



# 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: <https://sysco-supplierportal.force.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.

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 Historical documents will not be available.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](#)

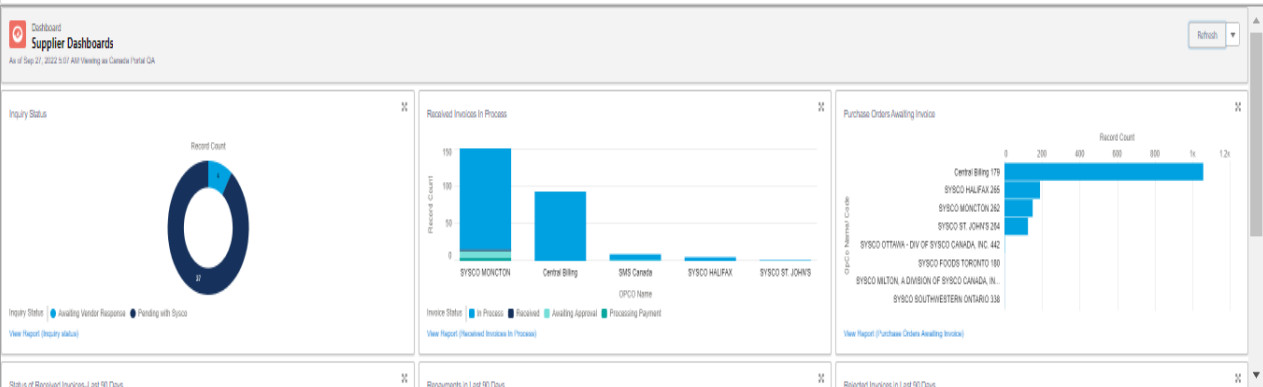
To request access to Sysco SPIRIT, please email: [Otagpenko.laterny@corp.sysco.ca](mailto:Otagpenko.laterny@corp.sysco.ca)

**ENABLE POP UPS:** Ensure you have pop-ups enabled, by selecting 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 included:

1. Freshpoint
2. Sysco Fine Meats (Dorma Meat Co)
3. Sysco Guest Supply
4. Grande Valley
5. Fin's Seafood



## 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

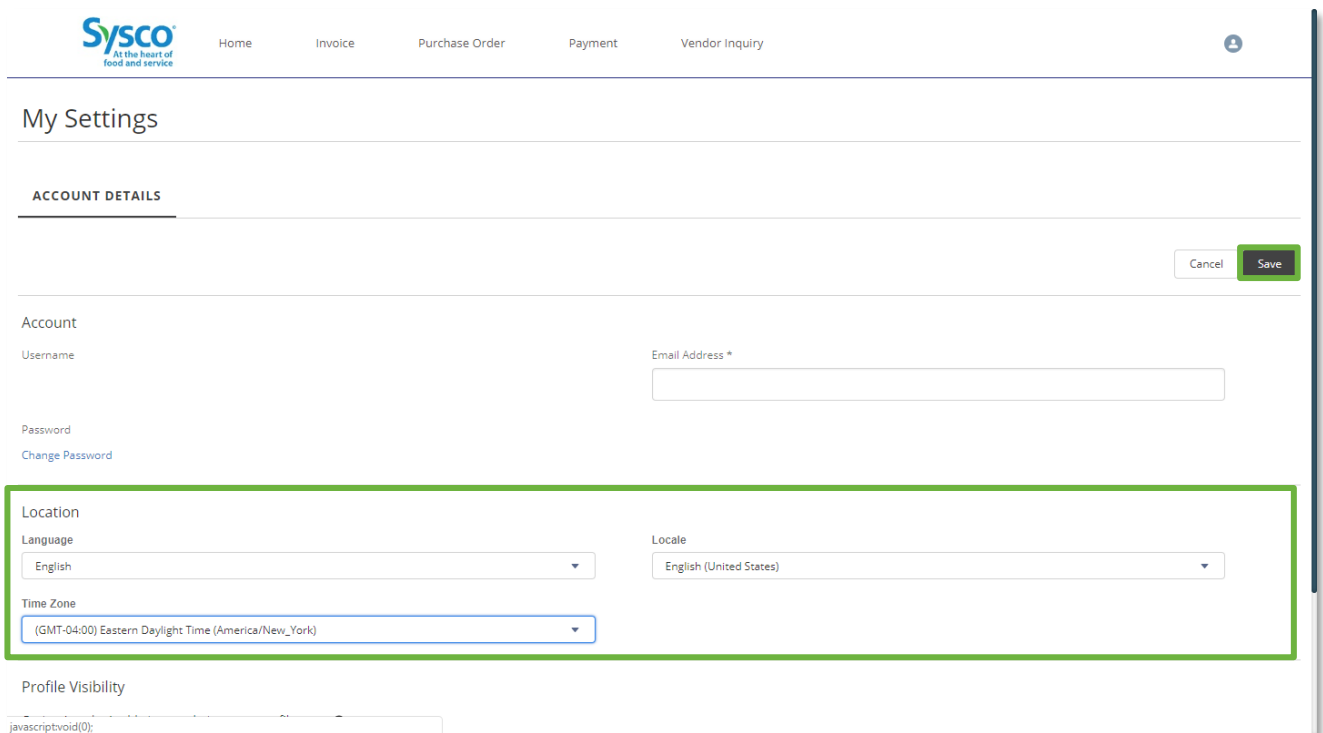
You must adhere to the following password rules:

- \* 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"/>

## 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.



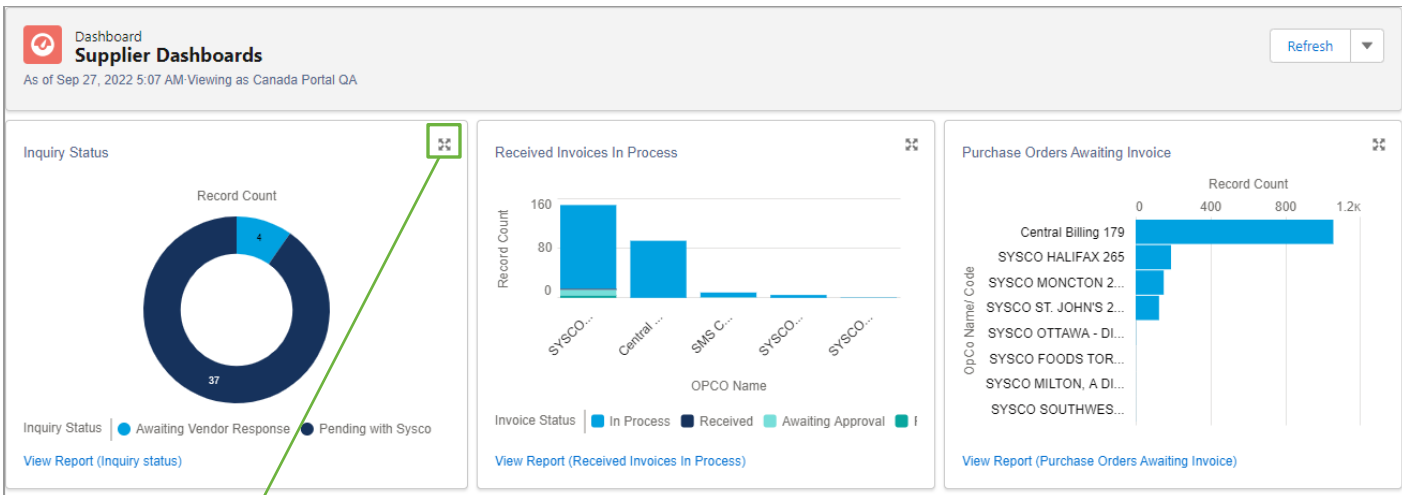
The screenshot shows the Sysco SPIRIT user interface. At the top, there is a navigation bar with the Sysco logo and links for Home, Invoice, Purchase Order, Payment, and Vendor Inquiry. A user profile icon is in the top right. Below the navigation bar is the 'My Settings' section. Under 'ACCOUNT DETAILS', there are 'Account' and 'Password' sections. The 'Location' section is highlighted with a green border and contains three dropdown menus: 'Language' (set to English), 'Locale' (set to English (United States)), and 'Time Zone' (set to (GMT-04:00) Eastern Daylight Time (America/New\_York)). To the right of the Location section are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted in green. Below the Location section is a 'Profile Visibility' section with a text input field containing '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

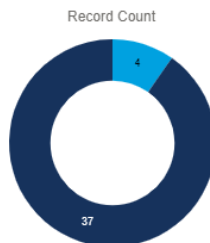
Suppliers have the ability to get a more in-depth view of the activity by clicking on each section of the graph. The list of items under each category's status will open for further review.



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

### Dashboard Component

Inquiry Status



Inquiry Status | ● Awaiting Vendor Response ● Pending with Sysco

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

## View and Export Reports

- 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**

Total Records  
41

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
<b>Subtotal</b>						
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

- Click the **Export** button to download report.
- 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

**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

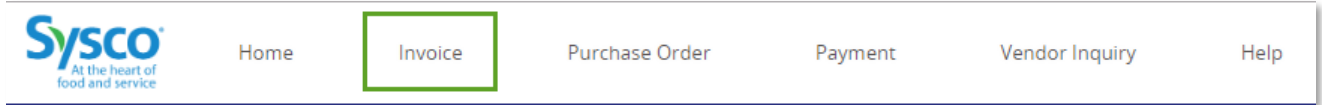
Excel Format .xlsx


Cancel Export

- Click the **Export** button.

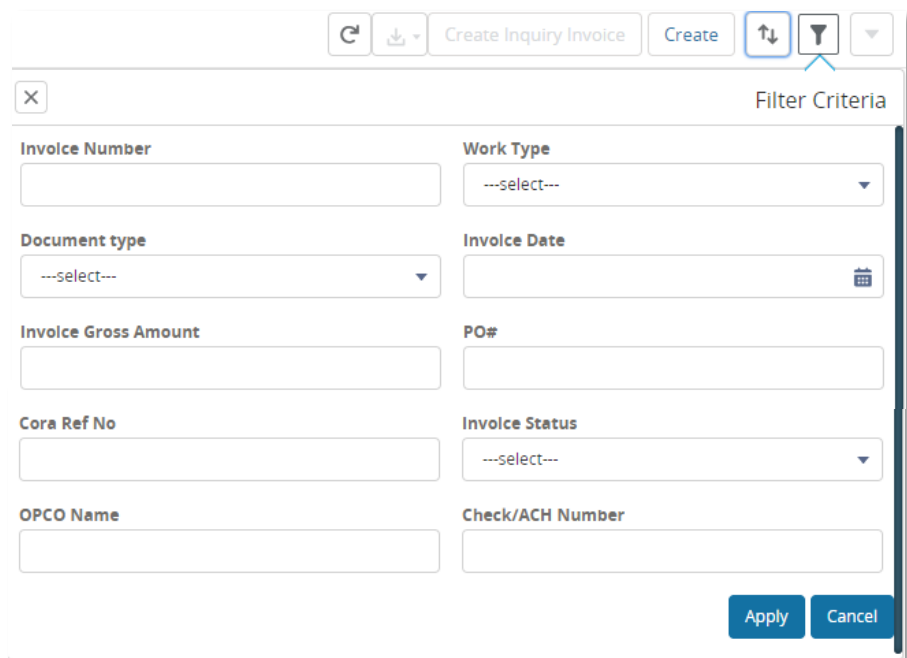
## Invoice Filter Function

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)
<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	



## 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.

The navigation bar includes: Sysco | SPIRIT, Home, Invoice (selected), Purchase Order, Payment, Vendor Inquiry, Vendor Portal, Help.

The table below shows a list of invoices with columns for Invoice Number, Work Type, PO#, Invoice Date, OPO Name, and Invoice Status. Two invoices are visible, each with a 'View' link.


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

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.

The screenshot shows the 'View Invoice' page for invoice INV-15305442. It is divided into several sections:

- 2 Invoice Header:** A table with fields: Invoice Number (IDS0509), Vendor Number (44321000), Work Type (Non PO Invoice), Invoice Status (In Process), and OpCo Name/Code (SYSCO MONCTON 262).
- 1 Attachments:** A table listing attachments. One attachment 'sample.pdf' is shown with columns for Title, Is Primary, Public Attachment, Owner, Last Modified, and Size.
- 3 Invoice Information:** A sidebar panel containing:
  - INVOICE DETAILS:** Currency (CAD), Invoice Gross Amount (1,800), Line Total Amount (1,800).
  - INVOICE TAXES:** (Collapsed)
  - ADDITIONAL DETAIL:** Payment Due Date (9/12/2022), Rejection Comments, Vendor Comments.
- 4 INVOICE LINE ITEMS:** A table at the bottom showing the invoice line items. One line is visible with an amount of 1,800.

