

Whole Foods Market on Workday

Instructional Guide

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Whole Foods Market on Workday Instructional Guide

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!

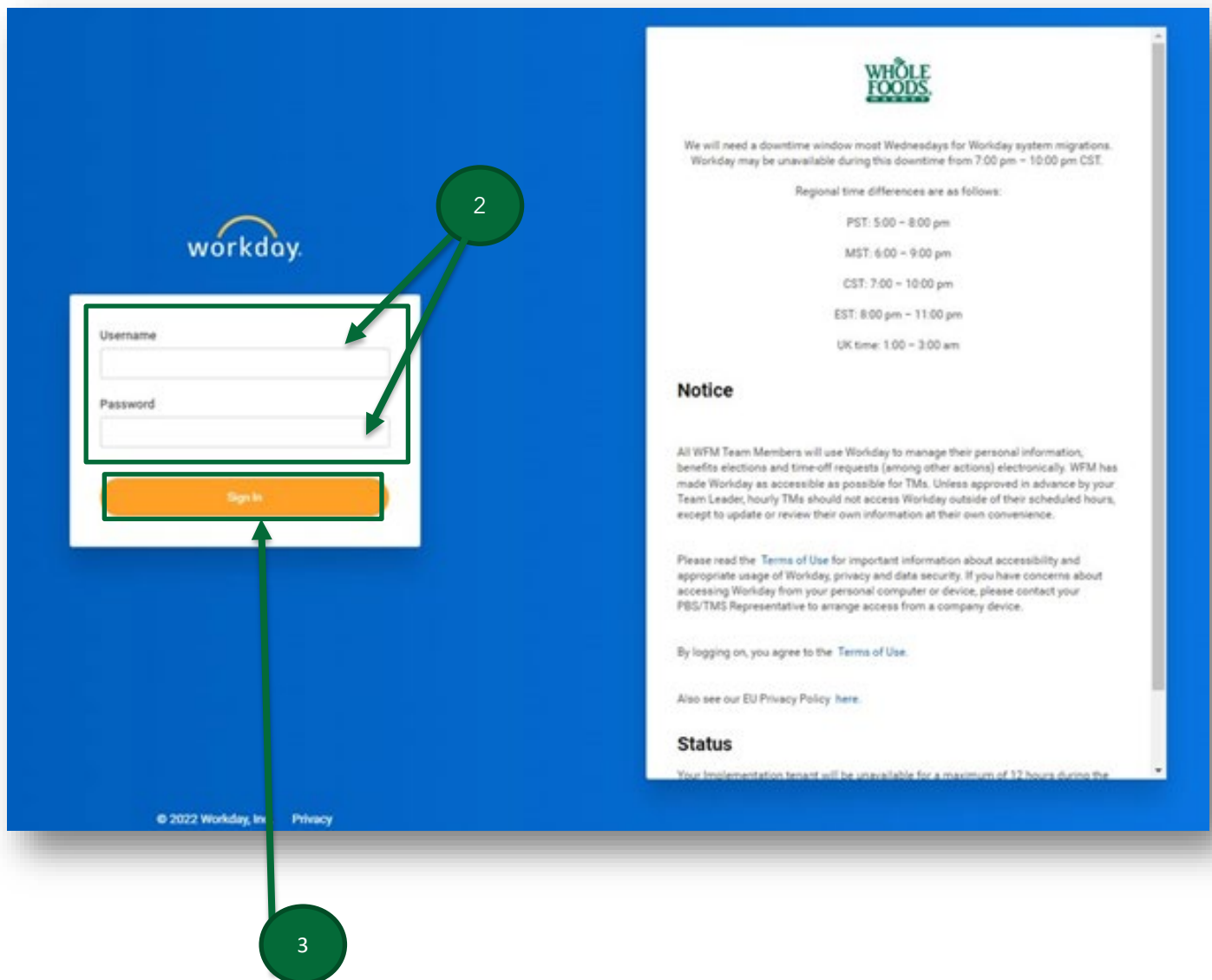


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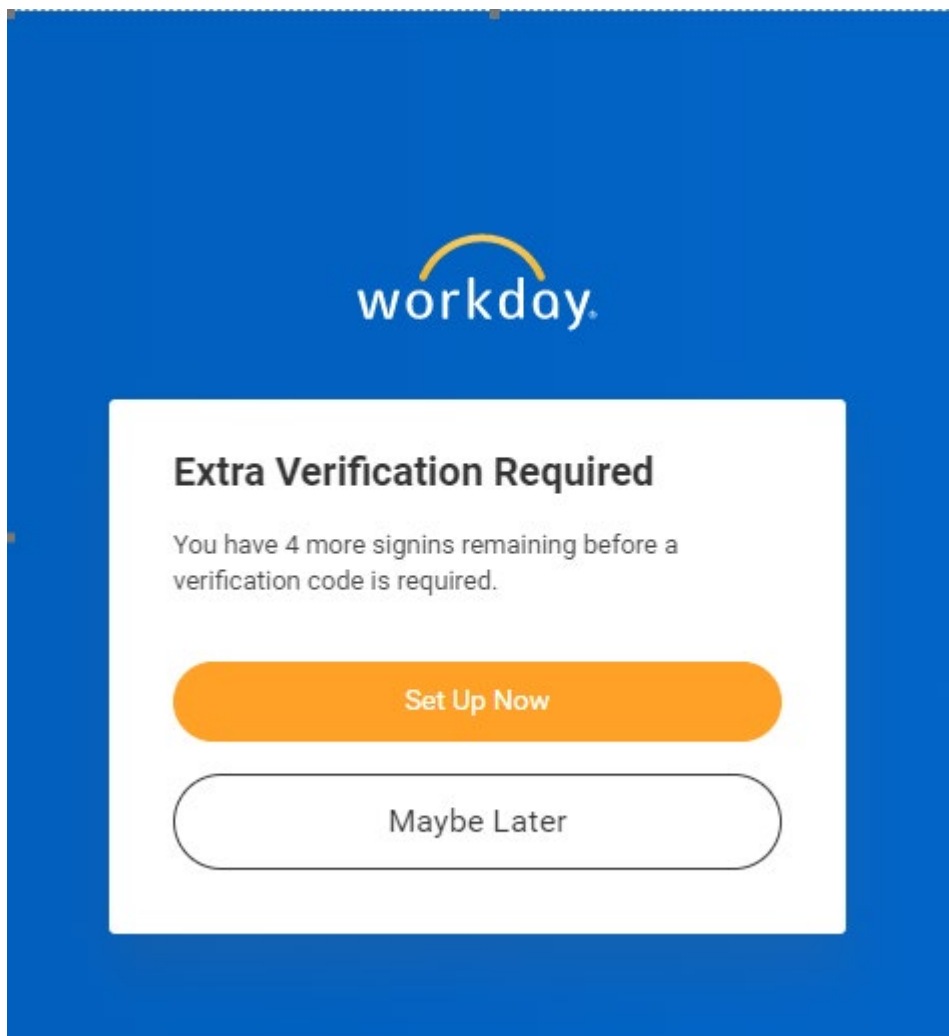
Log in to Workday

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



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 .



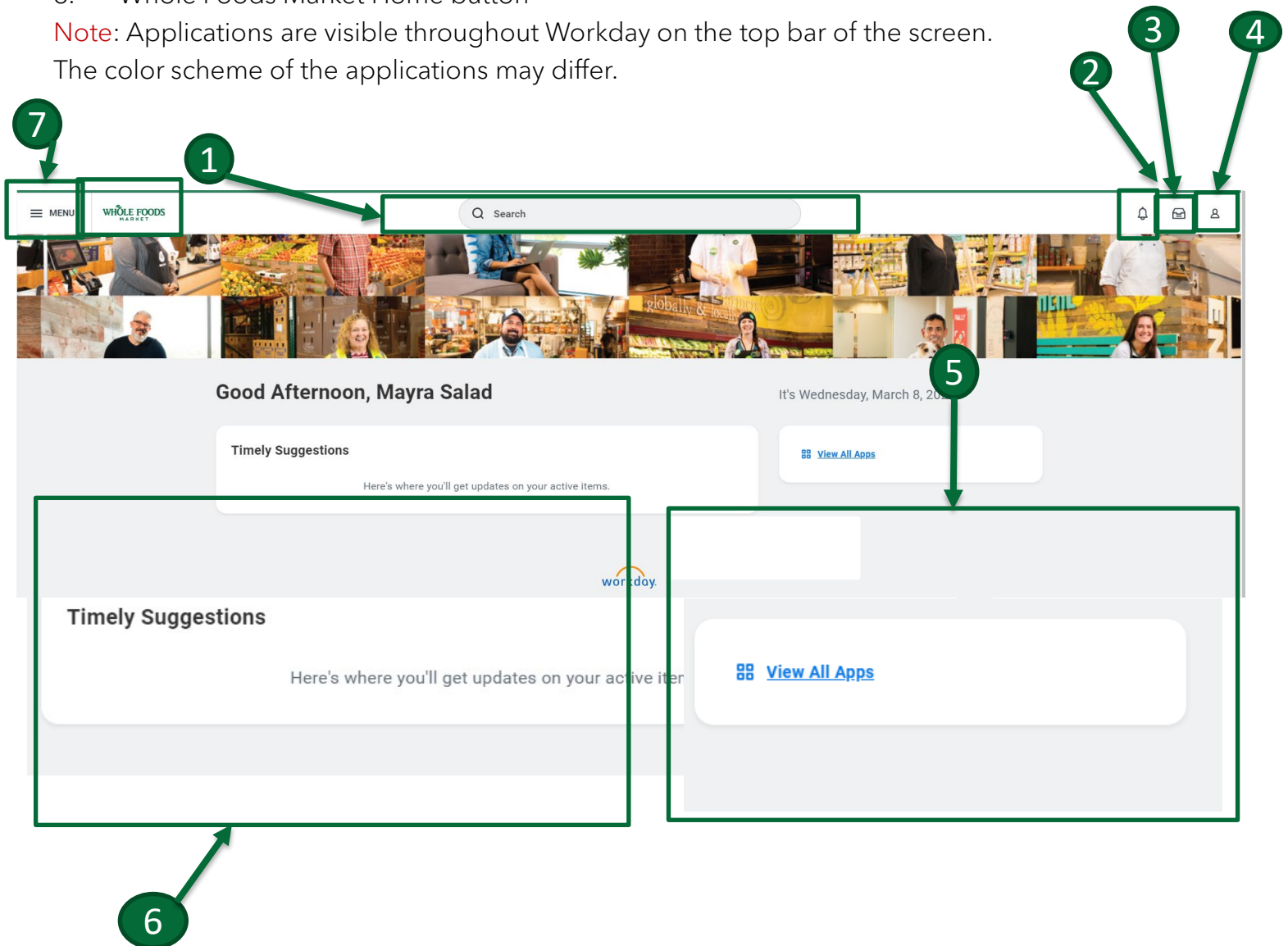
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Navigating Your Home Page

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

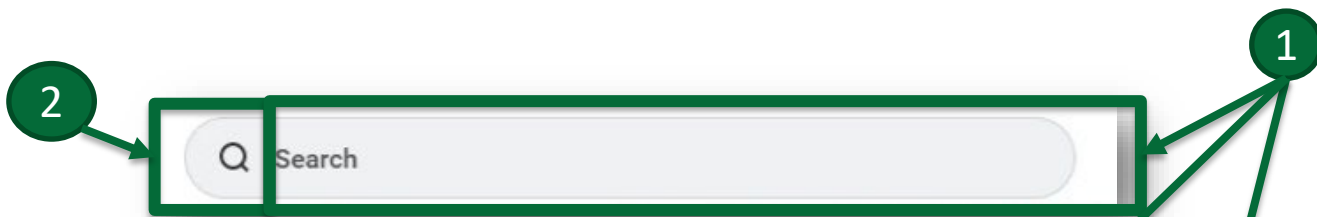
Note: Applications are visible throughout Workday on the top bar of the screen. The color scheme of the applications may differ.



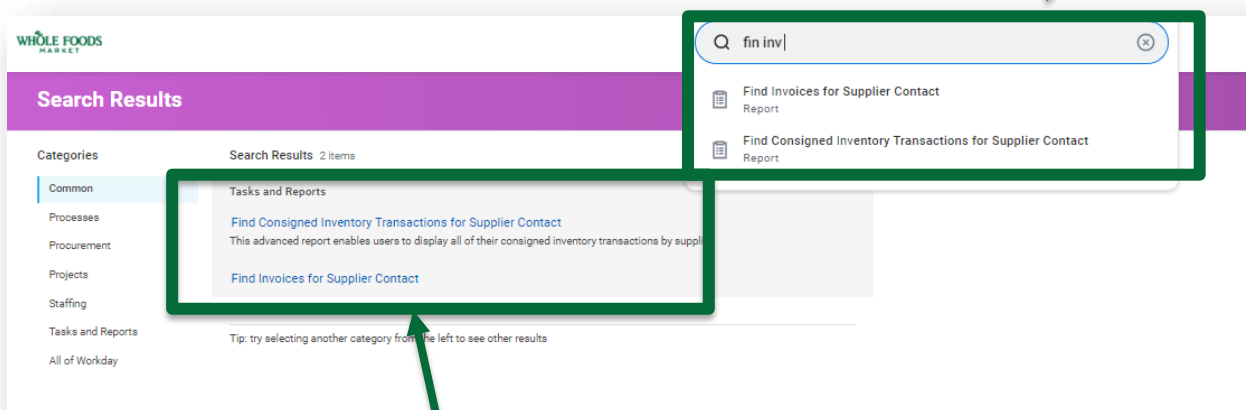
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Search Field

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.



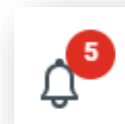
1. Enter a keyword in the search field.
2. Click the **magnifier icon** to display results.
3. Click on the **search result** to view more.



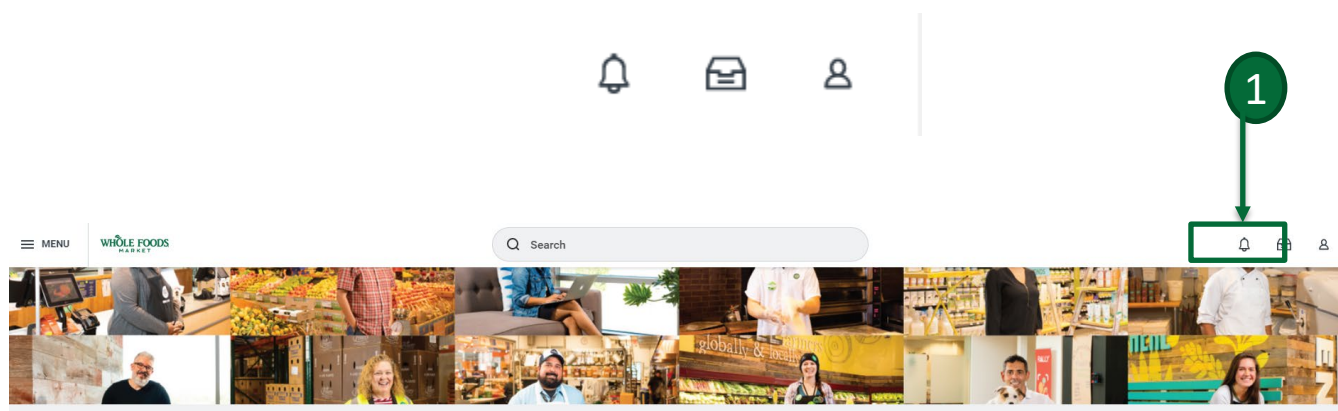
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Notifications

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.



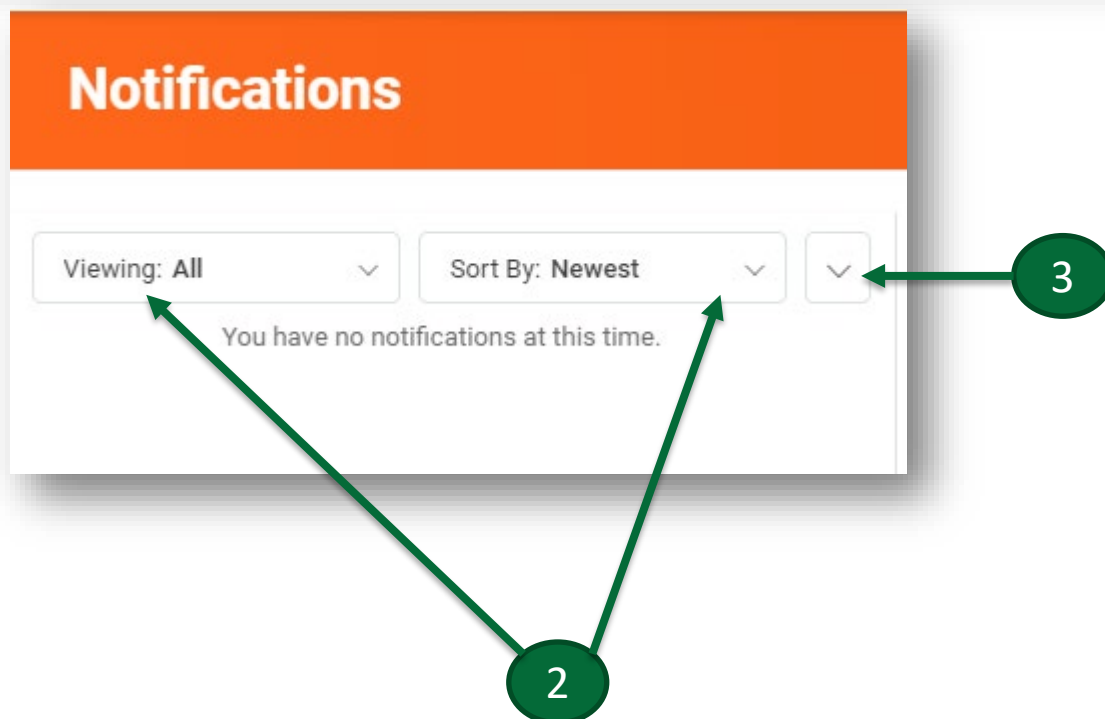
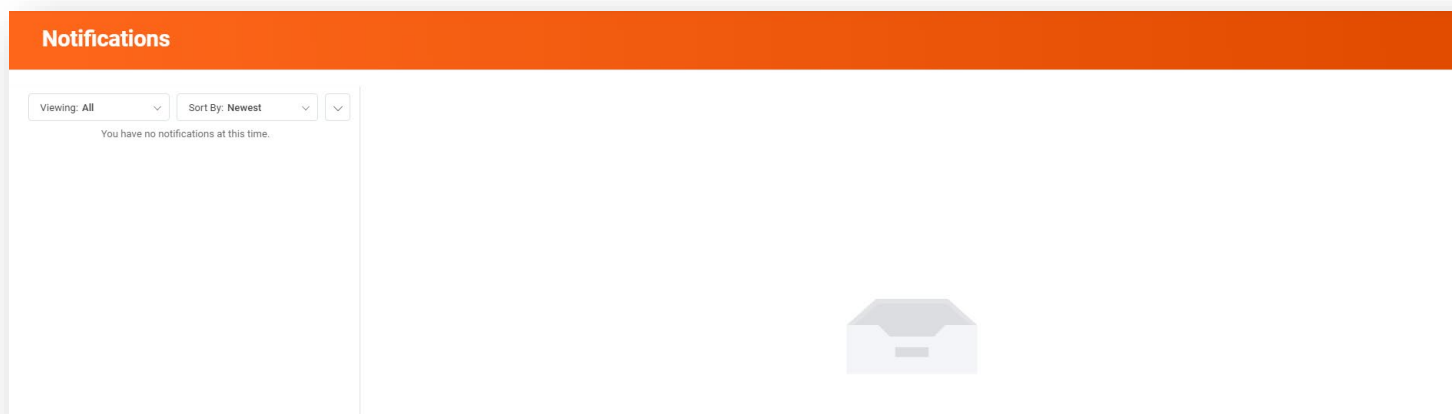
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Notifications continued

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.



