Sysco SPIRIT

USER MANUAL

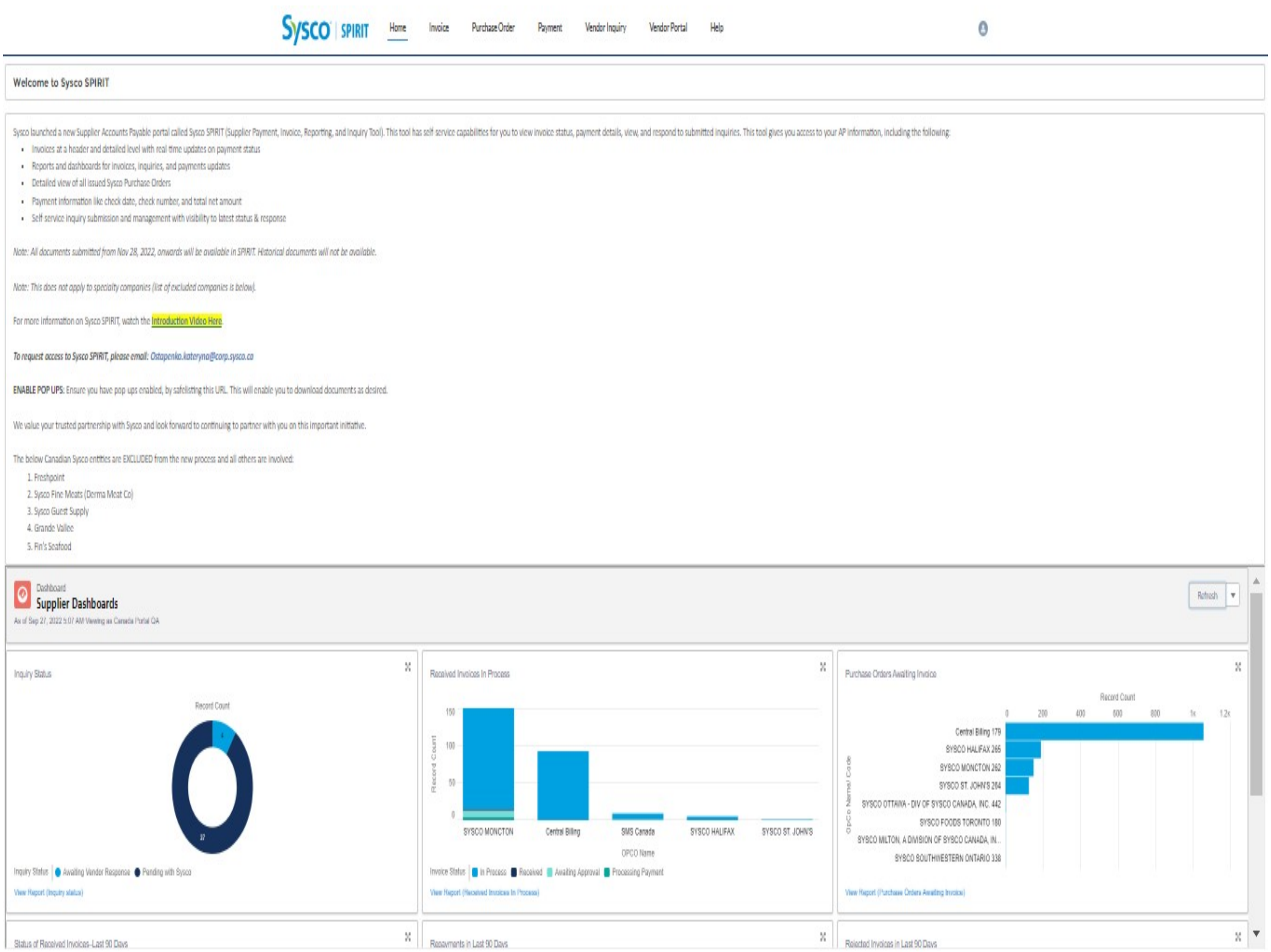
This document provides systematic instructions to access Sysco's Supplier Payment, Invoice, Reporting, and Inquiry Tool (Sysco SPIRIT), navigate the site, download specific payables related documentation, and create an inquiry. Suppliers can search proprietary information by Check Number, Invoice Number,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

Sysco SPIRIT Log in

1. In your internet browser address field, type: **syscoapflow.my.site.com** and press **Enter**.

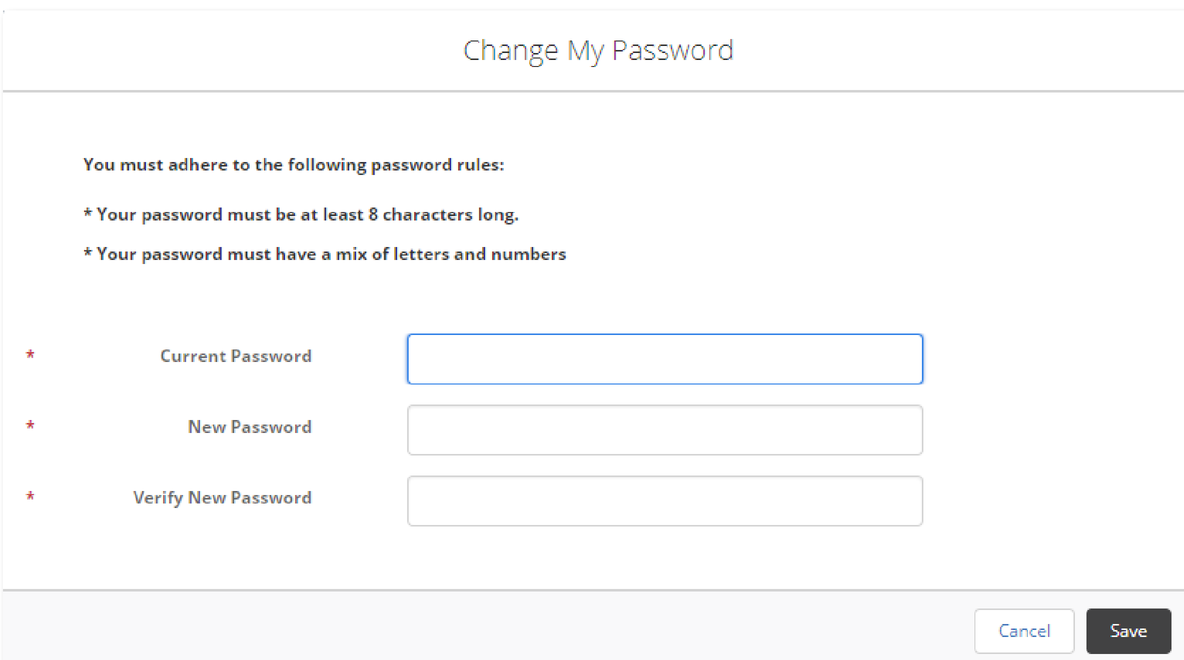
   Tip! It is recommended to use Google Chrome over other browsers for optimum results.

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/



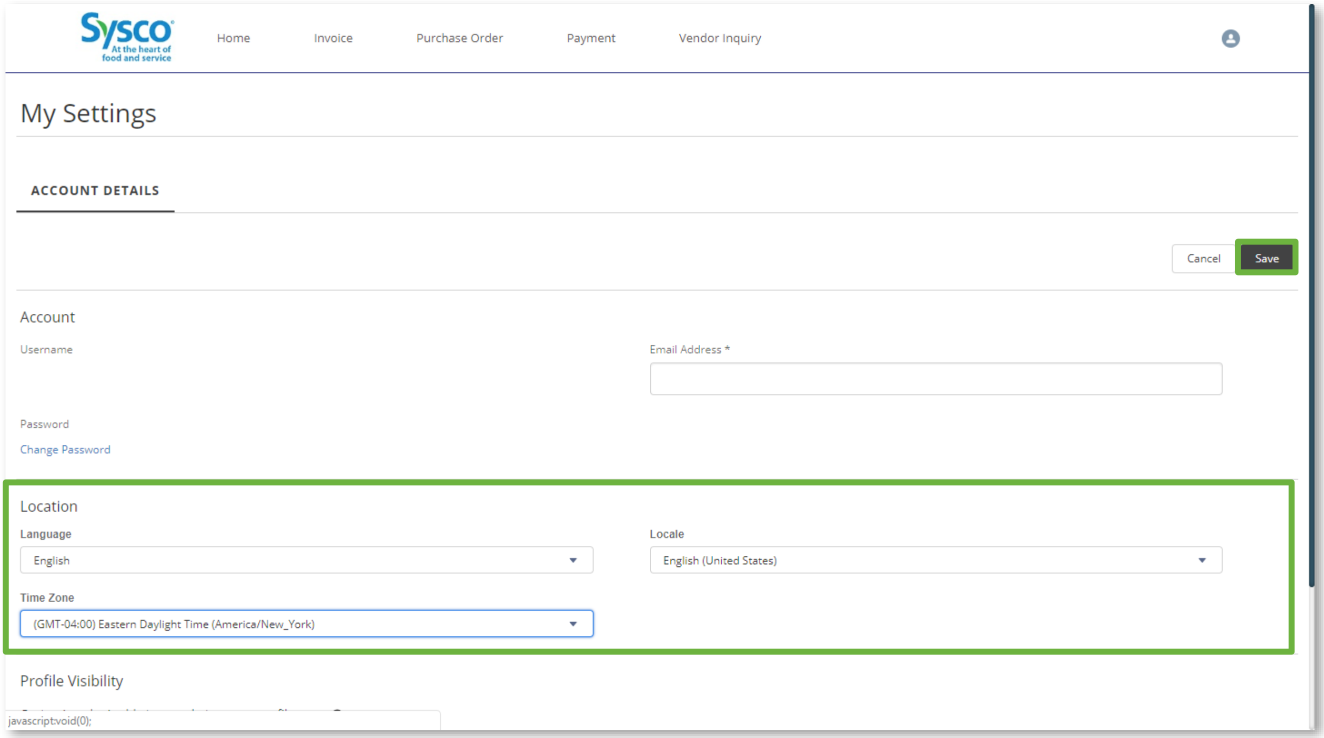
Change Password

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 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.

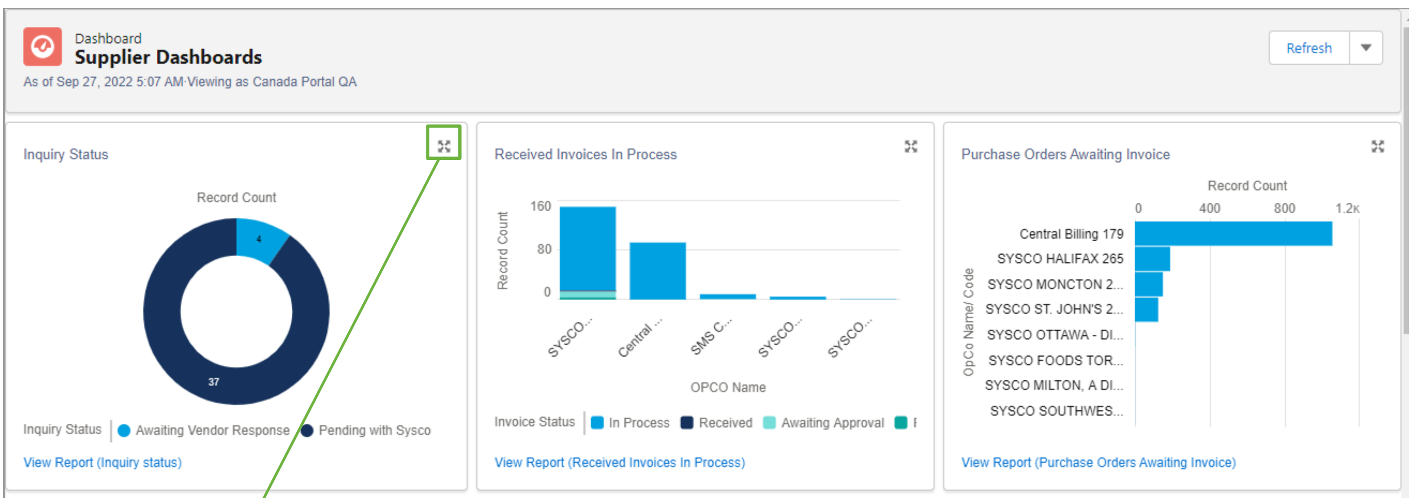


Supplier Dashboards

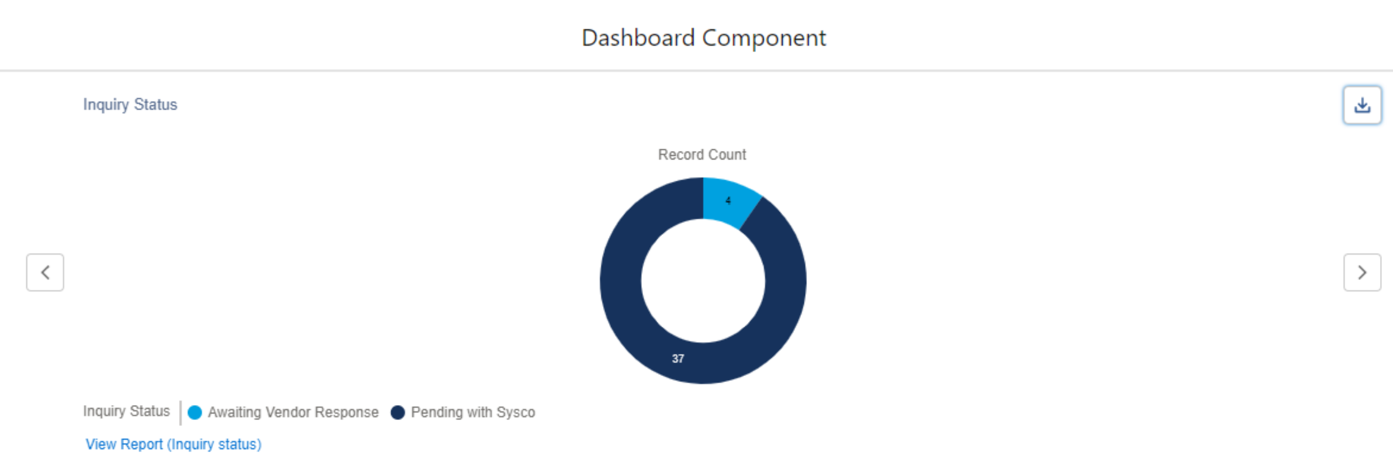
The Sysco SPIRIT Dashboard provides Suppliers a high level overview of the activity for each category listed below:

- 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.

