



# Sysco SPIRIT

USER MANUAL





# Accessing Sysco SPIRIT

## Sysco SPIRIT User Manual

This document provides systematic instructions to access Sysco's Supplier Payment, Invoice, Reporting, and Inquiry Tool (Sysco SPIRIT), navigate the site, download specific payables related documentation, and create an inquiry. Suppliers can search proprietary information by Check Number, Invoice Number, or PO Number.

## Sysco SPIRIT Log in

1. In your internet browser address field, type: [syscoapflow.my.site.com](https://syscoapflow.my.site.com) and press **Enter**.

**Tip!** It is recommended to use Google Chrome over other browsers for optimum results.

2. In the Supplier **User ID** and **Password** fields, type your user ID and password.
3. Click the **Log in** button. The Sysco SPIRIT homepage displays.

In case you do not have access please refer to this link and request access:

<https://syscoapflow.my.salesforce-sites.com/SPIRITAccess/>

The screenshot shows the Sysco SPIRIT homepage and a dashboard. The homepage includes a navigation bar with links: Home, Invoice, Purchase Order, Payment, Vendor Inquiry, Vendor Portal, and Help. Below the navigation bar is a 'Welcome to Sysco SPIRIT' message. The main content area contains a list of capabilities: view invoice status, payment details, view and respond to submitted inquiries, and view AP information. It also includes a note about document availability and a link to request access. The dashboard section, titled 'Supplier Dashboards', shows various charts and reports. The 'Inquiry Status' chart is a donut chart showing 'Awaiting Vendor Response' and 'Pending with Sysco'. The 'Received Invoices In Process' chart is a bar chart showing the number of invoices in process for various companies. The 'Purchase Orders Awaiting Invoice' chart is a bar chart showing the number of purchase orders awaiting invoice for various companies. The dashboard also includes a 'Status of Received Invoices Last 90 Days' and a 'Rejected Invoices Last 90 Days' section.

**Sysco SPIRIT** Home Invoice Purchase Order Payment Vendor Inquiry Vendor Portal Help

Welcome to Sysco SPIRIT

Sysco launched a new Supplier Accounts Payable portal called Sysco SPIRIT (Supplier Payment, Invoice, Reporting, and Inquiry Tool). This tool has self-service capabilities for you to view invoice status, payment details, view, and respond to submitted inquiries. This tool gives you access to your AP information, including the following:

- Invoices at a header and detailed level with real-time updates on payment status
- Reports and dashboards for invoices, inquiries, and payments updates
- Detailed view of all issued Sysco Purchase Orders
- Payment information like check date, check number, and total net amount
- Self-service inquiry submission and management with visibility to latest status & response

Note: All documents submitted from Nov 28, 2022, onwards will be available in SPIRIT. Historical documents will not be available.

Note: This does not apply to specialty companies (list of excluded companies is below).

For more information on Sysco SPIRIT, watch the [Introduction Video Here](#).

To request access to Sysco SPIRIT, please email: [Outsourcing.laternier@corp.sysco.ca](mailto:Outsourcing.laternier@corp.sysco.ca)

**ENABLE POP UPS:** Ensure you have pop-ups enabled, by whitelisting this URL. This will enable you to download documents as desired.

We value your trusted partnership with Sysco and look forward to continuing to partner with you on this important initiative.

The below Canadian Sysco entities are EXCLUDED from the new process and all others are involved:

1. Freshpoint
2. Sysco Fine Meats (Doroma Meats Co)
3. Sysco Guest Supply
4. Grande Valley
5. Felt's Scotland

**Dashboard**  
**Supplier Dashboards**  
As of Sep 27, 2022 5:17 AM Viewing as Canada Portal GA

**Inquiry Status**

Recent Count

Inquiry Status: ● Awaiting Vendor Response ● Pending with Sysco

[View Report \(Inquiry Status\)](#)

**Received Invoices In Process**

Percent Count

Invoice Status: ■ In Process ■ Received ■ Awaiting Approval ■ Processing Payment

[View Report \(Received Invoices In Process\)](#)

**Purchase Orders Awaiting Invoice**

Record Count

[View Report \(Purchase Orders Awaiting Invoice\)](#)


**Status of Received Invoices Last 90 Days**

**Repayments in Last 90 Days**

**Rejected Invoices in Last 90 Days**



## Change Password

1. Click the **User**  icon.
2. Select **My Settings** from the drop down menu.
3. Click the **Change Password** hyperlink.
4. Enter Current Password.
5. Enter New Password, using the following the password requirements:
  - Password must be at least 8 characters long.
  - Password must include a minimum of one letter and one number.
6. Enter new password again to verify password.
7. Click **Save** button.

### Change My Password

You must adhere to the following password rules:


- \* Your password must be at least 8 characters long.
- \* Your password must have a mix of letters and numbers


*	Current Password	<input type="password"/>
*	New Password	<input type="password"/>
*	Verify New Password	<input type="password"/>

CancelSave




## Change Location & Language Settings

- 1. Click the **User**  icon.
- 2. Select **My Settings** from the drop down menu.
- 3. Select the **Language** from the Language drop down menu.
- 4. Select the **Language Locale** from the Locale drop down menu.
- 5. Select the **Time Zone** from the Time Zone drop down menu.
- 6. Click **Save** button to save changes.



HomeInvoicePurchase OrderPaymentVendor Inquiry



My Settings

ACCOUNT DETAILS

Account

Username

Email Address \*

Password

[Change Password](#)

Location

Language

English

Locale

English (United States)

Time Zone

(GMT-04:00) Eastern Daylight Time (America/New\_York)

Profile Visibility

javascriptvoid(0);

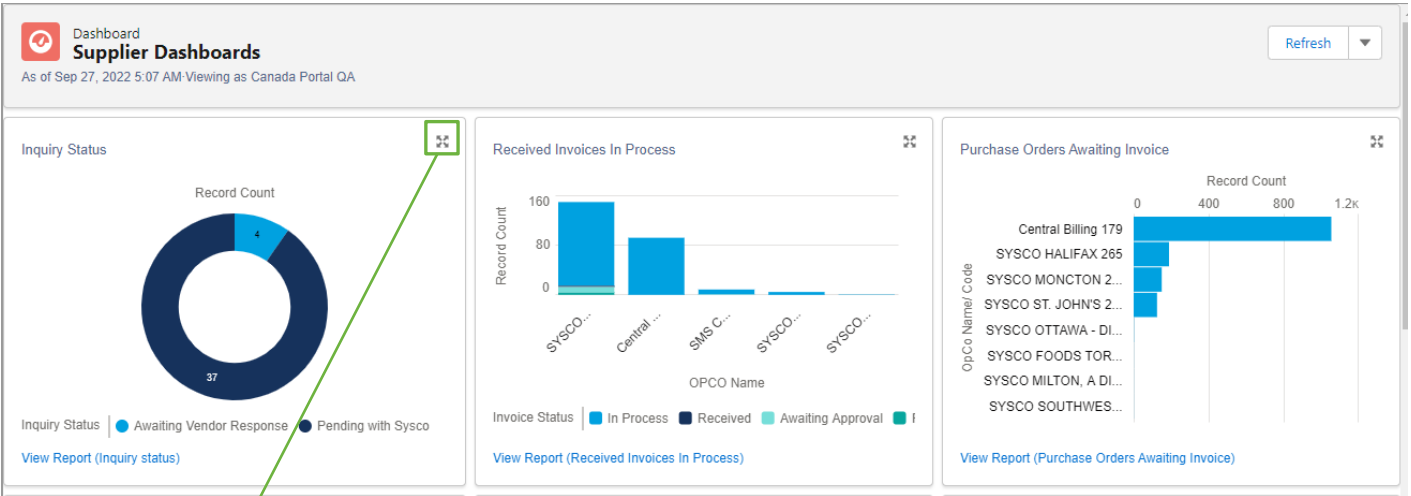


## Supplier Dashboards

The Sysco SPIRIT Dashboard provides Suppliers a high level overview of the activity for each category listed below:

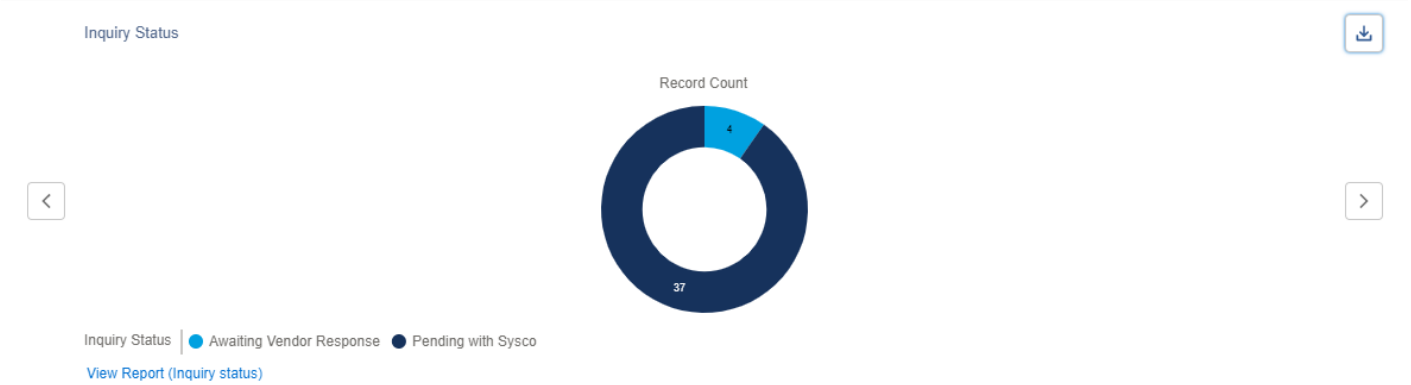
- Inquiry Status
- Received Invoices in Process
- Purchase Orders Awaiting Invoice
- Status of Invoices Received in Last 90 Days
- Repayments in Last 90 Days
- Rejected Invoices in Last 90 Days

Suppliers have the ability to get a more in-depth view of the activity by clicking on each section of the graph. The list of items under each category's status will open for further review.