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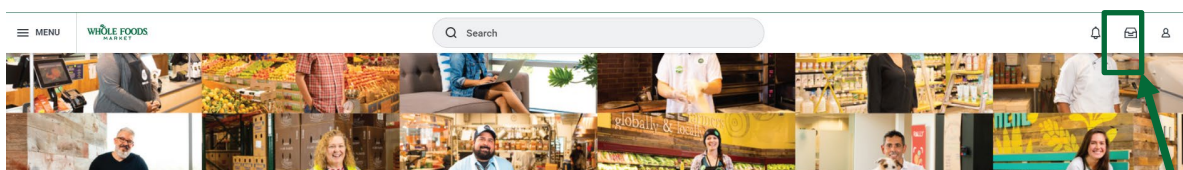
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Workday Inbox

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.



1



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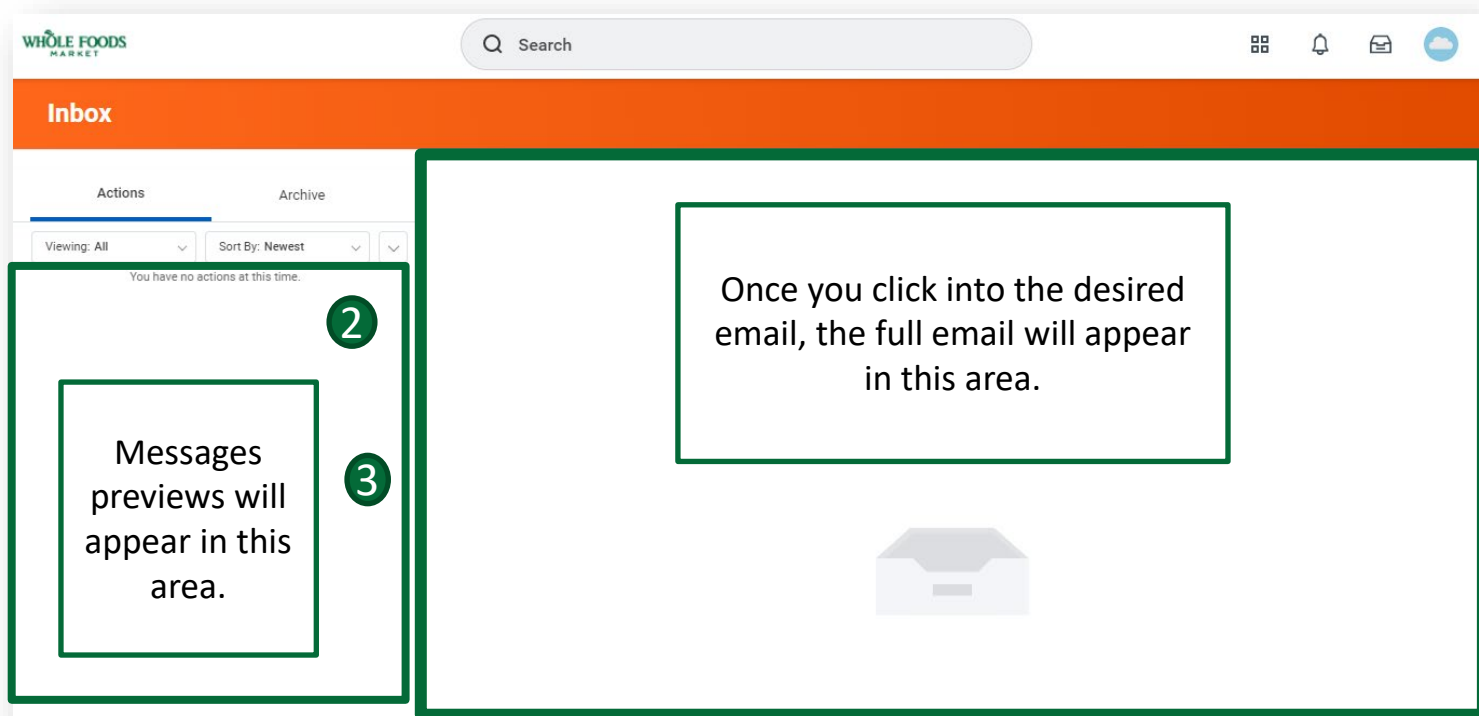
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Workday Inbox

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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.



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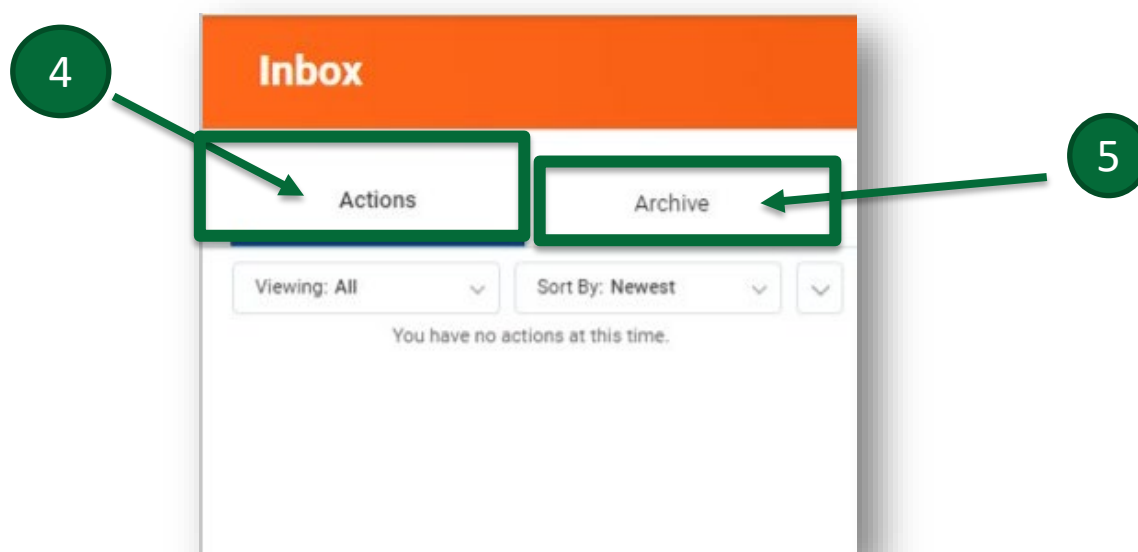
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Workday Inbox

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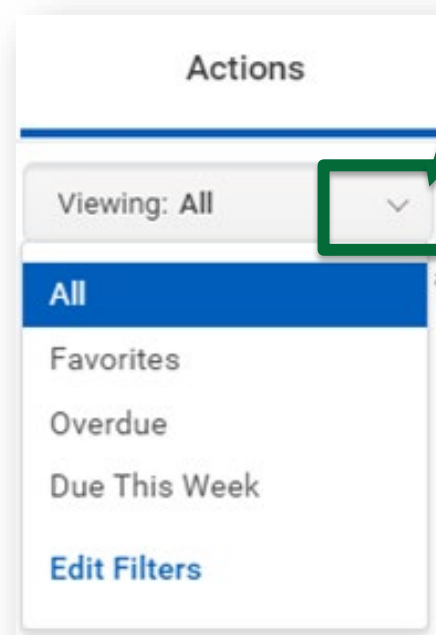
The inbox holds current and archived messages.

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.



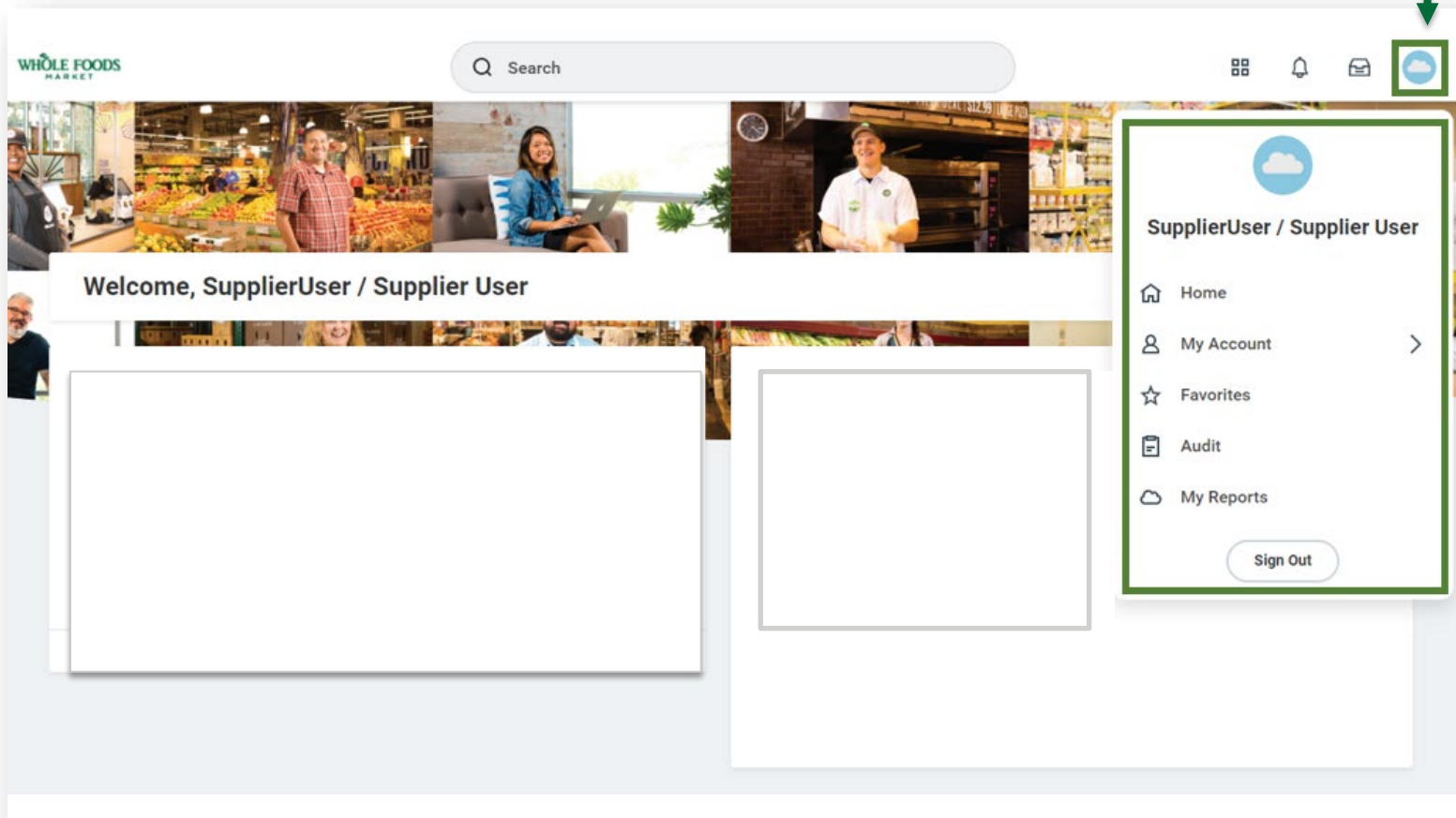
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Profile

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.



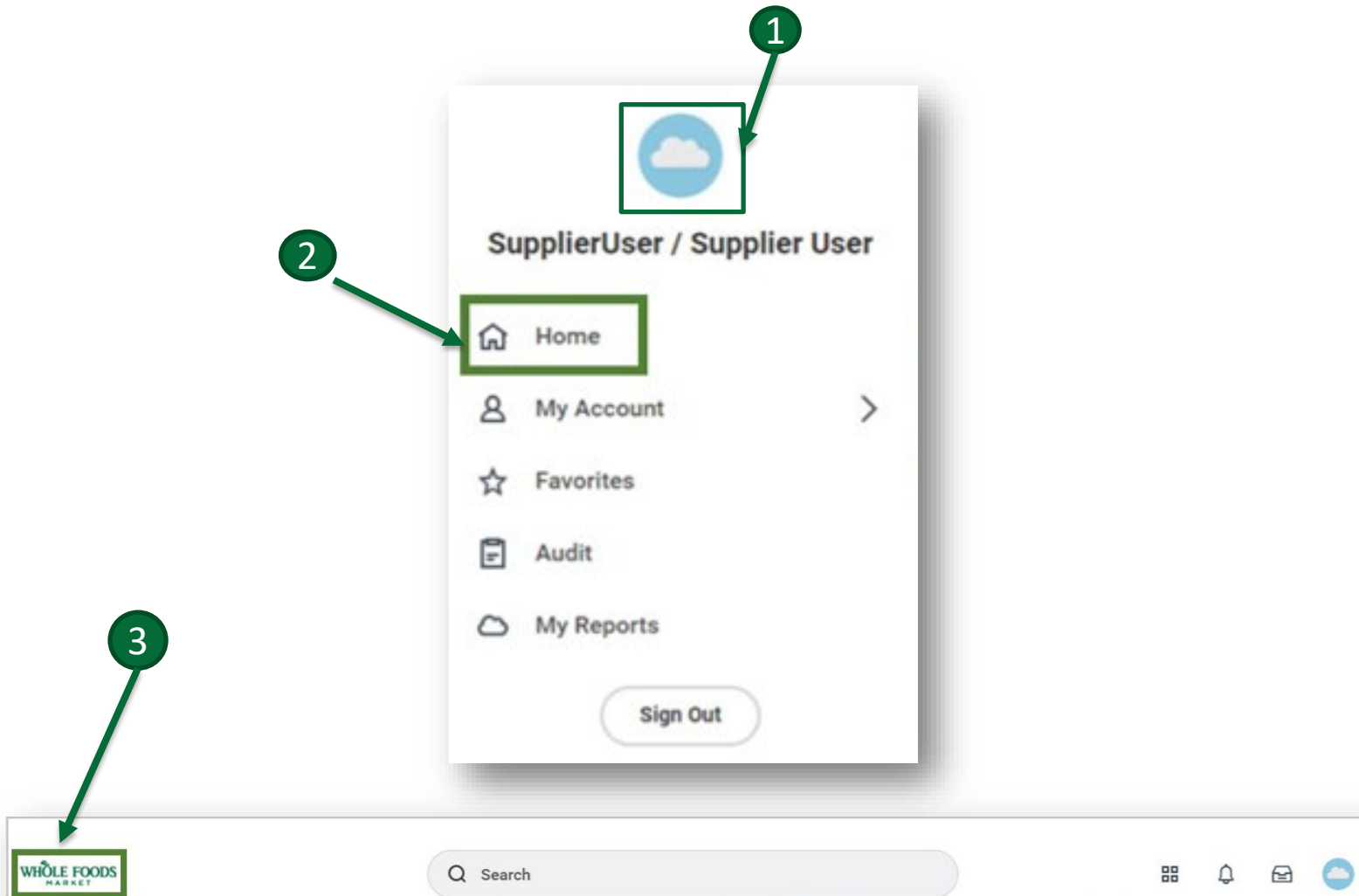
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Home

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.

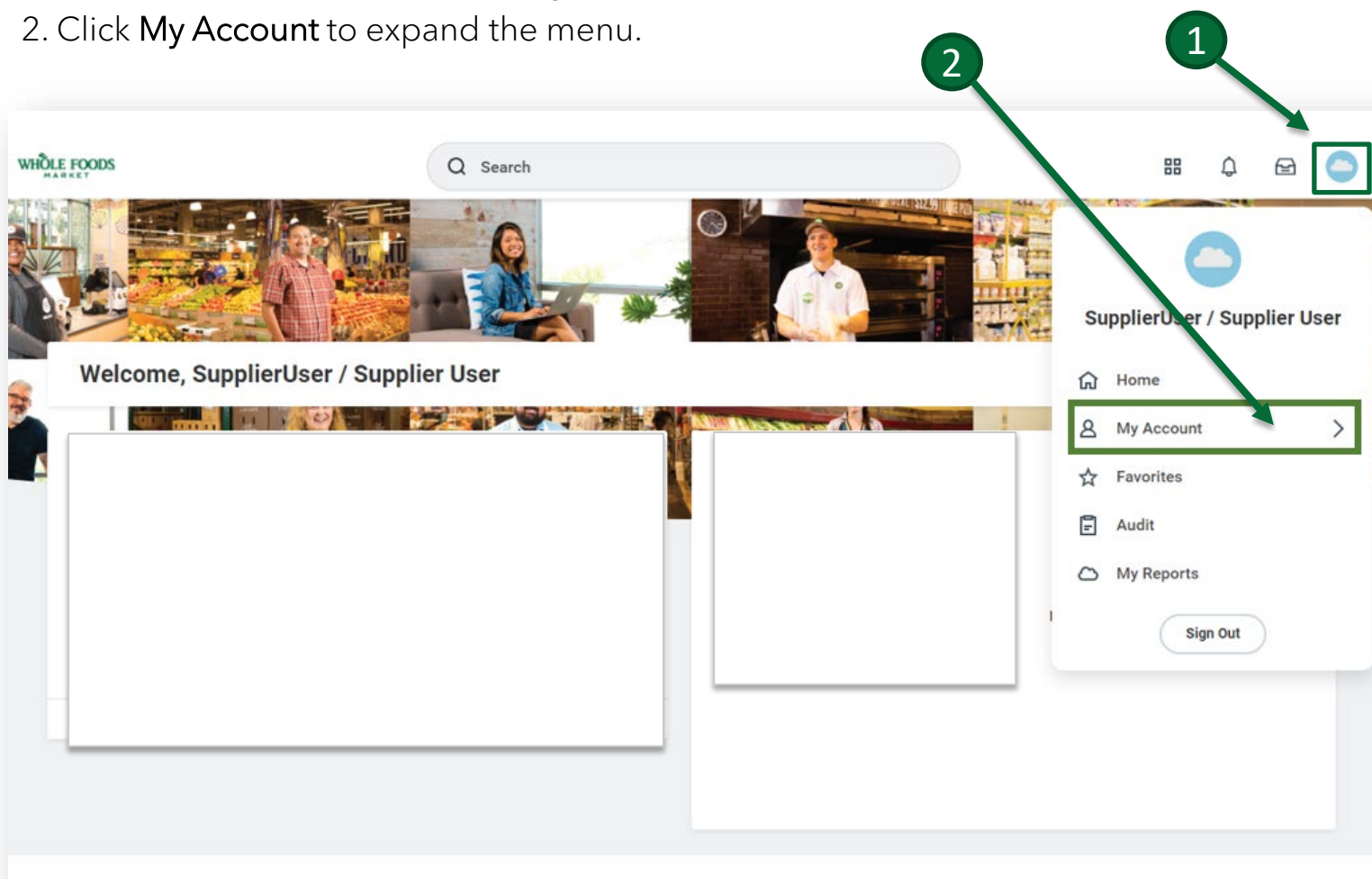


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My Account

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.