## 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**.

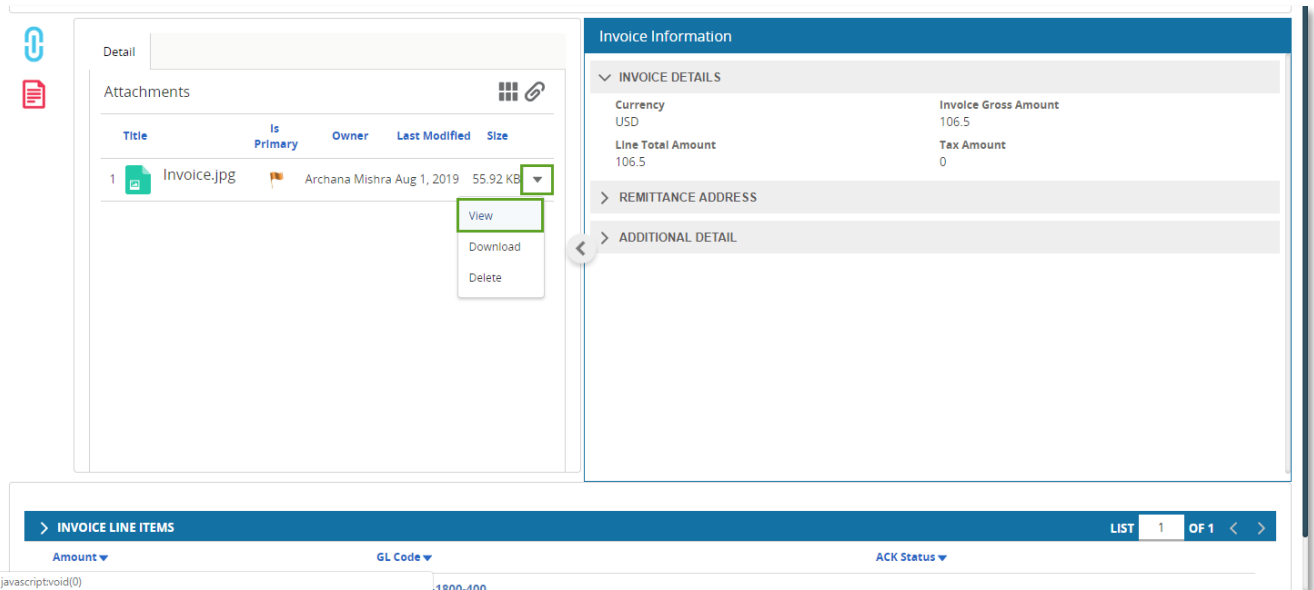
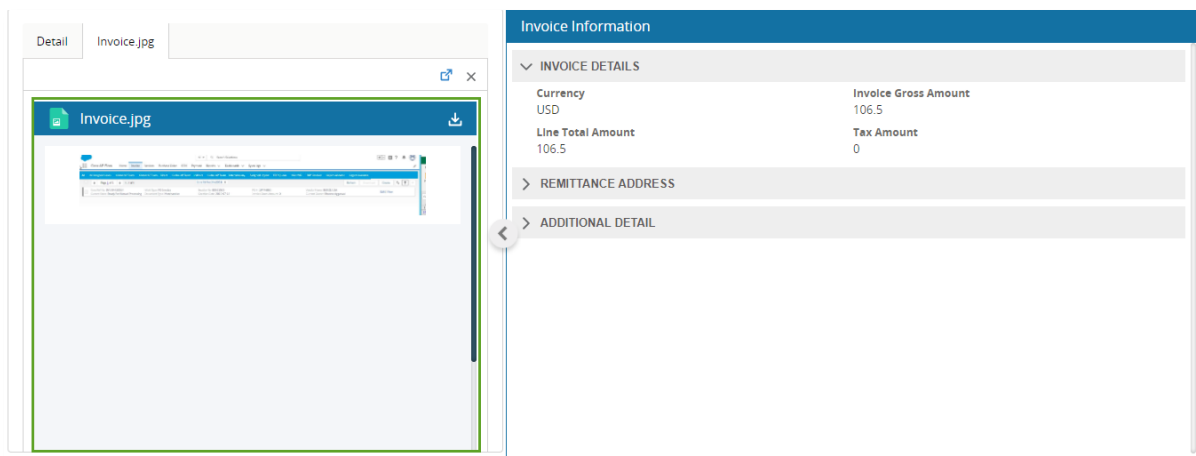



Image opens in view mode in the Attachments window.