Click the Expand icon to open the dashboard in an expanded view.

Dashboard Component





## View and Export Reports

1. Click the **View Report** hyperlink found under each Status Graph.
- The reports open in view mode with Open / Pending items listed first.

Report: Case Managers  
Inquiry status

Search

Add Chart

Filter

Refresh

Export

Total Records  
41

<input type="checkbox"/> Inquiry Status ↑	Case Number	Case Creation Date	Category	Topic	OpCo	Subject
<input type="checkbox"/> Awaiting Vendor Response (4)	CN-456915	7/28/2022 3:56 AM	General Inquiry	Process Questions	SYSKO MONCTON	test
	CN-456923	7/29/2022 3:48 AM	General Inquiry	Remittance Requests	Baltimore	TESTSTATE1
	CN-456901	7/27/2022 3:28 AM	General Inquiry	Process Questions	SYSKO MONCTON	Test HD Box
	CN-457072	8/17/2022 6:55 AM	General Inquiry	Process Questions	SYSKO HALIFAX	Test from Spirit Portal
Subtotal						
<input type="checkbox"/> Pending with Sysco (37)	CN-456897	7/26/2022 6:23 AM	Repayments	Invalid Cash Discount	SYSKO MONCTON	test5666
	CN-456920	7/28/2022 5:49 AM	Other	Others	SYSKO MONCTON	Test HD CA Portal
	CN-456925	7/29/2022 4:01 AM	General Inquiry	Process Questions	Baltimore	test3
	CN-457080	8/18/2022 4:52 AM	Other	Others	Central Billing	Test CB Inquiry
	CN-457101	8/22/2022 2:55 AM	Other DB	Other	SYSKO MONCTON	vendorQA

2. Click the **Export** button to download report.
3. Select desired **Export View** option.
- Suppliers have the option to export in Standard Excel Format or Details Only View. The Details Only View allows Suppliers to download the file in either Excel Format (.xlsx) or Comma Delimited (.csv) file format.

Export

Export View

Formatted Report

Export the report as it appears in Salesforce, including the report header, groupings, and filter details.

Details Only

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

Excel Format .xlsx

Cancel

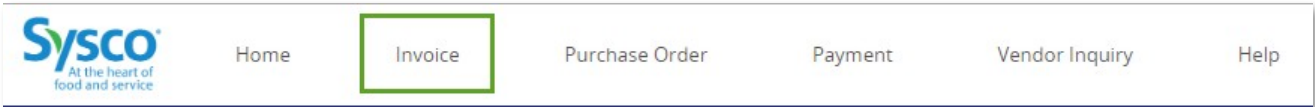
Export


4. Click the **Export** button.








## Invoice Filter Function


1. Select the **Invoice** tab from the Navigation Bar.



2. Click on the **Filter**  icon.
3. Enter specific Filter Criteria to view desired Invoice information using one or a combination of the Filter Criteria listed below:

- Invoice Number
- Work Type
- Document Type
- Invoice Date
- Invoice Gross Amount
- PO#
- Cora Ref No
- Invoice Status
- OpCo Name
- Check / ACH Number
- Vendor Name
- Vendor Number

 Create Inquiry Invoice Create 



Filter Criteria

Invoice Number	Work Type
<input type="text"/>	<div>---select---</div>
Document type	Invoice Date
<div>---select---</div>	<input type="text"/>
Invoice Gross Amount	PO#
<input type="text"/>	<input type="text"/>
Cora Ref No	Invoice Status
<input type="text"/>	<div>---select---</div>
OPCO Name	Check/ACH Number
<input type="text"/>	<input type="text"/>

Apply Cancel

 **Note:** Please see ["Invoice Filter Reference Table"](#) for further details.

4. Click the **Apply** button to apply filter criteria set.



# Invoice Management

Sysco SPIRIT User Manual

## Invoice Filter Reference Table

Field Name	Description	Options (where applicable)
<b>Invoice Number</b>	Supplier provided invoice number	
<b>Work Type</b>	Type of invoice	<ul style="list-style-type: none"> <li><b>PO Invoice:</b> Invoice for services or goods relating to an issued Sysco Purchase Order</li> <li><b>Non-PO Invoice:</b> Invoice for services or goods</li> <li><b>Credit Memo:</b> Repayment</li> </ul>
<b>Document Type</b>	Second level of classification for an invoice type.	<ul style="list-style-type: none"> <li><b>Merchandize:</b> Purchase Order created for direct goods</li> <li><b>Drop Shipments:</b> Purchase Order for direct goods with those goods being shipped directly to customer locations</li> <li><b>Normal Invoices:</b> Standard invoices not tied to Purchase Orders</li> <li><b>Credit Memo:</b> Credit invoice from Sysco to Supplier</li> <li><b>Indirect PO:</b> Invoices for Pos from Procurement Express</li> </ul>
<b>Invoice Date</b>	Date of invoice creation	<ul style="list-style-type: none"> <li>Month/ Day / Year</li> </ul>
<b>Invoice Gross Amount</b>	Total amount being invoiced, including taxes, fees, charges and shipping costs	
<b>PO#</b>	Purchase Order Number provided by Sysco	
<b>Cora Ref No</b>	Sysco's unique identifier for the received invoice	<ul style="list-style-type: none"> <li>INV-#####</li> </ul>
<b>Invoice Status</b>	Sysco's status for the invoice	<ul style="list-style-type: none"> <li><b>In Process:</b> Invoice is being process by Sysco AP</li> <li><b>Paid:</b> Invoice has been processed and paid</li> <li><b>Rejected:</b> Invoice has been rejected. Please review rejection reasons for further clarification</li> <li><b>Processing Payment:</b> Invoice has been processed and is schedule to be paid soon</li> <li><b>Awaiting Approval:</b> Invoice is currently being reviewed and approved by Sysco AP</li> <li><b>Received:</b> Invoice has been received and will be sent for processing soon.</li> </ul>
<b>OpCo Name</b>	Name of Sysco Operating Company being invoiced	
<b>Check / ACH Number</b>	Number of Sysco issued Check or ACH Payment	
<b>Vendor Name</b>	Name of the Vendor	



# Invoice Management

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## View Invoice Details

- 1. Select the **Invoice** tab on the Navigation Bar.
- 2. Apply Invoice Filters if needed. See [“Invoice Filter Function”](#) for further instructions.
- 3. Click the **View** hyperlink to open the Invoice Information.

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All

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Create Inquiry InvoiceCreate

<input type="checkbox"/>	Invoice Number: IDS2709-02 Invoice Status: In Process	Work Type: PO Invoice Document type: Merchandize	PO#: 1365663 Cora Ref No: INV-15311186	Invoice Date: 9/27/2022 Invoice Gross Amount: 1167.60	OPCO Name: SYSCO MONCT... Check/ACH Number: -	View
<input type="checkbox"/>	Invoice Number: SINV00785894 Invoice Status: In Process	Work Type: PO Invoice Document type: Drop Shipments	PO#: 5513091 Cora Ref No: INV-15311107	Invoice Date: 7/28/2022 Invoice Gross Amount: 4195.21	OPCO Name: Central Billing Check/ACH Number: -	View

Invoices open in view mode. Suppliers have the ability to view (1) Attachments, (2) Invoice Header, (3) Invoice Details, (4) Invoice Line Details, and (5) Payments.

Invoice > VIEW > INV-15305442

2

Invoice Number: IDS0509  
Vendor Number: 44321000  
Document type: Normal Invoices

Work Type: Non PO Invoice  
Invoice Date: 9/5/2022  
Cora Ref No: INV-15305442

Invoice Status: In Process  
Created Date: 9/4/2022 11:03 PM

OpCo Name/ Code: SYSCO MONCTON 262

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Attachments

1

sample.pdf

Is Primary: ☒ Public Attachment: ☐ Owner: Cora Admin Last Modified: Sep 4, 2022 Size: 3.03 KB

3

Invoice Information

INVOICE DETAILS

Currency: CAD Invoice Gross Amount: 1,600  
Line Total Amount: 1,600

INVOICE TAXES

ADDITIONAL DETAIL

Payment Due Date: 9/12/2022 Rejection Comments:  
Vendor Comments:

4

INVOICE LINE ITEMS


Amount: 1,600

GL Code:

ACK Status:



## View or Download Invoice Image

1. Select the **Invoice** tab on the Navigation Bar.
2. Apply Invoice Filters if needed. See [“Invoice Filter Function”](#) for further instructions.
3. Click the **View** hyperlink to open the Invoice Information.
4. Click the **Actions** drop-down  icon.
5. Select **View**.

