draft change request, click here.

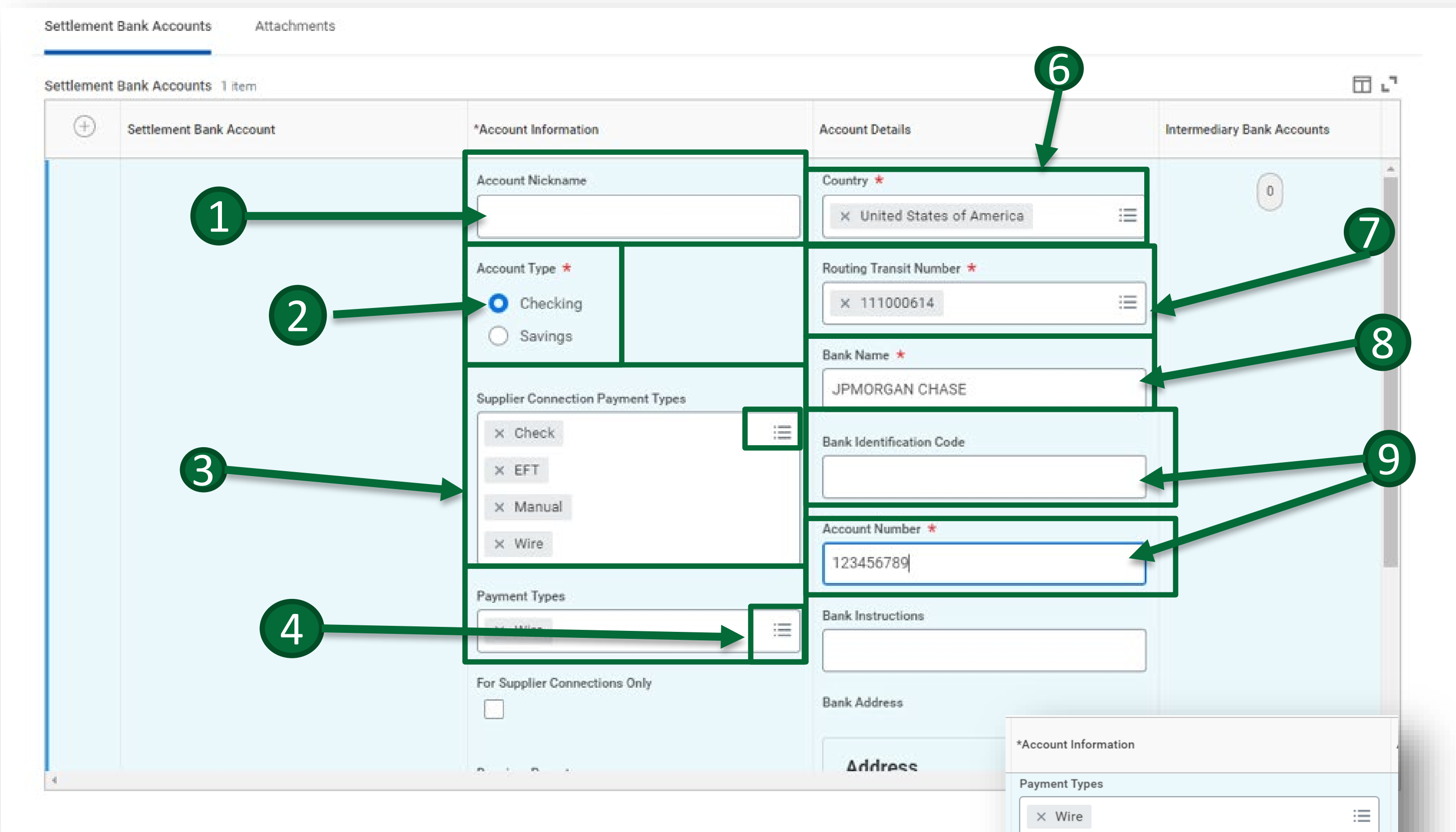


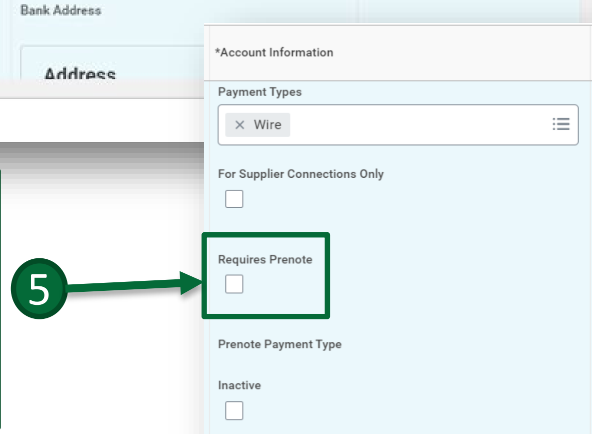
Change or Add Settlement Bank Information

continued

Note: Fields with a red asterisk* are required fields.

1. Enter your company name in the **Account Nickname** field.
2. Select the **Checking** button under Account Type.
3. Select **Electronic Payment – EFT** from the menu icon under Supplier Connection Payment Types.
4. Select **Electronic Payment – EFT** from the menu icon under Payment Types.
5. Select **Requires Prenote** button. (US Suppliers, please ensure you click this button!)
6. Select the **Country** from the menu icon. (The bank information required for the country selected will be marked with a red asterisk next to the required field.)
7. Enter the **Routing Transaction Number** in the open field.
8. Enter the **Bank Name** in the open field.
9. Enter the **Account Number** in the open field.





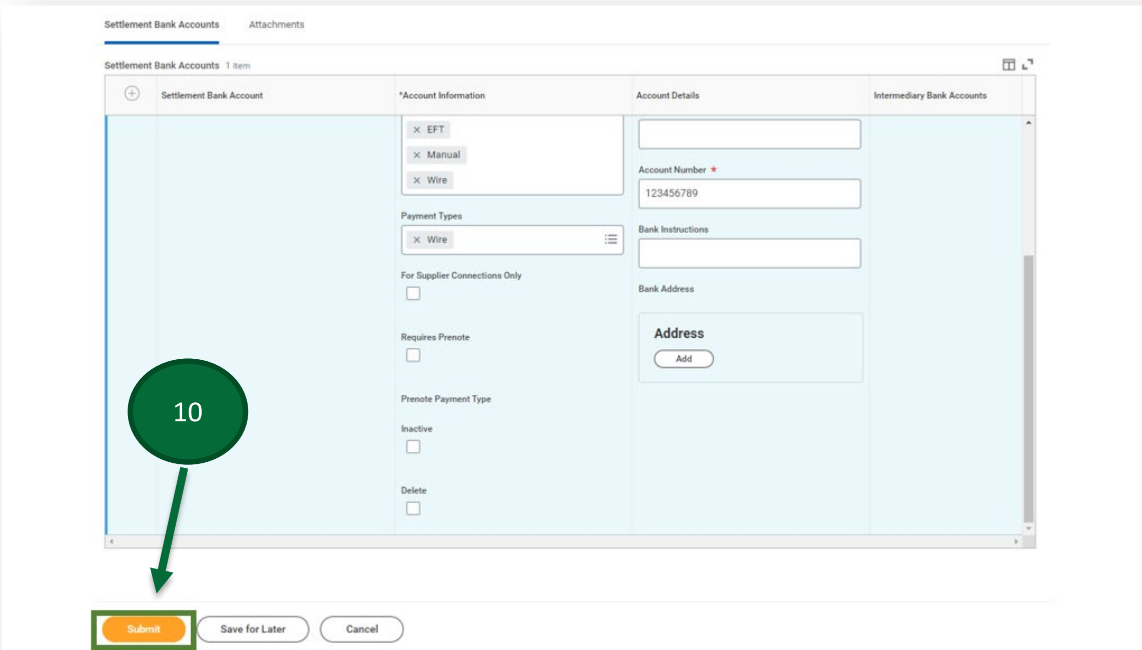
Important Note:

- Please include the IBAN, BIC or SWIFT code in case we ever need to process a wire payment! (Step 9)
- Please ensure you click the Requires Prenote box. (Step 5)

Change or Add Settlement Bank Information

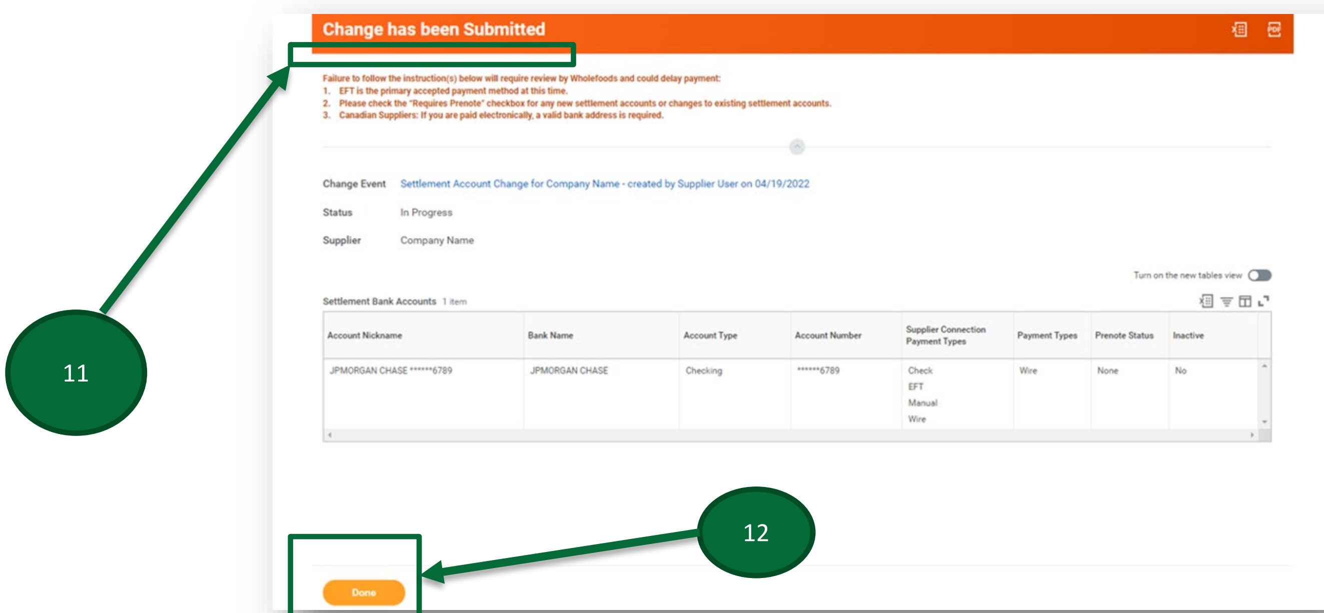
continued

10. Click **Submit**.



11. Confirm the Change has been Submitted banner appears.
12. Click **Done** to submit the change request to Whole Foods Market.

Note: The change will be approved within 72 business hours.



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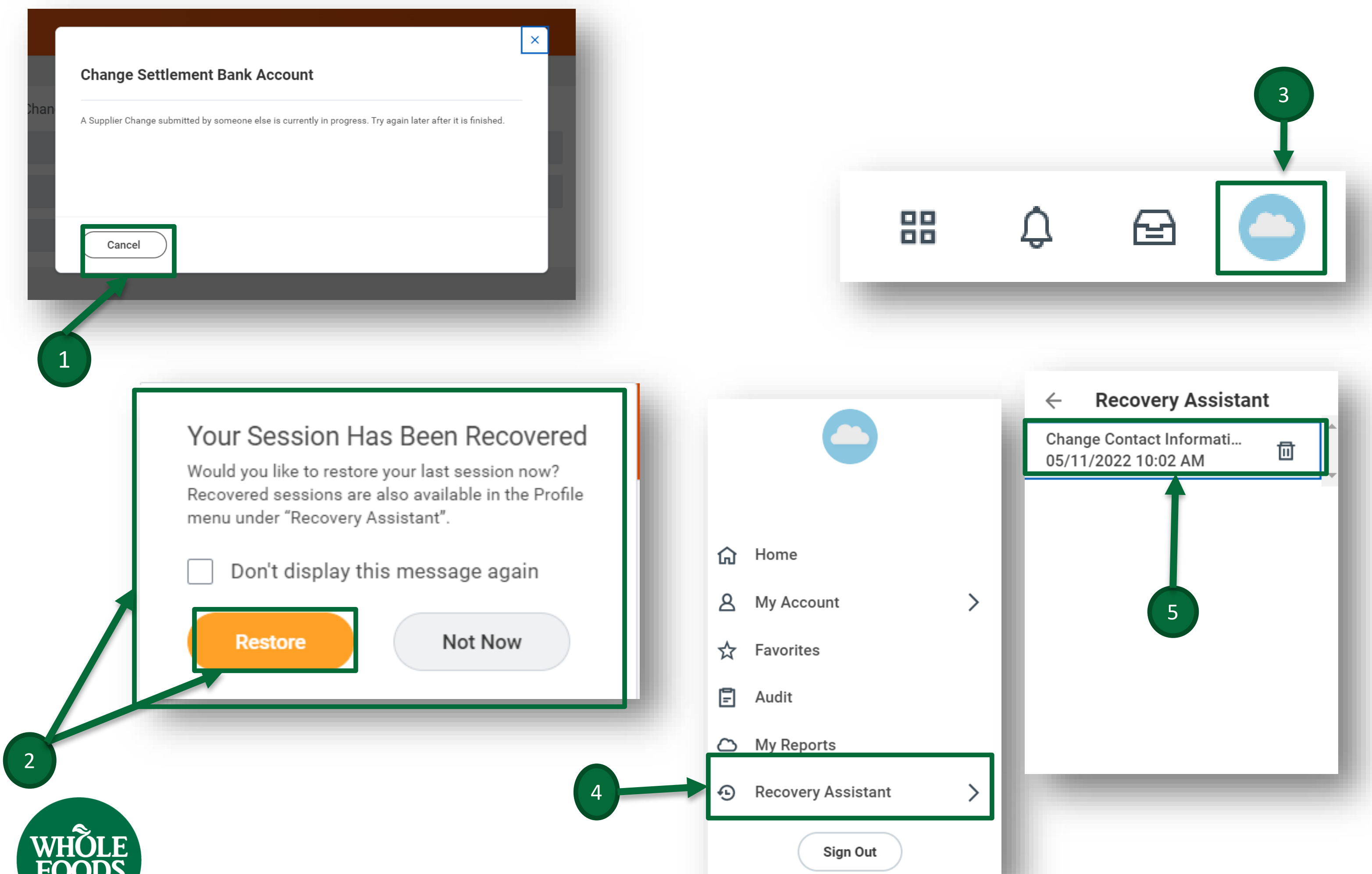
Recovery Assistant and Unapproved Change Requests

If there is a change to the contact information or settlement bank information previously submitted and awaiting Whole Foods Market approval, the system will **not** allow other account users to submit a change request until the previous submitted change has been approved.

1. Click **Cancel** and try again later after the change is processed.

If you closed the window prior to submitting the change request, you can recover the draft change request using the Recovery Assistance.

2. To recover the previous change from the previous session, click **Restore** on the Recovery Assistant pop-up message.
3. Or recover the change in progress by clicking the **Profile icon** on the top right of the screen.
4. Scroll down and click **Recovery Assistance**.
5. Click the **change** that is in progress.