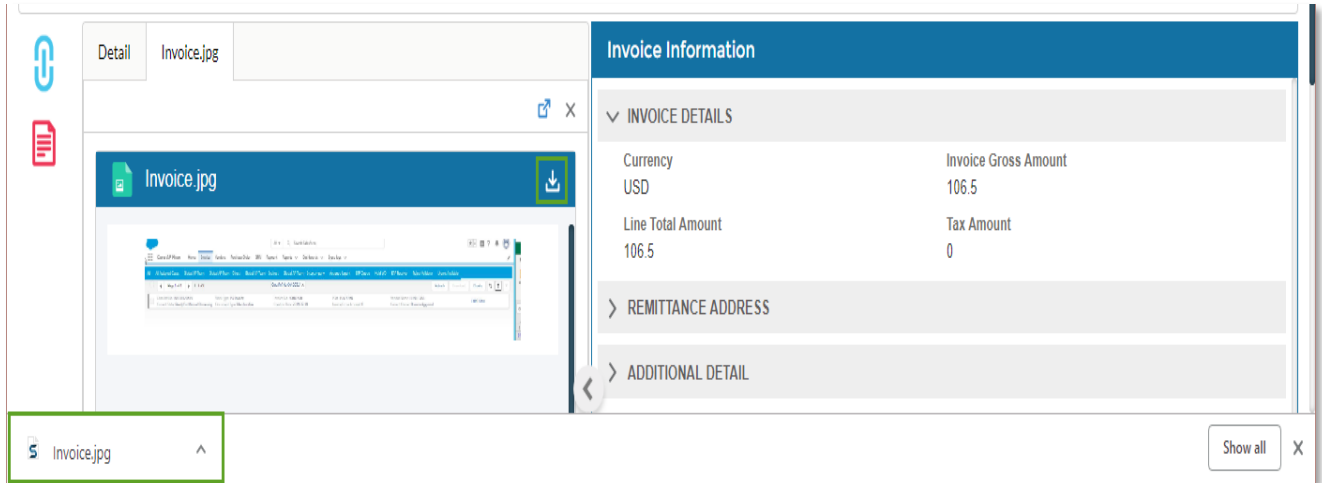


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# Invoice Management

Sysco SPIRIT User Manual

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



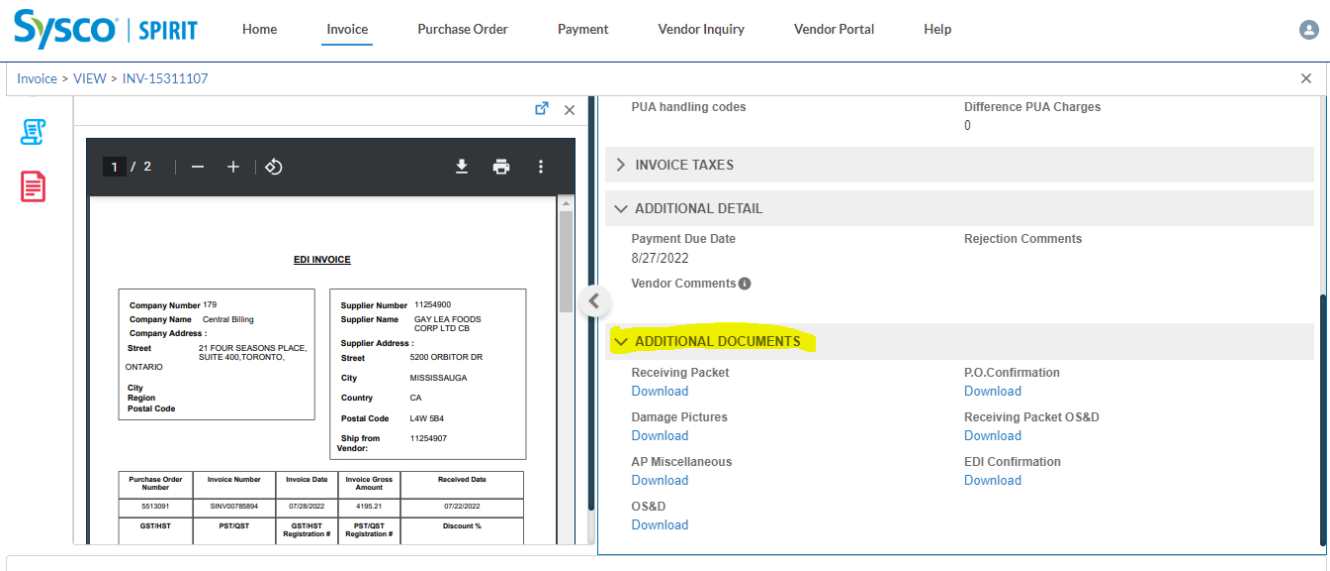
The screenshot displays the Sysco SPIRIT interface for invoice management. On the left, a file named 'Invoice.jpg' is shown in a preview window, with a download icon highlighted in a green box. The main content area is titled 'Invoice Information' and contains the following details:

INVOICE DETAILS	
Currency	Invoice Gross Amount
USD	106.5
Line Total Amount	Tax Amount
106.5	0

Below the table, there are expandable sections for 'REMITTANCE ADDRESS' and 'ADDITIONAL DETAIL'. At the bottom of the interface, a file list shows 'Invoice.jpg' with an upward arrow icon, and a 'Show all' button is visible on the right.

## 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



Invoice > VIEW > INV-15311107

**EDI INVOICE**

<b>Company Number</b> 179	<b>Supplier Number</b> 11254900
<b>Company Name</b> Central Billing	<b>Supplier Name</b> GAY LEA FOODS CORP LTD CA
<b>Company Address :</b> Street 21 FOUR SEASONS PLACE, SUITE 400, TORONTO, ONTARIO	<b>Supplier Address :</b> Street 5200 ORBITOR DR City MISSISSAUGA Country CA Postal Code L4W 5B4 Ship from 11254907 Vendor:

Purchase Order Number	Invoice Number	Invoice Date	Invoice Gross Amount	Received Date
5113091	SINV00785694	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	P.O.Confirmation
<a href="#">Download</a>	<a href="#">Download</a>
Damage Pictures	Receiving Packet OS&D
<a href="#">Download</a>	<a href="#">Download</a>
AP Miscellaneous	EDI Confirmation
<a href="#">Download</a>	<a href="#">Download</a>
OS&D	
<a href="#">Download</a>	

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

Continued on next page.

## 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.

The screenshot shows the Sysco SPIRIT interface with the 'Invoice' tab selected. A list of three invoices is displayed. The 'Download' icon in the top right of the list is highlighted with a green box. A dropdown menu is open, showing 'Invoice data' as the selected option, also highlighted with a green box.

Invoice Number	Work Type	PO#	Invoice Date	Invoice Gross Amount	View
85779098	PO Invoice	24601910	2019-07-20	4...	View
85779097	PO Invoice	24326050	2019-07-20	5...	View
85779096	PO Invoice	24253150	2019-07-20	5...	View

6. Click the downloaded Excel file to open.

The screenshot shows the same Sysco SPIRIT interface. At the bottom, a file explorer window is open, showing a downloaded file named 'Invoice\_Antonia\_11...xls' with an Excel icon. The file name is highlighted with a green box.

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

## 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.

The screenshot shows the Sysco SPIRIT interface with the 'Invoice' tab selected. A table lists several invoices. The 'Download' icon in the top right of the table is highlighted, and a dropdown menu is open, showing options: 'Invoice data', 'Invoice data with Attachments' (highlighted in yellow), and 'Select & Download'.

Invoice Number	Work Type	PO#	Invoice Date	OPCO Name
IDS2709-02	PO Invoice	1365663	9/27/2022	SYSCO MONCT...
SINV00785894	PO Invoice	5513091	7/28/2022	Central Billing
SINV00785873	PO Invoice	5513160	7/28/2022	Central Billing
SINV00785870	PO Invoice	5513092	7/28/2022	Central Billing

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

The screenshot shows the Sysco SPIRIT interface with a green confirmation alert at the top: "We are processing your request. You will receive an email once done." Below the alert, the invoice list is visible, showing the first invoice selected.

Invoice Number	Work Type	PO#	Invoice Date	OPCO Name
IDS2709-02	PO Invoice	1365663	9/27/2022	SYSCO MONCT...

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.