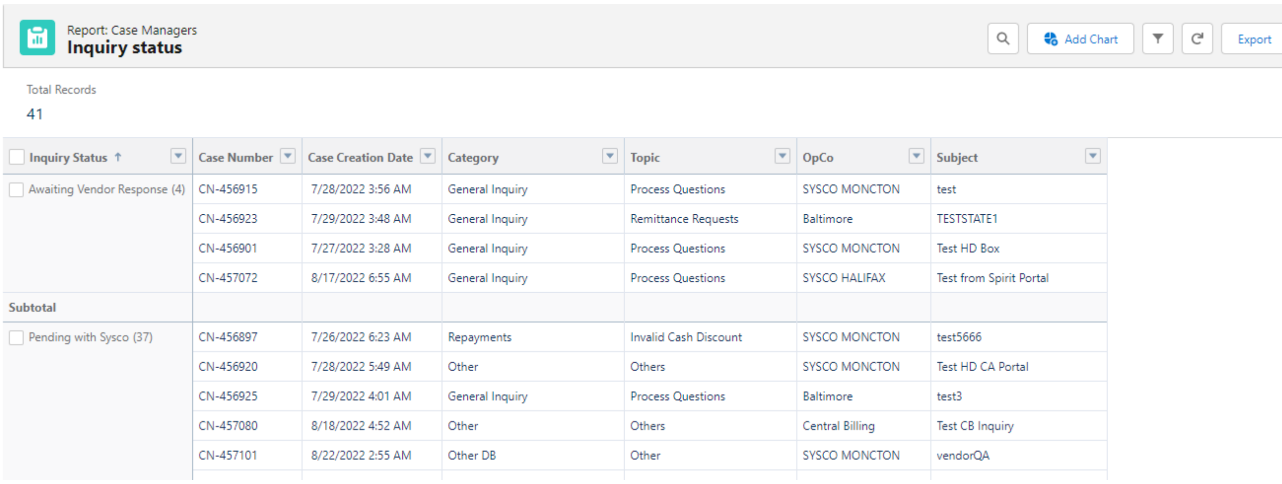


Click the Expand icon to open the dashboard in an expanded view.



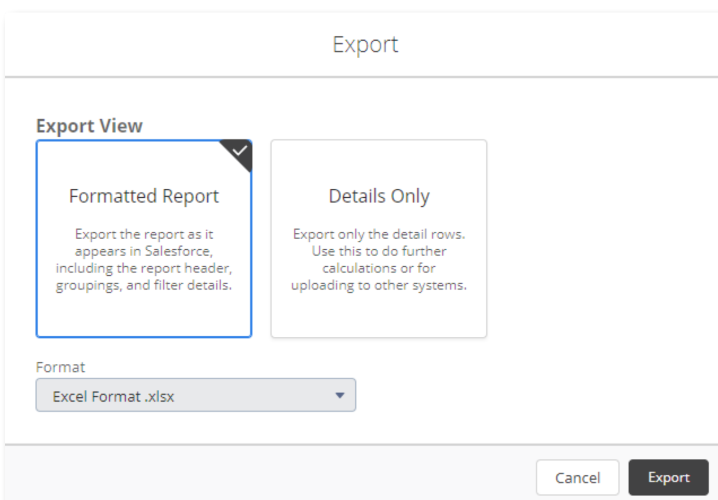
View and Export Reports

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



Inquiry Status	Case Number	Case Creation Date	Category	Topic	OpCo	Subject
Awaiting Vendor Response (4)	CN-456915	7/28/2022 3:56 AM	General Inquiry	Process Questions	SYSCO 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	SYSCO MONCTON	Test HD Box
	CN-457072	8/17/2022 6:55 AM	General Inquiry	Process Questions	SYSCO HALIFAX	Test from Spirit Portal
Subtotal						
Pending with Sysco (37)	CN-456897	7/26/2022 6:23 AM	Repayments	Invalid Cash Discount	SYSCO MONCTON	test5666
	CN-456920	7/28/2022 5:49 AM	Other	Others	SYSCO 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	SYSCO MONCTON	vendorQA

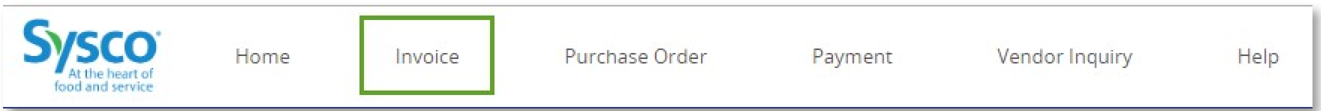
2. Click the **Export** button to download report.
3. Select desired **Export View** option.
    - Suppliers have the option to export in Standard Excel Format or Details Only View. The Details Only View allows Suppliers to download the file in either Excel Format (.xlsx) or Comma Delimited (.csv) file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



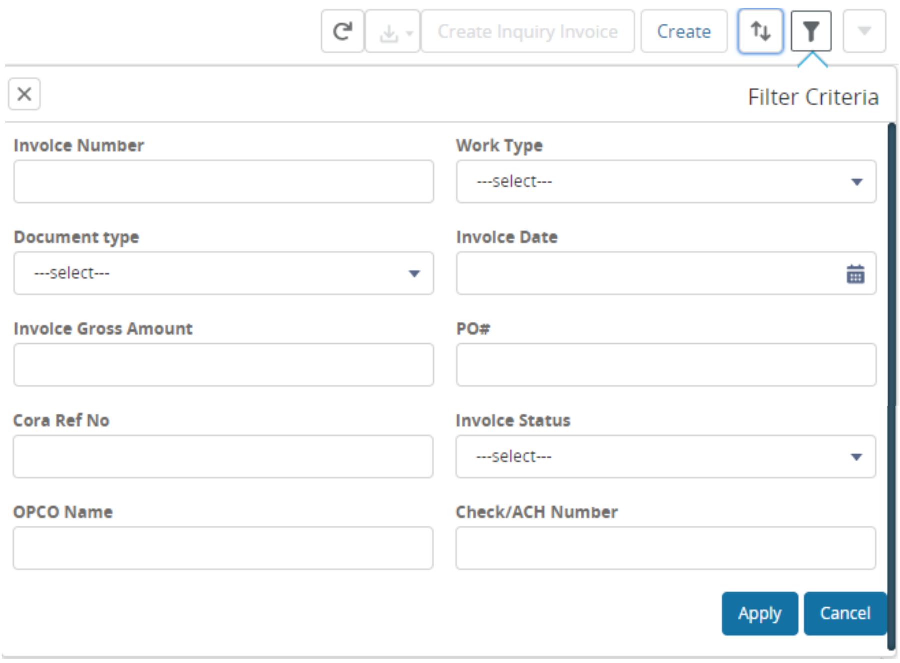
4. Click the **Export** button.

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



Note: Please see "Invoice Filter Reference Table" for further details.

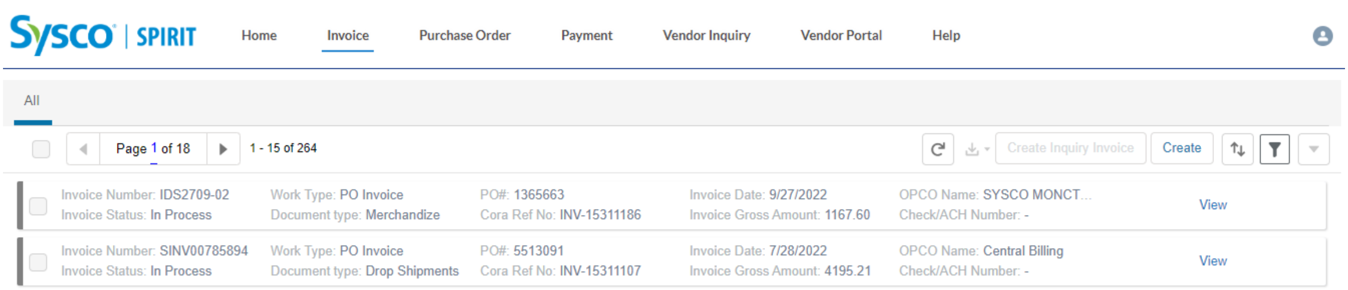
4. Click the **Apply** button to apply filter criteria set.

Invoice Filter Reference Table

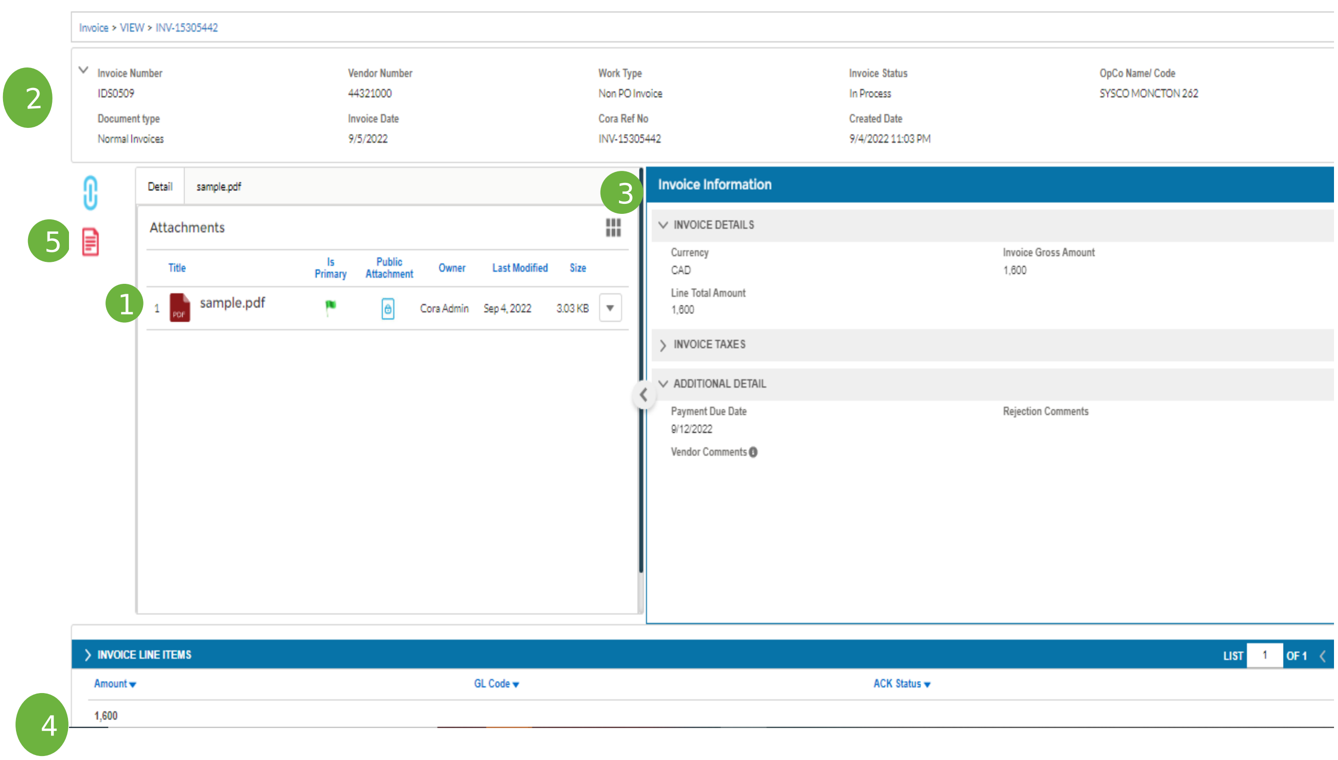
Field Name	Description	Options (where applicable)
Invoice Number	Supplier provided invoice number	
Work Type	Type of invoice	• **PO Invoice**: Invoice for services or goods relating to an issued Sysco Purchase Order **Non-PO Invoice**: Invoice for services or goods **Credit Memo**: Repayment
Document Type	Second level of classification for an invoice type.	• **Merchandize**: Purchase Order created for direct goods • **Drop Shipments**: Purchase Order for direct goods with those goods being shipped directly to customer locations • **Normal Invoices**: Standard invoices not tied to Purchase Orders • **Credit Memo**: Credit invoice from Sysco to Supplier • **Indirect PO**: Invoices for Pos from Procurement Express
Invoice Date	Date of invoice creation	• Month/ Day / Year
Invoice Gross Amount	Total amount being invoiced, including taxes, fees, charges and shipping costs	
PO#	Purchase Order Number provided by Sysco	
Cora Ref No	Sysco's unique identifier for the received invoice	• INV-########
Invoice Status	Sysco's status for the invoice	• **In Process**: Invoice is being process by Sysco AP • **Paid**: Invoice has been processed and paid • **Rejected**: Invoice has been rejected. Please review rejection reasons for further clarification • **Processing Payment**: Invoice has been processed and is schedule to be paid soon • **Awaiting Approval**: Invoice is currently being reviewed and approved by Sysco AP • **Received**: Invoice has been received and will be sent for processing soon.
OpCo Name	Name of Sysco Operating Company being invoiced	
Check / ACH Number	Number of Sysco issued Check or ACH Payment	
Vendor Name	Name of the Vendor	

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.