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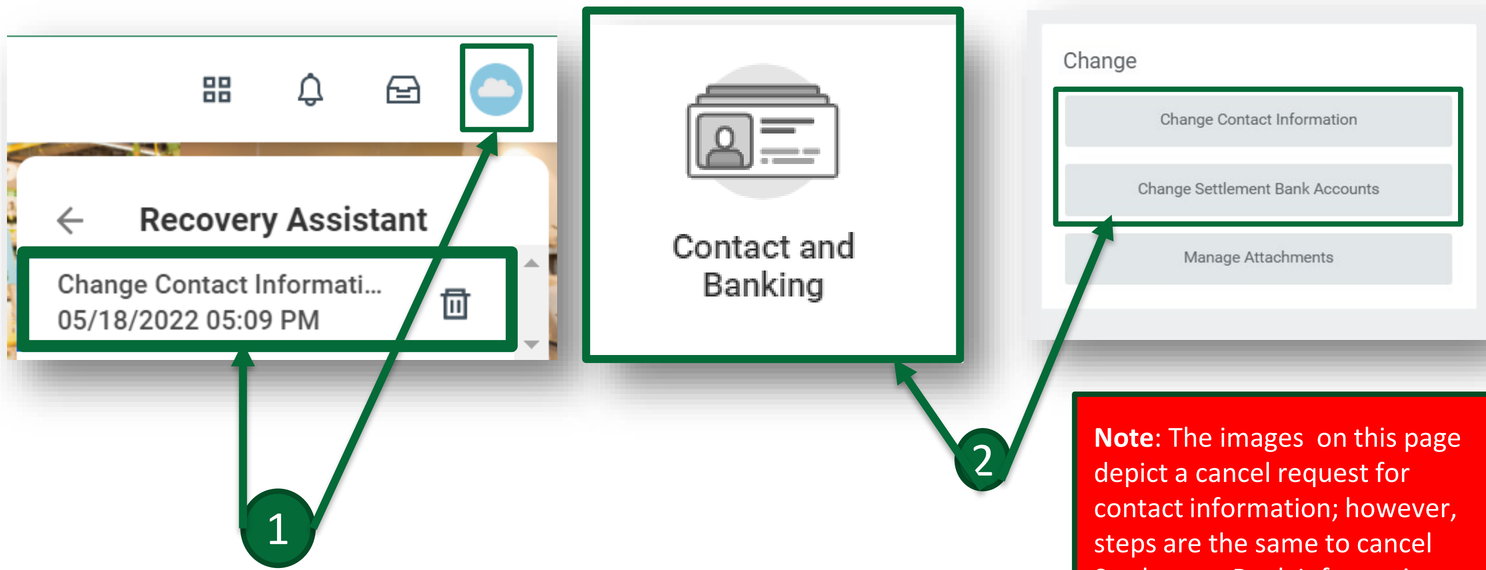
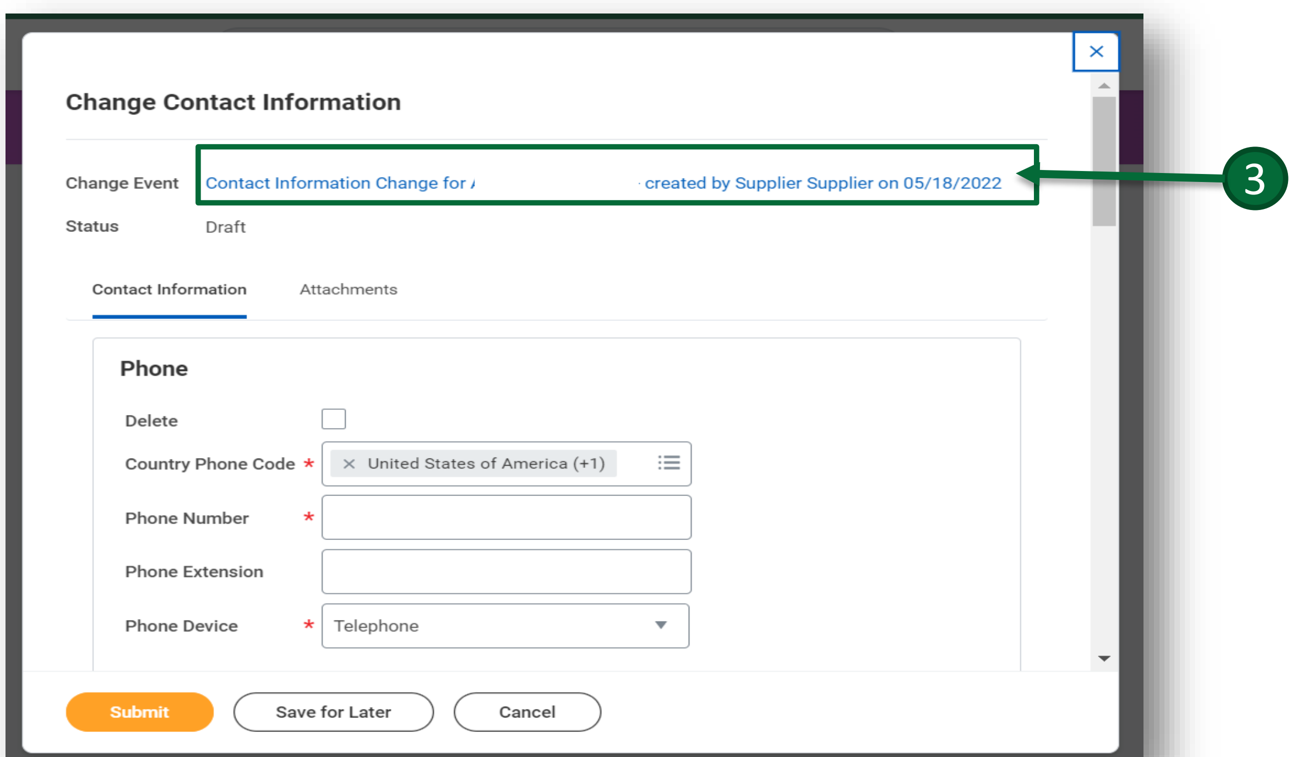
How To Cancel A Draft Change Request

1. To cancel a draft change request to contact or settlement bank information, access the request by either clicking on the **change request that was initiated** from the Recovery Assistant under the Profile drop-down menu.
2. Or by clicking the **Change Contact Information** or **Change Bank Settlement Information** tab from your Contact and Banking Worklet.



Note: The images on this page depict a cancel request for contact information; however, steps are the same to cancel Settlement Bank Information.

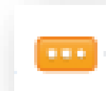
3. Click the **change event link** in blue.