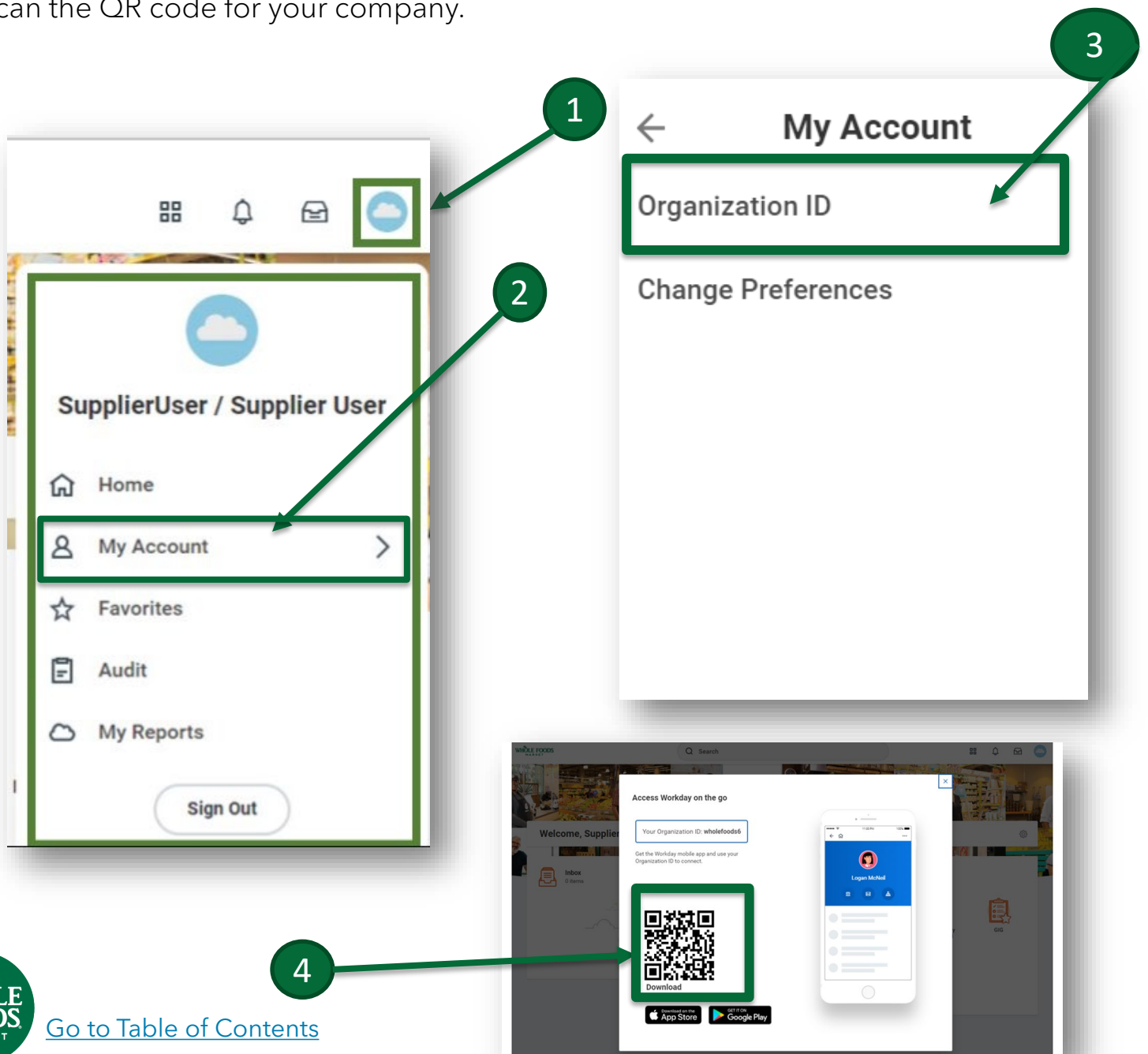


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Organization ID

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.



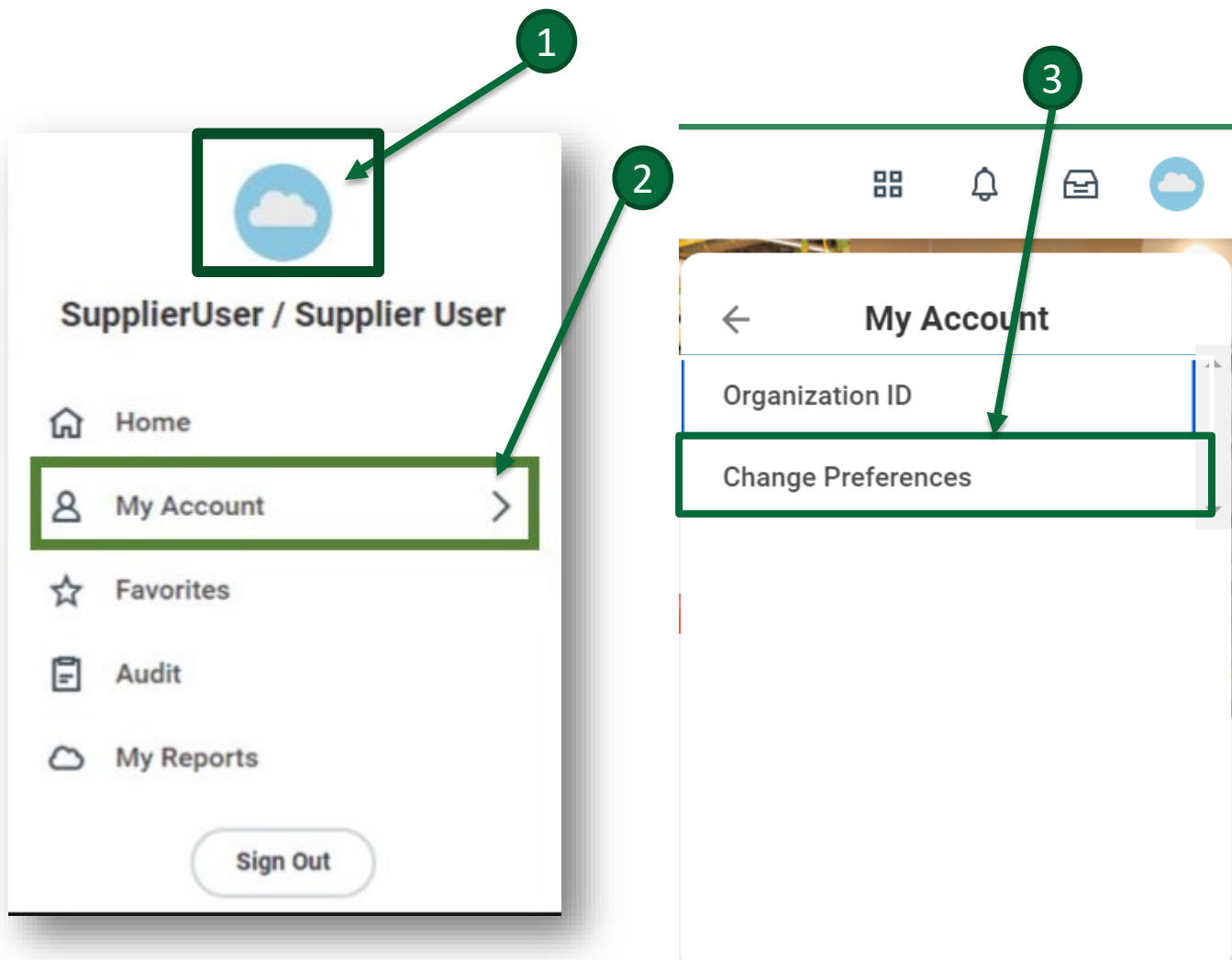
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Change Preferences

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**.



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Change Preferences

continued

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**, users 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.

The screenshot shows the 'Change Preferences' dialog box for a 'SupplierUser / Supplier User'. The dialog is divided into three sections: Global Preferences, Search Preferences, and Account Preferences. Callout 4 points to the 'Global Preferences' section header. Callout 5 points to the 'Preferred Locale' drop-down menu. Callout 6 points to the 'Preferred Display Language' drop-down menu. Callout 7 points to the 'Preferred Hour Clock' drop-down menu. Callout 8 points to the 'Preferred Search Category' field in the 'Search Preferences' section. Callout 9 points to the menu icon in the 'Account Preferences' section. The 'Global Preferences' section includes fields for Default Locale, Preferred Locale, Default Display Language, Preferred Display Language, Default Timezone, Default Hour Clock (from Locale), Preferred Hour Clock, Default Currency, and Preferred Currency. The 'Search Preferences' section includes the Preferred Search Category field. The 'Account Preferences' section includes the Mobile Carrier field. At the bottom are 'OK' and 'Cancel' buttons.



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Change Preferences

continued

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**.

The screenshot displays the 'Workflow Preferences' and 'Background Notification Preferences' sections. The 'Workflow Preferences' section includes fields for 'Email Address for Business Processes', 'Suppress Inbox Exceptions' (with a checkbox), 'Default Inbox Filter' (with a dropdown menu), and 'Opt Out of Absence Third-Party Calendar Integration Events' (with a checkbox). The 'Background Notification Preferences' section includes checkboxes for 'Display a message when a background report completes' and 'Display a message when a shared background report completes'. Below these is the 'Channel' section, which has a sidebar with tabs for 'Email', 'Mobile Push Notification', and 'Pop-up notification'. The 'Email' tab is selected, showing 'Parent Notification Type' as 'HCM' and 'Notification Type' as 'Give Feedback'. There is a 'Frequency' dropdown set to 'Mute' and a menu icon. At the bottom, there are 'OK' and 'Cancel' buttons. Numbered callouts (10-17) point to specific elements: 10 points to the 'Workflow Preferences' header; 11 points to the 'Suppress Inbox Exceptions' checkbox; 12 points to the 'Background Notification Preferences' header; 13 points to the 'Display a message when a background report completes' checkbox; 14 points to the 'Channel' header; 15 points to the 'Email' tab; 16 points to the menu icon in the 'Email' tab; and 17 points to the 'OK' button.

Workflow Preferences

Email Address for Business Processes

Suppress Inbox Exceptions ☐

Default Inbox Filter × Due This Week [?] ⋮

Opt Out of Absence Third-Party Calendar Integration Events ☐

Background Notification Preferences

Display a message when a background report completes ☒

Display a message when a shared background report completes ☒

Channel

Click here to sort

Email

Mobile Push Notification

Pop-up notification

Parent Notification Type HCM

Notification Type Give Feedback

Frequency * × Mute ⋮

OK Cancel

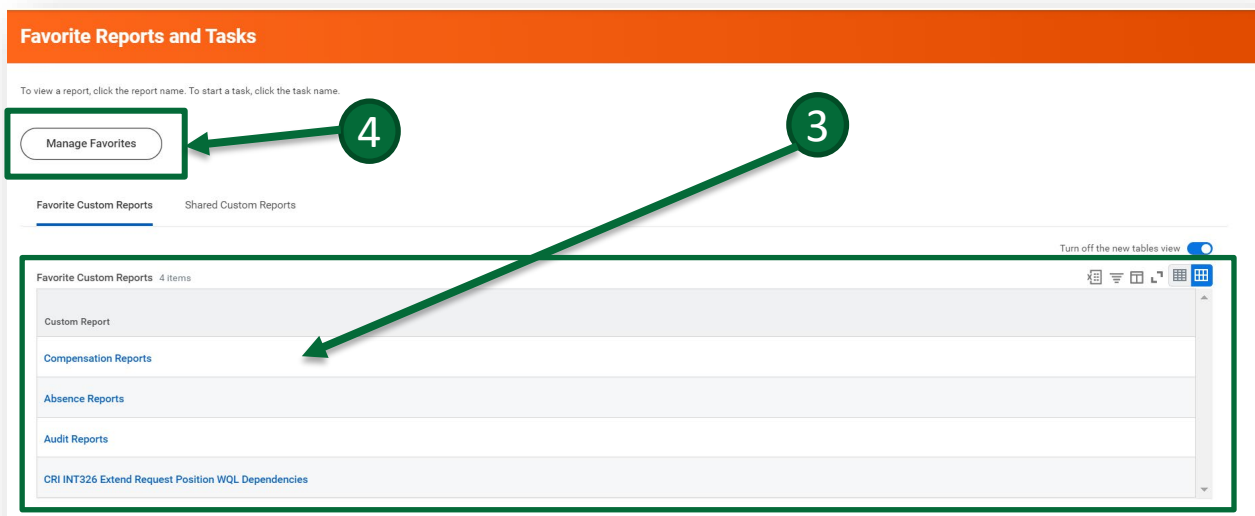
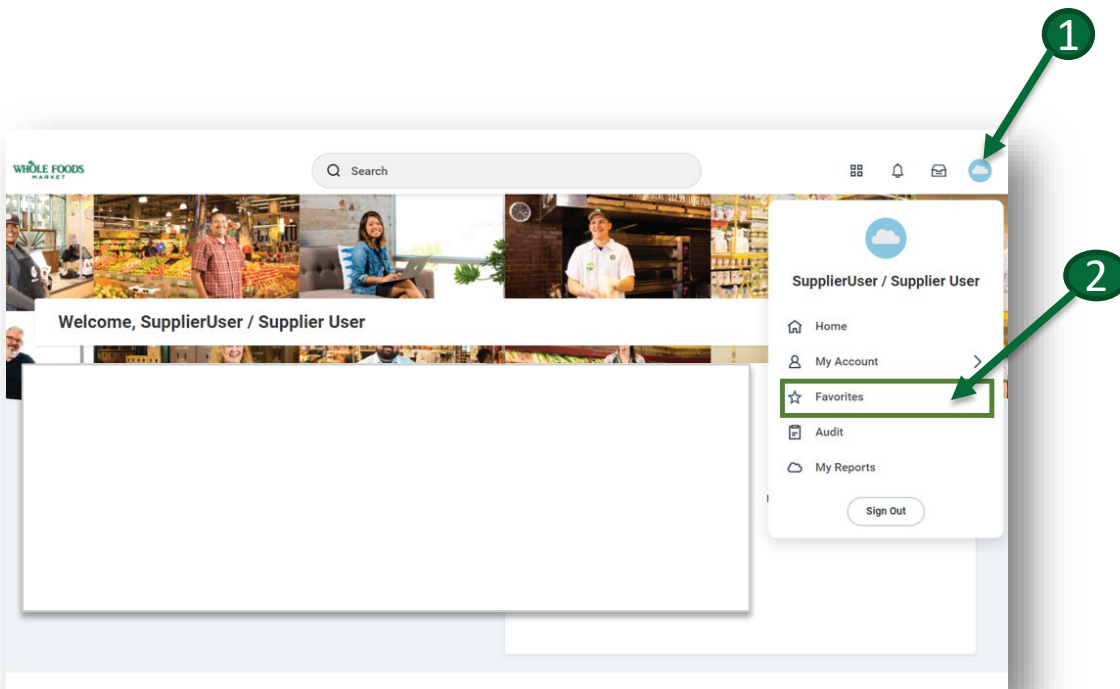


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Favorites

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.

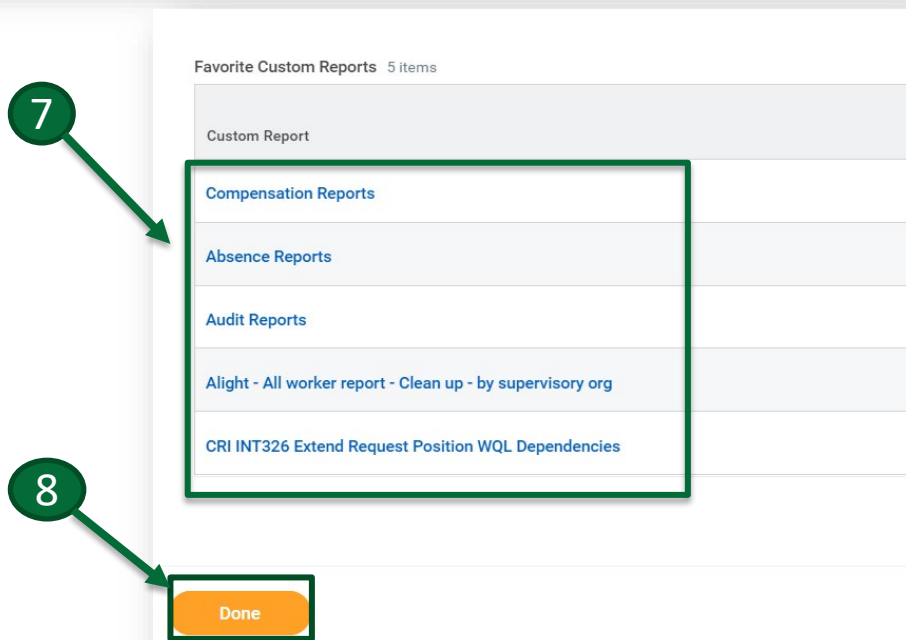
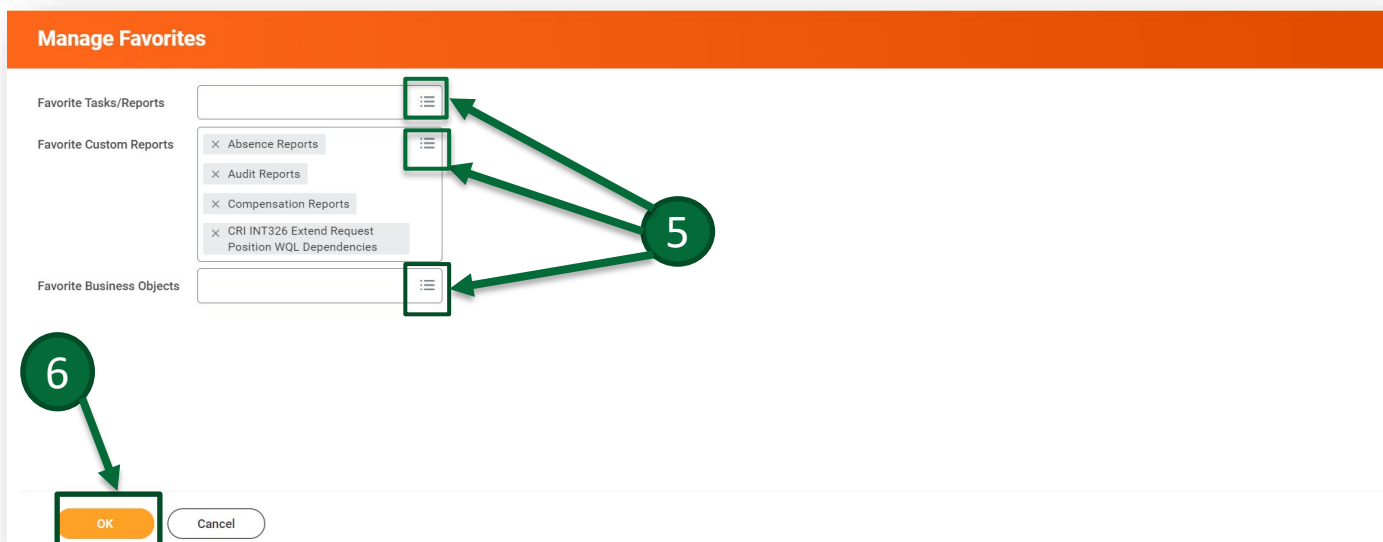


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Favorites

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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**.