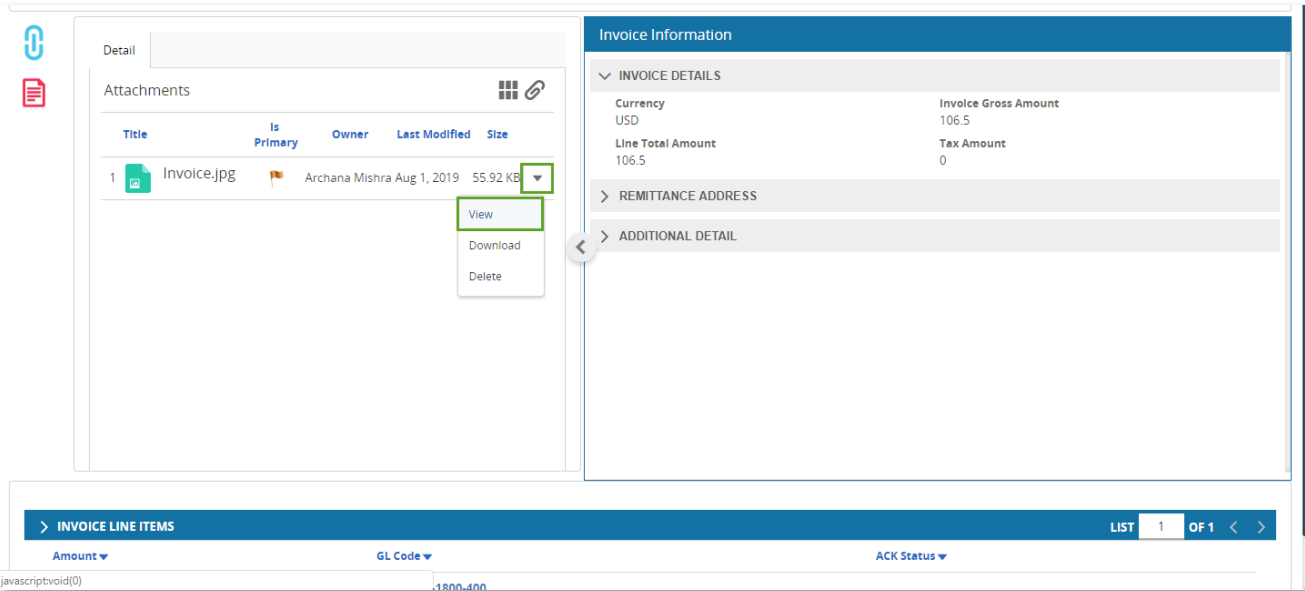
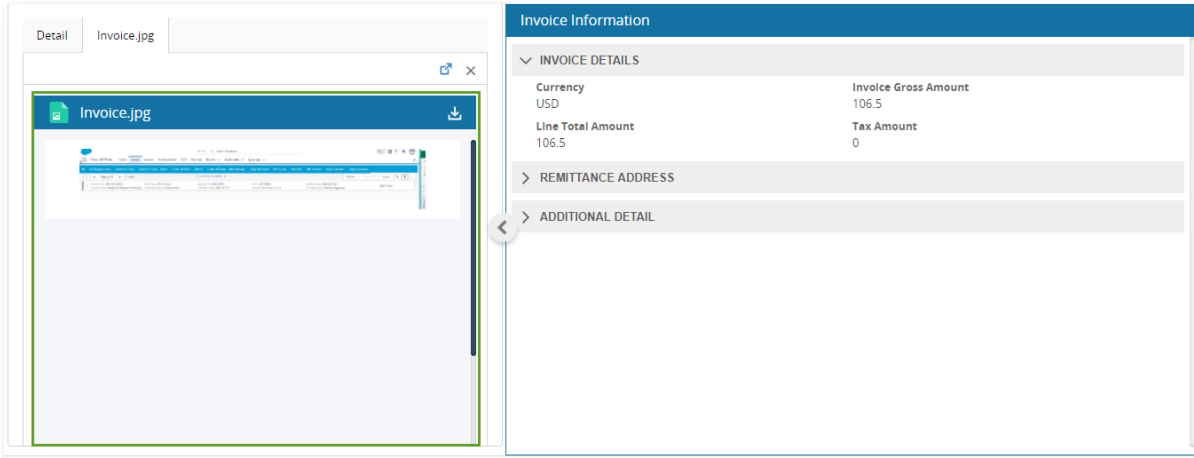


Image opens in view mode in the Attachments window.




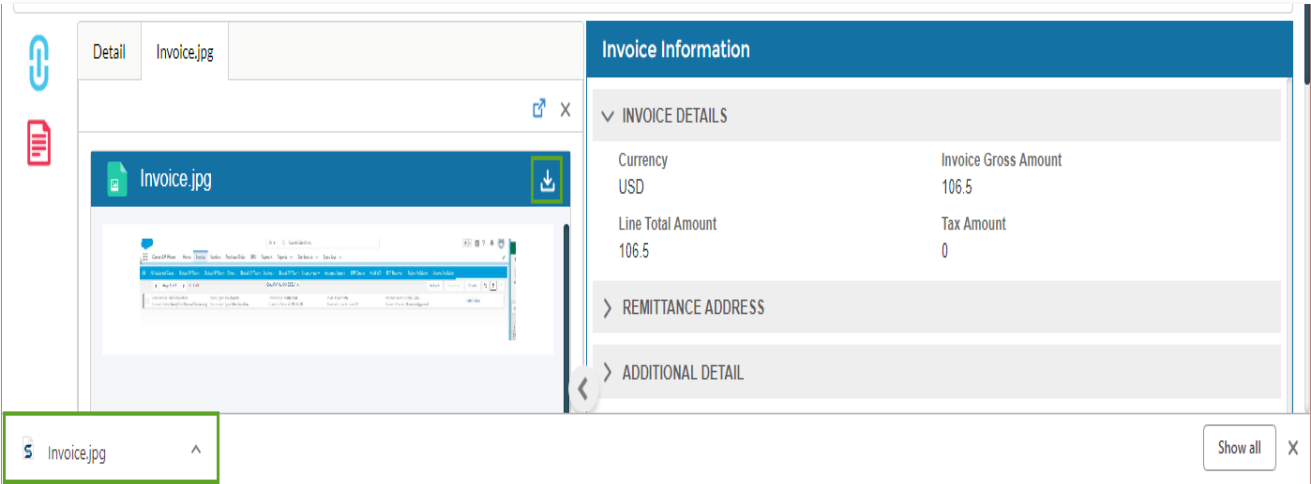
Continued on next page.



# Invoice Management

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6. Click the Download  icon.
7. Click on Downloaded file to open it.





# Invoice Management

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## View or Download Supporting Documents from Open Text

1. Select the **Invoice** tab on the Navigation Bar.
2. Apply Invoice Filters if needed. See [“Invoice Filter Function”](#) for further instructions.
3. Click the **View** hyperlink to open the Invoice Information.
4. Expand **ADDITIONAL DOCUMENTS** section.
5. Click on **Download** hyperlink to download required document

Sysco | SPIRIT

Home

Invoice

Purchase Order

Payment

Vendor Inquiry

Vendor Portal

Help

Invoice > VIEW > INV-15311107

EDI INVOICE

Company Number 179

Company Name Central Billing

Company Address :  
Street 21 FOUR SEASONS PLACE,  
SUITE 400, TORONTO,  
ONTARIO  
City  
Region  
Postal Code

Supplier Number 11254900

Supplier Name GAY LEA FOODS  
CORP LTD GB

Supplier Address :  
Street 5200 ORBITOR DR  
City MISSISSAUGA  
Country CA  
Postal Code L4W 5B4  
Ship from  
Vendor: 11254907

Purchase Order Number	Invoice Number	Invoice Date	Invoice Gross Amount	Received Date
5513091	SNV0785694	07/28/2022	4185.21	07/22/2022
GSTHST	PSTQST	GSTHST Registration #	PSTQST Registration #	Discount %

PUA handling codes

Difference PUA Charges  
0

> INVOICE TAXES

< ADDITIONAL DETAIL

Payment Due Date  
8/27/2022

Rejection Comments

Vendor Comments 1

< ADDITIONAL DOCUMENTS

Receiving Packet  
Download

P.O.Confirmation  
Download

Damage Pictures  
Download

Receiving Packet OS&D  
Download

AP Miscellaneous  
Download

EDI Confirmation  
Download

OS&D  
Download

Documents will be downloaded to default download folder of the browser in a zip folder

Continued on next page.

Last Updated: 08/06/2025

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# Invoice Management

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## Download Invoice Tab Details

1. Select the **Invoice** tab from the Navigation Bar.
2. Apply Invoice Filters if needed. See “Invoice Filter Function” section for further instructions.
3. Click the Selection box ☒ next to the Invoice to download details in Excel format.
  - To select all, click the Selection box ☒ at the top of the Invoice page.
4. Click the **Download dropdown** icon.
5. Select Invoice data.

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All

☒

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Create Inquiry InvoiceCreate

<input checked="" type="checkbox"/>	Invoice Number: 85779098 Invoice Status: Paid	Work Type: PO Invoice Document type: Merchan...	PO#: 24601910 Cora Ref No: INV-044302...	Invoice Date: 2019-07-20 Invoice Gross Amount: 4...	<div>Invoice data Invoice data with Attachments</div>	View
<input checked="" type="checkbox"/>	Invoice Number: 85779097 Invoice Status: Paid	Work Type: PO Invoice Document type: Merchan...	PO#: 24326050 Cora Ref No: INV-044302...	Invoice Date: 2019-07-20 Invoice Gross Amount: 5...	OPCO Name: Sysco San ... Check/ACH Number: 322...	View
<input checked="" type="checkbox"/>	Invoice Number: 85779096 Invoice Status: Paid	Work Type: PO Invoice Document type: Merchan...	PO#: 24253150 Cora Ref No: INV-044302...	Invoice Date: 2019-07-20 Invoice Gross Amount: 5...	OPCO Name: Sysco San ... Check/ACH Number: 322...	View

6. Click the downloaded Excel file to open.

Sysco | SPIRIT

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All

☒

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Create Inquiry InvoiceCreate

<input checked="" type="checkbox"/>	Invoice Number: 85779098 Invoice Status: Paid	Work Type: PO Invoice Document type: Merchan...	PO#: 24601910 Cora Ref No: INV-044302...	Invoice Date: 2019-07-20 Invoice Gross Amount: 4...	OPCO Name: Sysco San ... Check/ACH Number: 322...	View
<input checked="" type="checkbox"/>	Invoice Number: 85779097 Invoice Status: Paid	Work Type: PO Invoice Document type: Merchan...	PO#: 24326050 Cora Ref No: INV-044302...	Invoice Date: 2019-07-20 Invoice Gross Amount: 5...	OPCO Name: Sysco San ... Check/ACH Number: 322...	View