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.



View or Download Invoice Image

1. Select the **Invoice** tab on the Navigation Bar.
2. Apply Invoice Filters if needed. See <u>"Invoice Filter Function"</u> for further instructions.
3. Click the **View** hyperlink to open the Invoice Information.
4. Click the **Actions** drop-down icon.
5. Select **View**.

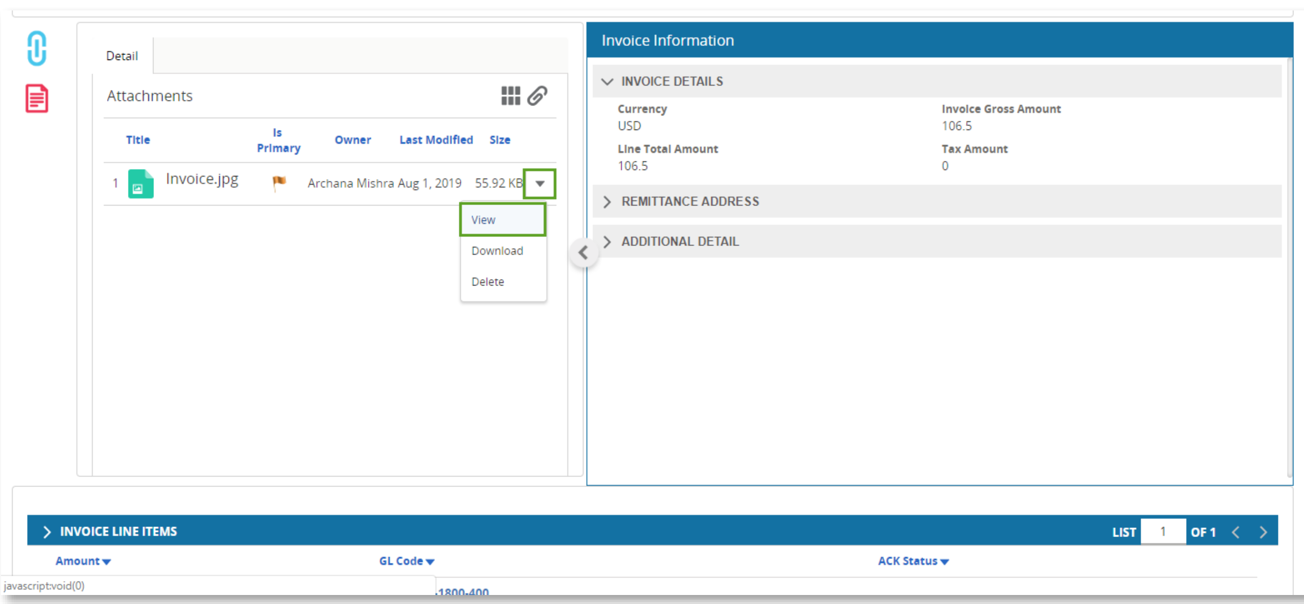
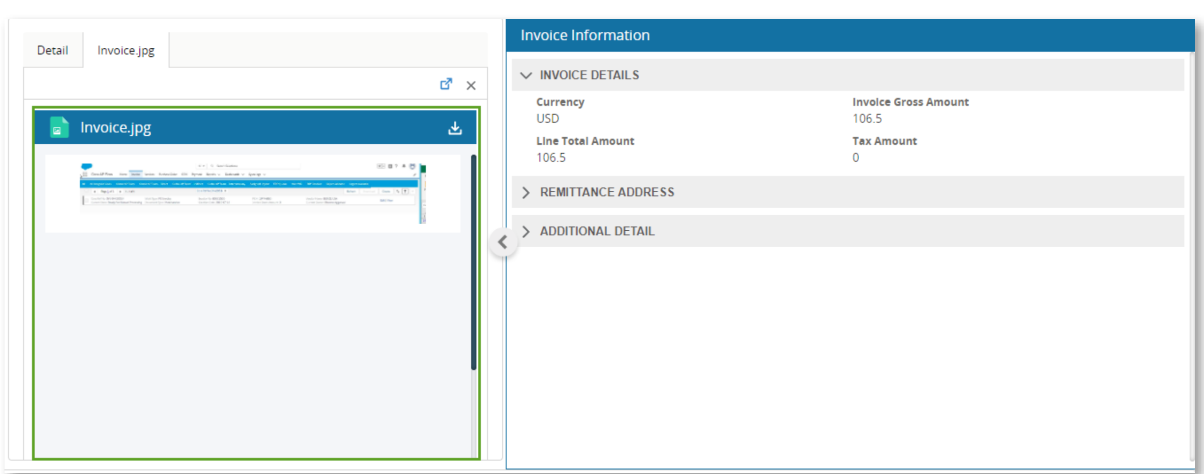


Image opens in view mode in the Attachments window.



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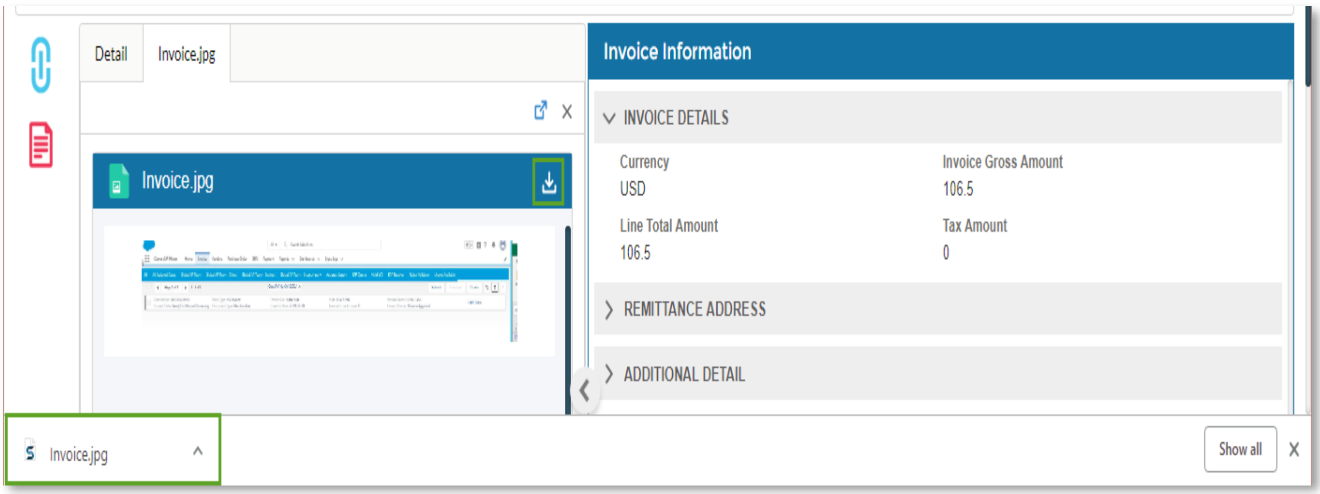
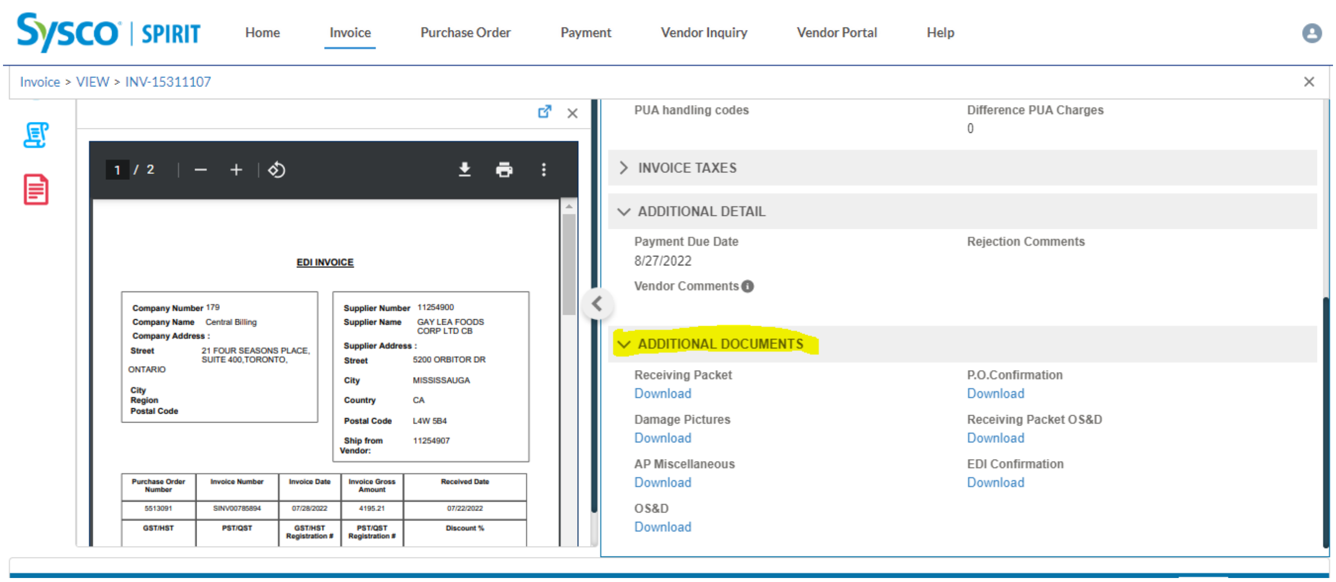
6. Click the Download icon.
7. Click on Downloaded file to open it.



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



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

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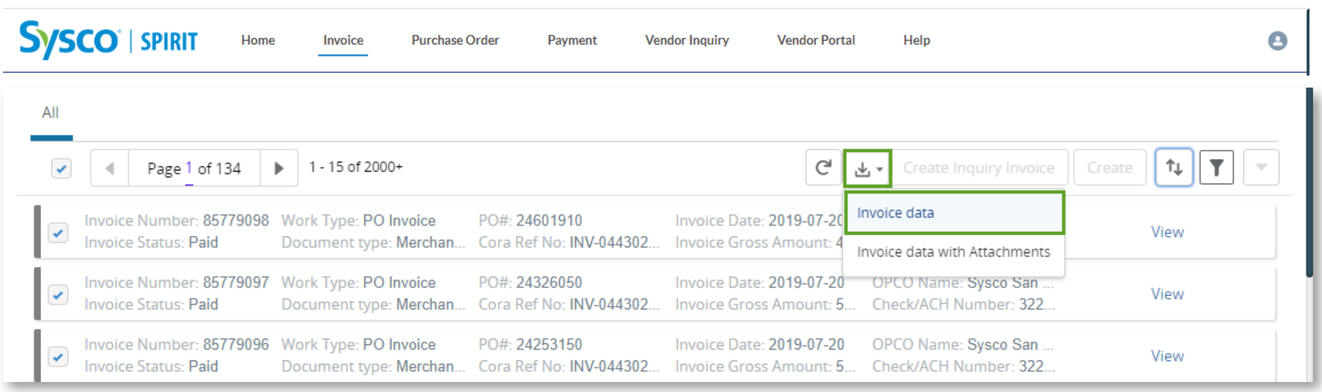
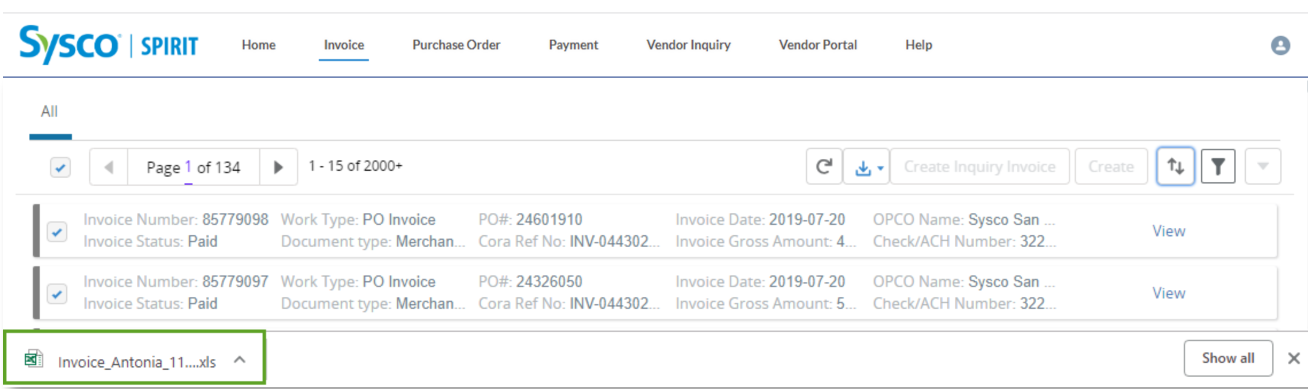
Download Invoice Tab Details

1. Select the **Invoice** tab from the Navigation Bar.
2. Apply Invoice Filters if needed. See <u>"Invoice Filter Function"</u> 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.