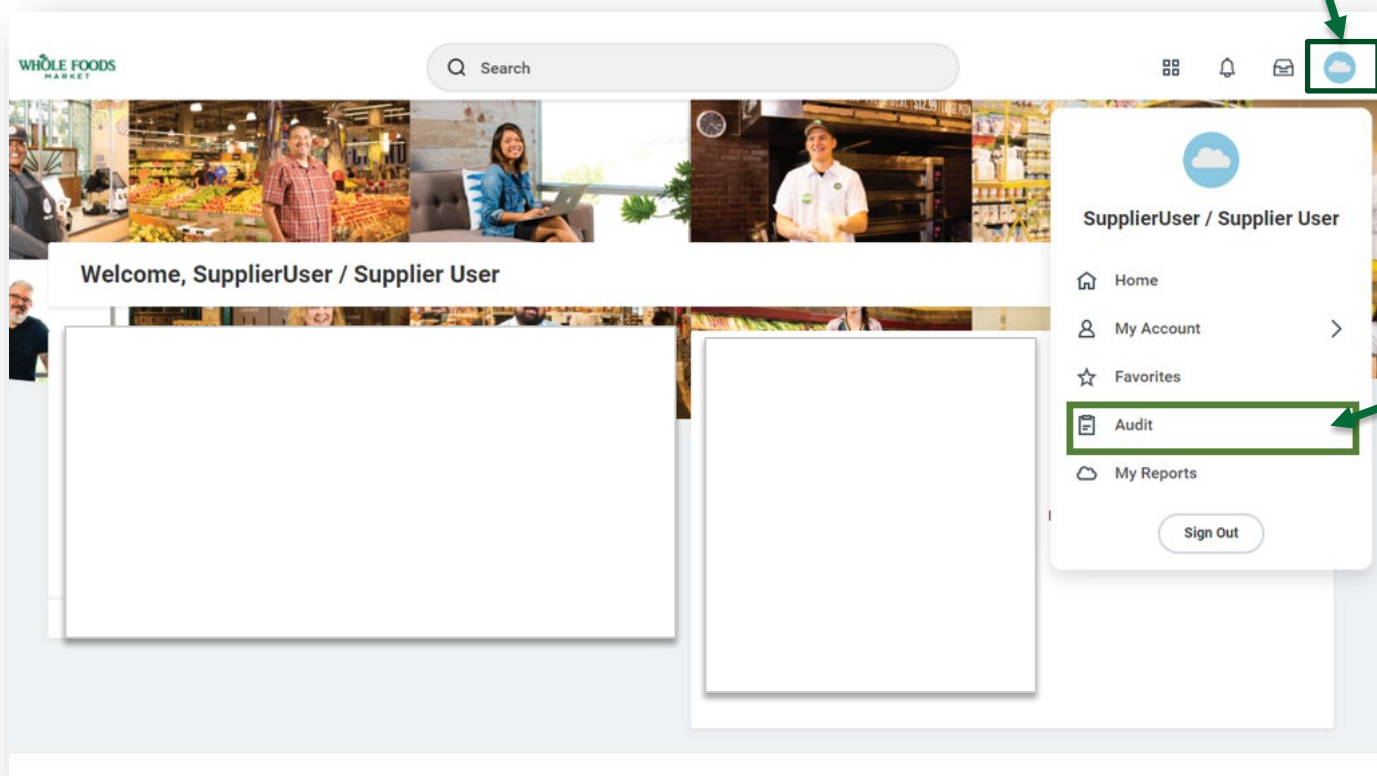
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Audit

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.



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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 in the top right to view the report in a printable version.

The screenshot displays the 'Whole Foods Market' logo in the top left corner. Below it is a search bar with the placeholder text 'Q Search'. The main header bar is orange and contains the text 'Categorized Reports and Tasks for Auditing'. Below the header bar is a large white box with a green border. Inside this box, the text 'Clickable reports and tasks previously initiated will appear here.' is centered. In the top right corner of the interface, there are two icons: a document icon and a PDF icon. Callout 3 points to the main content area, callout 4 points to the document icon, and callout 5 points to the PDF icon.



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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**.

The first screenshot shows the Workday interface with the user profile menu open. The menu items are: Home, My Account, Favorites, Audit, and My Reports. The 'My Reports' item is highlighted with a green box and a green arrow labeled '2'. A green circle labeled '1' points to the profile icon in the top right corner.

The second screenshot shows the 'My Reports' page. The page has an orange header with the title 'My Reports'. Below the header is a table with columns: File Name, Type, File, Created by, and Date and Time Created. The table is empty and displays 'No Data'. Below the table are two buttons: 'More Reports' and 'Process Monitor'. The 'More Reports' button is highlighted with a green box and a green arrow labeled '4'. The 'Process Monitor' button is highlighted with a green box and a green arrow labeled '5'. A green circle labeled '3' points to the 'My Reports' page header.

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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.

The image shows two screenshots from the Workday 'My Reports' interface. The top screenshot is a search window titled 'My Reports' with a close button (X) in the top right. It contains a 'Report Tags' field with a menu icon (three horizontal lines) to its right, a 'Created in Last x Days' field with the value '30', and 'OK' and 'Cancel' buttons at the bottom. Numbered callouts 1 through 4 point to the window border, the menu icon, the 'Created in Last x Days' field, and the 'OK' button respectively. The bottom screenshot shows the 'My Reports' results page. It has an orange header bar with 'My Reports' and a '0/10 101' indicator. Below the header, it states 'This query has a result limit of 10000 records.' and shows 'Report Tags (empty)' and 'Created in Last x Days 60'. A table with 8 columns (File Name, Type, Process, Request Name, Created by, Date and Time Created, Size, Expiration Date) is shown with '0 items'. Below the table is a cloud icon and the text 'No items available.' A callout 5 points to the table area.



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Instructional Guide

My Reports

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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.

The instructional guide shows the following steps:

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.



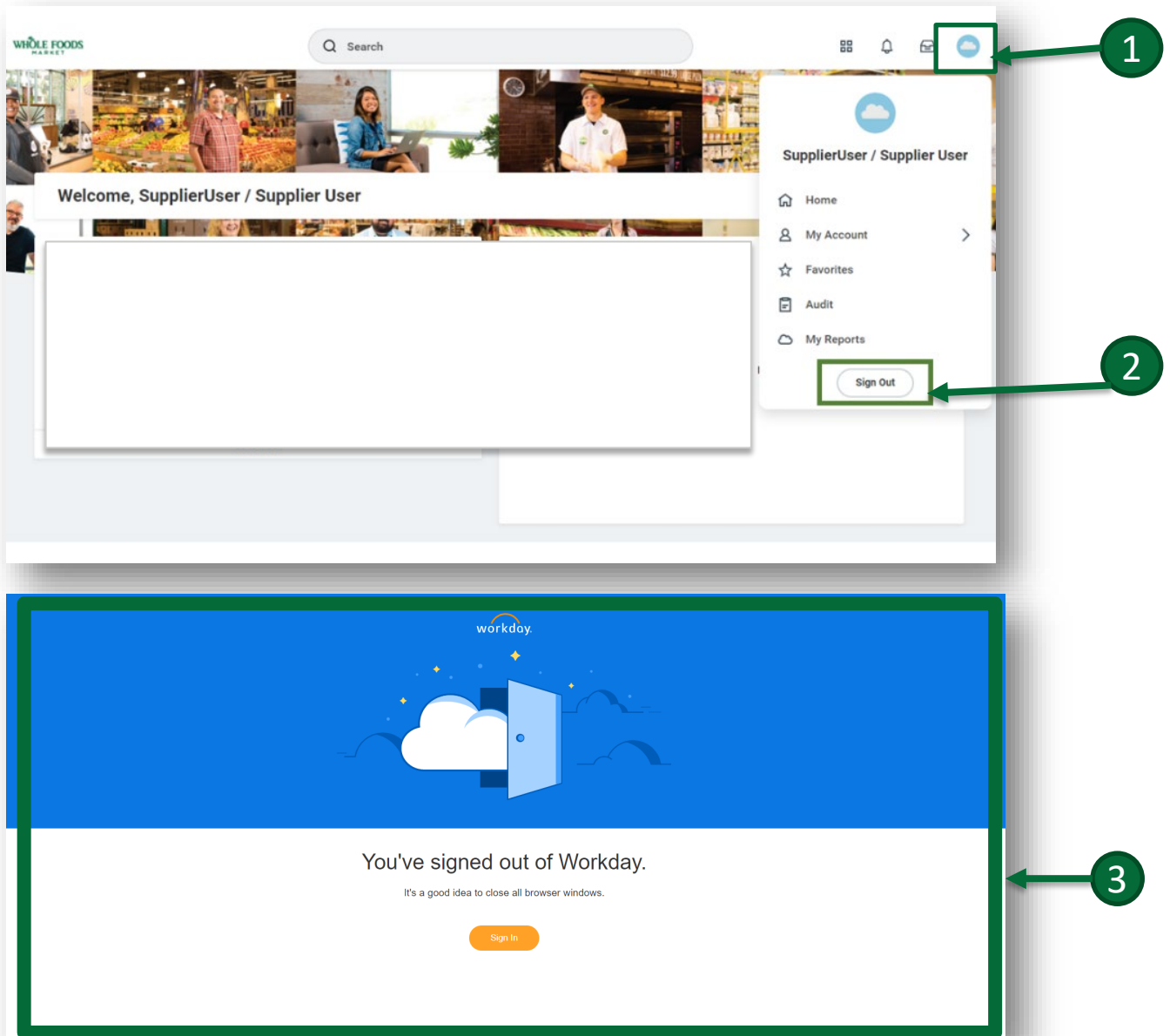
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Sign Out

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.

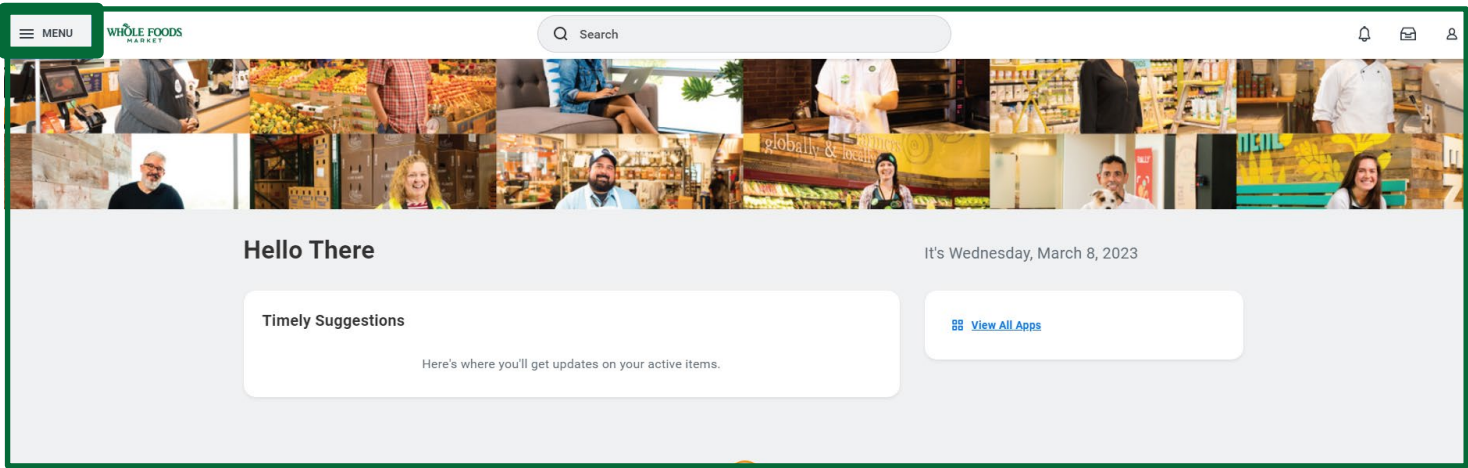


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Navigating Your Applications

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

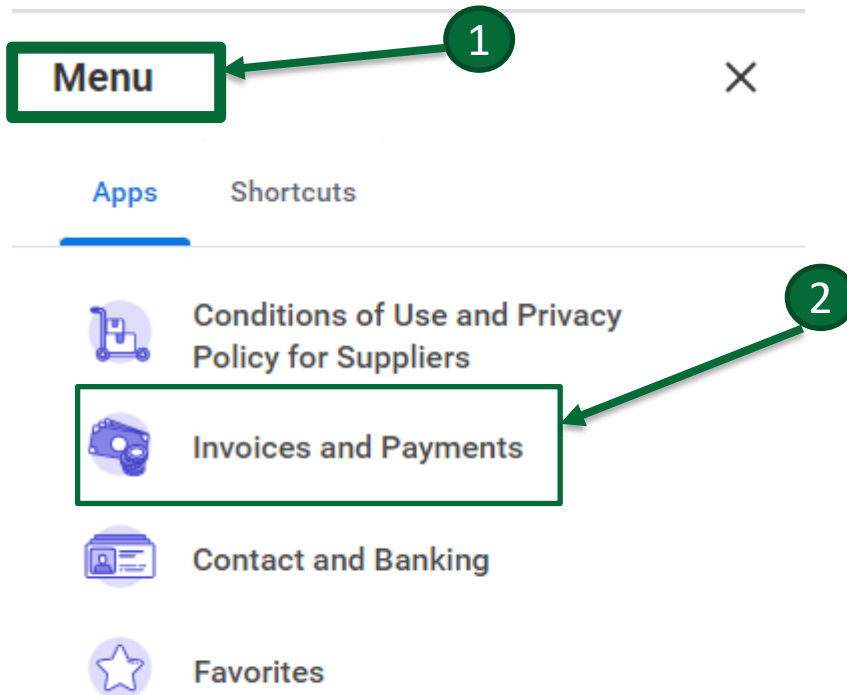


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View Most Recent Invoices and Payments

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.



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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.

The screenshot displays the 'Invoices and Payments' section of the Whole Foods Market Workday interface. At the top, there is a search bar and a navigation menu. The main content area is divided into two panels: 'Most Recent Invoices' on the left and 'Most Recent Payments' on the right. Callout 2 points to the search bar. Callout 3 points to the 'Invoice' column in the 'Most Recent Invoices' table. Callout 4 points to the 'View' button in the 'Most Recent Payments' table.

Most Recent Invoices Table:

Invoice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
SI-0005720		200.00	USD	04/11/2022	Approved	Unpaid
SI-0004122		2,550.00	USD	03/08/2022	Approved	Paid
SI-0004030		2,500.00	USD	02/27/2022	Approved	Unpaid
SI-0004031		2,500.00	USD	02/27/2022	Approved	Unpaid
SI-0003826		2,550.00	USD	02/16/2022	Approved	Unpaid
SI-0003825		2,550.00	USD	02/16/2022	Approved	Unpaid
SI-0003765		700.00	USD	01/31/2022	Draft	Unpaid
SI-0003768		2,550.00	USD	01/31/2022	Approved	Paid
SI-0003766		700.00	USD	01/31/2022	Canceled	Unpaid
SI-0003767		5,200.00	USD	01/31/2022	Approved	Paid

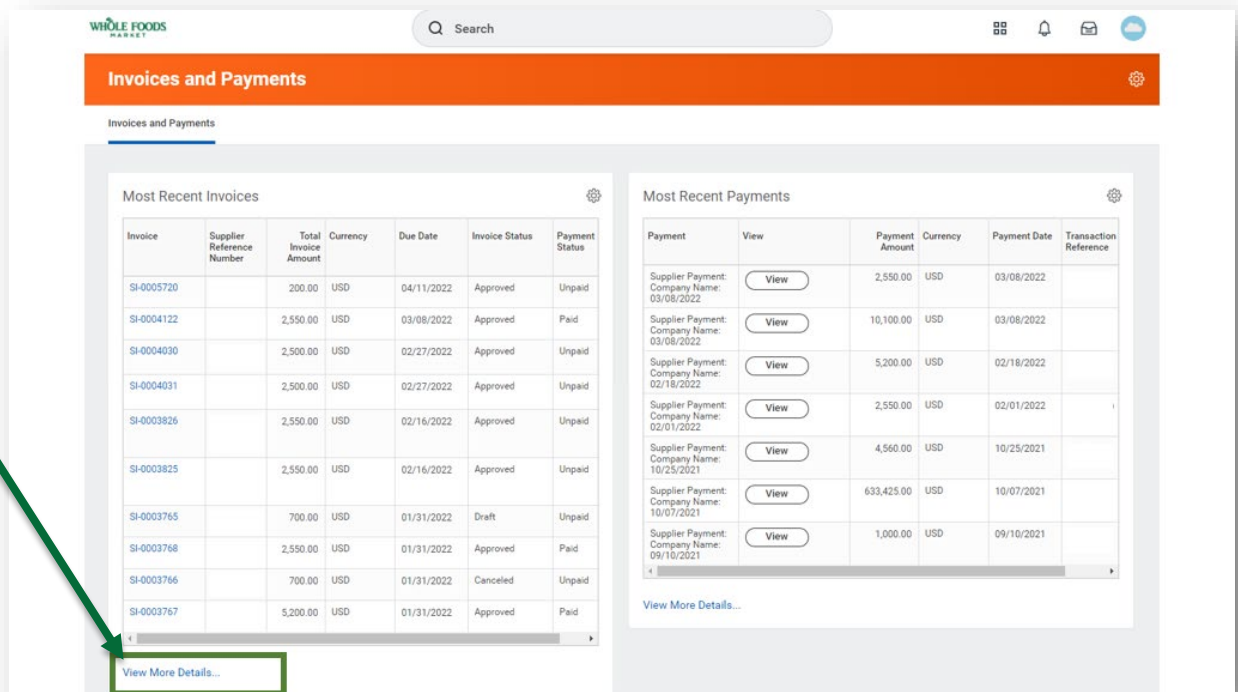
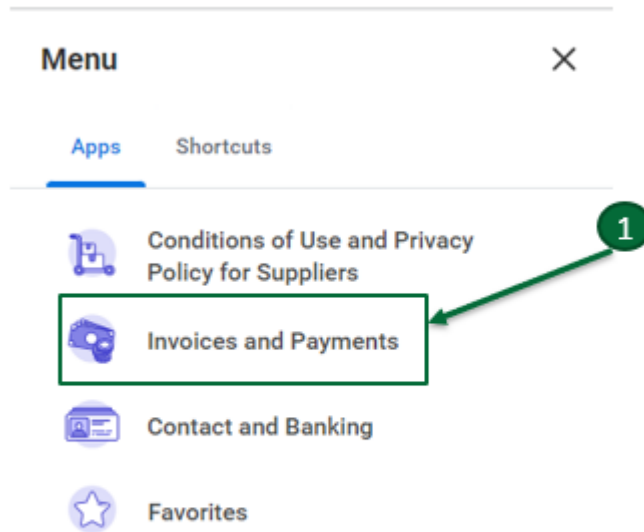
Most Recent Payments Table:

Payment	View	Payment Amount	Currency	Payment Date	Transaction Reference
Supplier Payment: Company Name: 03/08/2022	View	2,550.00	USD	03/08/2022	
Supplier Payment: Company Name: 03/08/2022	View	10,100.00	USD	03/08/2022	
Supplier Payment: Company Name: 02/18/2022	View	5,200.00	USD	02/18/2022	
Supplier Payment: Company Name: 02/01/2022	View	2,550.00	USD	02/01/2022	
Supplier Payment: Company Name: 10/25/2021	View	4,560.00	USD	10/25/2021	
Supplier Payment: Company Name: 10/07/2021	View	633,425.00	USD	10/07/2021	
Supplier Payment: Company Name: 09/10/2021	View	1,000.00	USD	09/10/2021	

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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.

The screenshot shows a search box titled "Find Invoices for Supplier Contact". It contains several input fields and menu icons. Numbered callouts point to specific elements: 3 points to the search box title; 4 points to the "Invoice Due Date On or After" field; 5 points to the calendar icon for the "Invoice Due Date On or After" field; 6 points to the "Invoice Due Date On or Before" field; 7 points to the "Invoice Number" field; 8 points to the "Supplier Reference Number" field; 9 points to the "Invoice Status" field; 10 points to the "Payment Status" field; 11 points to the "OK" button. The "Invoice Due Date On or After" field contains the date "04/09/2022" and a calendar icon. The "Invoice Due Date On or Before" field contains the placeholder "MM/DD/YYYY" and a calendar icon. The "Invoice Number" field is empty. The "Supplier Reference Number" field is empty. The "Invoice Status" field has a menu icon. The "Payment Status" field has a menu icon. The "OK" button is orange and the "Cancel" button is white.

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**.

Whole Foods Market on Workday


Instructional Guide


Find Specific Invoices

continued

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

13

Find Invoices for Supplier Contact 


Invoice Due Date On or After 03/19/2022 

Turn on the new tables view ☐

Invoice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
SI-0005720	mr.4.11	200.00	USD	04/11/2022	Approved	Unpaid

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

Find Invoices for Supplier Contact 

Invoice Due Date On or After 03/19/2022

1 item

Invoice	Supplier Reference Number
SI-0005720	mr.4.11



Whole Foods Market on Workday Instructional Guide

Find Specific Invoices continued

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.