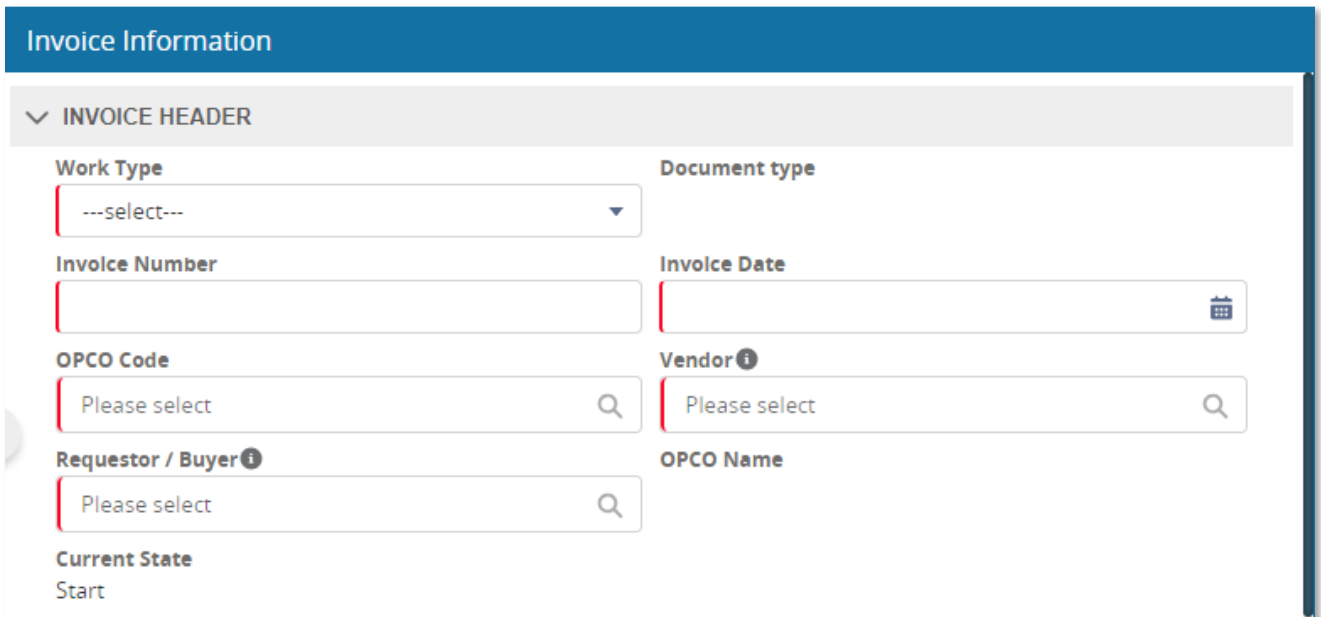
[Download](#)

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

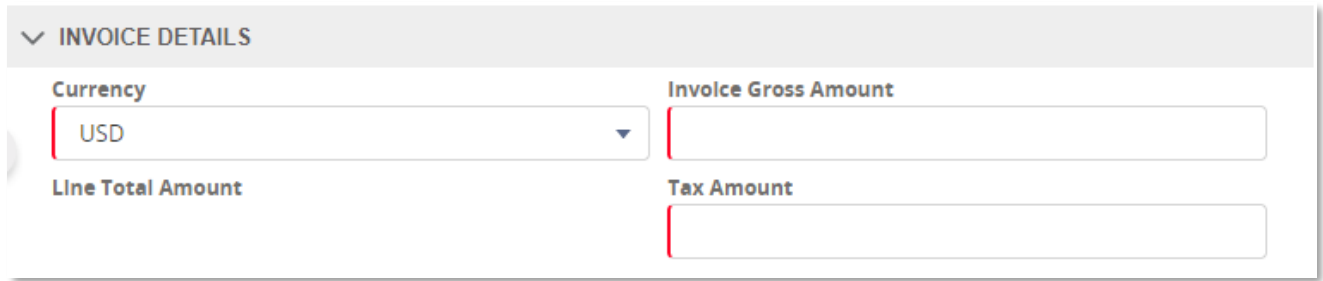
<b>Work Type</b> ---select---	<b>Document type</b>
<b>Invoice Number</b>	<b>Invoice Date</b>
<b>OPCO Code</b> Please select	<b>Vendor</b> Please select
<b>Requestor / Buyer</b> Please select	<b>OPCO Name</b>

**Current State**  
Start

Continued on next page.

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

- Currency
- Invoice Gross Amount
- Tax Amount



INVOICE DETAILS

Currency: USD

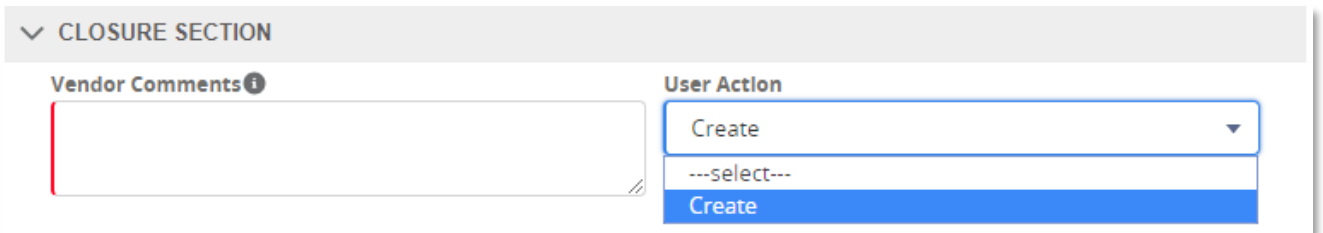
Invoice Gross Amount: [Empty]

Line Total Amount: [Empty]

Tax Amount: [Empty]

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



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



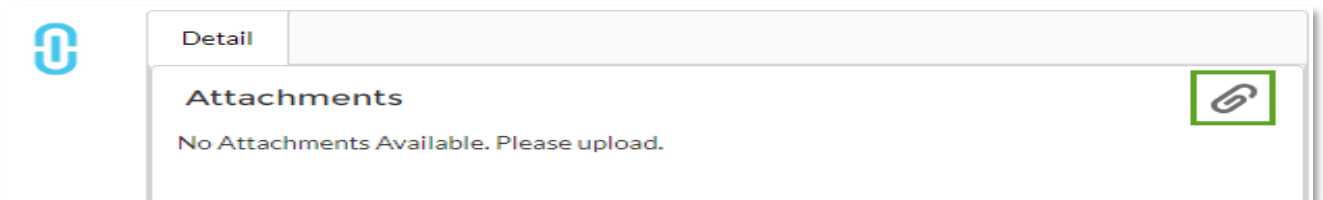
CLOSURE SECTION

Vendor Comments: [Empty]

User Action: Create

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

 **Important!** Attachments are mandatory.

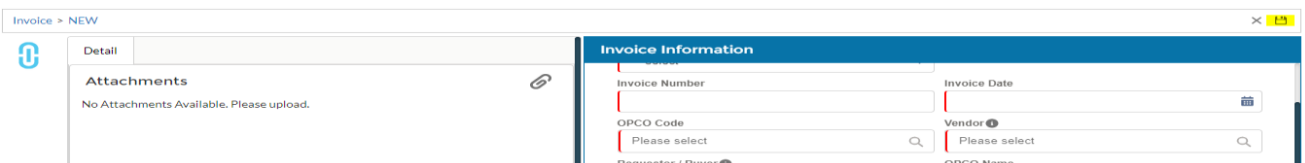


Detail

Attachments

No Attachments Available. Please upload.