6. Click the downloaded Excel file to open.

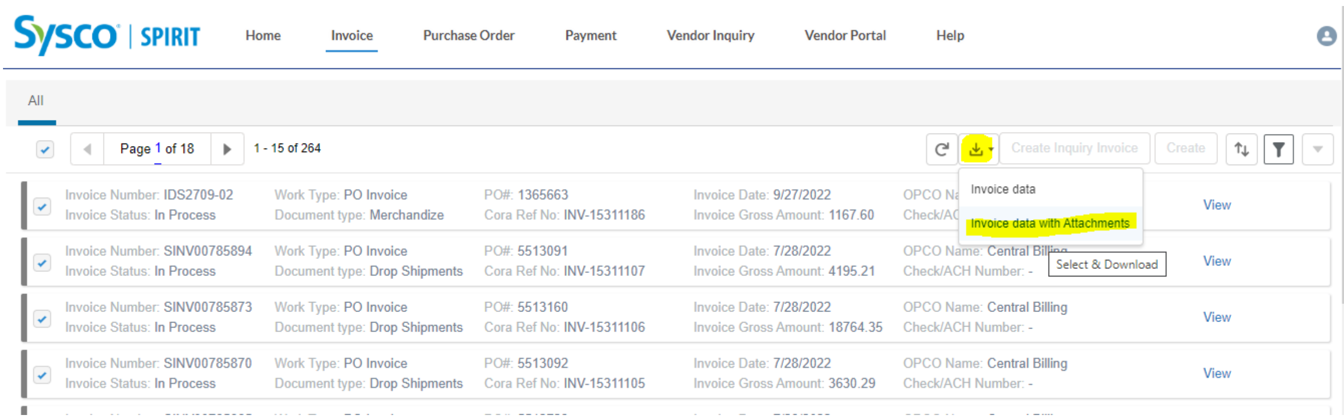


Excel file will open with fields Invoice Number, Invoice Status, Work Type, Document Type, PO#, Cora Ref No, Invoice Date, Invoice Gross Amount, OpCo Name, and Check/ACH Number. Suppliers have the ability to sort and filter data as needed in Excel. Example:

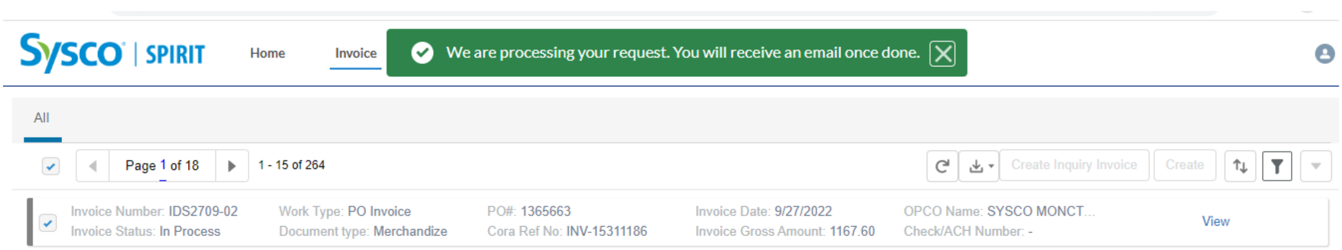
A	B	C	D	E	F	G	H	I	J
Invoice Number	**Invoice Status**	**Work Type**	**Document type**	**PO#**	**Cora Ref No**	**Invoice Date**	**Invoice Gı**	**OPCO Name**	**Check/ACH Number**
IDS2709-02	In Process	PO Invoice	Merchandize	1365663	INV-15311186	Tue Sep 27 00:00:0	1167.60	SYSCO MONCTON	64495373
SINV00785894	In Process	PO Invoice	Drop Shipments	5513091	INV-15311107	Thu Jul 28 00:00:0	4195.21	Central Billing	64495374
SINV00785865	In Process	PO Invoice	Drop Shipments	5512723	INV-15311104	Thu Jul 28 00:00:0	18786.86	Central Billing	64495375
SINV00785870	In Process	PO Invoice	Drop Shipments	5513092	INV-15311105	Thu Jul 28 00:00:0	3630.29	Central Billing	64495376
SINV00785873	In Process	PO Invoice	Drop Shipments	5513160	INV-15311106	Thu Jul 28 00:00:0	18764.35	Central Billing	64495377

Download Invoice Tab Details with Attachments

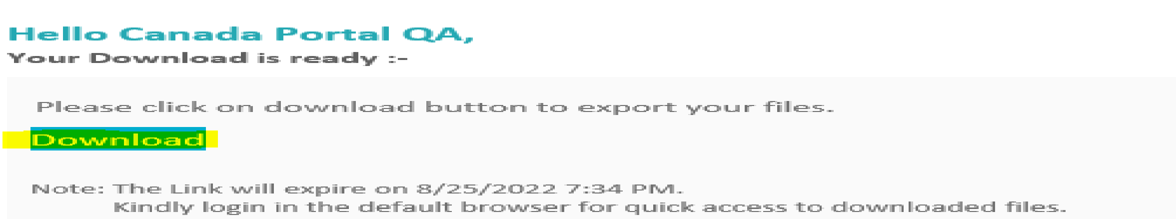
1. Select the **Invoice** tab from the Navigation Bar.
2. Apply Invoice Filters if needed. See <u>"Invoice Filter Function"</u> section for further instructions.
3. Click the Selection box next to the Invoice to download details in Excel format.
   - To select all, click the Selection box at the top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



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



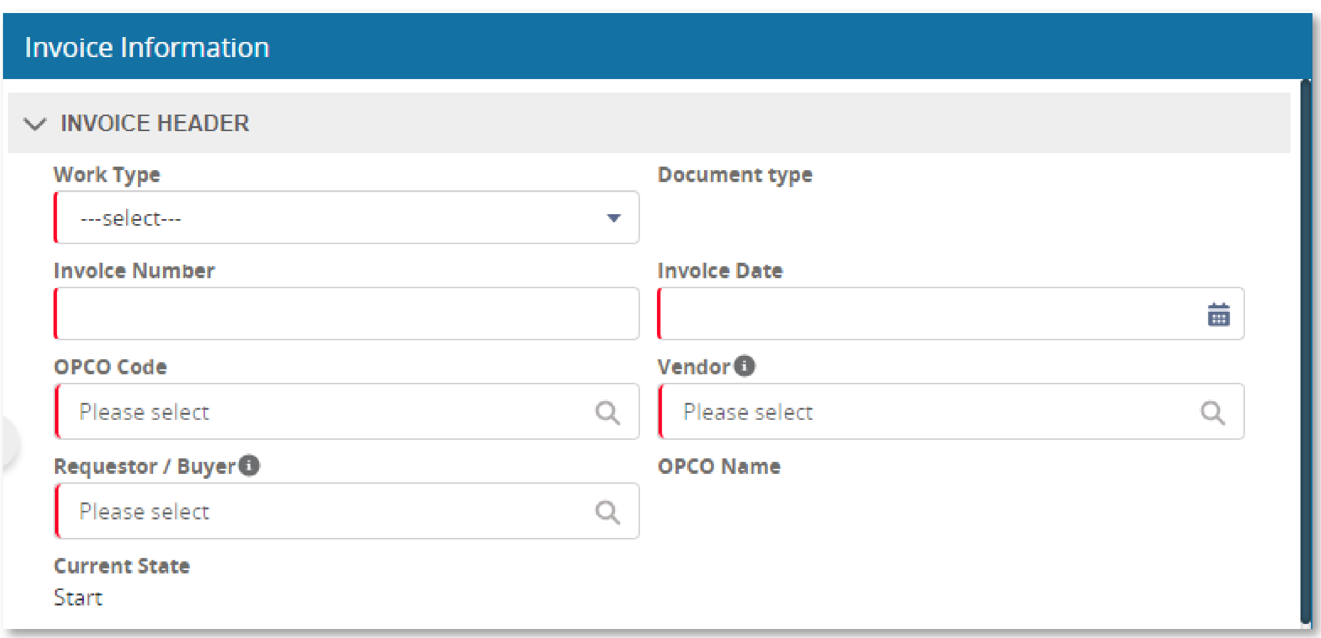
7. Once the request is completed, user will receive an email on registered email id with a link to download attachments. The link will remain active for 24 hours. User can download up to 25 invoices in one go.



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.



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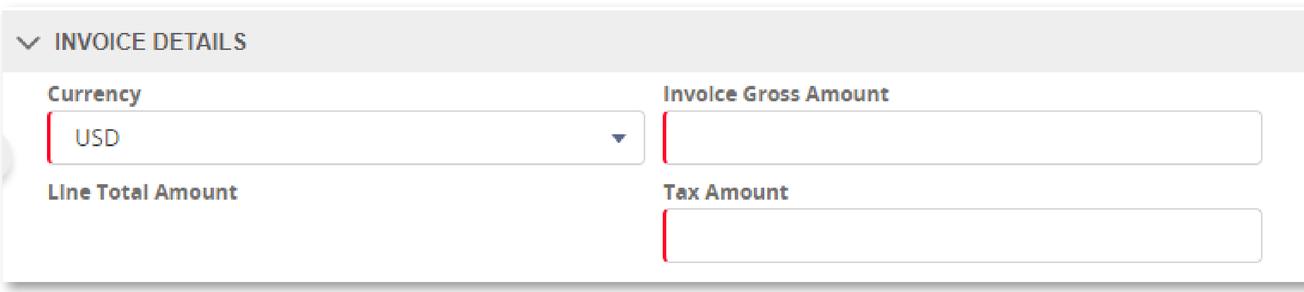
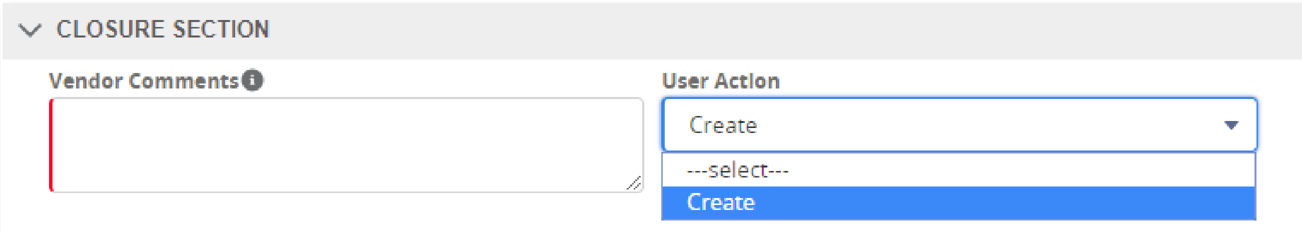
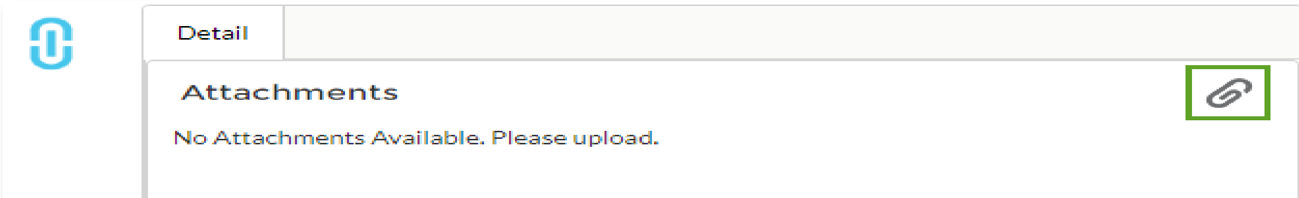
5. Enter the **Invoice Details** information:
    - Currency
    - Invoice Gross Amount
    - Tax Amount



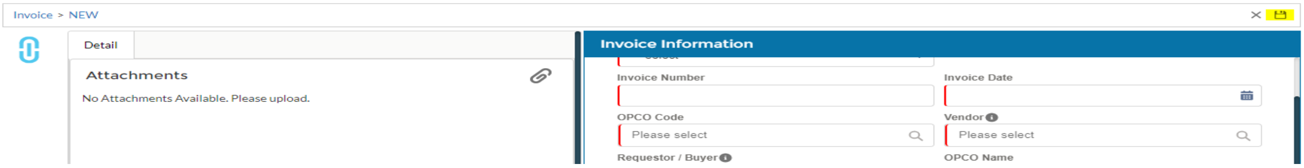
6. Enter Supplier comments in the **Comments** box.
7. Select **Create** from the User Action drop down menu.



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



9. Click the Save icon to create invoice.



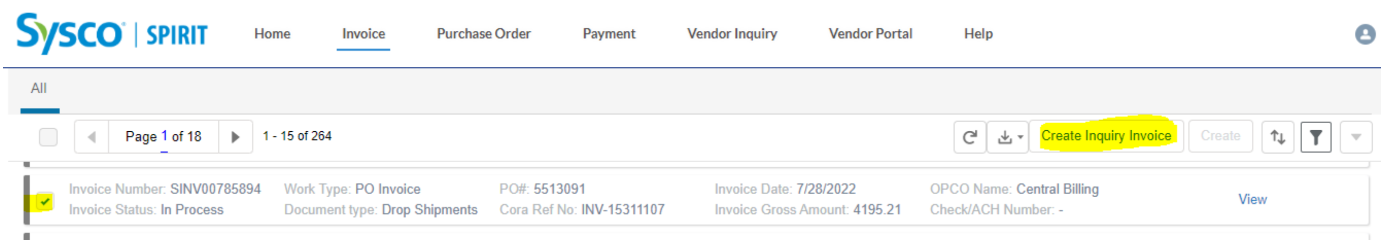
New Invoice Reference Table

Field Name	Description	Options (where applicable)
Work Type	Type of invoice	• **PO Invoice**: Invoice for services or goods relating to an issued Sysco Purchase Order **Non-PO Invoice**: Invoice for services or goods **Credit Memo**: Repayment
Document Type	Second level of classification for an invoice type.	• **Merchandize**: Purchase Order created for direct goods • **Drop Shipments**: Purchase Order for direct goods with those goods being shipped directly to customer locations • **Normal Invoices**: Standard invoices not tied to Purchase Orders • **Credit Memo**: Credit invoice from Sysco to Supplier • **Indirect PO**: Invoices for indirect Purchase Orders from Procurement Express
Invoice Number	Supplier provided invoice number	
Invoice Date	Date of invoice creation	• Month/ Day / Year
OpCo Code / Name	Code & Name of Sysco Operating Company being invoiced	
Vendor	Vendor name	
Requestor / Buyer	Operating Company buyer who is purchasing the goods or services	