Supplier Invoice

Invoice Number

SI-0005720

Status

Approved

Invoice Information

Company

B201 Whole Foods Market Services, Inc.

Supplier

Company Name

Currency

USD

Invoice Date

04/11/2022

Invoice Received Date

(empty)

Total Invoice Amount

200.00

Line Total Amount

200.00

Payment Practices

No

Terms and Taxes

Payment Terms

NET 0

Due Date

04/11/2022

Reference Type

(empty)

Reference Number

(empty)

Tax Amount

0.00

Default Tax Option

Enter Tax Due to Supplier

Default Tax Code

(empty)

Invoice Reference Information

Ship-To Address

550 Bowie Street Austin, TX 78703-0074 United States of America

Supplier's Invoice Number

(empty)

Document Link

(empty)

Invoice Lines

Tax

Invoice Lines

Tax

Invoice Lines 1 item

Company	Item	Item Description	Supplier Item Identifier	Related Purchase Item	Spend Category	Ship-To Address	Ship-To Contact	Tax
B201 Whole Foods Market Services, Inc.					Supplies - Other 00279	550 Bowie Street Austin, TX 78703-0074 United States of America		<div>Tax Applicability Vertex</div> <div>Tax Code</div> <div>Withholding Tax Code</div>

WHOLE FOODS MARKET

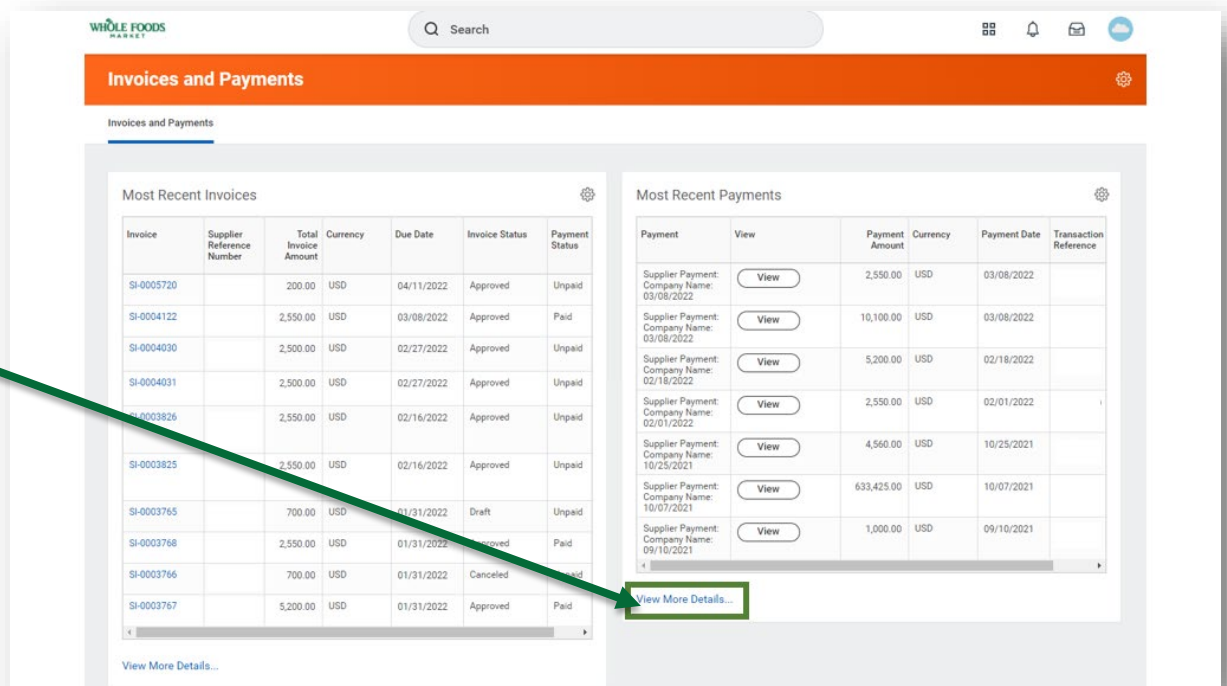
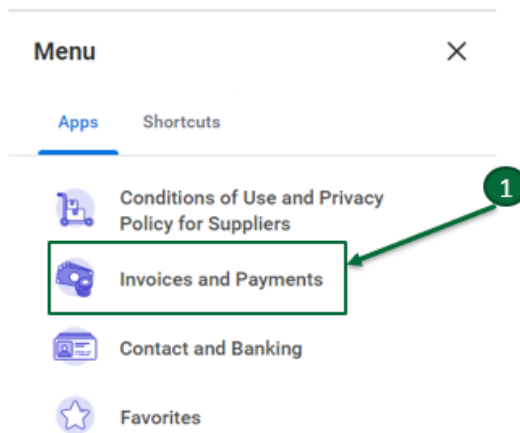
[Go to Table of Contents](#)



Whole Foods Market on Workday Instructional Guide

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.



Whole Foods Market on Workday

Instructional Guide

Find Specific Payment Information

continued

The image shows a 'Find Specific Payment Information' dialog box with the following fields and callouts:

- 3**: Points to the 'Payment Date On or After' field, which includes a date input 'MM/DD/YYYY' and a calendar icon.
- 4**: Points to the 'Payment Date On or Before' field, which includes a date input 'MM/DD/YYYY' and a calendar icon.
- 5**: Points to the 'Menu icon' (three horizontal lines) for the 'Payment Types' field.
- 6**: Points to the 'Menu icon' for the 'Payment Status' field.
- 7**: Points to the 'Menu icon' for the 'Payment Currency' field.
- 8**: Points to the 'Payment Amount Equal To' input field, which contains the value '0'.
- 9**: Points to the 'Payment Amount Greater Than' input field, which contains the value '0'.
- 10**: Points to the 'Payment Amount Less Than' input field, which contains the value '0'.
- 11**: Points to the 'Supplier Reference Number' input field.
- 12**: Points to the 'Transaction Reference' input field.
- 13**: Points to the 'OK' button.

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 **Menu 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**.

Whole Foods Market on Workday Instructional Guide

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.

Find Payments for Supplier Contact

7 items

Payment	View	Payment Amount	Currency	Payment Date	Payment Type	Transaction Reference	Payment Status	Reconciliation Status	Invoices	Remittance File
Supplier Payment: Company Name: 03/08/2022	View	2,550.00	USD	03/08/2022	Check		Complete	Unreconciled	1	
Supplier Payment: Company Name: 03/08/2022	View	10,100.00	USD	03/08/2022	Check		Awaiting Settlement	Unreconciled	4	
Supplier Payment: Company Name: 02/18/2022	View	5,200.00	USD	02/18/2022	Check		Complete	Unreconciled	1	
Supplier Payment: Company Name: 02/01/2022	View	2,550.00	USD	02/01/2022	Check		Complete	Unreconciled	1	
Supplier Payment: Company Name: 10/25/2021	View	4,560.00	USD	10/25/2021	Check		Complete	Unreconciled	1	
Supplier Payment: Company Name: 10/07/2021	View	633,425.00	USD	10/07/2021	Check		Awaiting Settlement	Unreconciled	10	
Supplier Payment: Company Name: 09/10/2021	View	1,000.00	USD	09/10/2021	Check		Complete	Unreconciled	1	

View Payment for Supplier Contact

Supplier Payment: Supplier Payment: Company Name: 03/08/2022 Status: Complete Reconciliation Status: Unreconciled

Payment Information

Company: B201 Whole Foods Market Services, Inc.

Payee: Company Name

Payment Date: 03/08/2022

Payment Amount: 2,550.00

Currency: USD

Memo: (empty)

Payment Detail

Bank Account: JP Morgan Chase

Payment Type: Check

Transaction Reference: 73

Invoices Paid: 1 item

Invoice	Invoice Date	Supplier's Invoice Number	Invoice Amount	Discount Due Date	Invoice Due Date	Discount Taken	Payment Amount
Q	03/08/2022		2,550.00		03/08/2022	0.00	2,550.00



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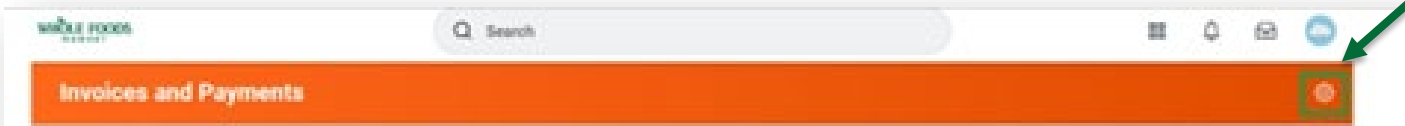
Whole Foods Market on Workday

Instructional Guide

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.

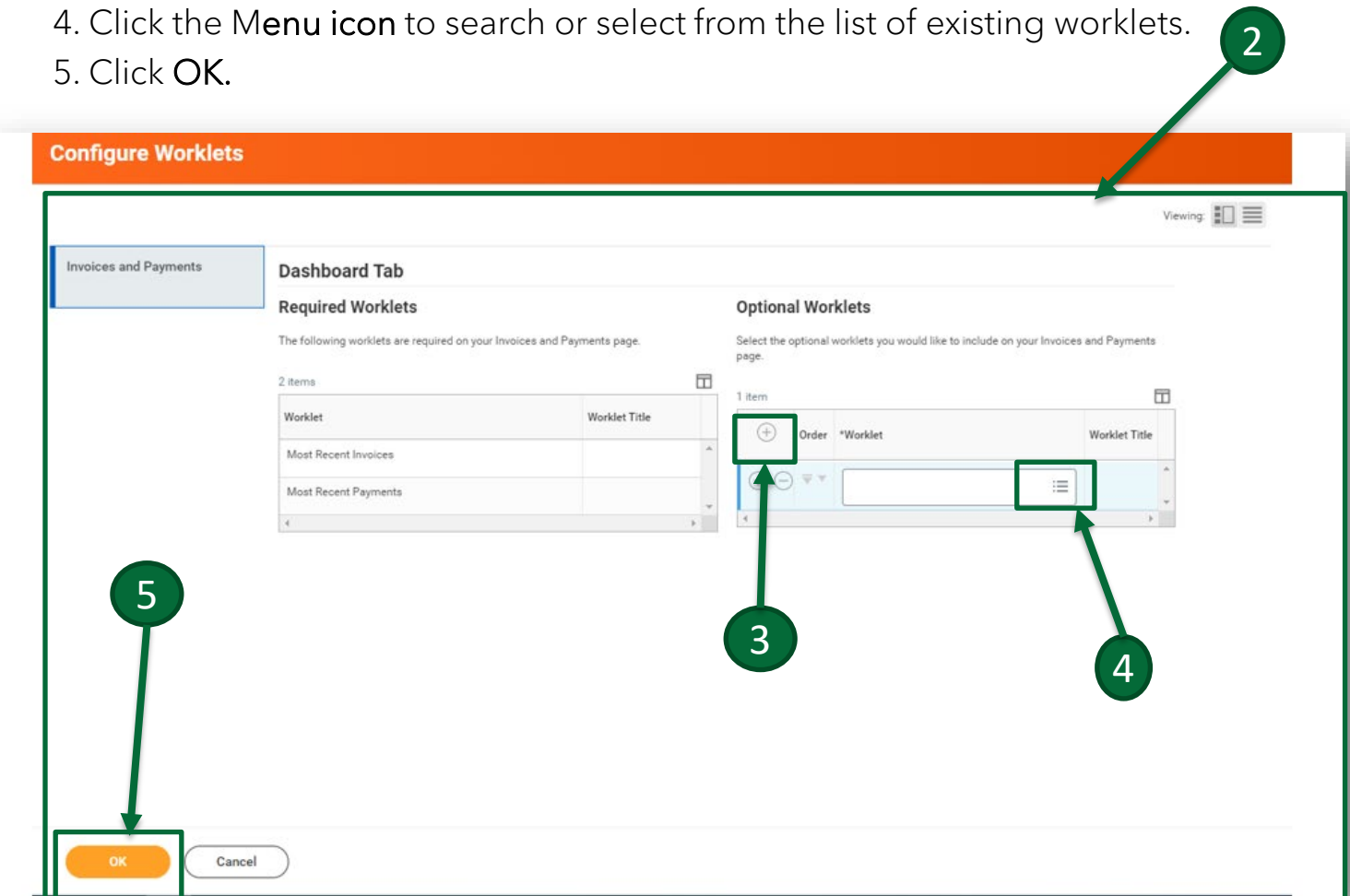


2. Once you click the Gear icon, select optional worklets you would like to include on the Invoices and Payments worklet.

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**.



Whole Foods Market on Workday Instructional Guide

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**.

The screenshot shows the 'Invoices and Payments' Worklet interface. At the top, there is an orange header bar with the title 'Invoices and Payments' and a gear icon on the right. Below the header, there are two main sections: 'Most Recent Invoices' and 'Most Recent Payments'. The 'Most Recent Invoices' section contains a table with columns: Invoice, Supplier Reference Number, Total Invoice Amount, Currency, Due Date, Invoice Status, and Payment Status. The 'Most Recent Payments' section contains a table with columns: Supplier Payment, Company Name, Payment Amount, Currency, Payment Date, and Transaction Reference. Both tables have a 'View' button next to each row. A callout box (6) is positioned over the gear icon in the 'Most Recent Invoices' section, showing a dropdown menu with options 'Show Chart' and 'Download to Excel'. A callout box (7) is positioned over the 'Show Chart' button in the same dropdown menu.

Invoices and Payments

Invoices and Payments

Most Recent Invoices

Invoice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
SI-0005720		200.00	USD	04/11/2022	Approved	Unpaid
SI-0004122		2,550.00	USD	03/08/2022	Approved	Paid
SI-0004030		2,500.00	USD	02/27/2022	Approved	Unpaid
SI-0004031		2,500.00	USD	02/27/2022	Approved	Unpaid
SI-0003826		2,550.00	USD	02/16/2022	Approved	Unpaid
SI-0003825		2,550.00	USD	02/16/2022	Approved	Unpaid
SI-0003765		700.00	USD	01/31/2022	Draft	Unpaid
SI-0003768		2,550.00	USD	01/31/2022	Approved	Paid
SI-0003766		700.00	USD	01/31/2022	Canceled	Unpaid
SI-0003767		5,200.00	USD	01/31/2022	Approved	Paid

[View More Details...](#)

Most Recent Payments

Supplier Payment	Company Name	Payment Amount	Currency	Payment Date	Transaction Reference
Supplier Payment: 03/08/2022		2,550.00	USD	03/08/2022	
Supplier Payment: 03/08/2022		10,100.00	USD	03/08/2022	
Supplier Payment: 02/18/2022		5,200.00	USD	02/18/2022	
Supplier Payment: 02/01/2022		2,550.00	USD	02/01/2022	
Supplier Payment: 10/25/2021		4,560.00	USD	10/25/2021	
Supplier Payment: 10/07/2021		633,425.00	USD	10/07/2021	
Supplier Payment: 09/10/2021		1,000.00	USD	09/10/2021	

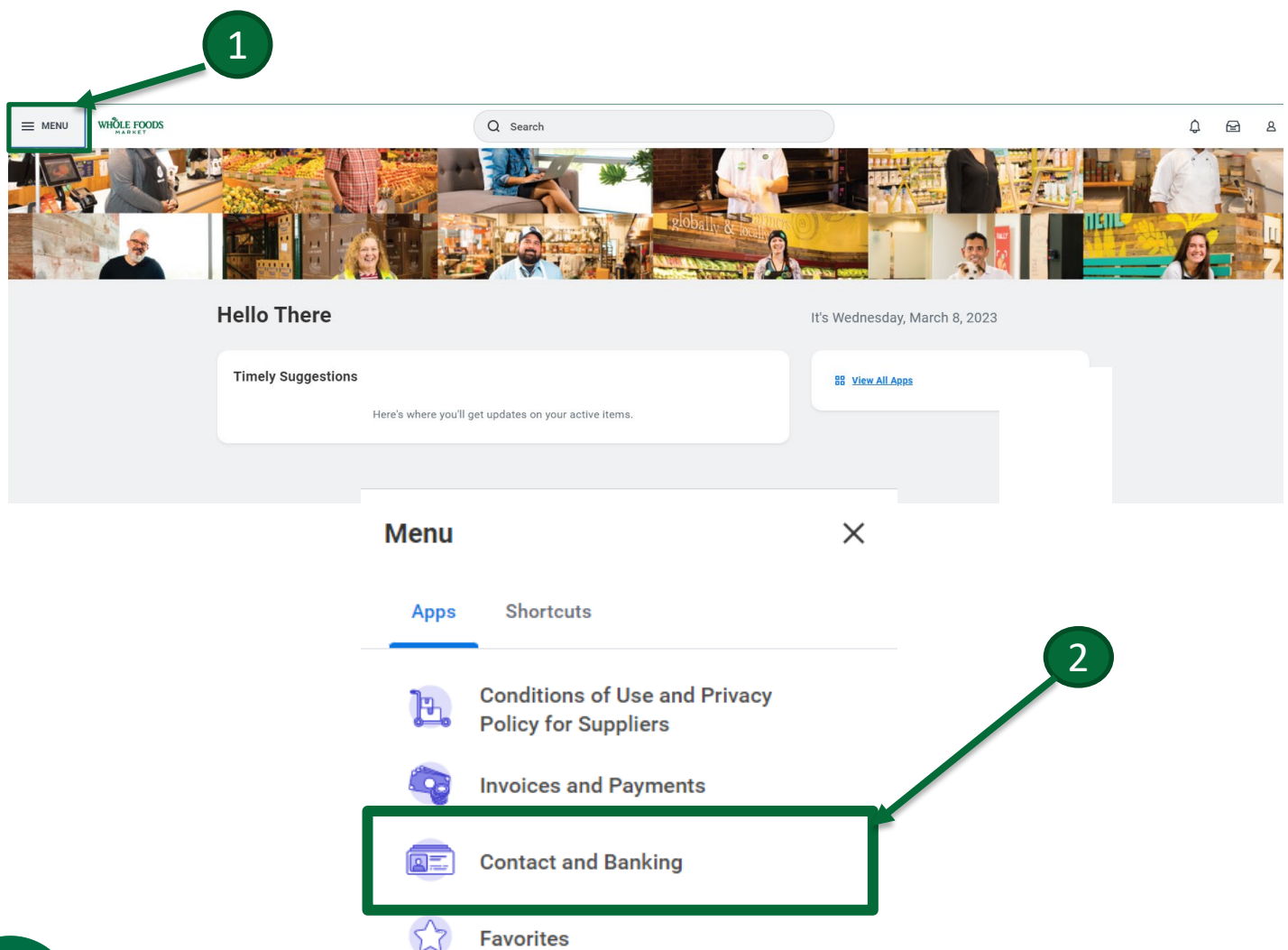
[View More Details...](#)