9. Click the Save  icon to create invoice.



Invoice > NEW

Invoice Information

Invoice Number: [Empty] Invoice Date: [Empty]

OPCO Code: [Please select] Vendor: [Please select]

Requestor / Buyer: [Empty] OPCODE Name: [Empty]



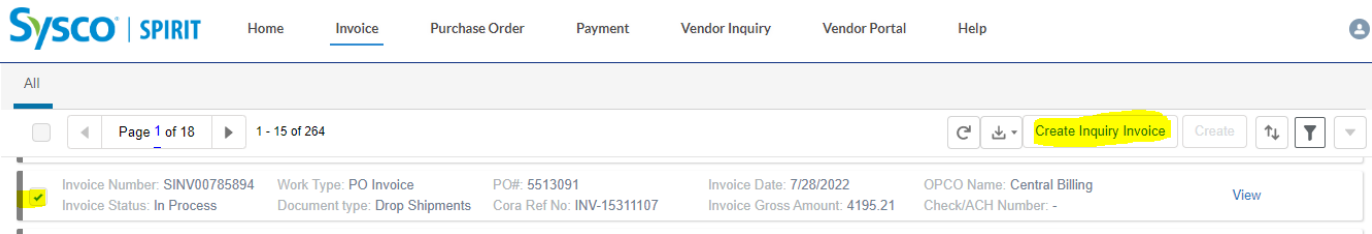
## New Invoice Reference Table

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>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 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.

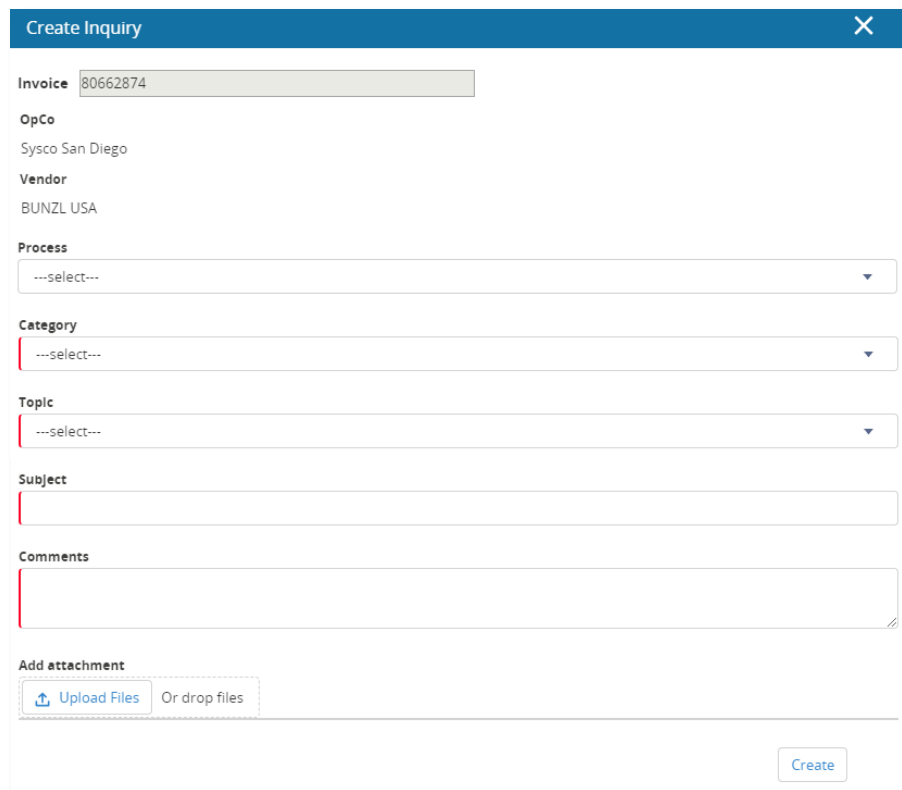


The screenshot shows the Sysco SPIRIT navigation bar with tabs for Home, Invoice, Purchase Order, Payment, Vendor Inquiry, Vendor Portal, and Help. Below the navigation bar is a table with the following data:

Invoice Number	Work Type	PO#	Invoice Date	OPCO Name
SINV00785894	PO Invoice	5513091	7/28/2022	Central Billing
Invoice Status: In Process	Document type: Drop Shipments	Cora Ref No: INV-15311107	Invoice Gross Amount: 4195.21	Check/ACH Number: -

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

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



The screenshot shows the 'Create Inquiry' form with the following fields:

- Invoice: 80662874
- OpCo: Sysco San Diego
- Vendor: BUNZL USA
- Process: ---select---
- Category: ---select---
- Topic: ---select---
- Subject: [Empty text box]
- Comments: [Empty text box]
- Add attachment: Upload Files (Or drop files)
- Create button


**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.

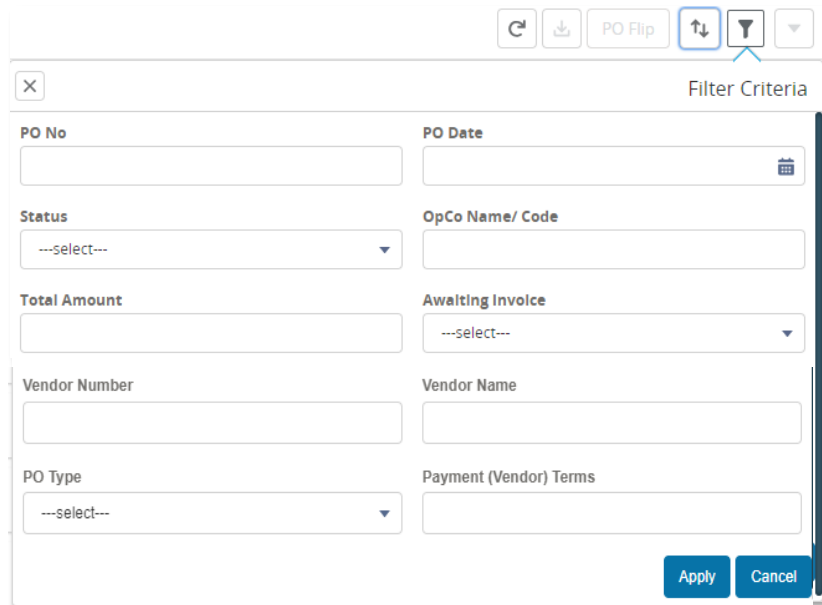
## Invoice Inquiry Reference Table

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



 **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)
<b>PO No</b>	Issues Sysco Purchase Order Number	
<b>PO Date</b>	Date Purchase Order was Issued	
<b>Status</b>	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>
<b>OpCo Name / Code</b>	Sysco Operating Company Name & Code	<ul style="list-style-type: none"> <li>• See <a href="#">Appendix</a> for listing</li> </ul>
<b>Total Amount</b>	Total Amount on the Purchase Order	
<b>Awaiting Invoice</b>	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>
<b>PO Type</b>	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>
<b>Vendor Number</b>	Sysco Vendor Number	
<b>Vendor Name</b>	Sysco Vendor Name	