Invoice\_Antonia\_11....xls ^ Show all x

Excel file will open with fields Invoice Number, Invoice Status, Work Type, Document Type, PO#, Cora Ref No, Invoice Date, Invoice Gross Amount, OpCo Name, and Check/ACH Number. Suppliers have the ability to sort and filter data as needed in Excel. Example:


A	B	C	D	E	F	G	H	I	J
Invoice Number	Invoice Status	Work Type	Document type	PO#	Cora Ref No	Invoice Date	Invoice G	OPCO Name	Check/ACH Number
IDS2709-02	In Process	PO Invoice	Merchandize	1365663	INV-15311186	Tue Sep 27 00:00:00	1167.60	SYSCO MONCTON	64495373
SINV00785894	In Process	PO Invoice	Drop Shipments	5513091	INV-15311107	Thu Jul 28 00:00:00	4195.21	Central Billing	64495374
SINV00785865	In Process	PO Invoice	Drop Shipments	5512723	INV-15311104	Thu Jul 28 00:00:00	18786.86	Central Billing	64495375
SINV00785870	In Process	PO Invoice	Drop Shipments	5513092	INV-15311105	Thu Jul 28 00:00:00	3630.29	Central Billing	64495376
SINV00785873	In Process	PO Invoice	Drop Shipments	5513160	INV-15311106	Thu Jul 28 00:00:00	18764.35	Central Billing	64495377



# Invoice Management

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## Download Invoice Tab Details with Attachments

1. Select the **Invoice** tab from the Navigation Bar.
2. Apply Invoice Filters if needed. See [“Invoice Filter Function”](#) section for further instructions.
3. Click the Selection box ☒ next to the Invoice to download details in Excel format.
  - To select all, click the Selection box ☒ at the top of the Invoice page.
4. Click the **Download dropdown**  icon.
5. Select Invoice data with Attachments.

**Sysco | SPIRIT** Home Invoice Purchase Order Payment Vendor Inquiry Vendor Portal Help

All

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Create Inquiry Invoice Create

<input checked="" type="checkbox"/>	Invoice Number: IDS2709-02 Invoice Status: In Process	Work Type: PO Invoice Document type: Merchandize	PO#: 1365663 Cora Ref No: INV-15311186	Invoice Date: 9/27/2022 Invoice Gross Amount: 1167.60	OPCO Name: Central Billing Check/ACH Number: -	Invoice data Invoice data with Attachments Select & Download	View
<input checked="" type="checkbox"/>	Invoice Number: SINV00785894 Invoice Status: In Process	Work Type: PO Invoice Document type: Drop Shipments	PO#: 5513091 Cora Ref No: INV-15311107	Invoice Date: 7/28/2022 Invoice Gross Amount: 4195.21	OPCO Name: Central Billing Check/ACH Number: -		View
<input checked="" type="checkbox"/>	Invoice Number: SINV00785873 Invoice Status: In Process	Work Type: PO Invoice Document type: Drop Shipments	PO#: 5513160 Cora Ref No: INV-15311106	Invoice Date: 7/28/2022 Invoice Gross Amount: 18764.35	OPCO Name: Central Billing Check/ACH Number: -		View
<input checked="" type="checkbox"/>	Invoice Number: SINV00785870 Invoice Status: In Process	Work Type: PO Invoice Document type: Drop Shipments	PO#: 5513092 Cora Ref No: INV-15311105	Invoice Date: 7/28/2022 Invoice Gross Amount: 3630.29	OPCO Name: Central Billing Check/ACH Number: -		View

6. User will receive a confirmation alert that request has been initiated.

**Sysco | SPIRIT** Home Invoice ✓ We are processing your request. You will receive an email once done. ✕

All

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Create Inquiry Invoice Create

<input checked="" type="checkbox"/>	Invoice Number: IDS2709-02 Invoice Status: In Process	Work Type: PO Invoice Document type: Merchandize	PO#: 1365663 Cora Ref No: INV-15311186	Invoice Date: 9/27/2022 Invoice Gross Amount: 1167.60	OPCO Name: SYSCO MONCT... Check/ACH Number: -	View
-------------------------------------	--	---	---	--	--	------

7. Once the request is completed, user will receive an email on registered email id with a link to download attachments. The link will remain active for 24 hours. User can download up to 25 invoices in one go.

**Hello Canada Portal QA,**  
Your Download is ready :-

Please click on download button to export your files.


**Download**

Note: The Link will expire on 8/25/2022 7:34 PM.  
Kindly login in the default browser for quick access to downloaded files.



## Create New Invoice

1. Select the **Invoice** tab from the Navigation Bar.
2. Click the **Create** button to open the Invoice Information Form.
3. Enter the **Invoice Header** information:
  - Work Type
  - Document Type
  - Invoice Number
  - Invoice Date
  - OPCO Code
  - Vendor
  - Requestor / Buyer

 **Important:** Must select Work Type, then Document Type. These two fields must be filled out prior to proceeding to the next step. This is applicable for Non PO Invoice & Credit Memo submission.

Invoice Information

INVOICE HEADER

Work Type

---select---

Document type

Invoice Number

Invoice Date

OPCO Code

Please select

Vendor

Please select

Requestor / Buyer

Please select

OPCO Name

Current State

Start

Continued on next page.



5. Enter the **Invoice Details** information:

- Currency
- Invoice Gross Amount
- Tax Amount

INVOICE DETAILS

Currency

USD

Invoice Gross Amount

Line Total Amount

Tax Amount

6. Enter Supplier comments in the **Comments** box.

7. Select **Create** from the User Action drop down menu.

CLOSURE SECTION

Vendor Comments


User Action

Create

---select---


Create

8. Click the Attach  icon and attach invoice in .pdf format.  **Note:** File size cannot exceed 8MB.

 **Important!** Attachments are mandatory.

Attachments

No Attachments Available. Please upload.



9. Click the Save  icon to create invoice.

Invoice > NEW

Detail

Attachments

No Attachments Available. Please upload.

Invoice Information

Invoice Number

Invoice Date

OPCO Code

Vendor

Please select

Please select

Requestor / Buyer

OPCO Name



## New Invoice Reference Table


Field Name	Description	Options (where applicable)
<b>Work Type</b>	Type of invoice	<ul style="list-style-type: none"> <li>• <b>PO Invoice:</b> Invoice for services or goods relating to an issued Sysco Purchase Order</li> <li>• <b>Non-PO Invoice:</b> Invoice for services or goods</li> <li>• <b>Credit Memo:</b> Repayment</li> </ul>
<b>Document Type</b>	Second level of classification for an invoice type.	<ul style="list-style-type: none"> <li>• <b>Merchandise:</b> Purchase Order created for direct goods</li> <li>• <b>Drop Shipments:</b> Purchase Order for direct goods with those goods being shipped directly to customer locations</li> <li>• <b>Normal Invoices:</b> Standard invoices not tied to Purchase Orders</li> <li>• <b>Credit Memo:</b> Credit invoice from Sysco to Supplier</li> <li>• <b>Indirect PO:</b> Invoices for indirect Purchase Orders from Procurement Express</li> </ul>
<b>Invoice Number</b>	Supplier provided invoice number	
<b>Invoice Date</b>	Date of invoice creation	<ul style="list-style-type: none"> <li>• Month/ Day / Year</li> </ul>
<b>OpCo Code / Name</b>	Code & Name of Sysco Operating Company being invoiced	
<b>Vendor</b>	Vendor name	
<b>Requestor / Buyer</b>	Operating Company buyer who is purchasing the goods or services	

*Continued on next page.*



## Create Invoice Inquiry

1. Select the **Invoice** tab from the Navigation Bar.
2. Apply Invoice Filters if needed. See [“Invoice Filter Function”](#) for further instructions.
3. Click the Selection box ☒ next to the Invoice create inquiry.
4. Click the **Create Inquiry Invoice** button.

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 **Create Inquiry Invoice**   

<input checked="" type="checkbox"/>	Invoice Number: SIN00785894 Invoice Status: In Process	Work Type: PO Invoice Document type: Drop Shipments	PO#: 5513091 Cora Ref No: INV-15311107	Invoice Date: 7/28/2022 Invoice Gross Amount: 4195.21	OPCO Name: Central Billing Check/ACH Number: -	<a href="#">View</a>
-------------------------------------	---	--	---	--	---	----------------------

5. Fill out the Inquiry Form with the following information:

- Invoice (auto-populated)
- OpCo (auto-populated)
- Vendor (auto-populated)
- Process
- Category
- Topic
- Subject
- Comments

Create Inquiry

Invoice

80662874

OpCo

Sysco San Diego

Vendor

BUNZL USA

Process

---select---

Category

---select---


Topic

---select---

Subject

Comments

Add attachment

 Upload Files

Or drop files


Create

 **Note:** Please see [Invoice Inquiry Reference Table](#) for further details.

6. Scroll to the bottom of the Create Inquiry box.
7. Click **Upload Files** to add supporting documentation. **Note:** File size cannot exceed 8MB.
8. Click the **Create** button to create Vendor Inquiry.