Whole Foods Market on Workday Instructional Guide

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

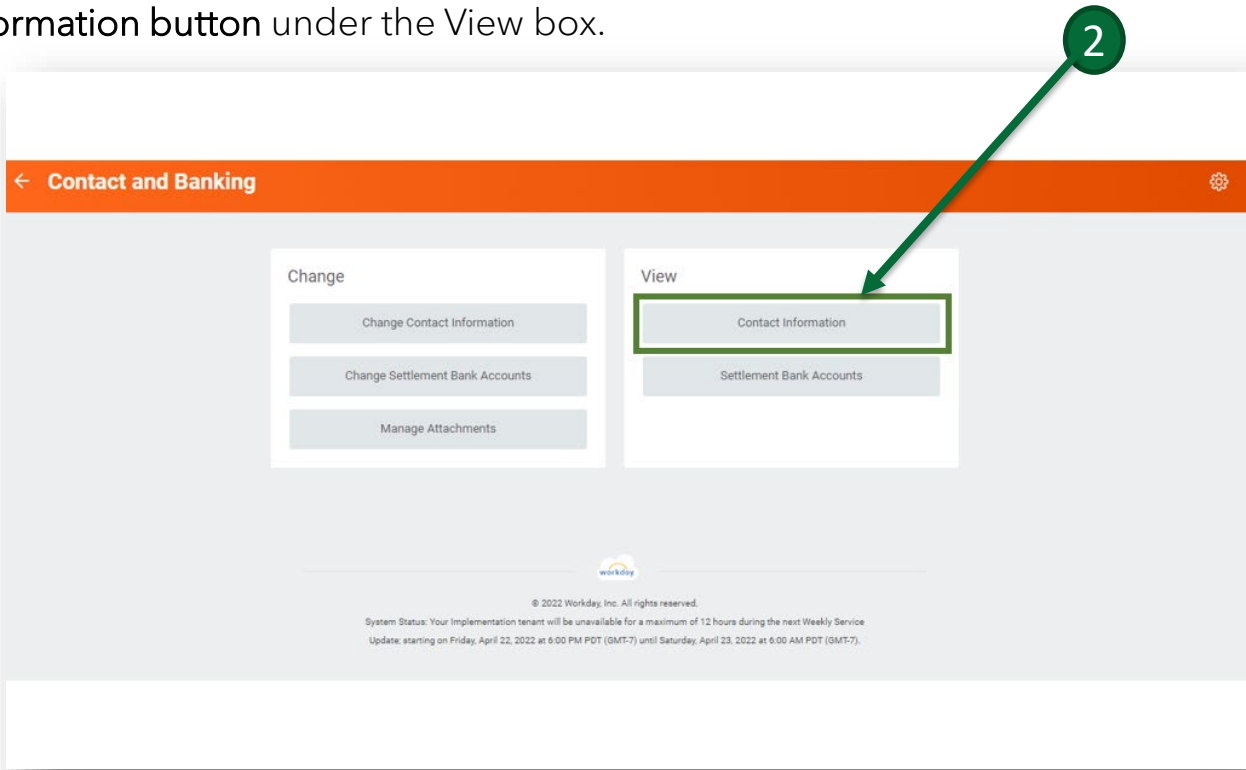


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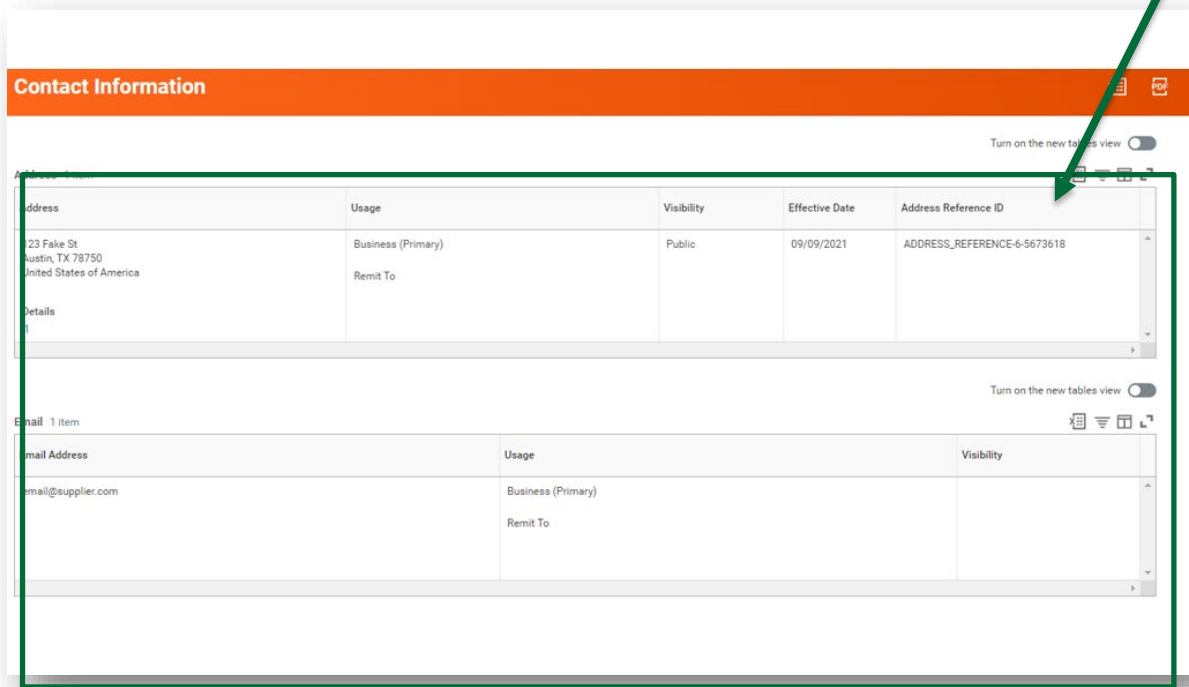
Whole Foods Market on Workday Instructional Guide

View Contact Information

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



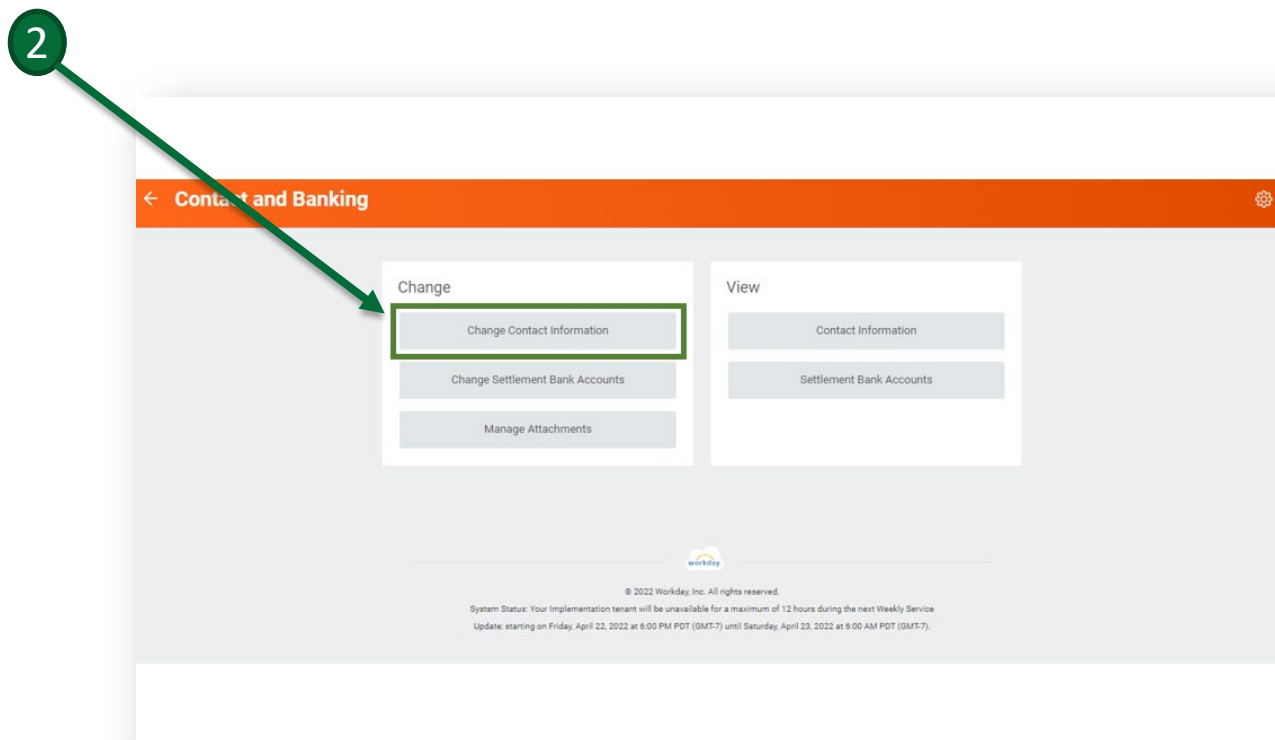
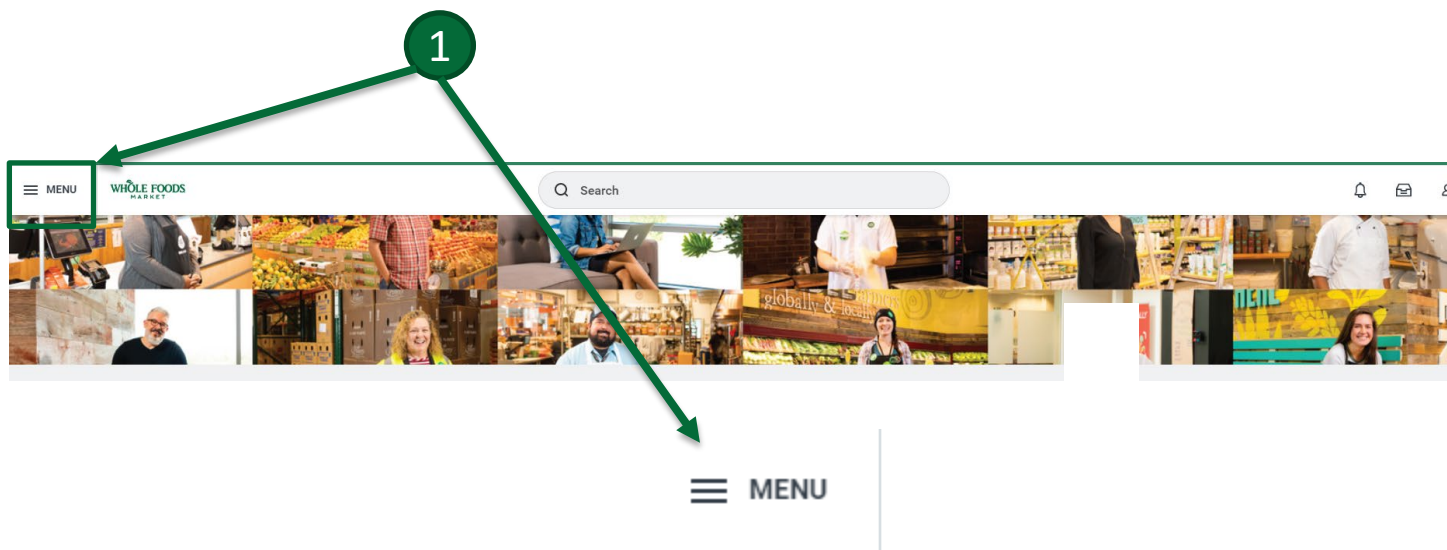
3. View the contact information.



Whole Foods Market on Workday Instructional Guide

Change or Add Contact Information

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



Whole Foods Market on Workday

Instructional Guide

Change or Add Contact Information

continued

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

Change Contact Information

Click OK to create a draft change request.

Supplier Company Name

Turn on the new tables view

Address 1 item

Address	Usage	Visibility	Effective Date
123 Fake St Austin, TX 78750 United States of America	Business (Primary) Remit To	Public	09/09/2021

Details
1

Turn on the new tables view

Email 1 item

Email Address	Usage	Visibility
email@supplier.com	Business (Primary) Remit To	

OK Cancel

3



Whole Foods Market on Workday Instructional Guide

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](#).

Whole Foods Market on Workday Instructional Guide

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](#).

6

Change has been Submitted

Failure to follow the instruction(s) below will require review by Wholefoods and could delay payment:
1. At least one active Remit To Address is required.

Contact Information Change Event [Contact Information Change for Company Name - created by Supplier User on 04/19/2022](#)

Status In Progress

Supplier Company Name

Contact Information

Address 1 item

Address	Usage	Visibility	Effective Date	Address Reference ID
(Updated) 1234 Fake St Austin, TX 78750 United States of America	Business (Primary) Remit To	Public	09/09/2021	ADDRESS_REFERENCE-6-5673618

Details
1

Email 1 item

Email Address	Usage	Visibility
Done	Business (Primary)	

7

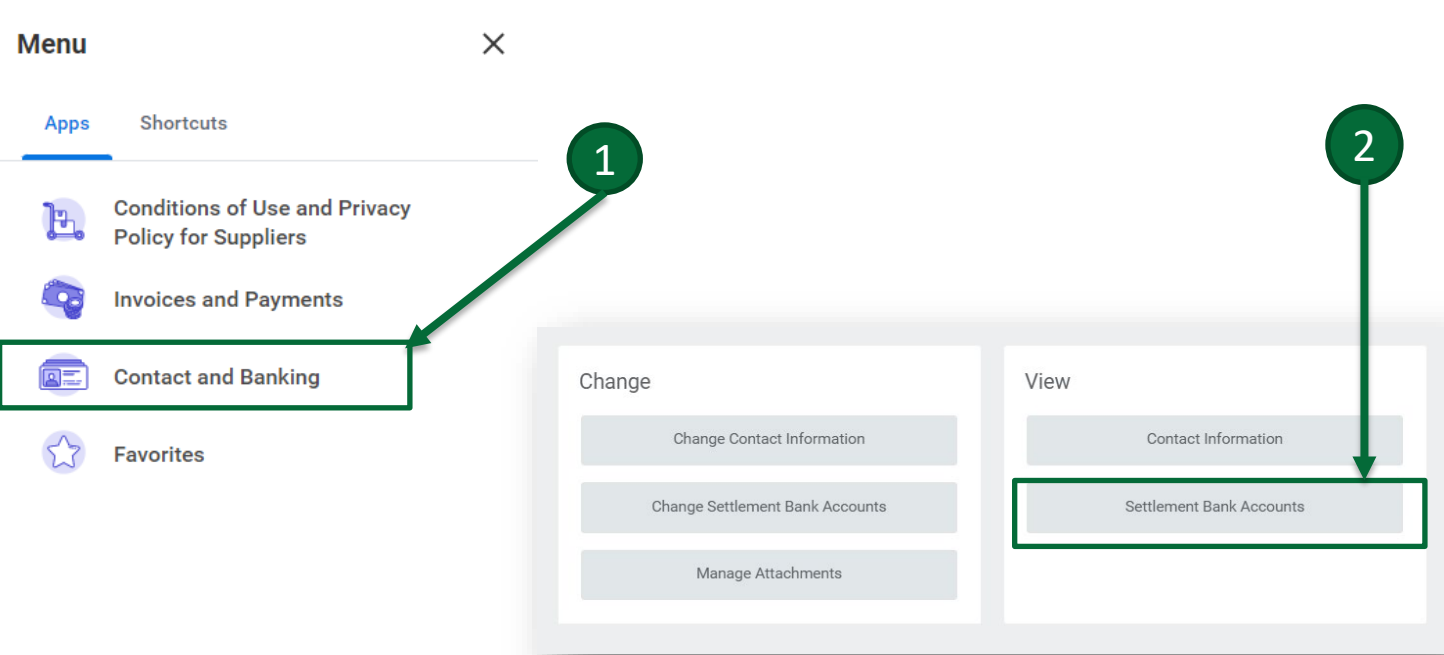


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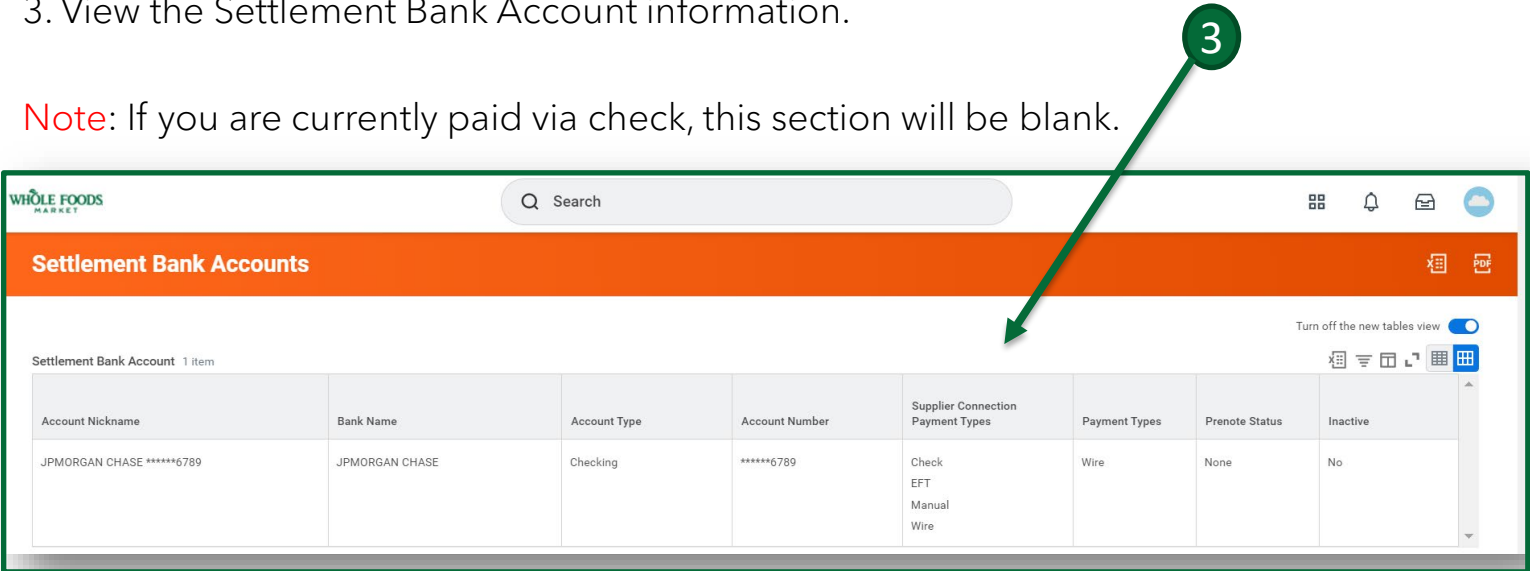
View Settlement Bank Information

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.



Whole Foods Market on Workday Instructional Guide

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.

The composite image illustrates the process of changing settlement bank information. It features four main components:

- Menu Dropdown:** A screenshot of the 'Menu' dropdown with 'Contact and Banking' highlighted. A green circle with the number '1' points to this menu item.
- Change Settlement Bank Accounts Button:** A button labeled 'Change Settlement Bank Accounts' is highlighted with a green box. A green circle with the number '2' points to this button.
- Change Settlement Bank Account Form:** A screenshot of the 'Change Settlement Bank Account' form. A green circle with the number '3' points to the 'OK' button at the bottom left of the form.
- Change Settlement Bank Account Confirmation Dialog:** A screenshot of a confirmation dialog box titled 'Change Settlement Bank Account'. A green circle with the number '3.5' points to the 'OK' button at the bottom of the dialog.



Whole Foods Market on Workday Instructional Guide

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 Settlement Bank Account

Failure to follow the instruction(s) below will require review by Wholefoods and could delay payment:

1. EFT is the primary accepted payment method at this time.
2. Please check the "Requires Prenote" checkbox for any new settlement accounts or changes to existing settlement accounts.
3. Canadian Suppliers: If you are paid electronically, a valid bank address is required.

Change Event Settlement Account Change for Company Name - created by Supplier User on 04/19/2022 Status Draft

Supplier Company Name

Settlement Bank Accounts Attachments

Settlement Bank Accounts 1 item

Settlement Bank Account	*Account Information	Account Details	Intermediary Bank Accounts
	<p>Account Nickname</p> <p>Account Type *</p> <p>Supplier Connection Payment Types</p> <p>Checking (selected)</p> <p>Savings</p> <p>Check (selected)</p> <p>EFT</p>	<p>Country *</p> <p>United States of America</p> <p>Routing Transit Number *</p> <p>111000614</p> <p>Bank Name *</p> <p>JPMORGAN CHASE</p> <p>Bank Identification Code</p>	

Submit Save for Later Cancel

Change Settlement Bank Account

- Failure to follow the instruction(s) below will require review by Wholefoods and could delay payment:
1. EFT is the primary accepted payment method at this time.
 2. Please check the "Requires Prenote" checkbox for any new settlement accounts or changes to existing settlement accounts.
 3. 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.