# Purchase Order Management

## 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.

All

Page 1 of 105    1 - 15 of 1568

PO No: 1365663	Status: Goods Received	Total Amount: 1167.60	Vendor Number: 44321000	PO Type: Indirect Expense	<a href="#">View</a>
PO Date: 11/23/2021	OpCo Name/ Code: SYSCO M...	Awaiting Invoice: No	Vendor Name: SYSCO LAKESI...	Payment (Vendor) Terms: -	

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				

**Purchase Order Information**

2 **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
Miscellaneous Merchandise Charges 0	Miscellaneous Freight Charges 0

3 **SHIPPING ADDRESS**

Ship To Name SYSCO TORONTO, A DIVISION	Ship To Address1 OF SYSCO CANADA INC.
Ship To Address2 7055 KENNEDY ROAD	Ship To Address3
Ship To City MISSISSAUGA	Ship To State/Province ON
Ship To Zip/Country/Cont	Ship To Country/Territory

1 **INVOICE LINE ITEMS**    LIST    1    OF 1

Jct/Service No.	Product/Service Description	Amount	UOM - Qty	Invoice Quantity	GRN Quantity	Invoice Unit Price	GRN Rate	Catch Weight	GRN Catch Weight	De
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	

## 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	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	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.

PO No:	Status:	Total Amount:	Vendor Number:	PO Type:	View
1365663 PO Date: 11/23/2021	Goods Received	1167.60 Awaiting Invoice: No	44321000 SYSCO LAKESI...	Indirect Expense Payment (Vendor) Terms: -	View
5523965 PO Date: 8/22/2022	Goods Received	9412.20 Awaiting Invoice: Yes	11254900 GAY LEA FOOD...	Dropship Payment (Vendor) Terms: -	View
5521876 PO Date: 8/16/2022	Goods Received	51686.86 Awaiting Invoice: Yes	11254900 GAY LEA FOOD...	Dropship Payment (Vendor) Terms: -	View

Suppliers will be routed to the Create New Invoice screen.

Invoice > NEW

**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.



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" value=""/>
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" value=""/>	Truck Load <input type="text"/>
Freight Charges <input type="text"/>	Pickup Allowance <input type="text"/>
Miscellaneous Charges	

Continued on next page.

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

▼ INVOICE TAXES

GST/HST	PST/QST
0.000	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

<b>Vendor Comments</b> ⓘ	<b>User Action</b>
	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.

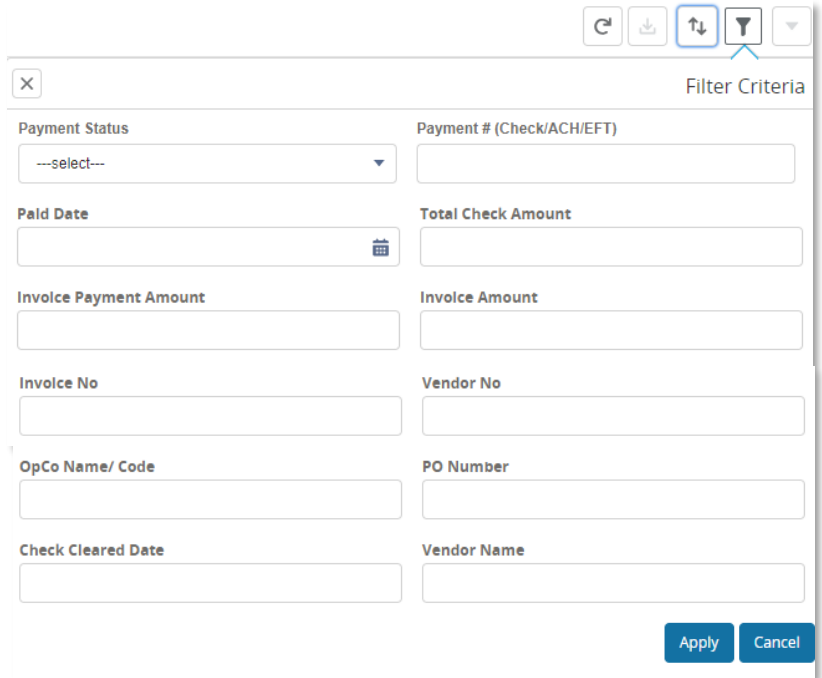
14. Click the Save icon to flip the PO and create the invoice.

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)
<input type="text" value="---select---"/>	<input type="text"/>
Paid Date	Total Check Amount
<input type="text" value=""/>	<input type="text"/>
Invoice Payment Amount	Invoice Amount
<input type="text" value=""/>	<input type="text"/>
Invoice No	Vendor No
<input type="text" value=""/>	<input type="text"/>
OpCo Name/ Code	PO Number
<input type="text" value=""/>	<input type="text"/>
Check Cleared Date	Vendor Name
<input type="text" value=""/>	<input type="text"/>

Apply Cancel

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

## Payment Details Filter Reference Table

Field Name	Description	Options (where applicable)
<b>Payment Status</b>	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>
<b>Payment #</b>	Check or ACH or EFT Number for the payment	
<b>Paid Date</b>	Date in which payment was made	
<b>Total Check Amount</b>	Total amount paid on the check	
<b>Invoice Payment Amount</b>	Total amount paid from the supplier invoice	
<b>Invoice Amount</b>	Total amount on the supplier invoice	
<b>Invoice No.</b>	Supplier-provided invoice number	
<b>Vendor No.</b>	Sysco vendor number	
<b>OpCo Name / Code</b>	Name & Coding of Sysco Operating Company being invoiced	
<b>PO Number</b>	Sysco issued Purchase Order number	
<b>Check Cleared Date</b>	Date in which the check cleared	
<b>Vendor Name</b>	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						
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: -	<a href="#">View</a>
<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	<a href="#">View</a>

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.