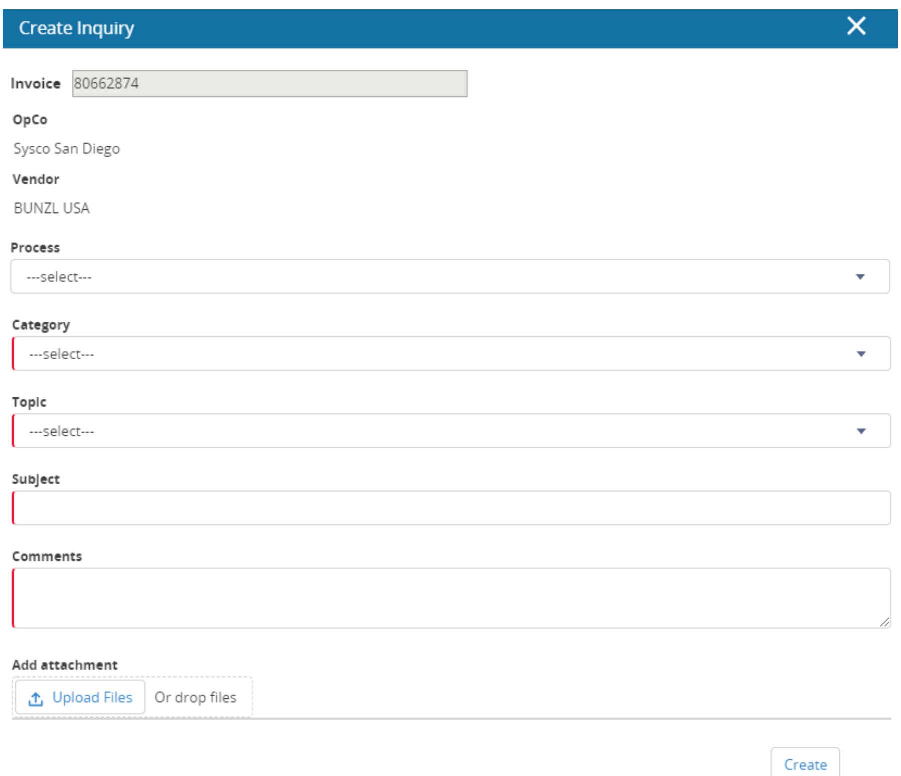
Continued on next page.

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.



5. Fill out the Inquiry Form with the following information:
   - Invoice (auto-populated)
   - OpCo (auto-populated)
   - Vendor (auto-populated)
   - Process
   - Category
   - Topic
   - Subject
   - Comments



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

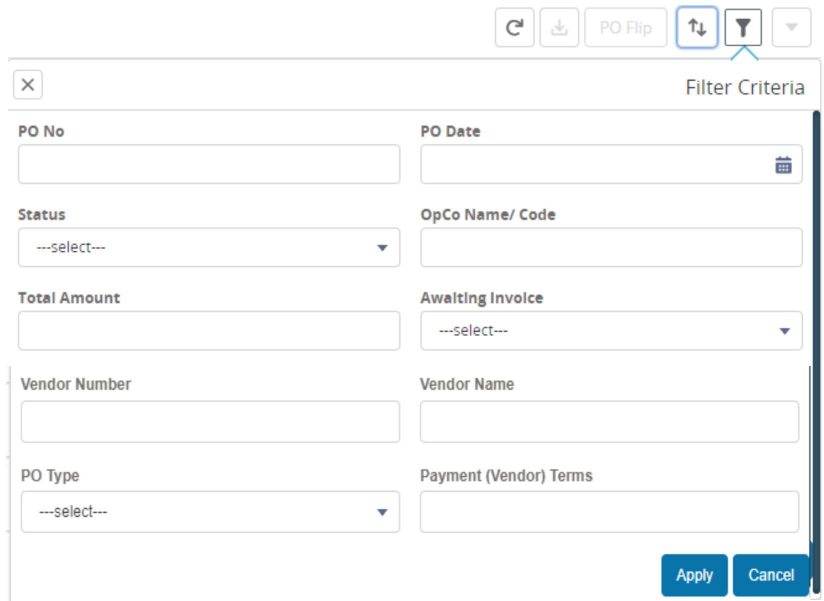
Field Name	Description	Options (where applicable)
Invoice	Supplier Invoice Number	
OpCo	Sysco Operating Company	
Vendor	Supplier Name	
Category	Main Category for the Inquiry	• General Inquiry • Payment Related Inquiry • Repayments • Other

Topic	Related Topic of the Inquiry
	Note: Each Category has different topic options
		• General Inquiry
		  • Process Questions
		  • Remittance Requests
		  • Tax Exemption Form
		  • Vendor Account Updates
		• Other
		  • Other
		• Payment Related Inquiry
		  • What is Status of Payment
		  • Credit Memo
		• Repayment
		  • Invalid Cash Discount
		  • Short Payment

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	

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



Note: Please see "PO Filter Reference Table" for further details.

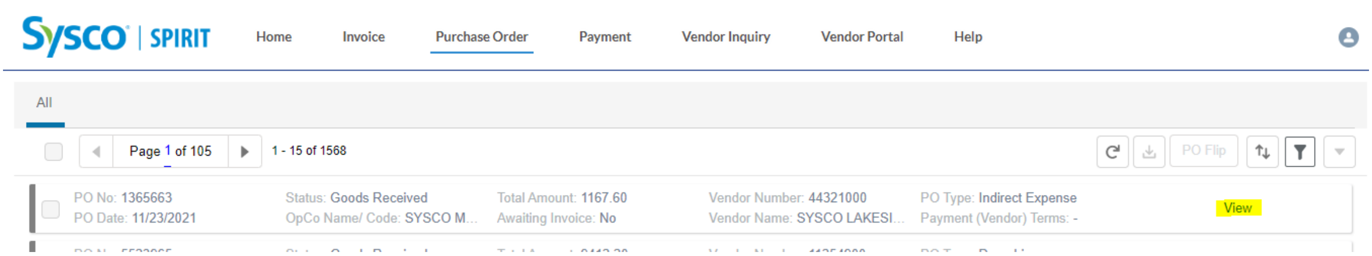
4. Click the **Apply** button to apply filter criteria.

PO Filter Reference Table

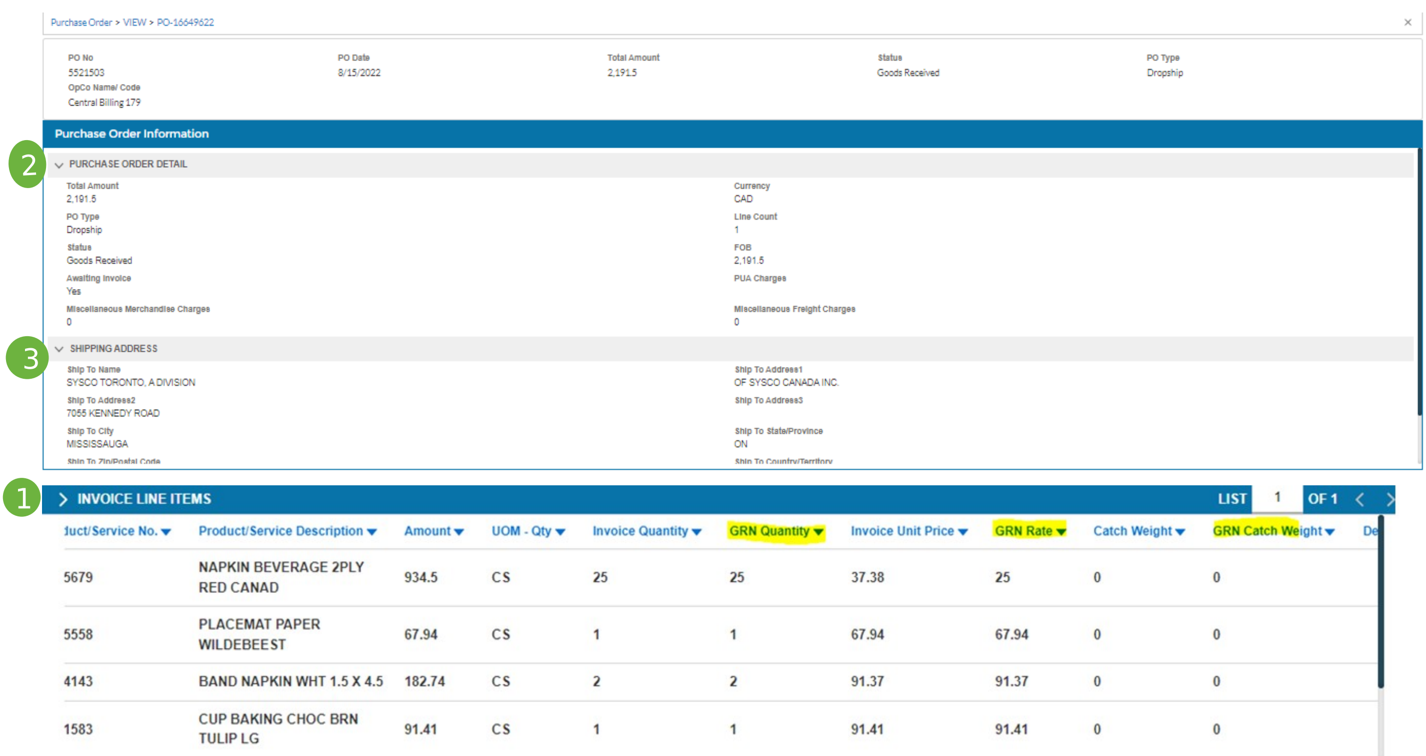
Field Name	Description	Options (where applicable)
PO No	Issues Sysco Purchase Order Number	
PO Date	Date Purchase Order was Issued	
Status	Status of PO	• **Open (Issued)**: Open and has been issued to Supplier • **Canceled**: Canceled and inactive • **Awaiting Goods**: Received invoice but still waiting to receive goods or services • **Goods Received**: Goods or services have been received • **Closed**: PO is inactive and has been closed
OpCo Name / Code	Sysco Operating Company Name & Code	• See Appendix for listing
Total Amount	Total Amount on the Purchase Order	
Awaiting Invoice	Invoice Status	• **Yes**: There have been no invoices received for this PO • **No**: There has been at least one invoice received for this PO
PO Type	Type of Purchase Order	• **Dropship**: Dropship PO • **Direct Merchandise**: Merch PO • **Procurement Express**: POs from Procurement Express
Vendor Number	Sysco Vendor Number	
Vendor Name	Sysco Vendor Name	

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.

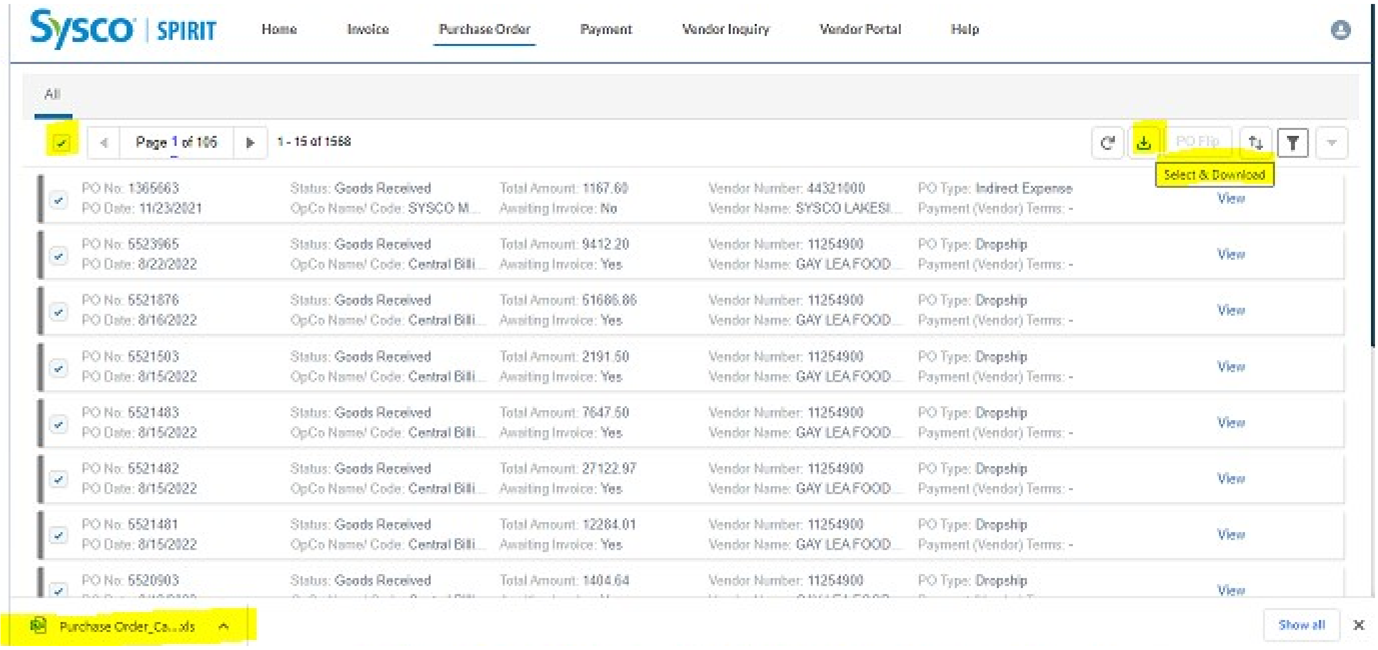


Purchase Orders open in view mode. Suppliers have the ability to view (1) PO Line Items, (2) Purchase Order Details, and (3) Shipping Address



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.