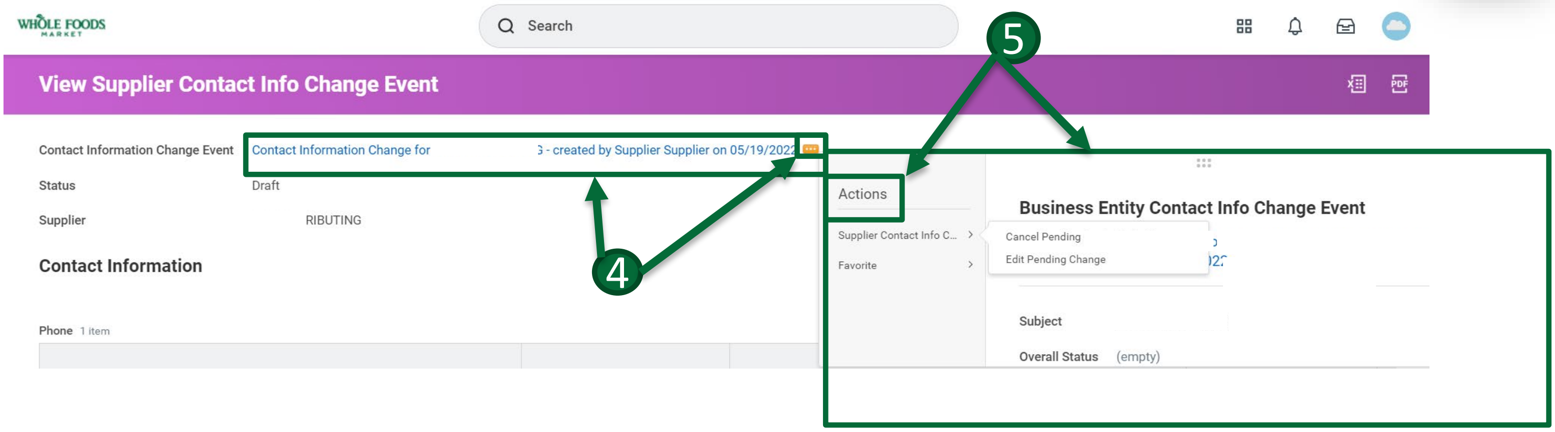


How To Cancel A Draft Change Request

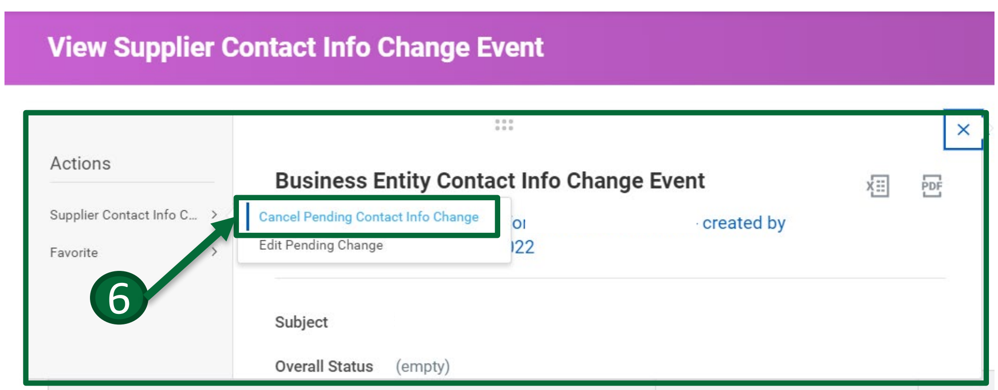
continued

4. In the View Supplier Contact Info or Settlement Bank Account Change Event screen, hover over the blue link and click on the **Related Action icon** (rectangle with three dots).