## Invoice Inquiry Reference Table

Field Name	Description	Options (where applicable)
<b>Invoice</b>	Supplier Invoice Number	
<b>OpCo</b>	Sysco Operating Company	
<b>Vendor</b>	Supplier Name	
<b>Category</b>	Main Category for the Inquiry	<ul style="list-style-type: none"> <li>• General Inquiry</li> <li>• Payment Related Inquiry</li> <li>• Repayments</li> <li>• Other</li> </ul>
<b>Topic</b>	Related Topic of the Inquiry  <b>Note:</b> Each Category has different topic options	<ul style="list-style-type: none"> <li>• General Inquiry                         <ul style="list-style-type: none"> <li>• Process Questions</li> <li>• Remittance Requests</li> <li>• Tax Exemption Form</li> <li>• Vendor Account Updates</li> </ul> </li> <li>• Other                         <ul style="list-style-type: none"> <li>• Other</li> </ul> </li> <li>• Payment Related Inquiry                         <ul style="list-style-type: none"> <li>• What is Status of Payment</li> <li>• Credit Memo</li> </ul> </li> <li>• Repayment                         <ul style="list-style-type: none"> <li>• Invalid Cash Discount</li> <li>• Short Payment</li> </ul> </li> </ul>
<b>Subject</b>	Subject of the inquiry to reflect the ask	
<b>Comments</b>	Details of the inquiry or any other additional comments that Supplier wants to add and make available for the Helpdesk team to understand the inquiry	








## Purchase Order Filter Function


1. Select the **Purchase Order** tab on the Navigation Bar.

2. Click on the **Filter**  icon.

3. Enter specific Filter Criteria to view desired Purchase Order information using one or a combination of the following Filter Criteria listed below:

- PO No
  - PO Date
  - Status
  - OpCo Name / Code
  - Total Amount
  - Awaiting Invoice
  - Vendor Name
  - Vendor Number
  - Vendor No
  - PO Type

 PO Flip   



Filter Criteria

PO No

PO Date

Status

---select---

OpCo Name/ Code

Total Amount

Awaiting Invoice

---select---

Vendor Number

Vendor Name

PO Type

---select---

Payment (Vendor) Terms

Apply

Cancel

 **Note:** Please see ["PO Filter Reference Table"](#) for further details.

4. Click the **Apply** button to apply filter criteria.



## PO Filter Reference Table

Field Name	Description	Options (where applicable)
PO No	Issues Sysco Purchase Order Number	
PO Date	Date Purchase Order was Issued	
Status	Status of PO	<ul style="list-style-type: none"> <li><b>Open (Issued):</b> Open and has been issued to Supplier</li> <li><b>Canceled:</b> Canceled and inactive</li> <li><b>Awaiting Goods:</b> Received invoice but still waiting to receive goods or services</li> <li><b>Goods Received:</b> Goods or services have been received</li> <li><b>Closed:</b> PO is inactive and has been closed</li> </ul>
OpCo Name / Code	Sysco Operating Company Name & Code	<ul style="list-style-type: none"> <li>See <a href="#">Appendix</a> for listing</li> </ul>
Total Amount	Total Amount on the Purchase Order	
Awaiting Invoice	Invoice Status	<ul style="list-style-type: none"> <li><b>Yes:</b> There have been no invoices received for this PO</li> <li><b>No:</b> There has been at least one invoice received for this PO</li> </ul>
PO Type	Type of Purchase Order	<ul style="list-style-type: none"> <li><b>Dropship:</b> Dropship PO</li> <li><b>Direct Merchandise:</b> Merch PO</li> <li><b>Procurement Express:</b> POs from Procurement Express</li> </ul>
Vendor Number	Sysco Vendor Number	
Vendor Name	Sysco Vendor Name	



# Purchase Order Management

Sysco SPIRIT User Manual



## View Purchase Order

1. Select the **Purchase Order** tab on the Navigation Bar.
2. Apply Purchase Order Filters if needed. See [“Purchase Order Filter Function”](#) for further instructions.
3. Click the **View** hyperlink to open the Purchase Order Information.

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All

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PO No: 1365663

Status: Goods Received

Total Amount: 1167.60

Vendor Number: 44321000

PO Type: Indirect Expense

PO Date: 11/23/2021

OpCo Name/ Code: SYSCO M...

Awaiting Invoice: No

Vendor Name: SYSCO LAKESI...

Payment (Vendor) Terms: -

View

Purchase Orders open in view mode. Suppliers have the ability to view (1) PO Line Items, (2) Purchase Order Details, and (3) Shipping Address

Purchase Order > VIEW > PO-15549522

PO No: 5521503

PO Date: 8/15/2022

Total Amount: 2,191.5

Status: Goods Received

PO Type: Dropship

OpCo Name/ Code: Central Billing 179

2

Purchase Order Information

3

PURCHASE ORDER DETAIL

Total Amount: 2,191.5

Currency: CAD

PO Type: Dropship

Line Count: 1

Status: Goods Received

FOB: 2,191.5

Awaiting Invoice: Yes

PUA Charges: 0

Miscellaneous Merchandise Charges: 0

Miscellaneous Freight Charges: 0

1

INVOICE LINE ITEMS


Juct/Service No.	Product/Service Description	Amount	UOM - Qty	Invoice Quantity	GRN Quantity	Invoice Unit Price	GRN Rate	Catch Weight	GRN Catch Weight
5679	NAPKIN BEVERAGE 2PLY RED CANAD	934.5	CS	25	25	37.38	25	0	0
5558	PLACEMAT PAPER WILDEBEE	67.94	CS	1	1	67.94	67.94	0	0
4143	BAND NAPKIN WHT 1.5 X 4.5	182.74	CS	2	2	91.37	91.37	0	0
1583	CUP BAKING CHOC BRN TULIP LG	91.41	CS	1	1	91.41	91.41	0	0



# Purchase Order Management

Sysco SPIRIT User Manual



## Download Purchase Order Tab Details

1. Select the **Purchase Order** on the Navigation Bar.
2. Apply Purchase Order Filters if needed. See [“Purchase Order Filter Function”](#) for further instructions.
3. Click the Selection box ☒ next to the Purchase Order to download details in Excel format.
  - To select all, click the Selection box ☒ at the top of the Purchase Order page.
4. Click the **Download**  icon.
5. Click on the downloaded Excel file to open it.

Sysco SPIRIT Home Invoice **Purchase Order** Payment Vendor Inquiry Vendor Portal Help

All

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 PO Filter 

Select & Download

<input checked="" type="checkbox"/>	PO No: 1365663 PO Date: 11/23/2021	Status: Goods Received OpCo Name/ Code: SYSCO M...	Total Amount: 1167.60 Awaiting Invoice: No	Vendor Number: 44321000 Vendor Name: SYSCO LAKESIDE...	PO Type: Indirect Expense Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5523965 PO Date: 8/22/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 9412.20 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5521876 PO Date: 8/16/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 51666.06 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5521503 PO Date: 8/15/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 2191.50 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5521483 PO Date: 8/15/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 7647.50 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5521482 PO Date: 8/15/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 27122.97 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5521481 PO Date: 8/15/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 12264.01 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5520903 PO Date: 8/15/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 1404.64 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>

Purchase Order\_Ca...xls

Show all X

Excel file will open with fields PO No, PO Date, Status, OpCo Name / Code, Total Amount, Awaiting Invoice, Vendor Number, Vendor Name, and Payment (Vendor) Terms. Suppliers have the ability to sort and filter data as needed in Excel.

PO No	PO Date	Status	OpCo Name/ Code	Total Amount	Awaiting Invoice	Vendor Number	Vendor Name	PO Type	Payment (Vendor) Terms
5510773	Mon Jul 11	Goods Received	Central Billing 179	7340.64	No	11254900	GAY LEA FOODS	Dropship	
5510496	Fri Jul 15	Goods Received	Central Billing 179	19830.51	No	11254900	GAY LEA FOODS	Dropship	
5508728	Tue Jul 12	Goods Received	Central Billing 179	61120.29	No	11254900	GAY LEA FOODS	Dropship	
5523965	Mon Aug 1	Goods Received	Central Billing 179	9412.20	Yes	11254900	GAY LEA FOODS	Dropship	



## Purchase Order Flip

Please Note: PO Flip functionality is only available for non-EDI Suppliers. If you submit invoices via iTrade, please do not use the PO flip. Instead, continue to use iTrade as part of your current process. PO Flip functionality is not available on Purchase Orders already tied to an invoice received by Sysco.

1. Select the **Purchase Order** tab from the Navigation Bar.

2. Apply Purchase Order Filters if needed. See ["Purchase Order Filter Function"](#) for further instructions.

3. Select the Purchase Order by clicking the Selection box ☒ next to the PO to be flipped.

• Awaiting Invoice Status must be **Yes**.

4. Click the **PO Flip** button.

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PO Flip

<input type="checkbox"/>	PO No: 1365663 PO Date: 11/23/2021	Status: Goods Received OpCo Name/ Code: SYSCO M...	Total Amount: 1167.60 Awaiting Invoice: No	Vendor Number: 44321000 Vendor Name: SYSCO LAKESI...	PO Type: Indirect Expense Payment (Vendor) Terms: -	<a href="#">View</a>
<input checked="" type="checkbox"/>	PO No: 5523965 PO Date: 8/22/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 9412.20 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>
<input type="checkbox"/>	PO No: 5521876 PO Date: 8/16/2022	Status: Goods Received OpCo Name/ Code: Central Billi...	Total Amount: 51686.86 Awaiting Invoice: Yes	Vendor Number: 11254900 Vendor Name: GAY LEA FOOD...	PO Type: Dropship Payment (Vendor) Terms: -	<a href="#">View</a>

Suppliers will be routed to the Create New Invoice screen.

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Invoice > NEW

Detail

Attachments

No Attachments Available. Please upload.

Invoice Information

INVOICE HEADER

Work Type  
PO Invoice

Document type  
Drop Shipments

Invoice Number

Invoice Date

OPCO Code  
179

Vendor  
GAY LEA FOODS CORP LTD CB

OPCO Name

PO#  
5523965

Current State  
Start

INVOICE DETAILS

Currency  
CAD

Invoice Gross Amount  
9,412.200

Line Total Amount  
9,412.2

Ecology/Deposit  
0.000

Continued on next page.