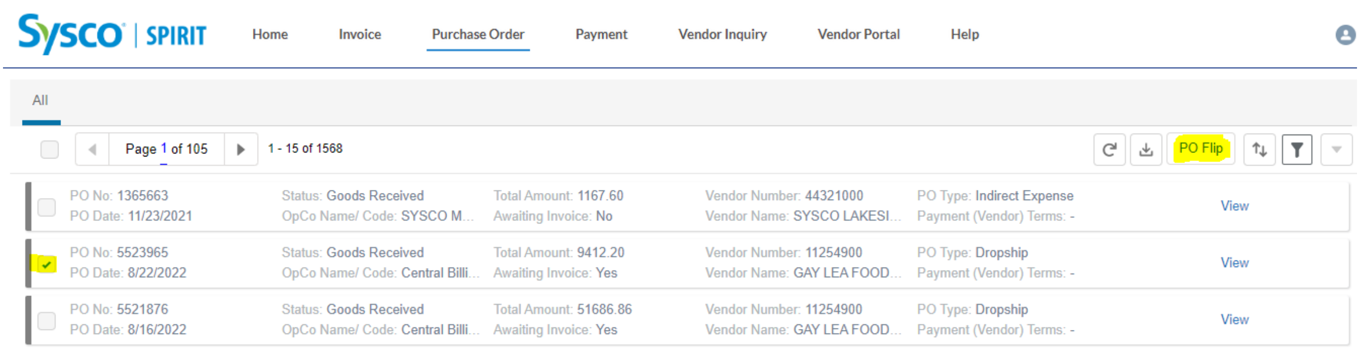
Excel file will open with fields PO No, PO Date, Status, OpCo Name / Code, Total Amount, Awaiting Invoice, Vendor Number, Vendor Name, and Payment (Vendor) Terms. Suppliers have the ability to sort and filter data as needed in Excel.

PO No	PO Date	Status	OpCo Name/ Code	Total Amou	Awaiting I	Vendor Number	Vendor Name	PO Type	Payment (Vendor) Terms
5510773	Mon Jul 1	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	

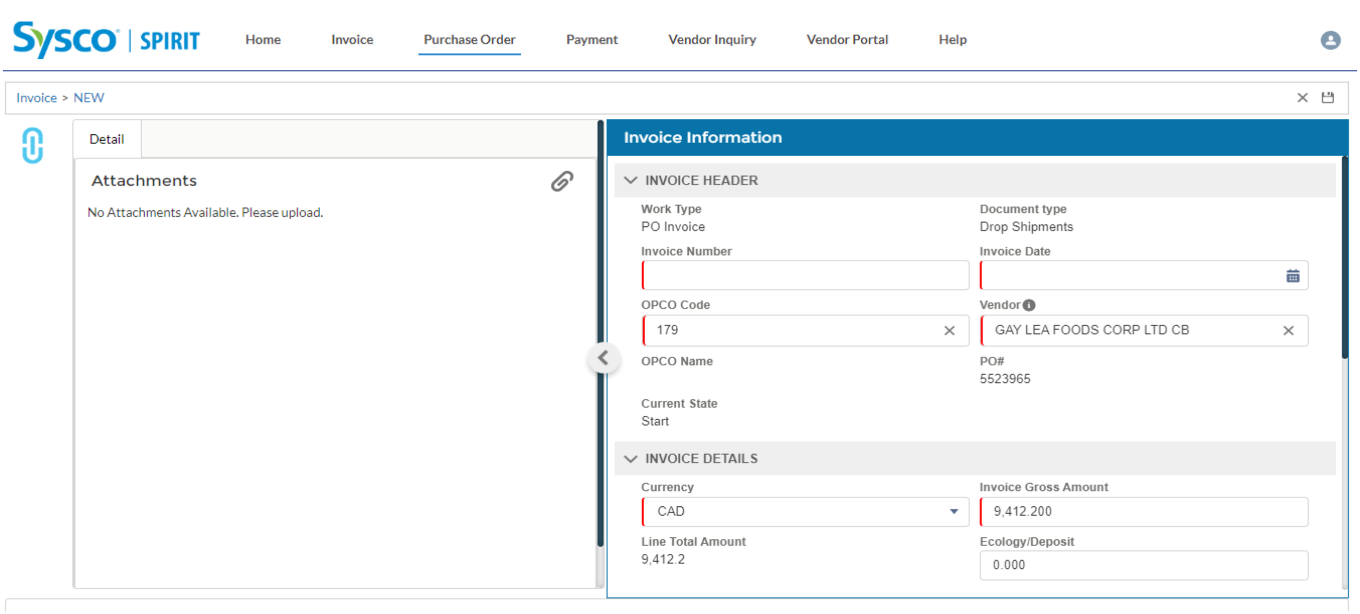
Purchase Order Flip

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.

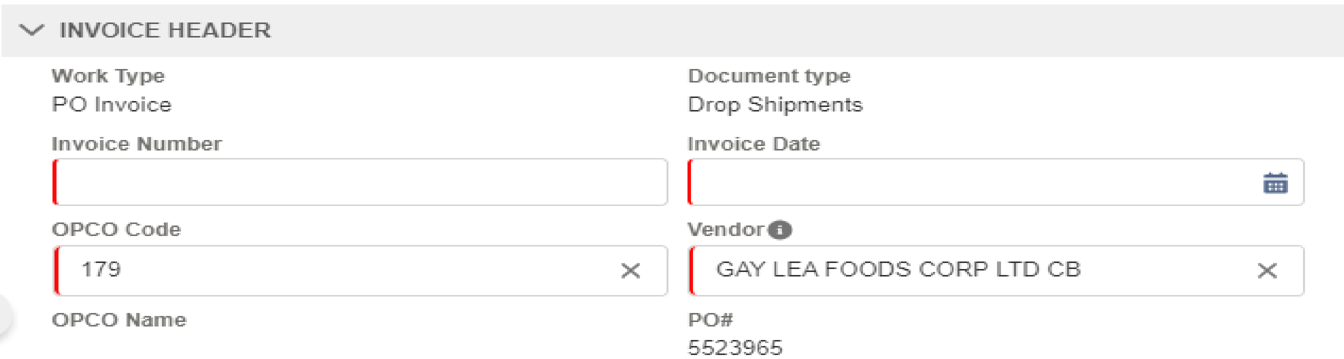


Suppliers will be routed to the Create New Invoice screen.

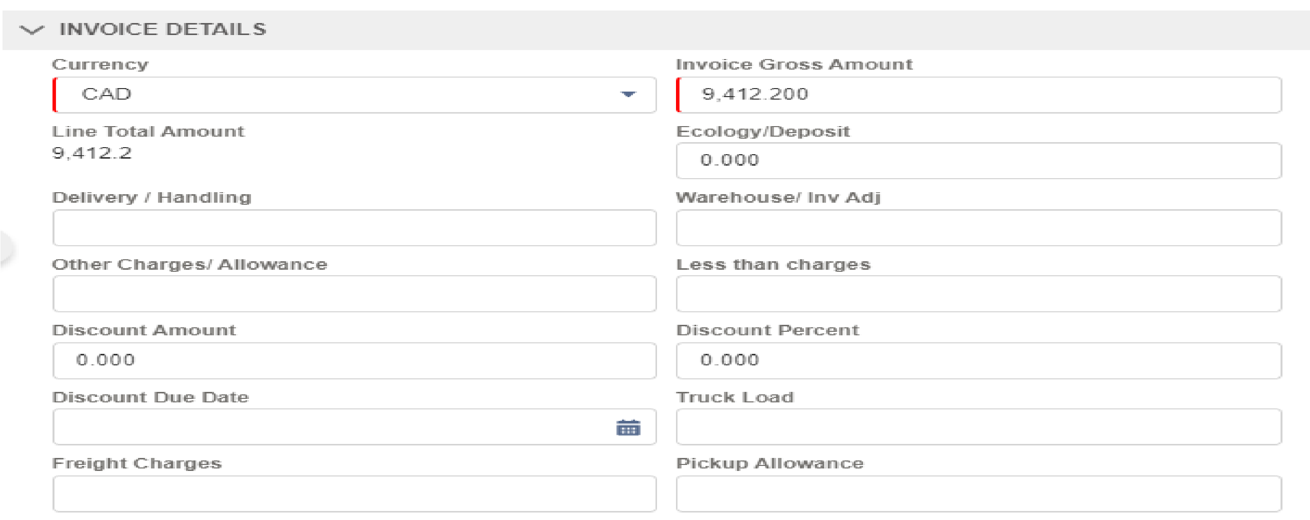


Continued on next page.

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)

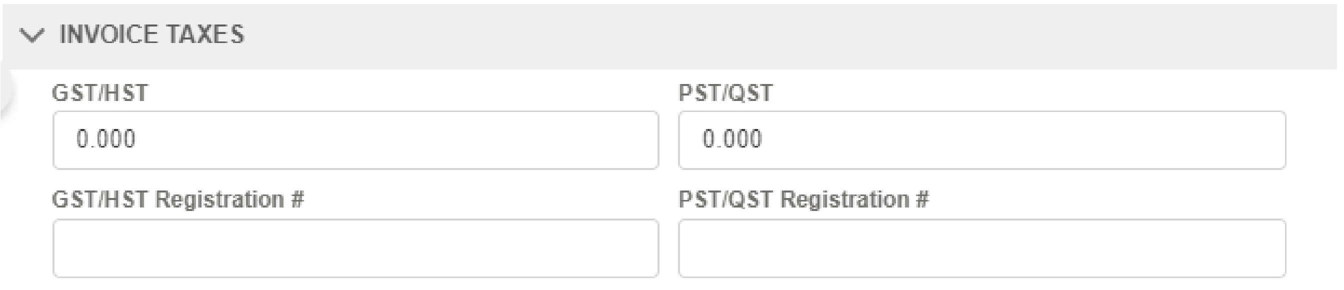


7. Confirm **Invoice Details** that are auto-populated from PO line items are accurate. Verify Currency, Invoice Gross Amount, and Line Amount
8. Enter any Ecology/ Deposit, Delivery Handling, Warehouse/ Inv Adj, Other Charges/ Allowance, Less than Charges, Discount Amount, Discount Percent, Discount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

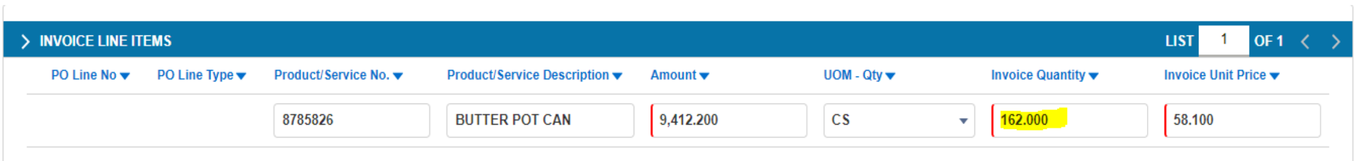


Continued on next page.

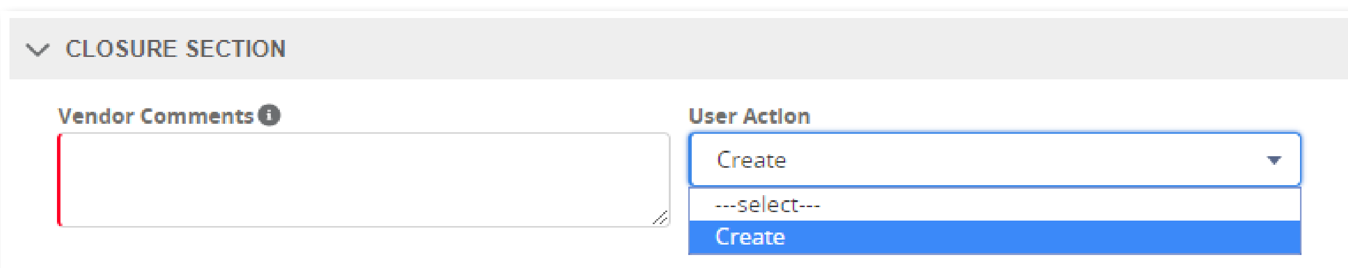
9. Enter **Invoice Taxes** if applicable for the invoice.



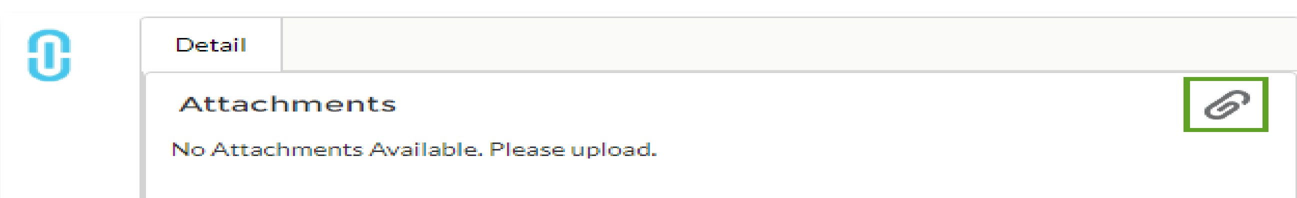
10. Verify **Invoice Line Items** and confirm/ update the quantity as applicable.