5. After clicking the Related Action icon, view the Actions menu.

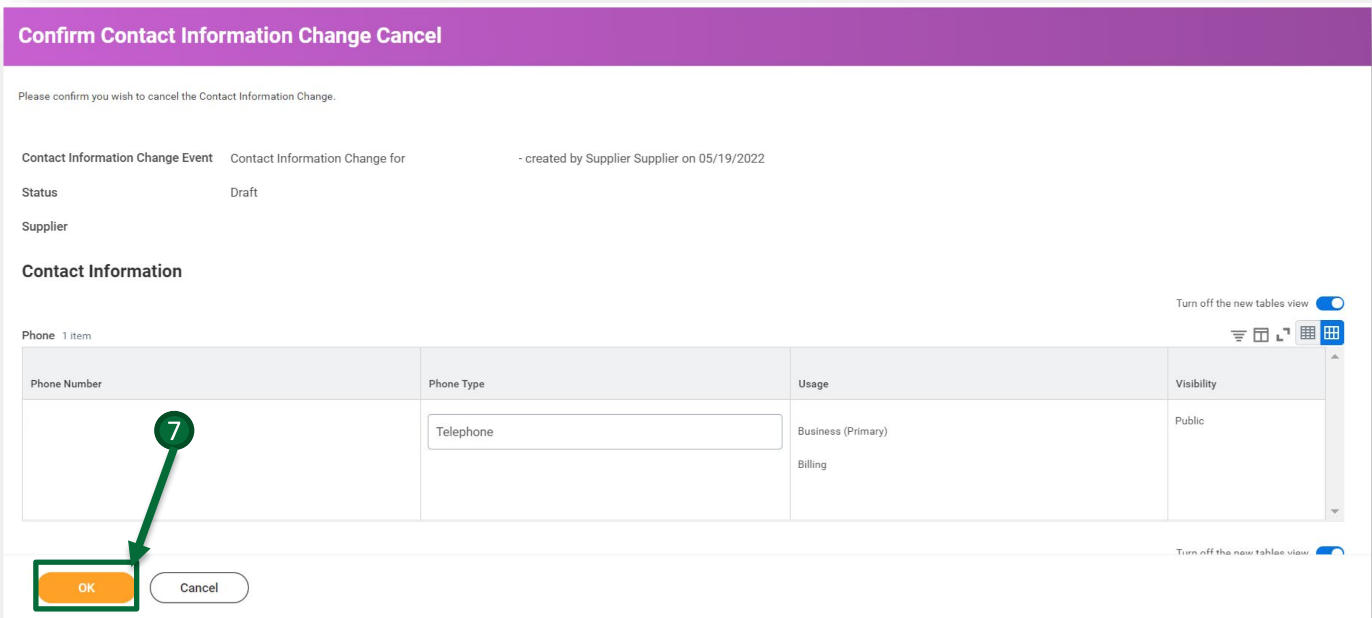


6. Scroll down on the Actions menu and click **Cancel Pending Contact Info Change**.

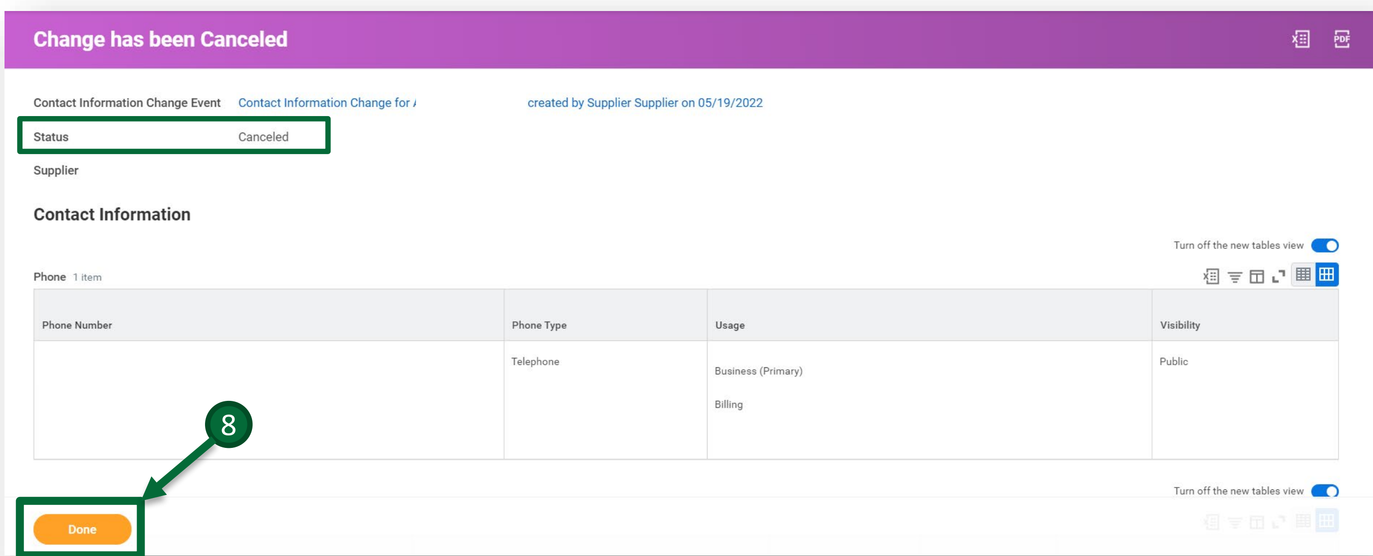
How To Cancel A Draft Change Request

continued

7. To confirm change cancel request, click **OK**.



8. Confirm that the status changed to Canceled and click **Done**.



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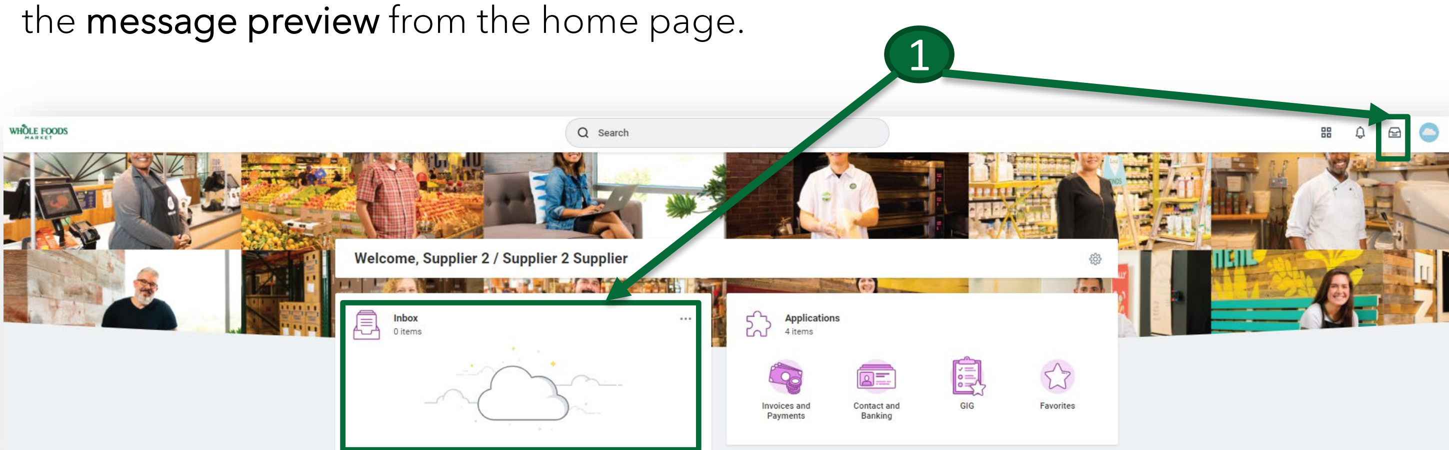
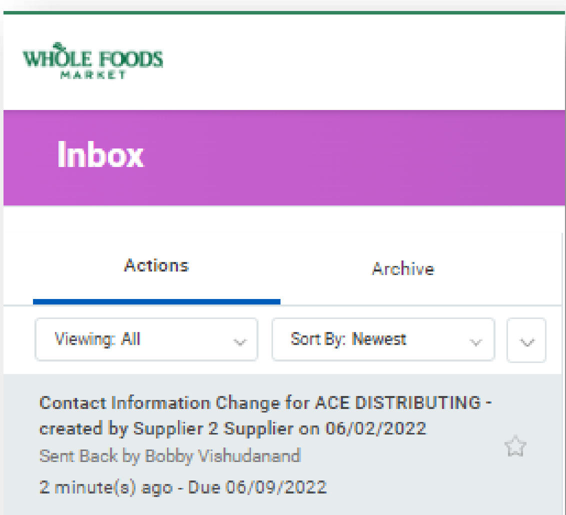
Returned and Denied Requests

If the submitted request was returned, you will receive an email in Workday. The email will contain the change request form to enter the revised information and submit the request back to Whole Foods Market. You can view the reason for the returned request at the bottom of the email.

1. To view the returned request, **click** the **inbox Icon** from your home page or **click** the **message preview** from the home page.





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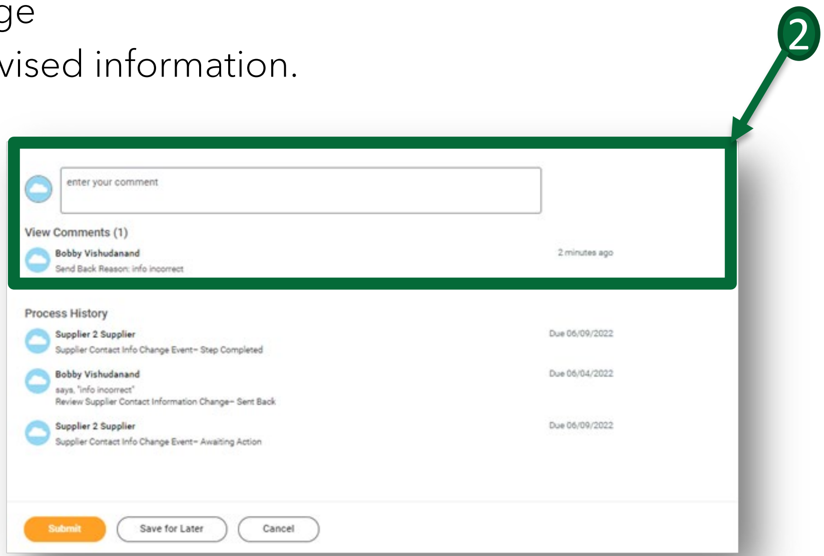
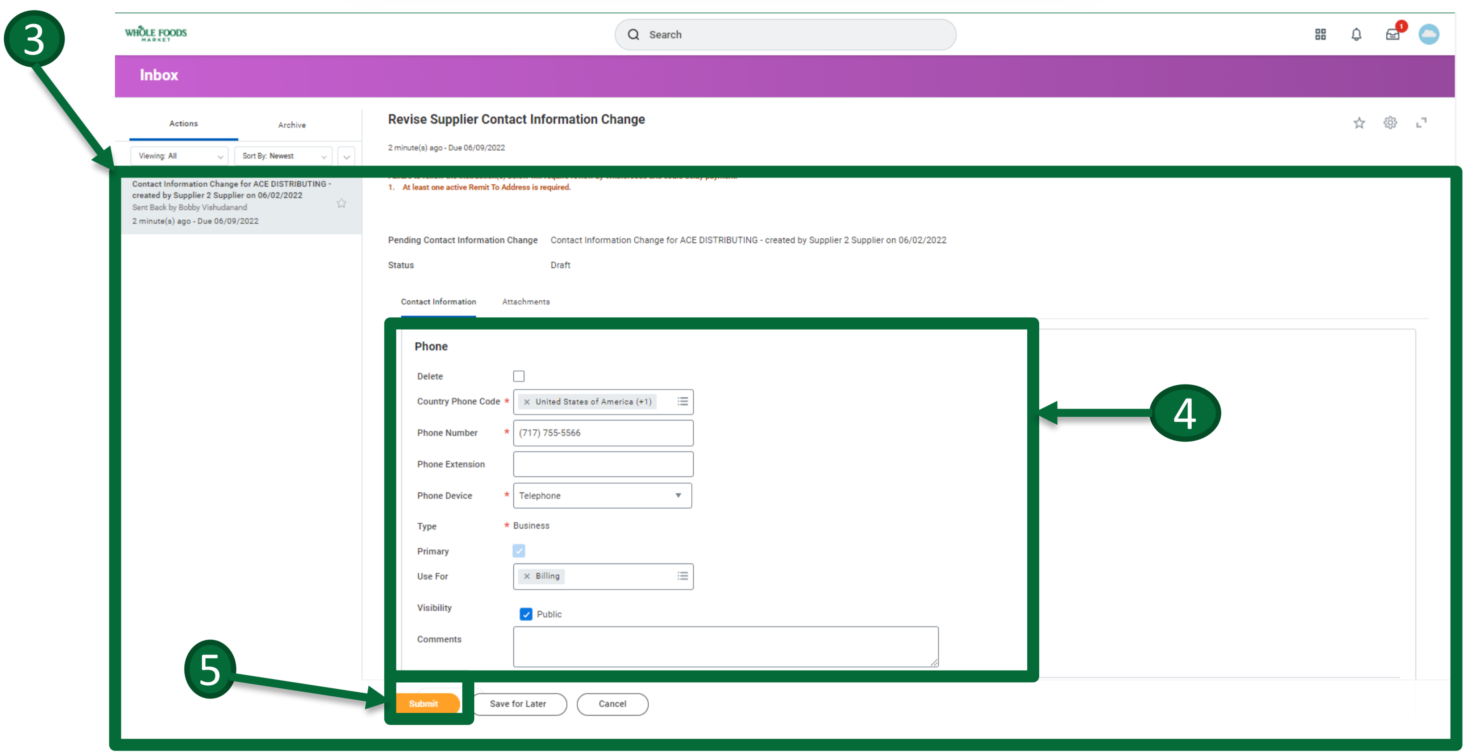
Returned and Denied Requests

continued

2. View the reason for the returned request at the bottom of the email
3. **Open** the message
4. Next **Enter** the revised information.
5. Click **Submit**.