Last Updated: 08/06/2025


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# Purchase Order Management

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- 5. Click the Attach  icon and attach invoice in .pdf format. **Note:** File size cannot exceed 8MB.
- 6. Enter the **Invoice Header** information:
  - Work Type (auto-populates to PO Invoice)
  - Document Type (auto-populates)
  - Invoice Number
  - Invoice Date
  - OPCO Code (see [Appendix](#) for listing)
  - Vendor (auto-populated)
  - PO # (auto-populated)

INVOICE HEADER

Work Type PO Invoice	Document type Drop Shipments
Invoice Number <input type="text"/>	Invoice Date <input type="text"/>
OPCO Code <input type="text" value="179"/>	Vendor <input type="text" value="GAY LEA FOODS CORP LTD CB"/>
OPCO Name	PO# 5523965

- 7. Confirm **Invoice Details** that are auto-populated from PO line items are accurate. Verify Currency, Invoice Gross Amount, and Line Amount
- 8. Enter any Ecology/ Deposit, Delivery Handling, Warehouse/ Inv Adj, Other Charges/ Allowance, Less than Charges, Discount Amount, Discount Percent, Discount Due Date, Truck Load, Freight Charges, and Miscellaneous Charges if applicable.

INVOICE DETAILS

Currency <input type="text" value="CAD"/>	Invoice Gross Amount <input type="text" value="9,412.200"/>
Line Total Amount 9,412.2	Ecology/Deposit <input type="text" value="0.000"/>
Delivery / Handling <input type="text"/>	Warehouse/ Inv Adj <input type="text"/>
Other Charges/ Allowance <input type="text"/>	Less than charges <input type="text"/>
Discount Amount <input type="text" value="0.000"/>	Discount Percent <input type="text" value="0.000"/>
Discount Due Date <input type="text"/>	Truck Load <input type="text"/>
Freight Charges <input type="text"/>	Pickup Allowance <input type="text"/>
Miscellaneous Charges	

Continued on next page.



# Purchase Order Management

Sysco SPIRIT User Manual



9. Enter **Invoice Taxes** if applicable for the invoice.

INVOICE TAXES

GST/HST

0.000

PST/QST

0.000

GST/HST Registration #

PST/QST Registration #

10. Verify **Invoice Line Items** and confirm/ update the quantity as applicable.

INVOICE LINE ITEMS							LIST	1	OF 1	<	>
PO Line No	PO Line Type	Product/Service No.	Product/Service Description	Amount	UOM - Qty	Invoice Quantity	Invoice Unit Price				
		8785826	BUTTER POT CAN	9,412.200	CS	162.000	58.100				

11. Enter **Supplier comments** in the Vendor Comments box.

12. Select **Create** from the User Action drop down menu.

CLOSURE SECTION




Vendor Comments


User Action

Create

---select---

Create


13. Click the Attach  icon and attach invoice in .pdf format.  Note: File size cannot exceed 8MB.  
Important  Attachments are mandatory.



Detail

Attachments

No Attachments Available. Please upload.




14. Click the Save  icon to flip the PO and create the invoice.





Continued on next page.



## Payment Details Filter Function

1. Select the **Payment** tab on the Navigation Bar.
2. Click on the **Filter**  icon.
3. Enter specific Filter Criteria to view desired Payment Details using one or a combination of the Filter Criteria listed below.

- Payment Status
- Payment # (Check/ACH/ EFT)
- Paid Date
- Total Check Amount
- Invoice Payment Amount
- Invoice Amount
- Invoice No
- Vendor No
- OpCo Name / Code
- PO Number
- Check Cleared Date
- Vendor Name



×

Filter Criteria

Payment Status	Payment # (Check/ACH/EFT)
<div>---select---</div>	<div></div>
Paid Date	Total Check Amount
<div></div>	<div></div>
Invoice Payment Amount	Invoice Amount
<div></div>	<div></div>
Invoice No	Vendor No
<div></div>	<div></div>
OpCo Name/ Code	PO Number
<div></div>	<div></div>
Check Cleared Date	Vendor Name
<div></div>	<div></div>

Apply

Cancel

4. Click the **Apply** button to apply filter criteria.








## Payment Details Filter Reference Table

Field Name	Description	Options (where applicable)
Payment Status	Status of payment	<ul style="list-style-type: none"><li>• Paid: Invoice has been paid</li><li>• Unpaid: Invoice has not been paid</li></ul>
Payment #	Check or ACH or EFT Number for the payment	
Paid Date	Date in which payment was made	
Total Check Amount	Total amount paid on the check	
Invoice Payment Amount	Total amount paid from the supplier invoice	
Invoice Amount	Total amount on the supplier invoice	
Invoice No.	Supplier-provided invoice number	
Vendor No.	Sysco vendor number	
OpCo Name / Code	Name & Coding of Sysco Operating Company being invoiced	
PO Number	Sysco issued Purchase Order number	
Check Cleared Date	Date in which the check cleared	
Vendor Name	Vendor name receiving payment	



## View Payment Details

1. Select the **Payment** tab on the Navigation Bar.
2. Apply Payment Details Filters if needed. See [“Payment Details Filter Function”](#) for further instructions.
3. Click the **View** hyperlink to open the Payment Details in View mode.

Sysco   SPIRIT		Home	Invoice	Purchase Order	Payment	Vendor Inquiry	Vendor Portal	Help	
All									
<input type="checkbox"/>		Page 1 of 1		1 - 2 of 2		    			
<input type="checkbox"/>	Payment Status: Unpaid Payment # (Check/ACH/EFT): 2...	Paid Date: 7/18/2022 Total Check Amount: 373.95	Invoice Payment Amount: 2777... Invoice Amount: 27770.70	Invoice No: DEMO2207-1 Vendor No: -	OpCo Name/ Code: SYSCO M... PO Number: -	View			
<input type="checkbox"/>	Payment Status: Paid Payment # (Check/ACH/EFT): 2...	Paid Date: 7/18/2022 Total Check Amount: 373.95	Invoice Payment Amount: 2777... Invoice Amount: 27770.70	Invoice No: QASUP1407-01 Vendor No: -	OpCo Name/ Code: SYSCO M... PO Number: 1374013	View			

Payment Details open in view mode. Suppliers are able to view (1) Invoice No, (2) Vendor No, (3) PO Number, (4) Payment Status, (5) Invoice Payment Amount, (6) Check Number, (7) Paid Date, (8) Currency, (9) Payment Method, (10) OpCo Name/Code, (11) Total Check Amount, (12) Invoice Discount Amount, (13) Check Cleared Date, and (14) Payment Status Description in the Payment Details screen.

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Payment > VIEW > PAY-03784706

Invoice No	Vendor No	PO Number	Payment Status	Invoice Payment Amount
QASUP1407-01		1374013	Paid	27,770.7

Payment Information


▼


PAYMENT DETAIL

Payment # (Check/ACH/EFT)	Paid Date
22310	7/18/2022
Currency	Payment Method
USD	ACH
OpCo Name/ Code	Total Check Amount
SYSCO MONCTON 262	373.95
Invoice Discount Amount	Check Cleared Date
0	
Payment Status Description	
Paid	



## Download Payment Tab Details






1. Select the **Payment** tab on the Navigation Bar.
2. Apply Payment Details Filters if needed. See ["Payment Details Filter Function"](#) for further instructions.
3. Click the Selection box ☒ next to the Payment Details to download details in Excel format.
  - To select all, click the Selection box ☒ at the top of the Payment Details page.
4. Click the **Download**  icon.



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All

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<input checked="" type="checkbox"/>	Payment Status: Paid Payment # (Check/ACH): 121531	Paid Date: 2019-07-01 Total Check Amount: 17427.85	Invoice Payment Amount: 8103.54 Invoice Amount: 8185.39	Invoice No: 80666952 Vendor No: 270446	OpCo Name/ Code: Sysco River... PO Number: 05522600	<a href="#">View</a>
<input checked="" type="checkbox"/>	Payment Status: Paid Payment # (Check/ACH): 121531	Paid Date: 2019-07-01 Total Check Amount: 17427.85	Invoice Payment Amount: 9324.31 Invoice Amount: 9418.5	Invoice No: 80666951 Vendor No: 270446	OpCo Name/ Code: Sysco River... PO Number: 05523640	<a href="#">View</a>






5. Click the downloaded Excel file to open.




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All

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<input checked="" type="checkbox"/>	Payment Status: Paid Payment # (Check/ACH): 121531	Paid Date: 2019-07-01 Total Check Amount: 17427.85	Invoice Payment Amount: 8103.54 Invoice Amount: 8185.39	Invoice No: 80666952 Vendor No: 270446	OpCo Name/ Code: Sysco River... PO Number: 05522600	<a href="#">View</a>
-------------------------------------	---	---	--	---	--	----------------------

 Payment\_Antonia\_1....xls ^


Show all X

Excel file will open with fields Payment Status, Payment # (Check/ACH), Paid Date, Total Check Amount, Invoice Payment Amount, Invoice Amount, Invoice No, Vendor No, OpCo Name / Code, and PO Number. Suppliers have the ability to sort and filter data as needed in Excel.



	A	B	C	D	E	F	G	H	I	J
1	Payment Status	Payment # (Check/ACH)	Paid Date	Total Check Amount	Invoice Payment Amount	Invoice Amount	Invoice No	Vendor No	OpCo Name/ Code	PO Number
2	Paid	121531	Mon Jul 01 00:	17427.85	9324.31	9418.50	80666951	270446	Sysco Riverside 320	05523640
3	Paid	121531	Mon Jul 01 00:	17427.85	8103.54	8185.39	80666952	270446	Sysco Riverside 320	05522600






## Vendor Inquiry Filter Function


1. Select the **Vendor Inquiry** tab from the Navigation Bar.
2. Click on the **Filter**  icon.
3. Enter specific Filter Criteria to view desired Vendor Inquiries using one or a combination of the Filter Criteria listed below.

- Case Number
- Subject
- Process
- OpCo Code
- Inquiry Status
- Created Date
- Category
- Created By
- Topic



Create Inquiry Case






Filter Criteria

Case Number	Subject
<input type="text"/>	<input type="text"/>
Process	OPCO Code
<div>---select---</div>	<input type="text"/>
Inquiry Status	Created Date
<div>---select---</div>	<input type="text"/>
Category	Created By
<div>---select---</div>	<input type="text"/>
Topic	
<div>---select---</div>	

Apply

Cancel

-  **Note:** Please see ["Vendor Inquiry Filter Reference Table"](#) for further details.
4. Click the **Apply** button to apply filter criteria.