11. Enter **Supplier comments** in the Vendor Comments box.
12. Select **Create** from the User Action drop down menu.



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

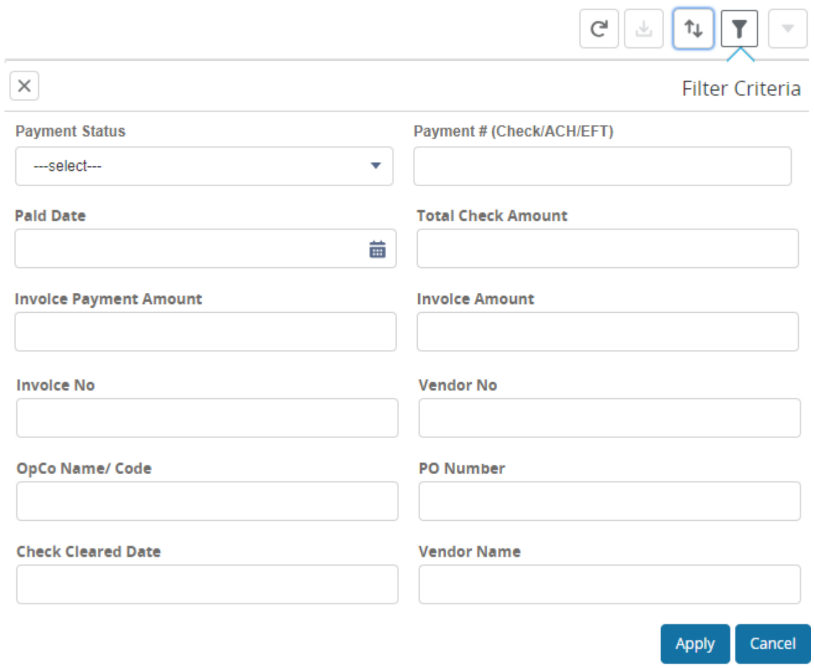


14. Click the Save icon to flip the PO and create the invoice.

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



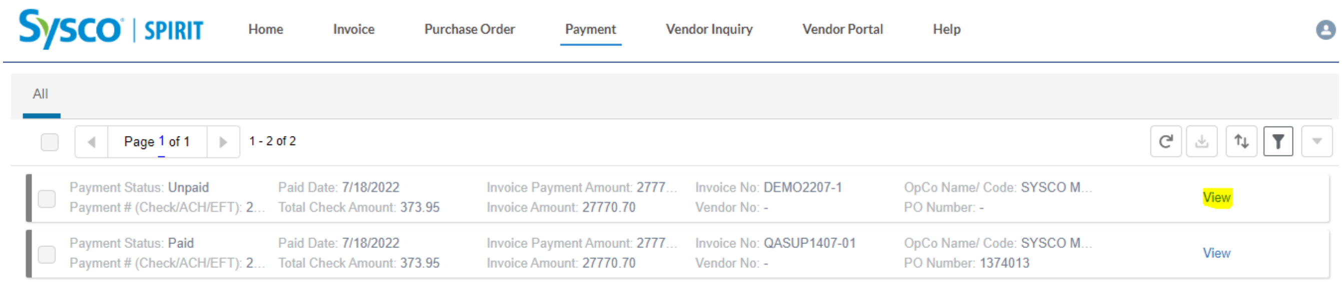
4. Click the **Apply** button to apply filter criteria.

Payment Details Filter Reference Table

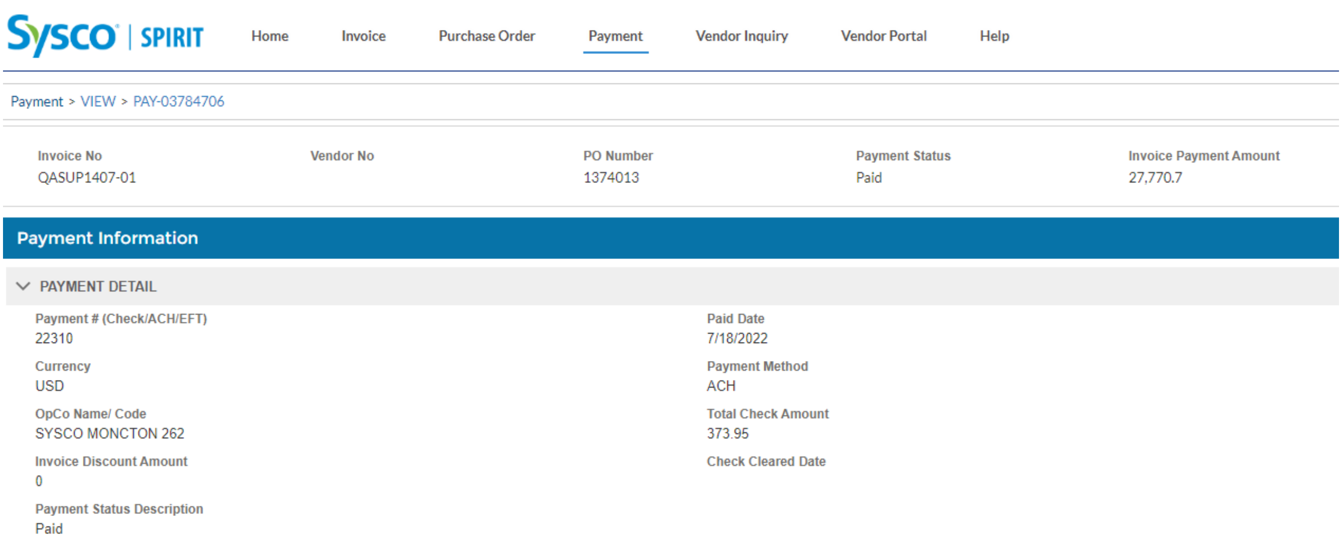
Field Name	Description	Options (where applicable)
Payment Status	Status of payment	• Paid: Invoice has been paid • Unpaid: Invoice has not been paid
Payment #	Check or ACH or EFT Number for the payment	
Paid Date	Date in which payment was made	
Total Check Amount	Total amount paid on the check	
Invoice 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.

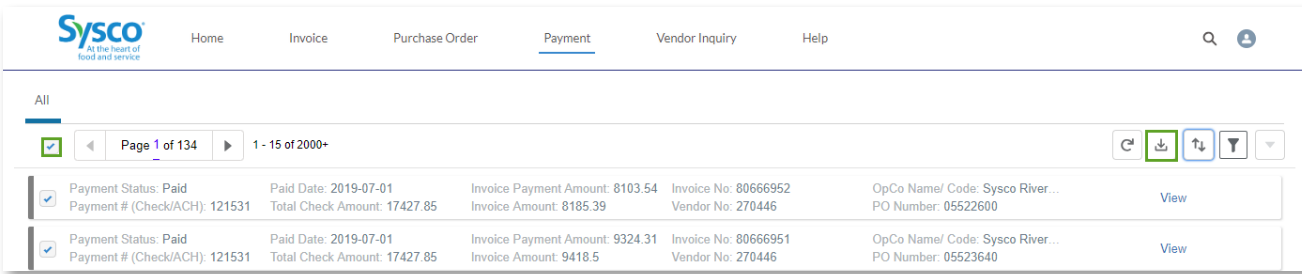


Payment Details open in view mode. Suppliers are able to view (1) Invoice No, (2) Vendor No, (3) PO Number, (4) Payment Status, (5) Invoice Payment Amount, (6) Check Number, (7) Paid Date, (8) Currency, (9) Payment Method, (10) OpCo Name/Code, (11) Total Check Amount, (12) Invoice Discount Amount, (13)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

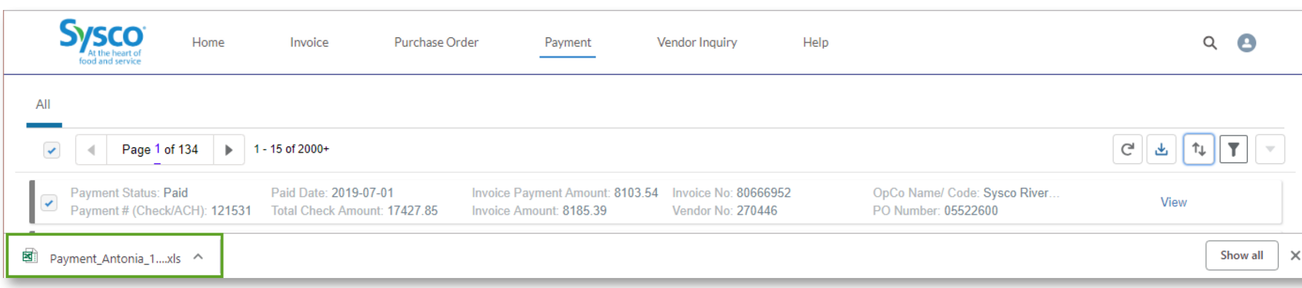


Download Payment Tab Details

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.



5. Click the downloaded Excel file to open.

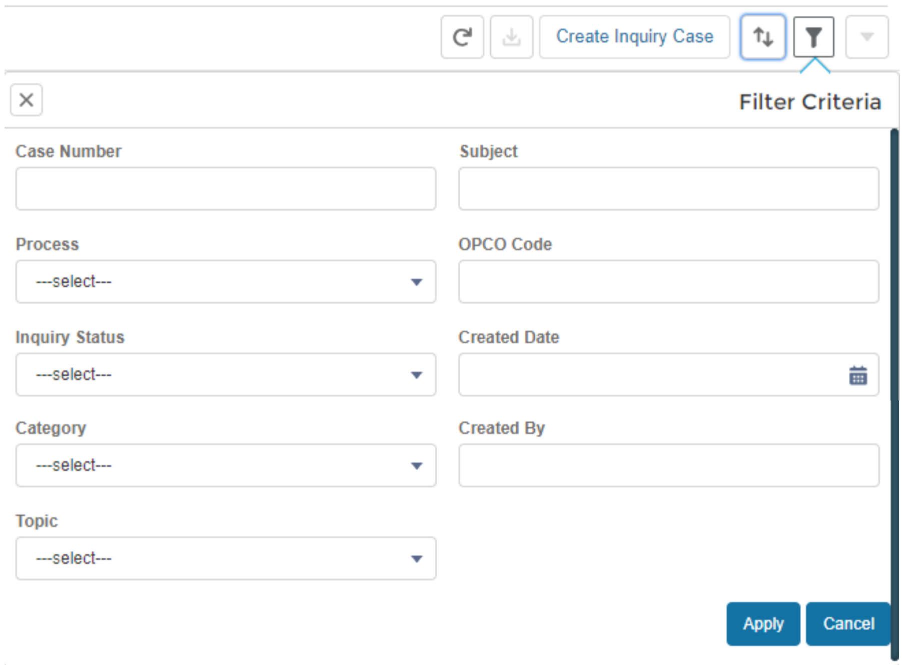


Excel file will open with fields Payment Status, Payment # (Check/ACH), Paid Date, Total Check Amount, Invoice Payment Amount, Invoice Amount, Invoice No, Vendor No, OpCo Name / Code, and PO Number. Suppliers have the ability to sort and filter data as needed in Excel.

	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



Note: Please see "Vendor Inquiry Filter Reference Table" for further details.

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

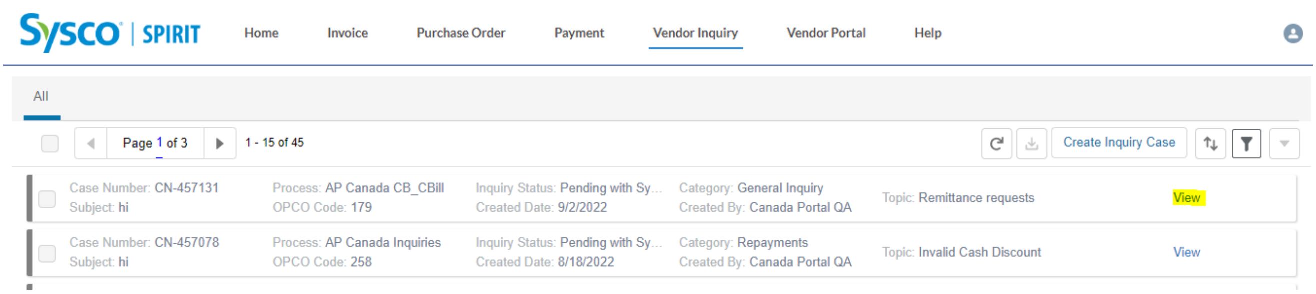
Vendor Inquiry Filter Reference Table

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	• See Appendix for listing
Inquiry Status	Current Status of Inquiry	• Resolved • Awaiting Vendor Response • Pending with Sysco
Created Date	Date Inquiry was Created / Submitted	
Category	Designated Inquiry Category	• General Inquiry • Payment Related Inquiry • Repayments • Other
Created By	User that Submitted Inquiry	

Topic	Sysco's status for the invoice	• General Inquiry
		  • Process Questions
		  • Remittance Requests
		  • Tax Exemption Form
		  • Vendor Account Updates
		• Other
		  • Other
		• Payment Related Inquiry
		  • What is Status of Payment
		  • Credit Memo
		• Repayment
		  • Invalid Cash Discount
		  • Short Payment

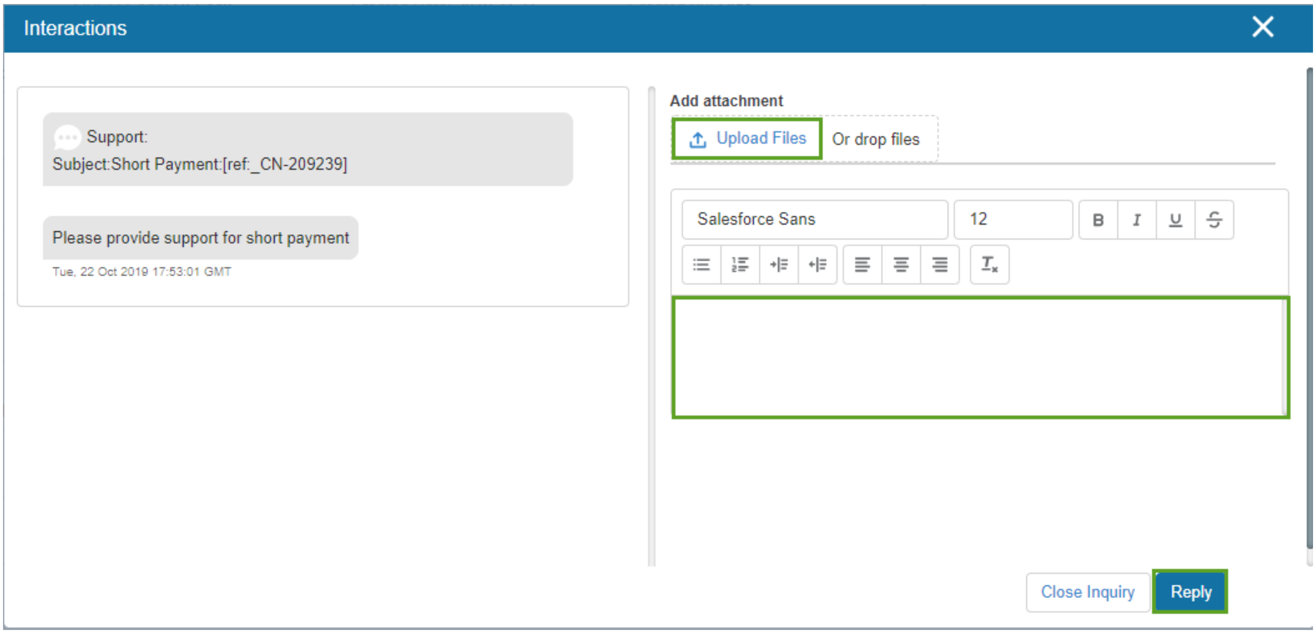
View Vendor Inquiry

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.