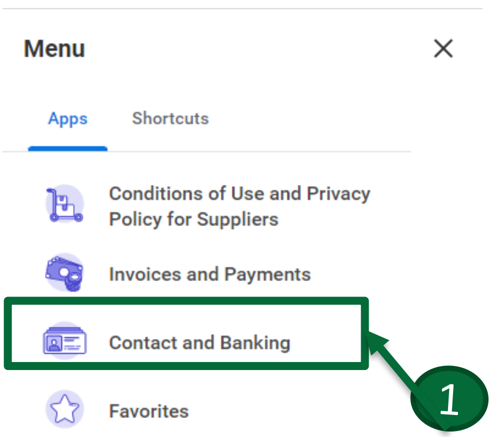


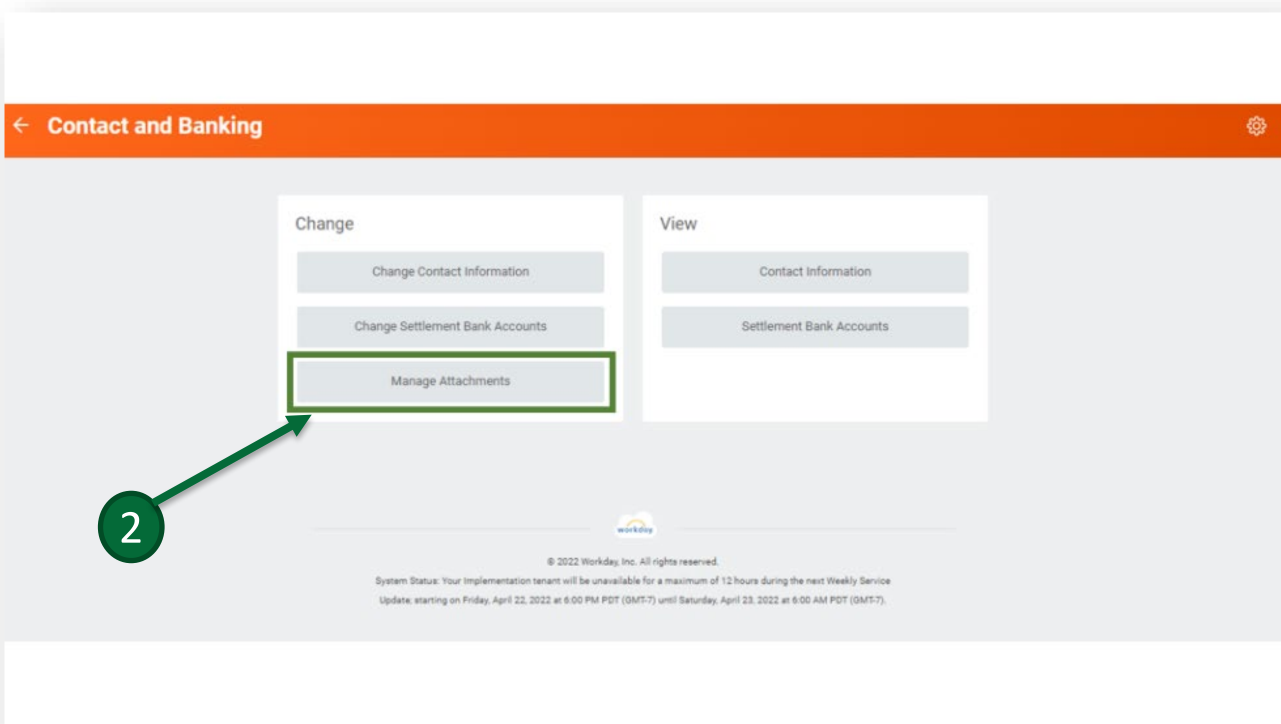


Manage Attachments

Uploaded attachments can be accessed through the Manage Attachment tab.

1. To view Manage Attachments, click **Contact and Banking on the Menu tab to the right of your home screen**.
2. To attach required documentation, click on **Manage Attachments** button.





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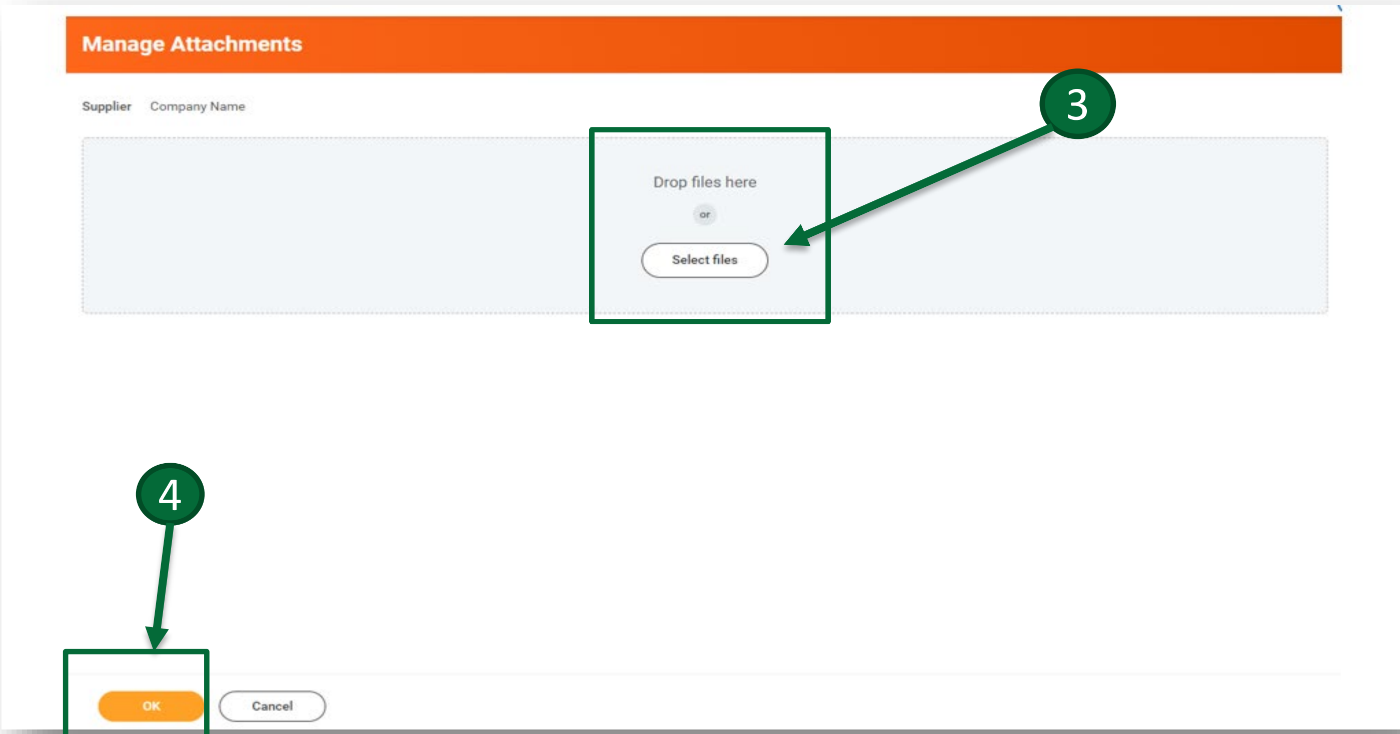
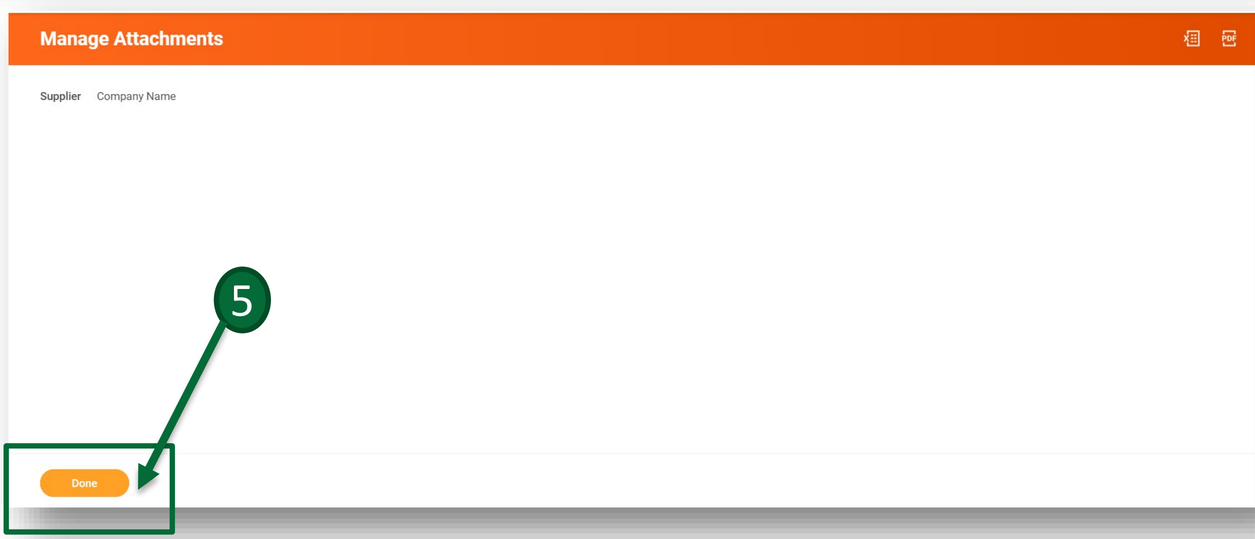
Manage Attachments