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Whole Foods Market on Workday Instructional Guide

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.

The screenshot shows the 'Settlement Bank Accounts' form in Workday. The form is divided into several sections: 'Settlement Bank Account', '*Account Information', 'Account Details', and 'Intermediary Bank Accounts'. The 'Settlement Bank Account' section has a table with one row. The '*Account Information' section contains fields for 'Account Nickname', 'Account Type' (with radio buttons for 'Checking' and 'Savings'), 'Supplier Connection Payment Types' (with a menu icon), and 'Payment Types' (with a menu icon). The 'Account Details' section contains fields for 'Country' (with a menu icon), 'Routing Transit Number', 'Bank Name', 'Bank Identification Code', 'Account Number', 'Bank Instructions', and 'Bank Address'. The 'Intermediary Bank Accounts' section has a table with one row. Numbered callouts 1-9 point to the following fields and buttons: 1. Account Nickname, 2. Checking button, 3. EFT button in Supplier Connection Payment Types, 4. EFT button in Payment Types, 5. Requires Prenote button, 6. Country menu icon, 7. Routing Transit Number field, 8. Bank Name field, 9. Account Number field. A red box with the text '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)' is located at the bottom left. A callout 5 points to the Requires Prenote button in the 'Payment Types' section.

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)

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Whole Foods Market on Workday Instructional Guide

Change or Add Settlement Bank Information continued

10. Click **Submit**.

The screenshot shows the 'Settlement Bank Accounts' form in Workday. The form is divided into several sections: 'Settlement Bank Account' (with a plus icon), '*Account Information' (with radio buttons for EFT, Manual, and Wire), 'Account Details' (with fields for Account Number and Bank Instructions), and 'Intermediary Bank Accounts'. There are also checkboxes for 'Payment Types', 'For Supplier Connections Only', 'Requires Prenote', 'Prenote Payment Type', 'Inactive', and 'Delete'. At the bottom, there are three buttons: 'Submit' (highlighted with a green box and a green circle with the number 10), 'Save for Later', and 'Cancel'.

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.

The screenshot shows a 'Change has been Submitted' banner at the top of the page. Below the banner, there is a section titled 'Change Event' with the text 'Settlement Account Change for Company Name - created by Supplier User on 04/19/2022'. The status is 'In Progress' and the supplier is 'Company Name'. Below this, there is a table titled 'Settlement Bank Accounts' with 1 item. The table has columns for Account Nickname, Bank Name, Account Type, Account Number, Supplier Connection Payment Types, Payment Types, Prenote Status, and Inactive. The table shows a single row for JPMORGAN CHASE *****6789. At the bottom, there is a 'Done' button (highlighted with a green box and a green circle with the number 12).

Account Nickname	Bank Name	Account Type	Account Number	Supplier Connection Payment Types	Payment Types	Prenote Status	Inactive
JPMORGAN CHASE *****6789	JPMORGAN CHASE	Checking	*****6789	Check EFT Manual Wire	Wire	None	No



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Whole Foods Market on Workday Instructional Guide

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.

Step 1: Click **Cancel** on the "Change Settlement Bank Account" dialog box.

Step 2: Click **Restore** on the "Your Session Has Been Recovered" pop-up message.

Step 3: Click the **Profile icon** (cloud icon) on the top right of the screen.

Step 4: Click **Recovery Assistant** in the side menu.

Step 5: Click the **change** (Change Contact Information) that is in progress in the Recovery Assistant screen.

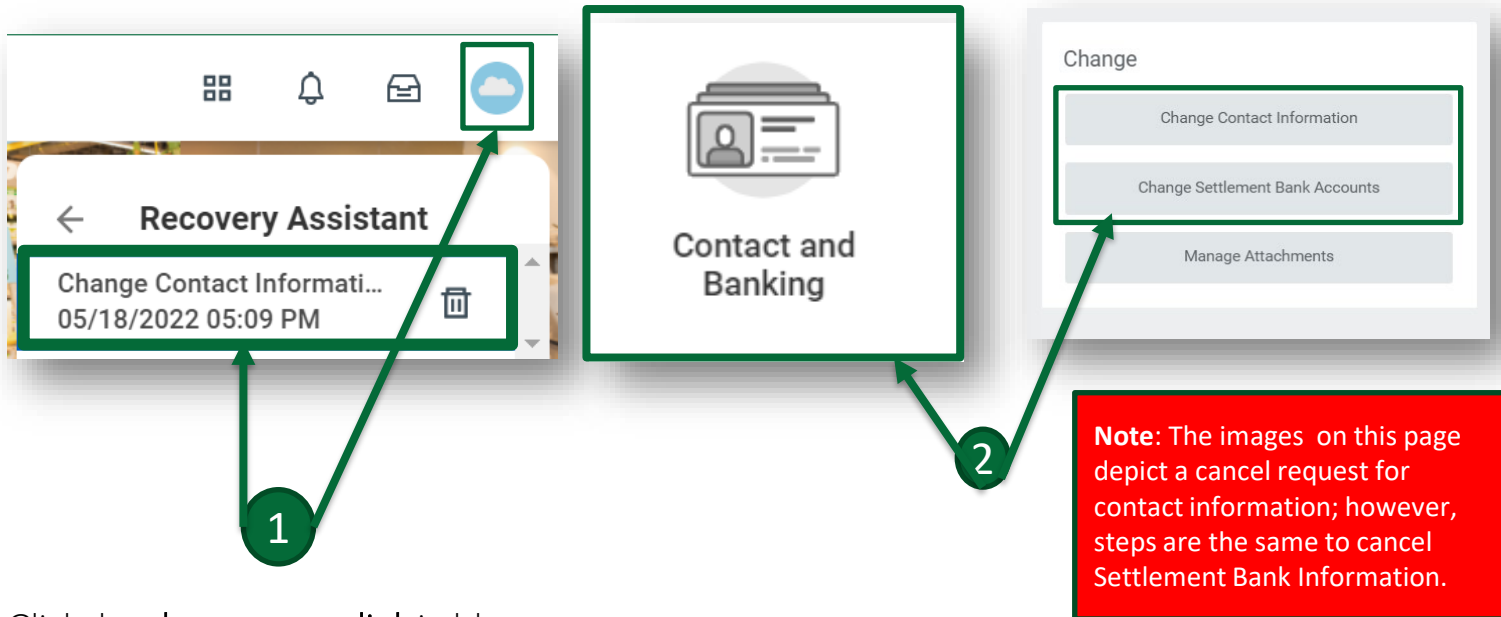
WHOLE FOODS MARKET

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Whole Foods Market on Workday Instructional Guide

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.



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

The screenshot shows the 'Change Contact Information' form. At the top, there is a 'Change Event' section with a blue link 'Contact Information Change for ' and a green arrow pointing to it labeled '3'. Below this, the 'Status' is 'Draft'. The form has two tabs: 'Contact Information' and 'Attachments'. Under 'Contact Information', there is a 'Phone' section with a 'Delete' checkbox, a 'Country Phone Code' dropdown (set to 'United States of America (+1)'), a 'Phone Number' field, a 'Phone Extension' field, and a 'Phone Device' dropdown (set to 'Telephone'). At the bottom, there are three buttons: 'Submit', 'Save for Later', and 'Cancel'.



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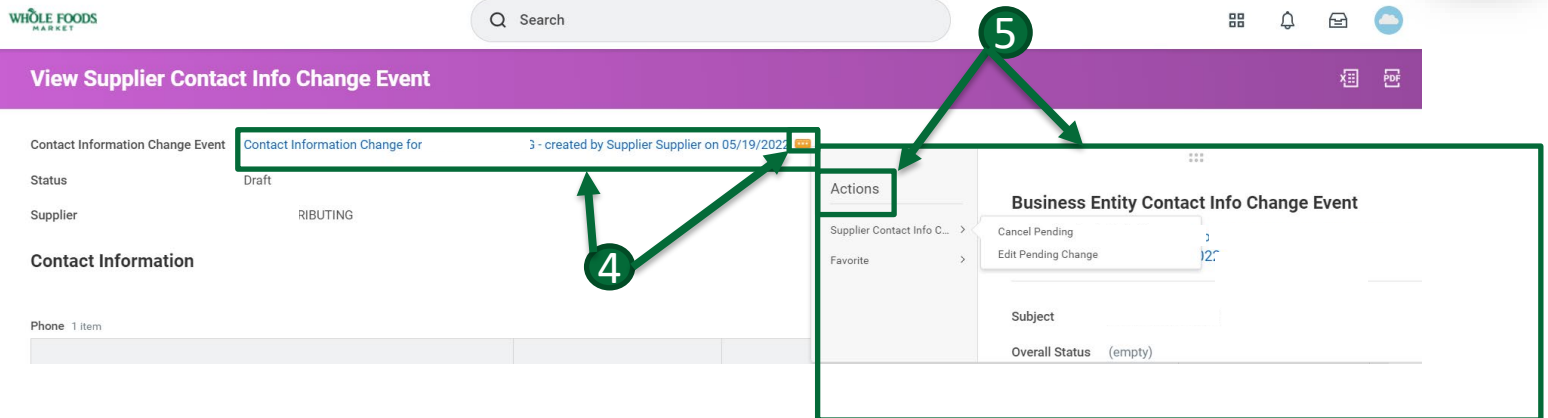
Whole Foods Market on Workday

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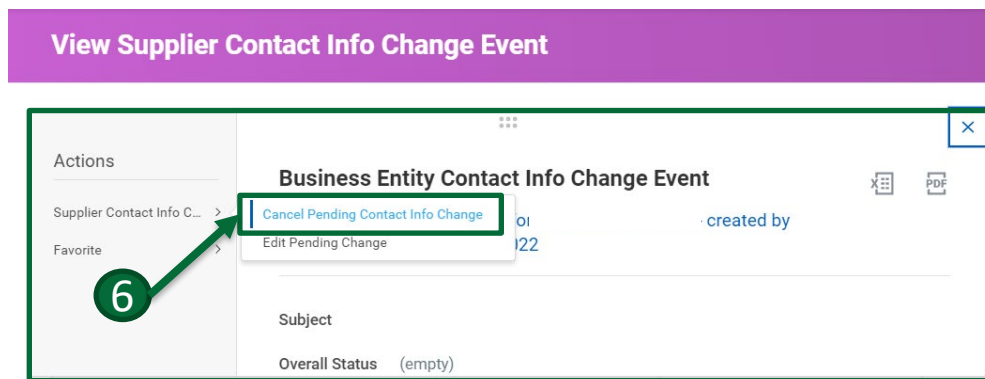
How To Cancel A Draft Change Request

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**.



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Whole Foods Market on Workday

Instructional Guide

How To Cancel A Draft Change Request

continued

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

Confirm Contact Information Change Cancel

Please confirm you wish to cancel the Contact Information Change.

Contact Information Change Event Contact Information Change for · created by Supplier Supplier on 05/19/2022

Status Draft

Supplier

Contact Information

Phone 1 item

Phone Number	Phone Type	Usage	Visibility
	Telephone	Business (Primary) Billing	Public

Turn off the new tables view ☐

Turn off the new tables view ☐

OK Cancel

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

Change has been Canceled

Contact Information Change Event Contact Information Change for / created by Supplier Supplier on 05/19/2022

Status Canceled

Supplier

Contact Information

Phone 1 item

Phone Number	Phone Type	Usage	Visibility
	Telephone	Business (Primary) Billing	Public

Turn off the new tables view ☐

Turn off the new tables view ☐

Done

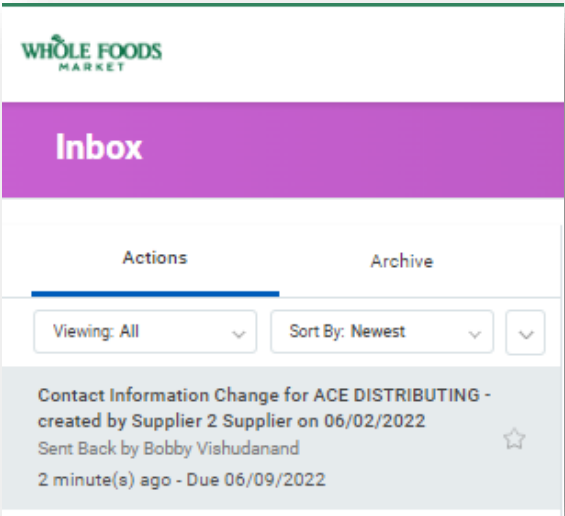
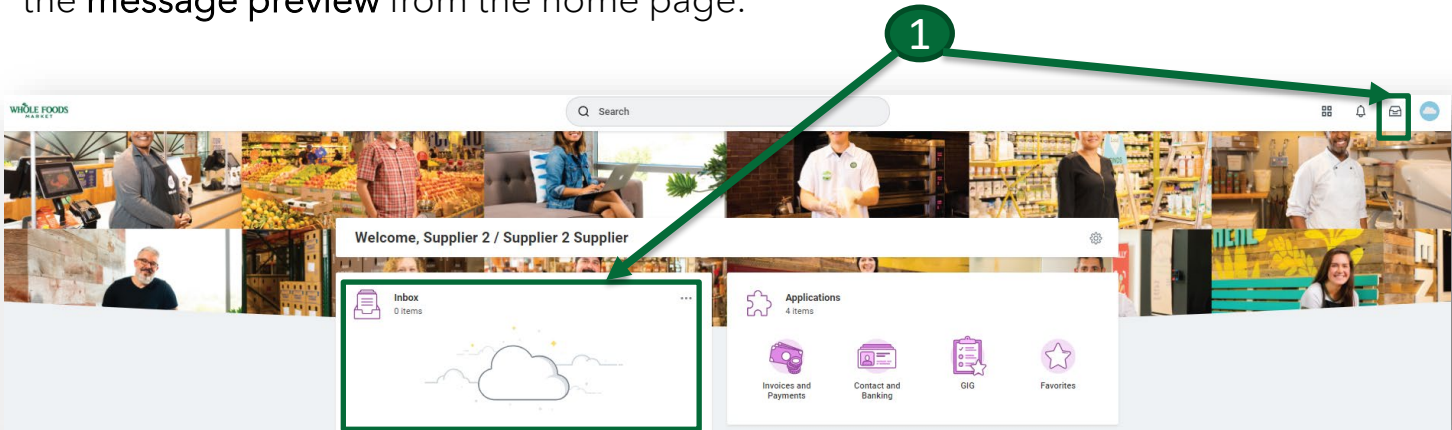


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Returned and Denied Requests

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.

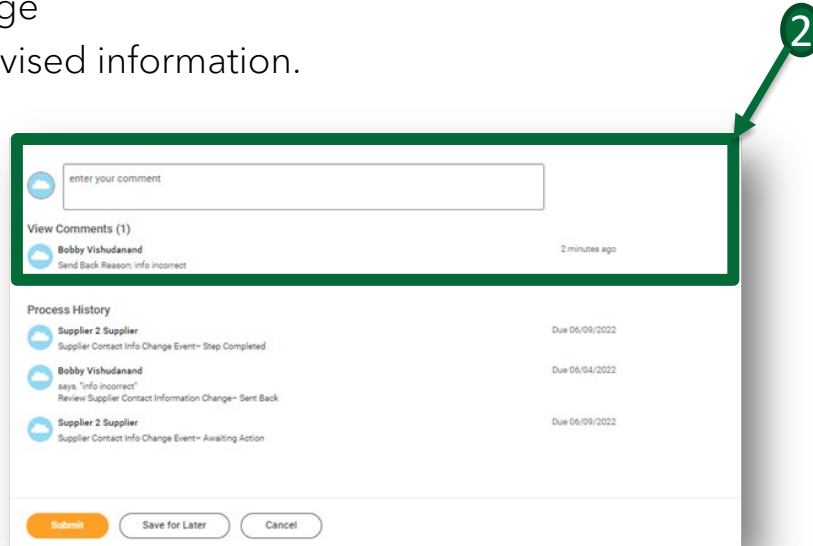


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Returned and Denied Requests continued

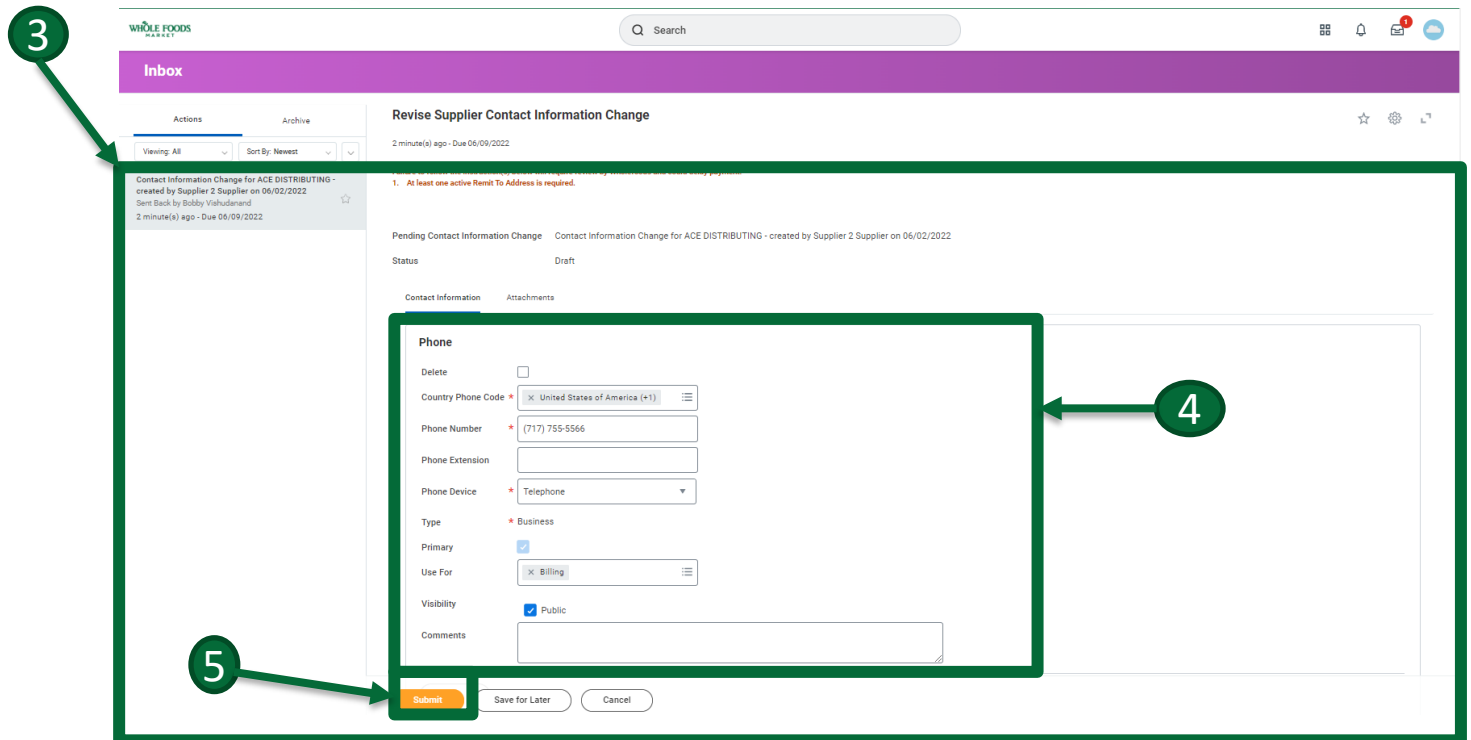
2. View the reason for the returned request at the bottom of the email
3. Open the message
4. Next **Enter** the revised information.
5. Click **Submit**.