## Vendor Inquiry Filter Reference Table

Field Name	Description	Options (where applicable)
Case Number	Sysco Helpdesk Case Number	
Subject	Supplier Created Subject	
Process	Inquiry Process Area	AP Canada Inquiries AP Canada CB_CBill
OpCo Code	Operating Company Code	<ul style="list-style-type: none"><li>See <a href="#">Appendix</a> for listing</li></ul>
Inquiry Status	Current Status of Inquiry	<ul style="list-style-type: none"><li>Resolved</li><li>Awaiting Vendor Response</li><li>Pending with Sysco</li></ul>
Created Date	Date Inquiry was Created / Submitted	
Category	Designated Inquiry Category	<ul style="list-style-type: none"><li>General Inquiry</li><li>Payment Related Inquiry</li><li>Repayments</li><li>Other</li></ul>
Created By	User that Submitted Inquiry	
Topic	Sysco's status for the invoice	<ul style="list-style-type: none"><li>General Inquiry<ul style="list-style-type: none"><li>Process Questions</li><li>Remittance Requests</li><li>Tax Exemption Form</li><li>Vendor Account Updates</li></ul></li><li>Other<ul style="list-style-type: none"><li>Other</li></ul></li><li>Payment Related Inquiry<ul style="list-style-type: none"><li>What is Status of Payment</li><li>Credit Memo</li></ul></li><li>Repayment<ul style="list-style-type: none"><li>Invalid Cash Discount</li><li>Short Payment</li></ul></li></ul>



## View Vendor Inquiry

1. Select the **Vendor Inquiry** tab on the Navigation Bar.
2. Apply Vendor Inquiry Filters if needed. See [“Vendor Inquiry Filter Function”](#) for further instructions.
3. Click the **View** hyperlink to open the Vendor Inquiry in View mode.



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Create Inquiry Case




<input type="checkbox"/>	Case Number: CN-457131 Subject: hi	Process: AP Canada CB_CBill OPCO Code: 179	Inquiry Status: Pending with Sy... Created Date: 9/2/2022	Category: General Inquiry Created By: Canada Portal QA	Topic: Remittance requests	<a href="#">View</a>
<input type="checkbox"/>	Case Number: CN-457078 Subject: hi	Process: AP Canada Inquiries OPCO Code: 258	Inquiry Status: Pending with Sy... Created Date: 8/18/2022	Category: Repayments Created By: Canada Portal QA	Topic: Invalid Cash Discount	<a href="#">View</a>

The Inquiry’s Interactions screen opens as a pop-up window. Suppliers have the ability to view interactions, reply, and add attachments.

- To add an attachment, click the **Upload Files** button.  **Note:** File size cannot exceed 8MB.
- To reply, enter any comments in the comments window and click the **Reply** button.

Interactions




Support:

Subject:Short Payment [ref:\_CN-209239]

Please provide support for short payment

Tue, 22 Oct 2019 17:53:01 GMT

Add attachment

 Upload Files

Or drop files

Salesforce Sans









12

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Close Inquiry


Reply

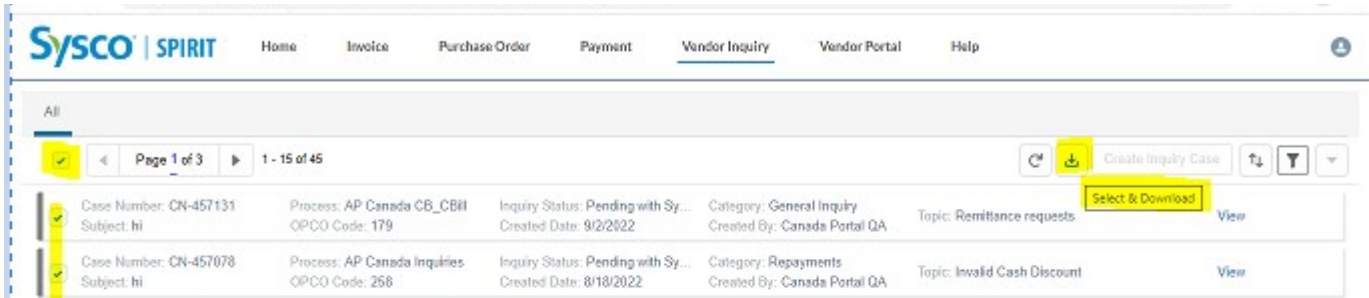
Last Updated: 08/06/2025

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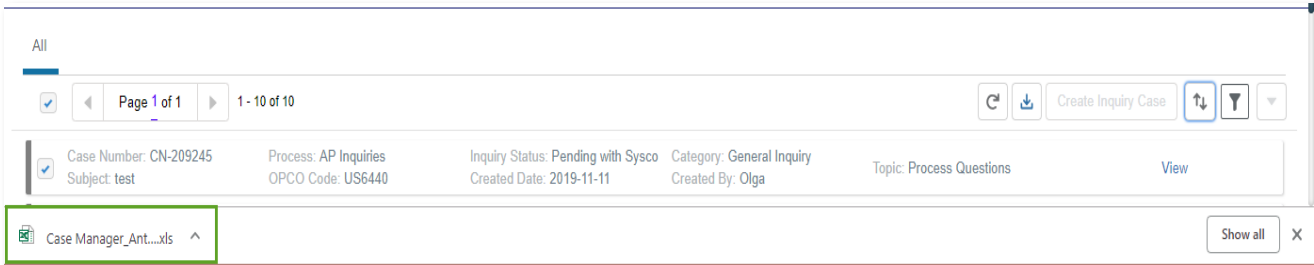


Download Vendor Inquiry Tab Details

- 1. Select the **Vendor Inquiry** tab on the Navigation Bar.
- 2. Apply Vendor Inquiry Filters if needed. See [“Vendor Inquiry Filter Function”](#) for further instructions.
- 3. Click the Selection box ☒ next to the Vendor Inquiry to download details in Excel format.
  - To select all, click the Selection box ☒ at the top of the Vendor Inquiry page.
- 4. Click the **Download**  icon.



- 5. Click the downloaded Excel file to open.



Excel file opens with fields Case Number, Subject, Process, OpCo Code, Inquiry Status, Created Date, Category, Created By, and Topic. Suppliers have the ability to sort and filter data as needed in Excel.

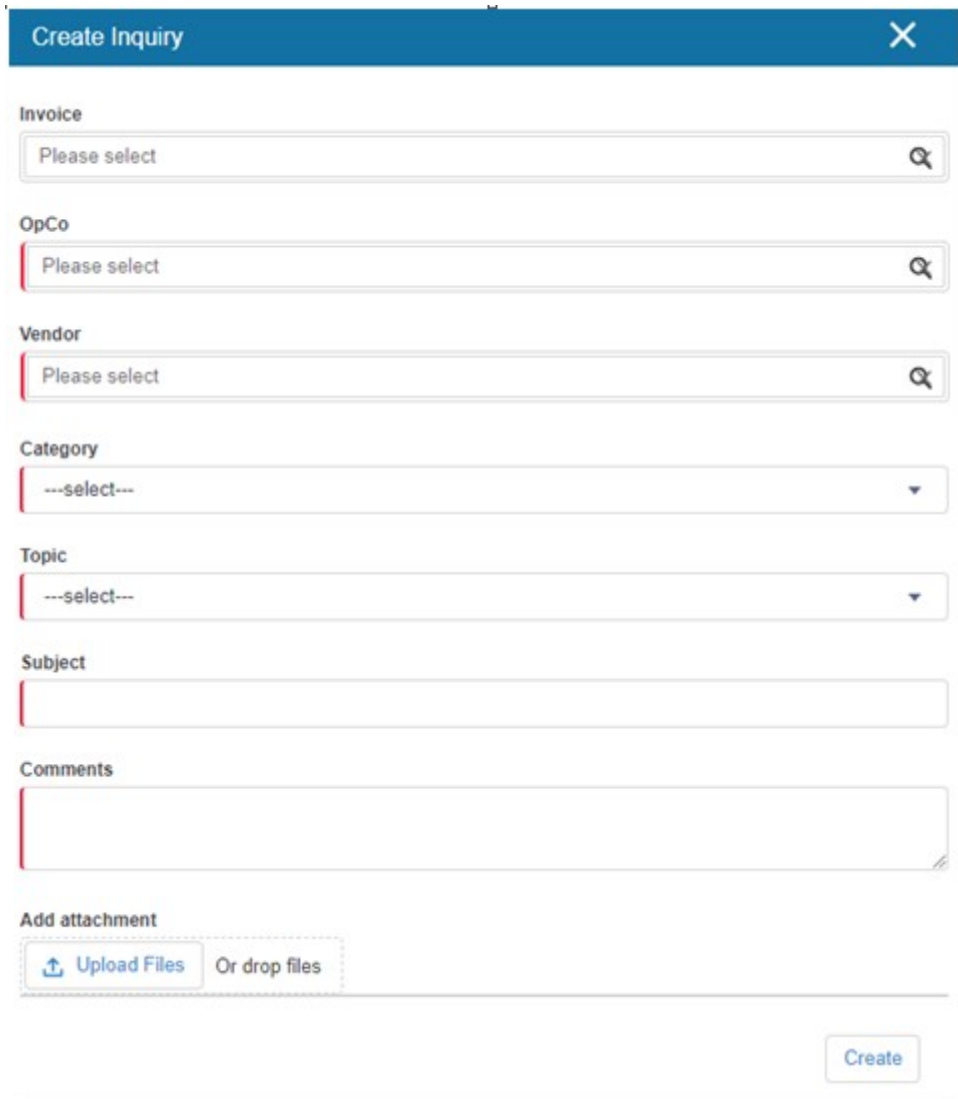
Case Num	Subject	Process	OPCO Cod	Inquiry Status	Created Date	Category	Created By	Topic
CN-45713	What is St	AP Canada C	258	Pending with Sysco	Fri Sep 02 12:	General Inquiry	Canada Portal QA	Remittance requests
CN-45712	Other Ver	AP Canada C	262	Resolved	Thu Aug 25 05	General Inquiry	Canada Portal QA	Process Questions
CN-45712	Payment S	AP Canada I	262	Pending with Sysco	Wed Aug 24 1	Repayments	Canada Portal QA	Invalid Cash Discount