continued

3. Navigate to the Attachments tab, click the **Select files** button to browse and attach files or drag and drop the files in the grey attachments area.
4. Click **OK.**
5. Click **Done** on the next page.





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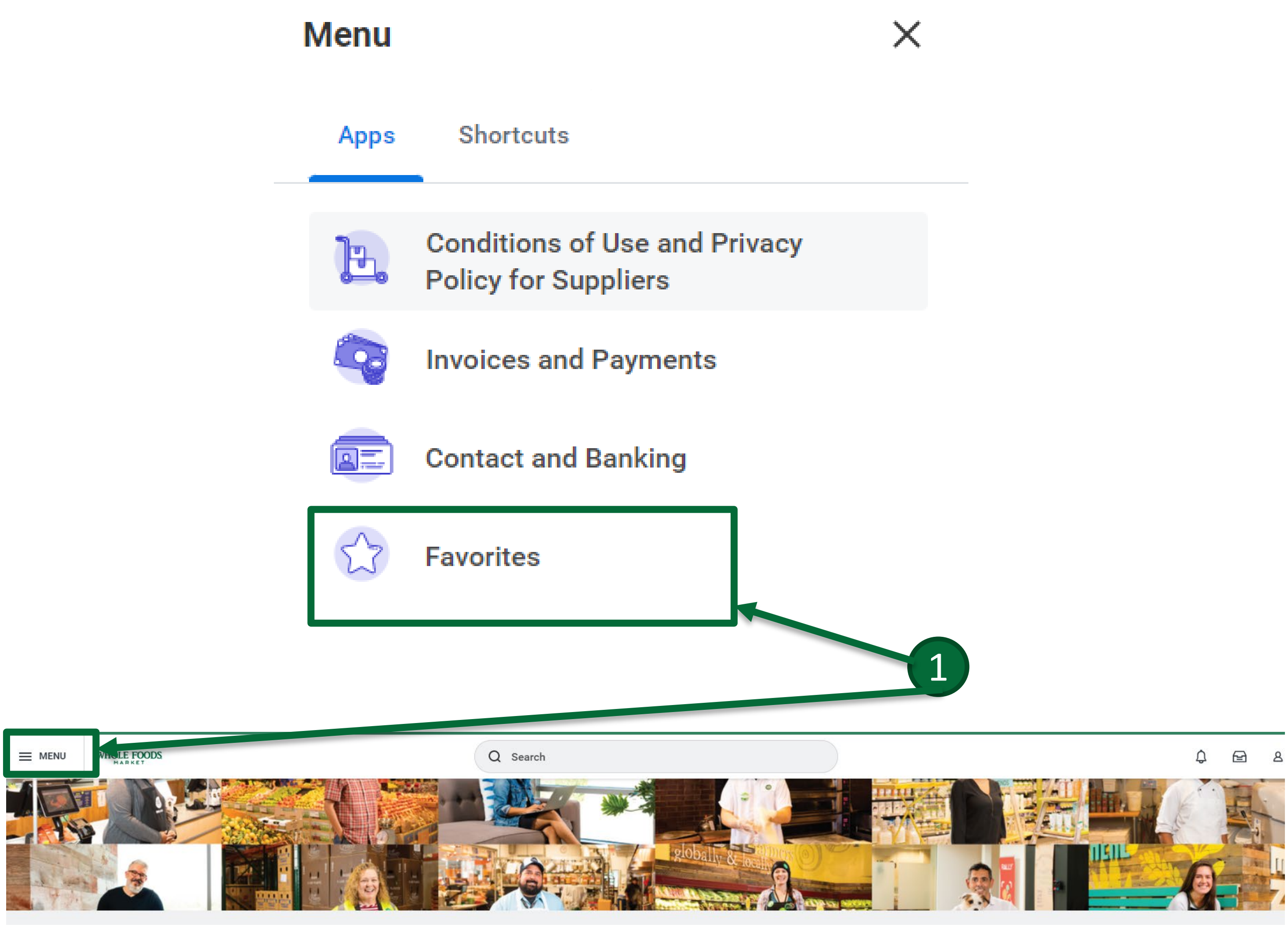
Favorites

The Favorites worklet holds favorite Audit Reports.