This screenshot shows a comment box at the top with the placeholder text "enter your comment". Below it, under "View Comments (1)", is a comment from Bobby Vishudanand, dated 2 minutes ago, stating "Send Back Reason: Info incorrect". Below the comments is a "Process History" section with three entries:

Actor	Action	Due Date
Supplier 2 Supplier	Supplier Contact Info Change Event- Step Completed	Due 06/09/2022
Bobby Vishudanand	says "Info incorrect" Review Supplier Contact Information Change- Sent Back	Due 06/04/2022
Supplier 2 Supplier	Supplier Contact Info Change Event- Awaiting Action	Due 06/09/2022

At the bottom are three buttons: "Submit" (orange), "Save for Later", and "Cancel". A green arrow labeled "2" points to the top right corner of this form.



This screenshot shows the "Revise Supplier Contact Information Change" form in the Workday inbox. The form is titled "Revise Supplier Contact Information Change" and has a status of "Draft". It contains a "Contact Information" section with a "Phone" sub-section. The "Phone" section includes fields for "Country Phone Code" (set to "United States of America (+1)"), "Phone Number" (set to "(717) 755-5566"), "Phone Extension", "Phone Device" (set to "Telephone"), "Type" (set to "Business"), "Primary" (checked), "Use For" (set to "Billing"), "Visibility" (set to "Public"), and a "Comments" text area. At the bottom are three buttons: "Submit" (orange), "Save for Later", and "Cancel". A green arrow labeled "3" points to the "Revise Supplier Contact Information Change" title. A green arrow labeled "4" points to the "Phone" section. A green arrow labeled "5" points to the "Submit" button.



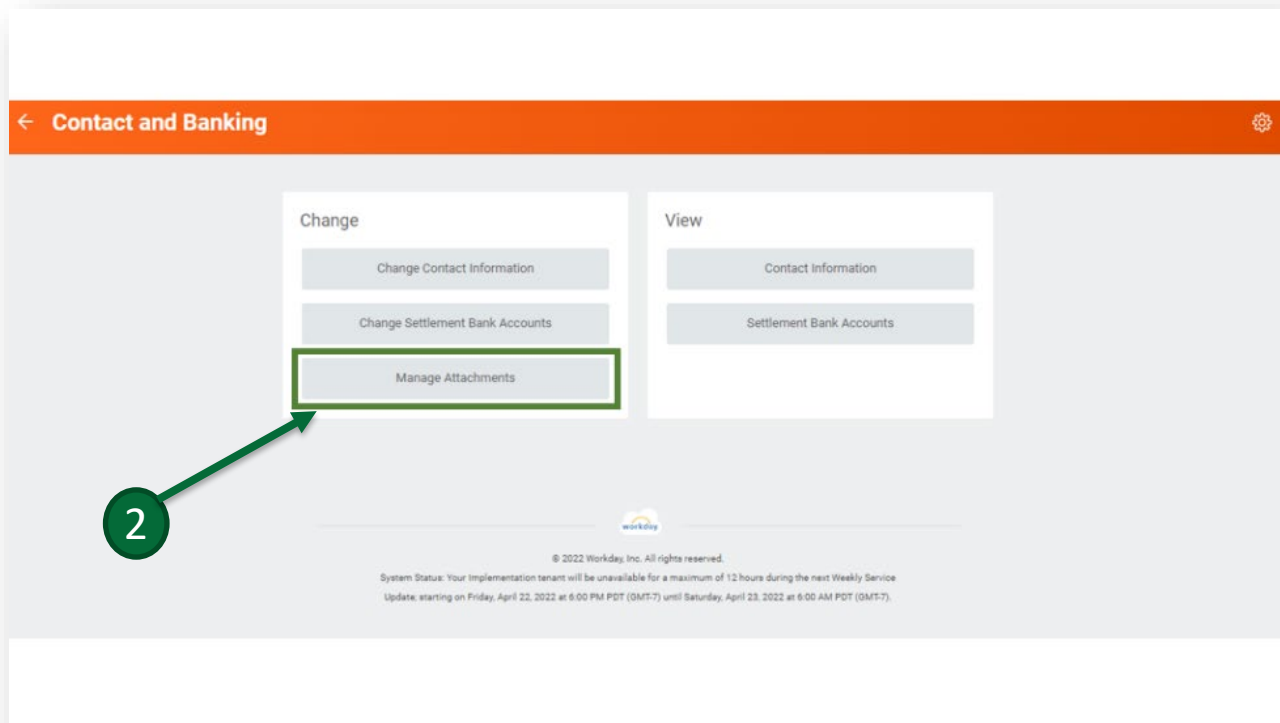
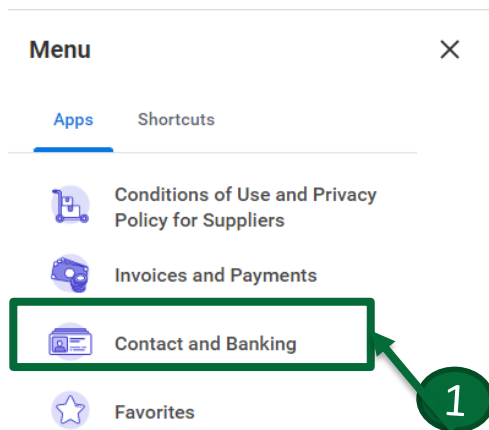
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Manage Attachments

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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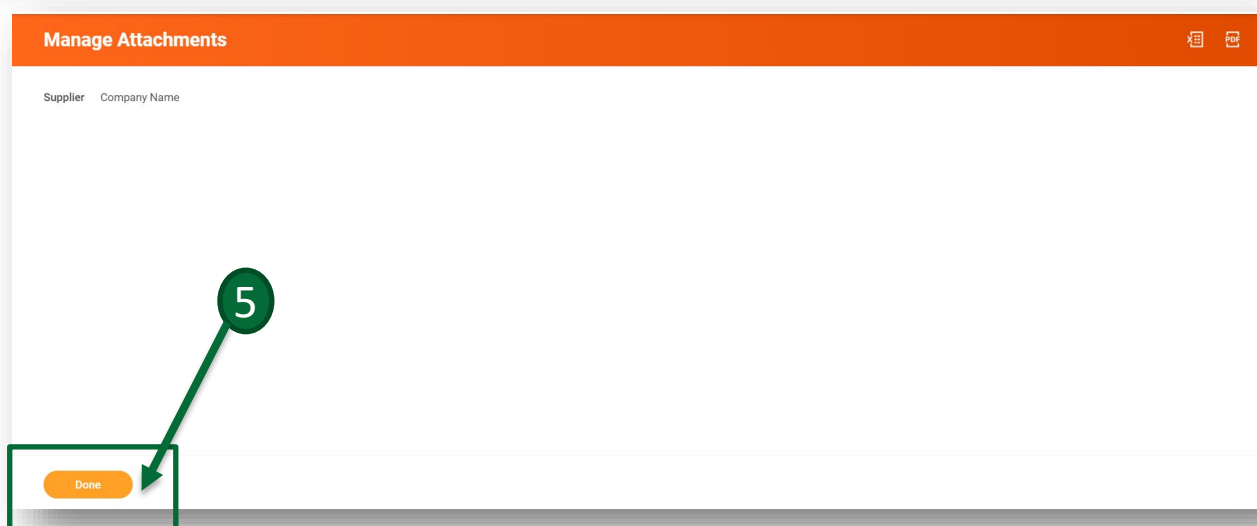
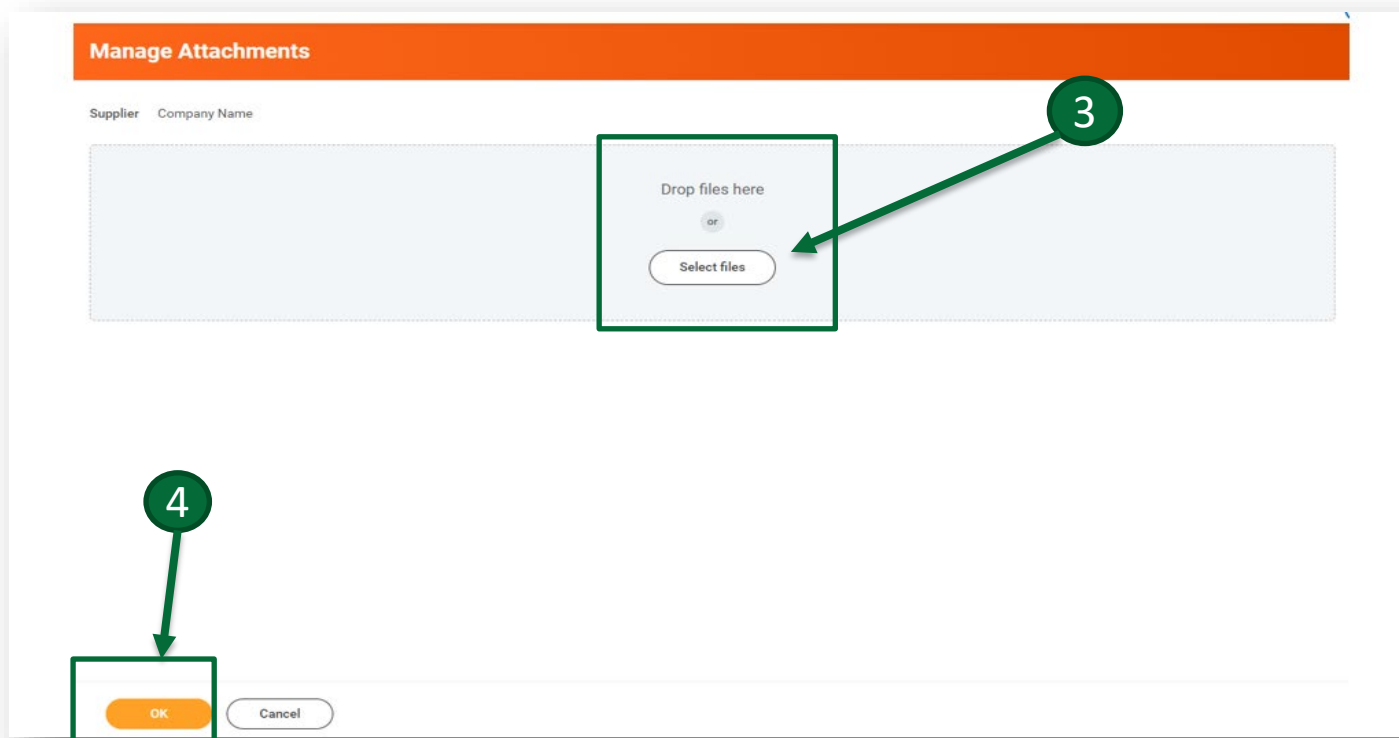
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Manage Attachments

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.



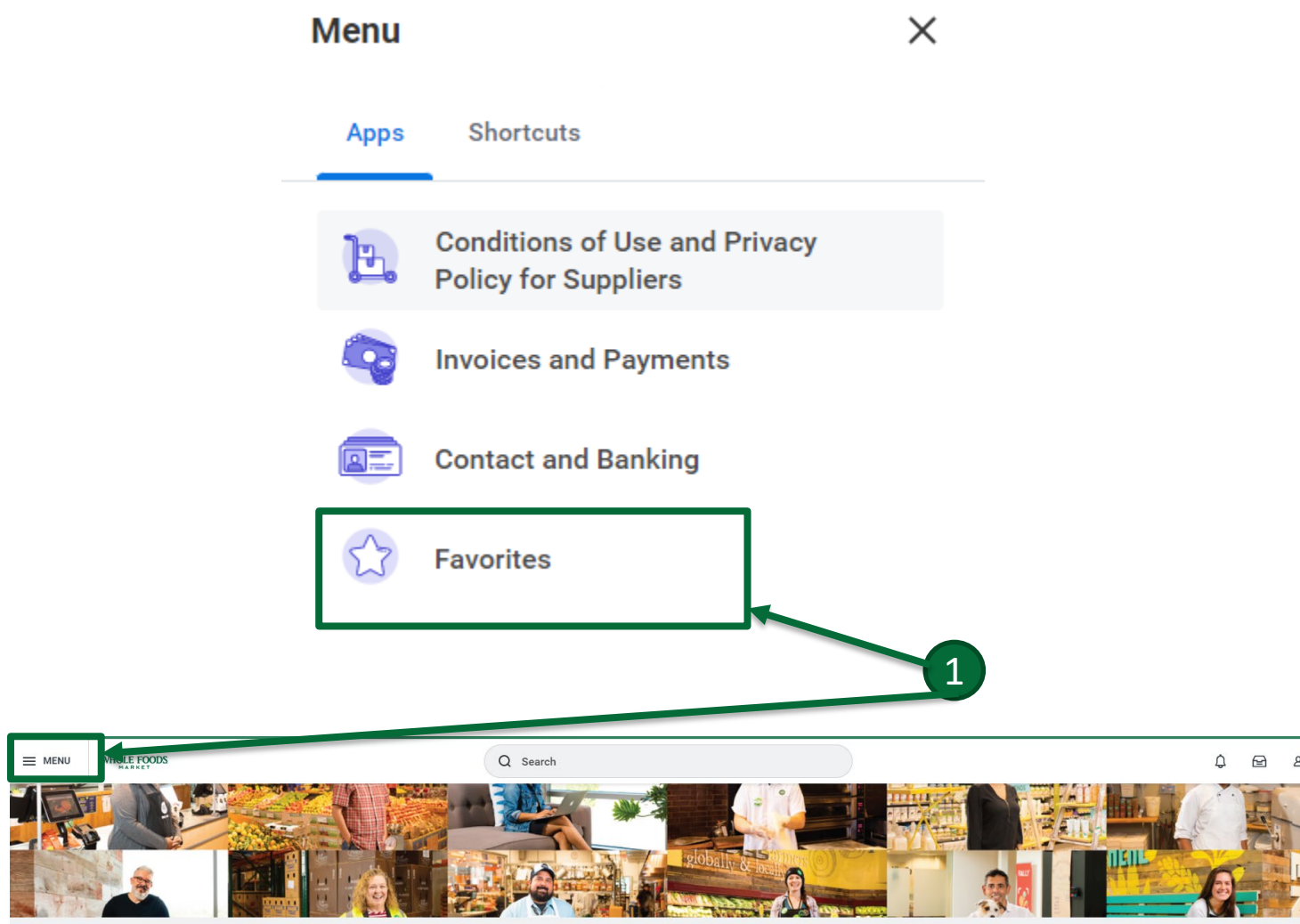
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Favorites

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.



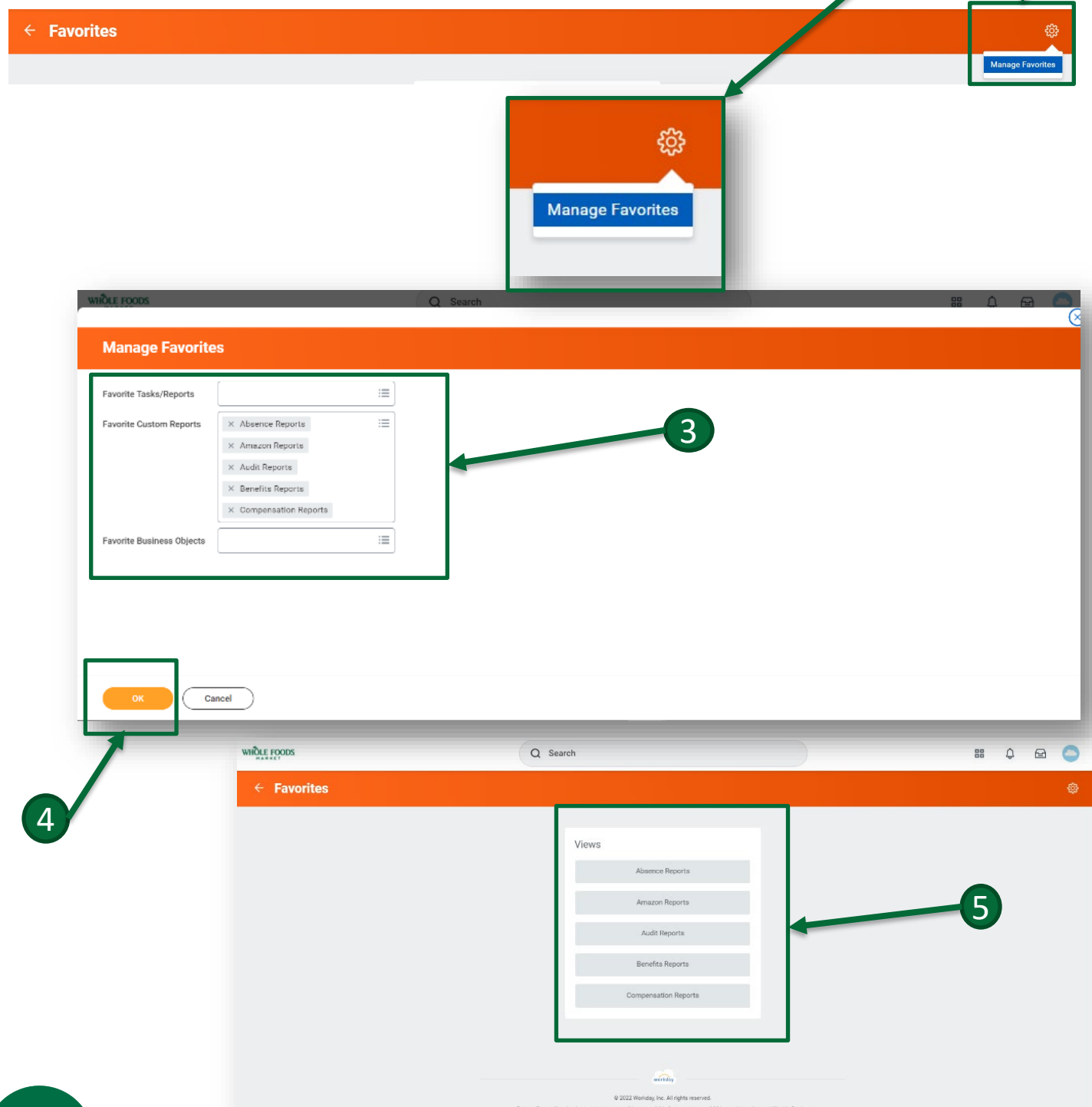
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Favorites

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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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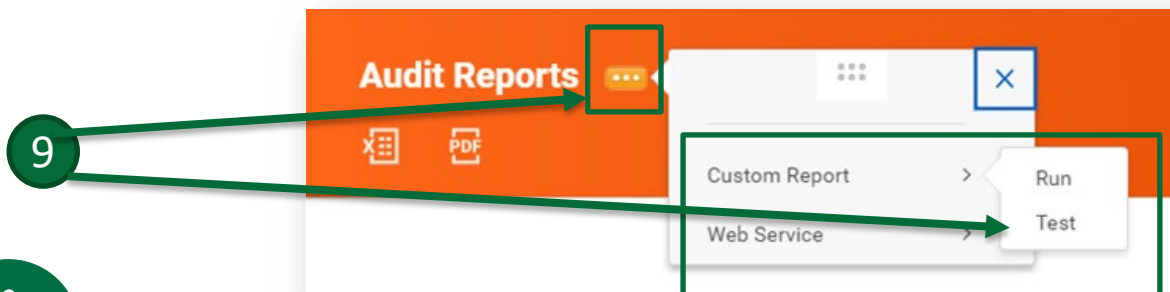
Favorites

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).



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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.