## Create Vendor Inquiry

1. Select the **Vendor Inquiry** tab on the Navigation Bar.
2. Click the **Create Inquiry Case** button.
3. Fill out the Inquiry Form with the following information:

- Invoice
- OpCo
- Vendor
- Topic
- Subject
- Comments




The screenshot shows a 'Create Inquiry' modal window. It contains several input fields: 'Invoice' (a search-style dropdown with 'Please select' and a magnifying glass icon), 'OpCo' (a search-style dropdown with 'Please select' and a magnifying glass icon), 'Vendor' (a search-style dropdown with 'Please select' and a magnifying glass icon), 'Category' (a standard dropdown menu with '---select---'), 'Topic' (a standard dropdown menu with '---select---'), 'Subject' (a text input field), and 'Comments' (a larger text area). At the bottom, there is an 'Add attachment' section with an 'Upload Files' button (containing an upload icon) and a dashed box labeled 'Or drop files'. A 'Create' button is located in the bottom right corner of the modal.

 **Note:** Please see ["Vendor Inquiry Reference Table"](#) for further details.

4. Click **Upload Files** to add supporting documentation. **Note:** File size cannot exceed 8MB.
5. Click the **Create** button to create Vendor Inquiry.




## Vendor Inquiry Reference Table

Field Name	Description	Options (where applicable)
Invoice	Supplier Invoice Number	
OpCo	Sysco Operating Company	
Vendor	Supplier Name	
Category	Main Category for the Inquiry	<ul style="list-style-type: none"><li>• General Inquiry</li><li>• Payment Related Inquiry</li><li>• Repayments</li><li>• Other</li></ul>
Topic	Related Topic of the Inquiry  <b>Note:</b> Each Category has different topic options	<ul style="list-style-type: none"><li>• General Inquiry<ul style="list-style-type: none"><li>• Process Questions</li><li>• Remittance Requests</li><li>• Tax Exemption Form</li><li>• Vendor Account Updates</li></ul></li><li>• Other<ul style="list-style-type: none"><li>• Other</li></ul></li><li>• Payment Related Inquiry<ul style="list-style-type: none"><li>• What is Status of Payment</li><li>• Credit Memo</li></ul></li><li>• Repayment<ul style="list-style-type: none"><li>• Invalid Cash Discount</li><li>• Short Payment</li></ul></li></ul>
Subject	Subject of the inquiry to reflect the ask	
Comments	Details of the inquiry or any other additional comments that Supplier wants to add and make available for the Helpdesk team to understand the inquiry	



## Search Attributes

1. Select the **Vendor Portal** tab from the Navigation Bar.
2. Enter specific Filter Criteria to fetch desired documents using one or a combination of the Filter Criteria listed below:
  - Vendor Number [Mandatory]
  - Sysco Fiscal Year/Period YYYYpp [Optional]
  - OpSite [Optional]
  - Document Type [Optional]
  - Payment Reference [Optional]
  - Opco PO Number [Optional]
  - CB/Cbill Invoice Number [Optional]
  - Opco Invoice Number [Optional]



Home

Invoice

Purchase Order

Payment

Vendor Inquiry

**Vendor Portal**

Help

Vendor Number

11254900

OpSite

---Select---

Payment Reference

CB/Cbill Invoice Number

Sysco Fiscal Year/Period YYYYpp

Document Type

---Select---

Opco PO Number

Opco Invoice Number

Search

Reset

Download


Click Search to find the documents based on search criteria.


Show

10

entries

Search:

 **Note:** Please see ["Filter Reference Table"](#) for further details.

Important  You can download upto 1000 records in single search. If your document is not included in the fetched records, narrow your search by applying additional optional filters.



## Filter Reference Table

Field Name	Format & other details
Vendor Number	<ul style="list-style-type: none"><li>• Dropdown containing Vendor Numbers mapped to the logged in user</li></ul>
Sysco Fiscal Year/Period YYYYpp	<ul style="list-style-type: none"><li>• Numeric upto 6 digits</li></ul>
OpSite	<ul style="list-style-type: none"><li>• Dropdown containing all Canada Opsites in scope for SPIRIT</li></ul>
Document Type	<ul style="list-style-type: none"><li>• Dropdown containing all applicable document types that can be retrieved from Open Text</li></ul>
Payment Reference	<ul style="list-style-type: none"><li>• Free Text, can be a string</li></ul>
OpCo PO Number	<ul style="list-style-type: none"><li>• Free Text, can be a string</li></ul>
CB/Cbill Invoice Number	<ul style="list-style-type: none"><li>• Free Text, can be a string</li></ul>
OpCo Invoice Number	<ul style="list-style-type: none"><li>• Free Text, can be a string</li></ul>



## View & Download Documents

1. Select the **Vendor Portal** tab on the Navigation Bar.
2. Apply Filters as needed to fetch required documents.
3. Click on the **Search** button to fetch documents from Open Text.

Show  entries

Search:

<input type="checkbox"/>	Document Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
<input checked="" type="checkbox"/>	Samples and Returns Backup	Toronto	2246984		4082175	78881	202001	02/24/2022
<input type="checkbox"/>	BILLBACK - DM	Central Ontario	2859479		1483524	101146	202202	08/11/2021
<input type="checkbox"/>	MISCELLANEOUS	Central Ontario	2859479		1480499	101146	202202	08/11/2021
<input type="checkbox"/>	MISCELLANEOUS	Central Ontario	2859479		1477783	101146	202202	08/11/2021
<input type="checkbox"/>	UNLOADING SERVICES	Central Ontario	2859479		1479095	101146	202202	08/11/2021
<input type="checkbox"/>	FILL RATE PENALTY	Central Ontario	2859479		1481914	101146	202202	08/11/2021
<input type="checkbox"/>	MISCELLANEOUS	Central Ontario	2859479		1479164	101146	202202	08/11/2021
<input type="checkbox"/>	ALLIED RECLAMATION	Central Ontario	2859479		1482001	101146	202202	08/11/2021

Document data is fetched in view mode. Users have the ability to download fetched documents by selecting the records and clicking on **Download** button.

Search Reset Download

Please select atleast one record to enable Download. You can select upto 10 records.

Show  entries

<input type="checkbox"/>	Document Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
<input checked="" type="checkbox"/>	Samples and Returns Backup	Toronto	2246984		4082175	78881	202001	02/24/2022
<input checked="" type="checkbox"/>	BILLBACK - DM	Central Ontario	2859479		1483524	101146	202202	08/11/2021
<input checked="" type="checkbox"/>	MISCELLANEOUS	Central Ontario	2859479		1480499	101146	202202	08/11/2021
<input type="checkbox"/>	MISCELLANEOUS	Central Ontario	2859479		1477783	101146	202202	08/11/2021
<input type="checkbox"/>	UNLOADING SERVICES	Central Ontario	2859479		1479095	101146	202202	08/11/2021
<input type="checkbox"/>	FILL RATE PENALTY	Central Ontario	2859479		1481914	101146	202202	08/11/2021
<input type="checkbox"/>	MISCELLANEOUS	Central Ontario	2859479		1479164	101146	202202	08/11/2021

**Note:** The Download button would remain disabled(greyed out) unless user selects one or more(upto 10) records from list view



Download of Documents

- 1. Select documents to be downloaded using the check boxes. This enables the **Download** button.
- 2. Click on Download.

<input checked="" type="checkbox"/>	MISCELLANEOUS	Vancouver	CBV111	PO111	SV111	PN111	201408	15/12/2021
<input checked="" type="checkbox"/>	FREIGHT ALLOWANCE	Kelowna	CBV444	PO444	SV444	PN444	201408	15/12/2021

Showing 1 to 2 of 2 entries

Previous


1

Next

 2064347742.zip ^

Show all X

- 3. Documents will be downloaded to default download folder of the browser in a zip folder.

 **Note:** System will throw an alert asking user to keep selection up to 10 records only if more than 10 records are selected.

Continued on next page.



User can further search data on top of fetched records by entering keyword in **Search** box

User can also sort data based on any of List View fields

User clear the previously fetched data records by using the **Reset** button.

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# Appendix

Sysco SPIRIT User Manual

OpCo Code	OpCo Name
607	Canada Corporate Office
179	Central Billing
447	SMS Canada
823	CENTRAL DISTRIBUTION SYSCO FOOD SERVICES INC.
264	SYSCO ST. JOHN'S
265	SYSCO HALIFAX
268	Atlantic Sysco Outside Storage
162	SYSCO KELOWNA, A DIV OF SYSCO CANADA, INC.
180	SYSCO FOODS TORONTO
256	SYSCO MILTON, A DIVISION OF SYSCO CANADA, INC.
338	SYSCO SOUTHWESTERN ONTARIO
442	SYSCO OTTAWA - DIV OF SYSCO CANADA, INC.
838	SYSCO SOUTHWESTERN ONTARIO RDC
77	SYSCO CENTRAL ONTARIO-DIV SYSCO CANADA,INC
331	SYSCO GRAND MONTREAL
417	Mitshim Etatu Supply LP
44	SYSCO VANCOUVER, A DIV OF SYSCO CANADA, INC.
139	SYSCO VICTORIA, A DIV OF SYSCO CANADA, INC.
181	SYSCO CALGARY
257	SYSCO EDMONTON
258	SYSCO REGINA
274	SYSCO THUNDER BAY
262	SYSCO MONCTON
259	SYSCO WINNIPEG