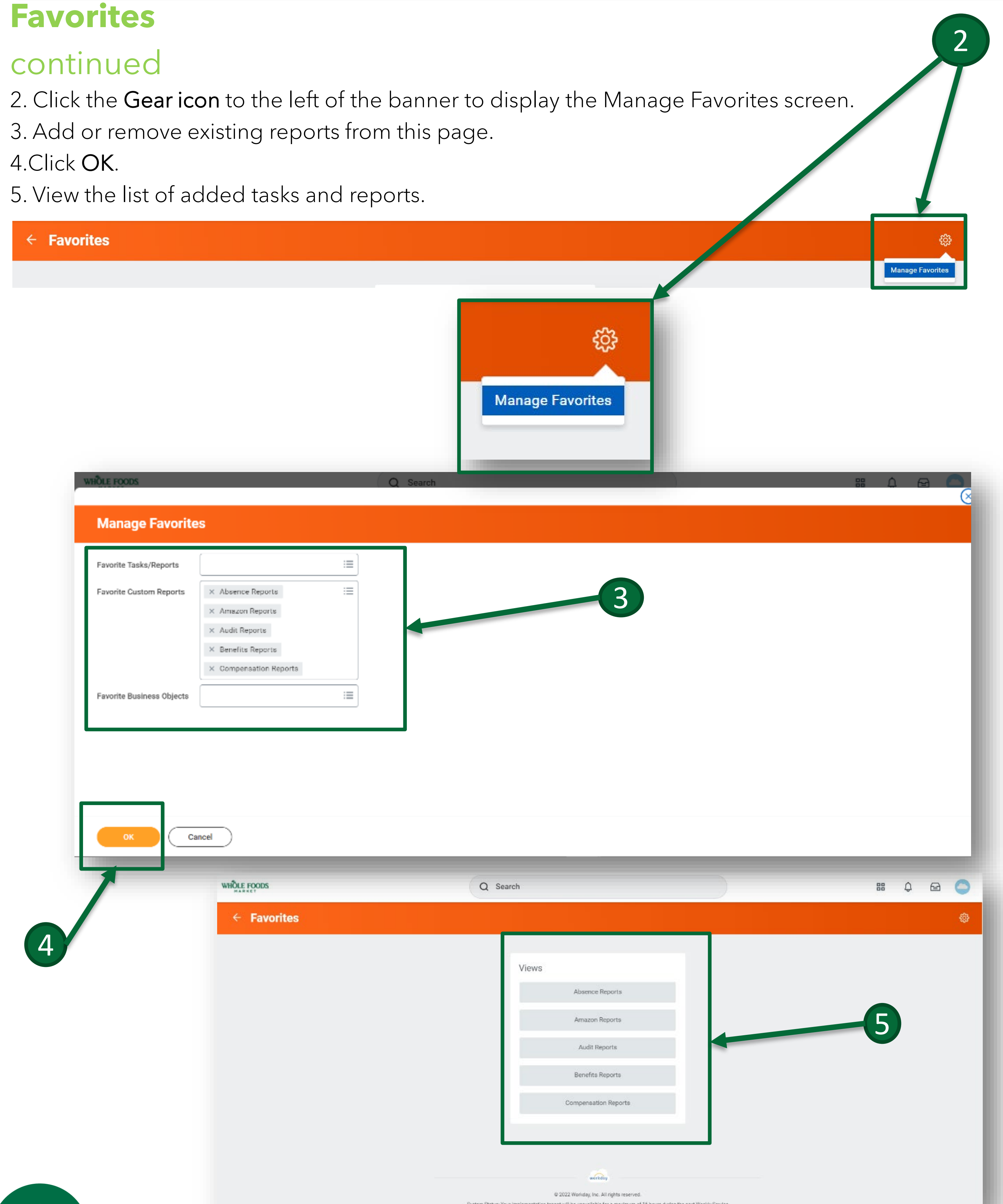
1. Click on the **Favorite worklet** from the Menu tab found to the right of your home page.



Favorites

continued

2. Click the **Gear icon** to the left of the banner to display the Manage Favorites screen.
3. Add or remove existing reports from this page.
4. Click **OK**.
5. View the list of added tasks and reports.



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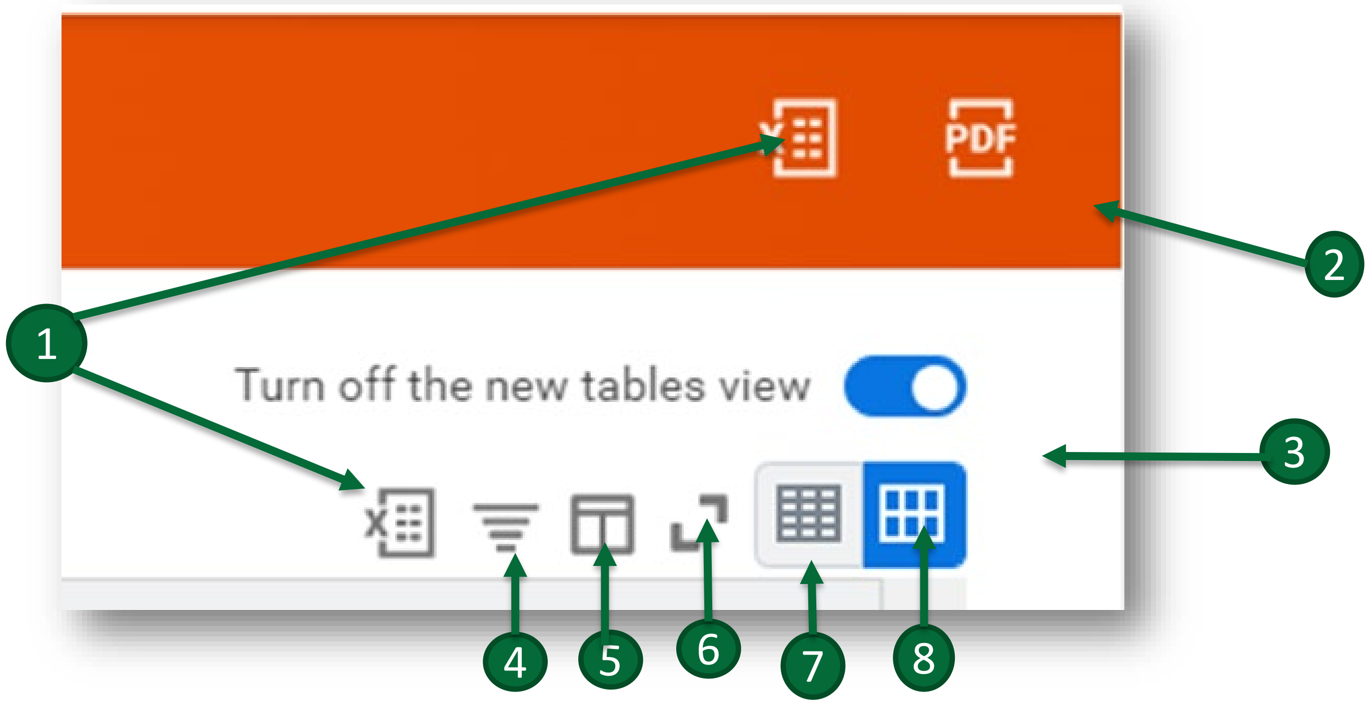
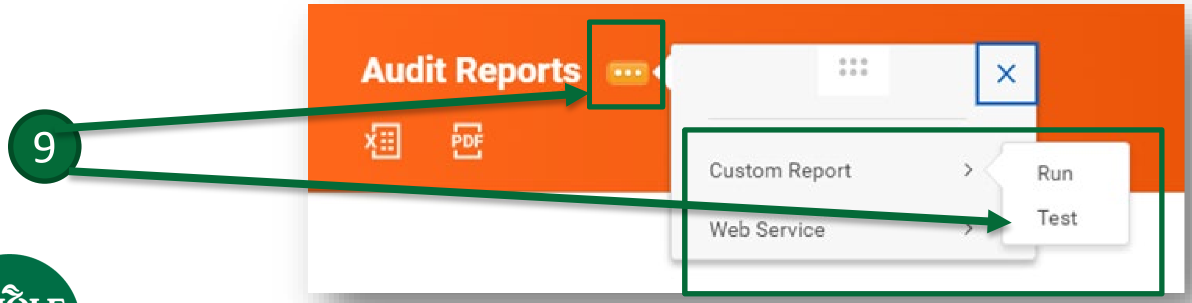
Favorites

continued

Once favorite custom reports have been added, you can view or export audit reports.



1. Click the **Export to Excel icon** to export to Excel.
2. Click the **PDF icon** to view a printable version in PDF format.
3. To turn off the new table view, click on the **Table View icon**.
4. Click **the Filter Grid icon** to filter grid data.
5. Click the **View/Edit Grid** to view or edit grid preference.
6. Click the **Toggle Fullscreen icon** to view the report in full screen.
7. Click the **Collapse icon** to collapse rows.
8. Click the **Expand Row icon** to expand rows.
9. To Run or Test Custom Reports or view Web Service URLs, click the **Related Action icon** (rectangle with three dots).



Pop-Up Errors and Alert Messages

Red pop-up error messages display if the user does not input all required information on the required field(s). Required fields have a red asterisk next to them. Until the user resolves the error(s), they will not be able to continue to the next step or submit or save information.

Orange pop-up alerts indicate potential problems on a page.

1. Click **View All** on the red pop-up error to view the error details and the location of the missing information.
2. Click **View All** on the orange pop-up alert to view related information.