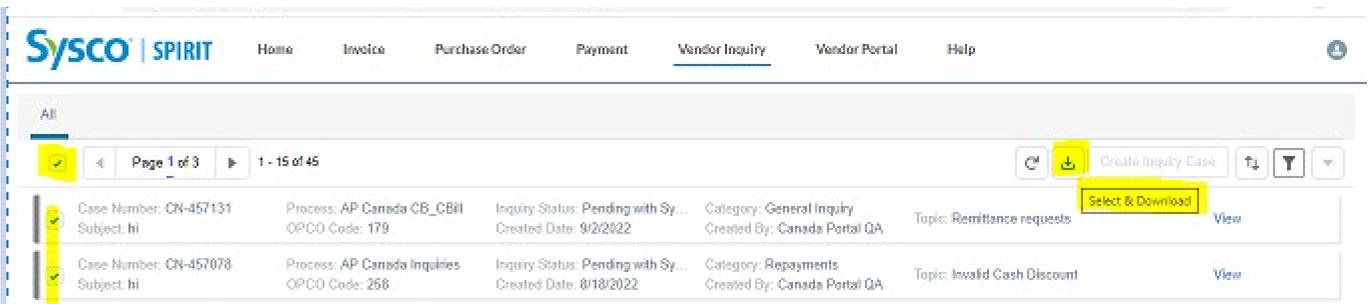
The Inquiry’s Interactions screen opens as a pop-up window. Suppliers have the ability to view interactions, reply, and add attachments.

- 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.

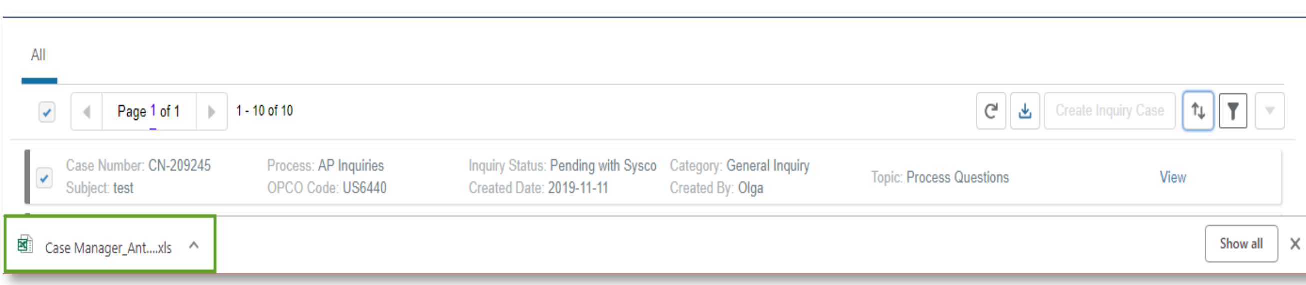


Download Vendor Inquiry Tab Details

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.

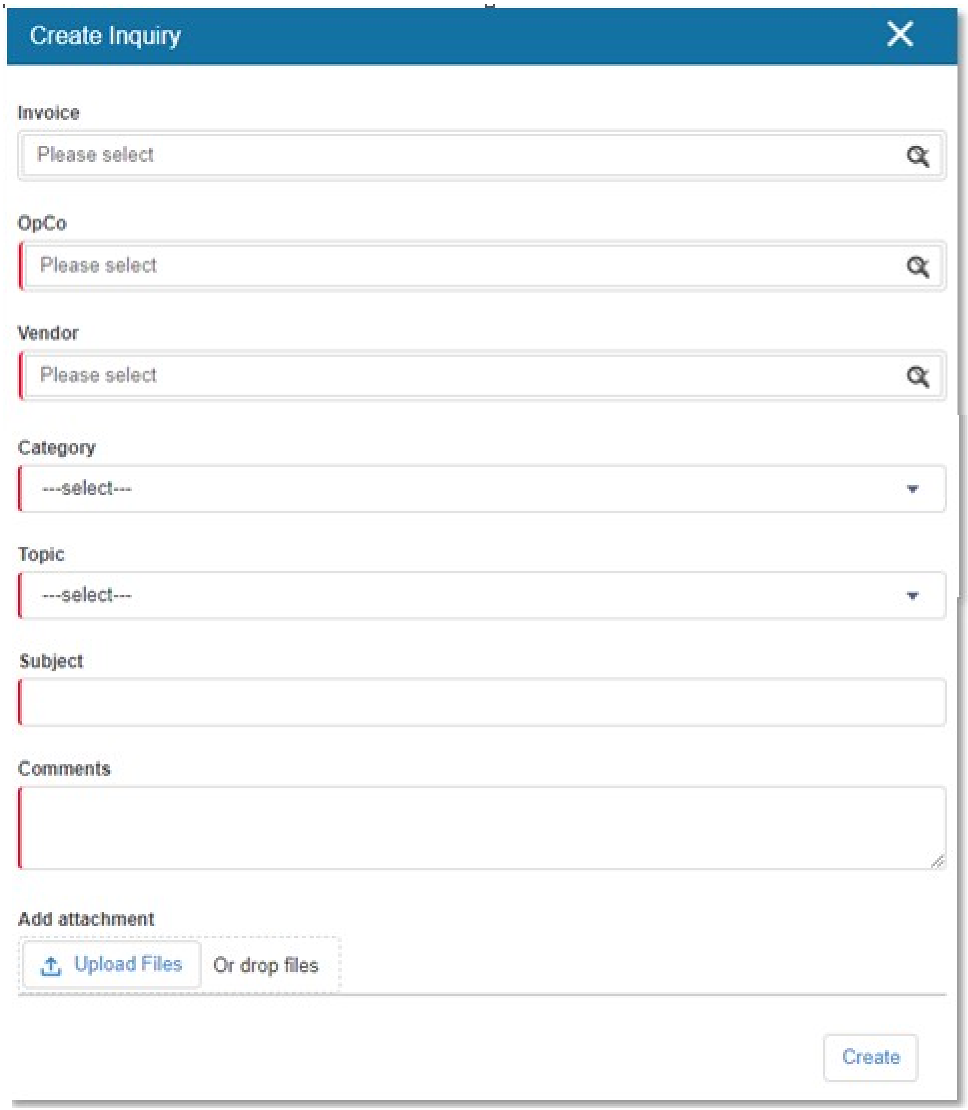


Excel file opens with fields Case Number, Subject, Process, OpCo Code, Inquiry Status, Created Date, Category, Created By, and Topic. Suppliers have the ability to sort and filter data as needed in Excel.

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 09	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



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

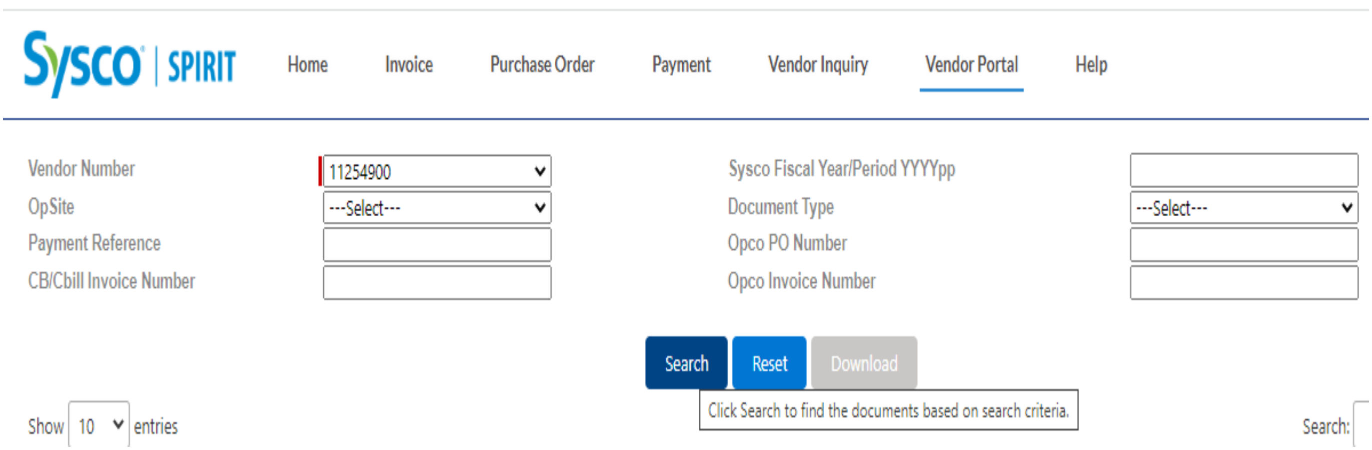
Field Name	Description	Options (where applicable)
Invoice	Supplier Invoice Number	
OpCo	Sysco Operating Company	
Vendor	Supplier Name	
Category	Main Category for the Inquiry	• General Inquiry • Payment Related Inquiry • Repayments • Other

Topic	Related Topic of the Inquiry
	Note: Each Category has different topic options
		• General Inquiry
		  • Process Questions
		  • Remittance Requests
		  • Tax Exemption Form
		  • Vendor Account Updates
		• Other
		  • Other
		• Payment Related Inquiry
		  • What is Status of Payment
		  • Credit Memo
		• Repayment
		  • Invalid Cash Discount
		  • Short Payment

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]



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	• Dropdown containing Vendor Numbers mapped to the logged in user
Sysco Fiscal Year/Period YYYYpp	• Numeric upto 6 digits
OpSite	• Dropdown containing all Canada Opsites in scope for SPIRIT
Document Type	• Dropdown containing all applicable document types that can be retrieved from Open Text
Payment Reference	• Free Text, can be a string
OpCo PO Number	• Free Text, can be a string
CB/Cbill Invoice Number	• Free Text, can be a string
OpCo Invoice Number	• Free Text, can be a string

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 10 entries Search:

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

Show 10 entries

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

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

☑	MISCELLANEOUS	Vancouver	CBV111	PO111	SV111	PN111	201408	15/12/2021
☑	FREIGHT ALLOWANCE	Kelowna	CBV444	PO444	SV444	PN444	201408	15/12/2021

Showing 1 to 2 of 2 entries   Previous 1 Next

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.

Notes: By default, 10 records/ page are available. User can set that to **25, 50, or 100** as required.

Show 10 entries Search:

10
25
50
100

cument Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
les and Returns Backup	Toronto	2246984		4082175	78881	202001	02/24/2022
ACK - DM	Central Ontario	2859479		1483524	101146	202202	08/11/2021

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

Show 10 entries Search: 22469

Document Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
Samples and Returns Backup	Toronto	2246984		4082175	78881	202001	02/24/2022
Samples and Returns Backup	Toronto	2246984		4065517	78881	202001	02/24/2022
Samples and Returns Backup	Central Ontario	2246984		9831083	78881	202001	02/24/2022

Showing 1 to 3 of 3 entries (filtered from 423 total entries) Previous 1 Next

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

Document Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
Samples and Returns Backup	Toronto	2246984		4082175	78881	202001	02/24/2022
BILLBACK - DM	Central Ontario	2859479		1483524	101146	202202	08/11/2021
MISCELLANEOUS	Central Ontario	2859479		1480499	101146	202202	08/11/2021
MISCELLANEOUS	Central Ontario	2859479		1477783	101146	202202	08/11/2021
UNLOADING SERVICES	Central Ontario	2859479		1479095	101146	202202	08/11/2021
FILL RATE PENALTY	Central Ontario	2859479		1481914	101146	202202	08/11/2021
MISCELLANEOUS	Central Ontario	2859479		1479164	101146	202202	08/11/2021
ALLIED RECLAMATION	Central Ontario	2859479		1482001	101146	202202	08/11/2021
SAMPLES AND RETURNS	Central Ontario	2883190		1484733	102037	202203	09/10/2021
MISCELLANEOUS	Central Ontario	2883190		1483586	102037	202203	09/10/2021

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

Search Reset Download

Click Reset to clear the previous selection.

Show 10 entries Search:

Document Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
Samples and Returns Backup	Toronto	2246984		4082175	78881	202001	02/24/2022
BILLBACK - DM	Central Ontario	2859479		1483524	101146	202202	08/11/2021
MISCELLANEOUS	Central Ontario	2859479		1480499	101146	202202	08/11/2021
MISCELLANEOUS	Central Ontario	2859479		1477783	101146	202202	08/11/2021
UNLOADING SERVICES	Central Ontario	2859479		1479095	101146	202202	08/11/2021

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