When creating an Ad Hoc Requisition the selection of a Goods Line request or Services Line request is based on more than the traditional commodity classification of the items or services. There are two basic determining factors when selecting the type of line item in a Workday requisition:

1. Spend Category. An equipment spend category is trackable as an asset so you will be unable to use an equipment item as a SERVICES line. Trackable spend categories can only be used with a GOODS line.

2. Receipt. How the item is to be received in Workday...by Quantity or by Dollar Amount.

GOODS are anything that will be received, accepted and tracked in Workday by the QUANTITY. For example: computers, business cards, or lab supplies are considered goods because they have a defineable Quantity, Unit Cost, and a Unit of Measure like Each, Box, or Job. Any item that needs to be recorded as an asset, including software is considered a good.

SERVICES are anything that will be received, accepted and tracked in Workday that is not a Goods Item, and will be received based on the DOLLAR AMOUNT only. A Services Line request does NOT have fields for Quantity, Unit Cost, or Unit of Measure and is simply expressed as an EXTENDED AMOUNT.

The Catalogs and Supplier Punchout Requisitions will follow the traditional Goods Line requisition so a Goods vs Services Line item choice does not need to be made when requisitioning from these sources.

But for Ad Hoc Requisitions we recommend using the best method available to properly account and receive the purchase.
Procurement: Goods Lines vs Services Lines

For example, FAU will be using the Request Services Line type requisition for creating BLANKET ORDER Requests whether the commodity is for Goods or Services. Since no assets (equipment) can be ordered on a blanket...(only small expense goods items and services)...the quantity of items ordered is not important but rather the dollar value of the delivery order against the blanket placed with the Supplier.

Remember that the item, service or delivery must be received in Workday using the Create Receipt task. When the Invoice is entered it will be matched against the Purchase Order and Receipt.

If there is a match between all three documents (three way match), the invoice does not require further handling for approval and can be paid.