Sysco   SPIRIT						
Home	Invoice	Purchase Order	Payment	Vendor Inquiry	Vendor Portal	Help
Payment > VIEW > PAY-03784706						
Invoice No QASUP1407-01	Vendor No	PO Number 1374013	Payment Status Paid	Invoice Payment Amount 27,770.7		

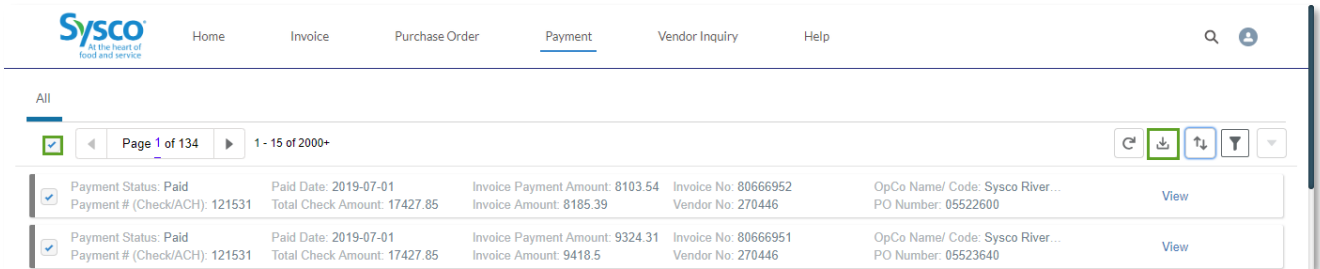
### Payment Information

#### ▼ PAYMENT DETAIL

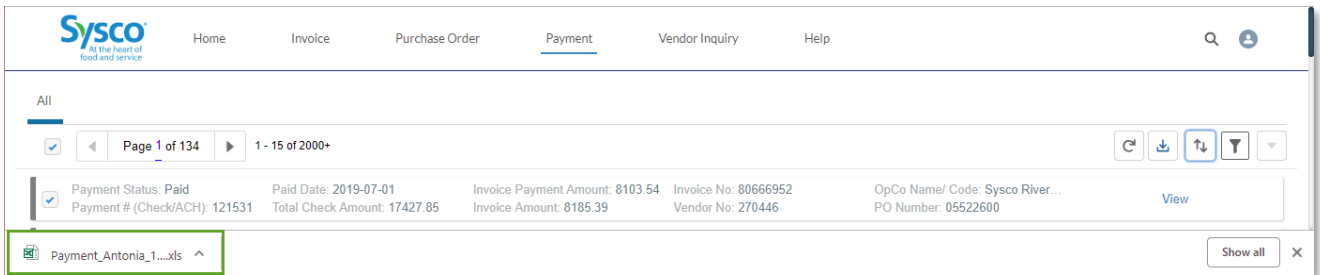
Payment # (Check/ACH/EFT) 22310	Paid Date 7/18/2022
Currency USD	Payment Method ACH
OpCo Name/ Code SYSCO MONCTON 262	Total Check Amount 373.95
Invoice Discount Amount 0	Check Cleared Date
Payment Status Description Paid	

## 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.




5. Click the downloaded Excel file to open.



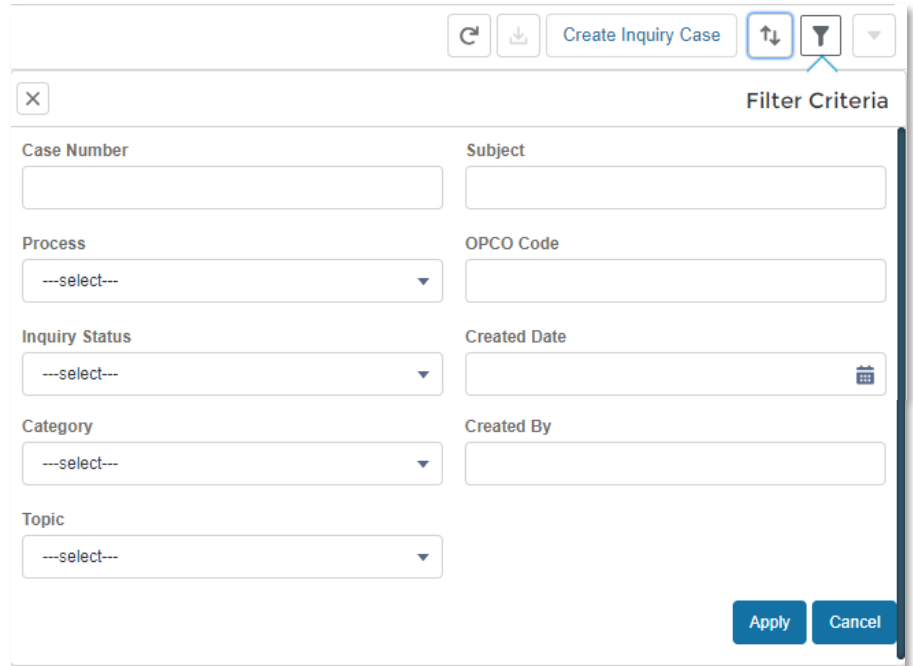
Excel file will open with fields Payment Status, Payment # (Check/ACH), Paid Date, Total Check Amount, Invoice Payment Amount, Invoice Amount, Invoice No, Vendor No, OpCo Name / Code, and PO Number. Suppliers have the ability to sort and filter data as needed in Excel.

	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.

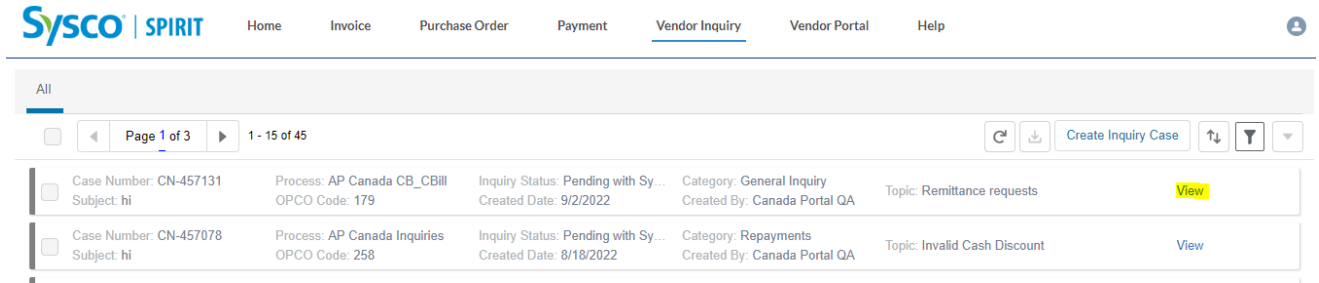
## Vendor Inquiry Filter Reference Table

Field Name	Description	Options (where applicable)
<b>Case Number</b>	Sysco Helpdesk Case Number	
<b>Subject</b>	Supplier Created Subject	
<b>Process</b>	Inquiry Process Area	AP Canada Inquiries AP Canada CB_CBill
<b>OpCo Code</b>	Operating Company Code	<ul style="list-style-type: none"> <li>See <a href="#">Appendix</a> for listing</li> </ul>
<b>Inquiry Status</b>	Current Status of Inquiry	<ul style="list-style-type: none"> <li>Resolved</li> <li>Awaiting Vendor Response</li> <li>Pending with Sysco</li> </ul>
<b>Created Date</b>	Date Inquiry was Created / Submitted	
<b>Category</b>	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>
<b>Created By</b>	User that Submitted Inquiry	
<b>Topic</b>	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.

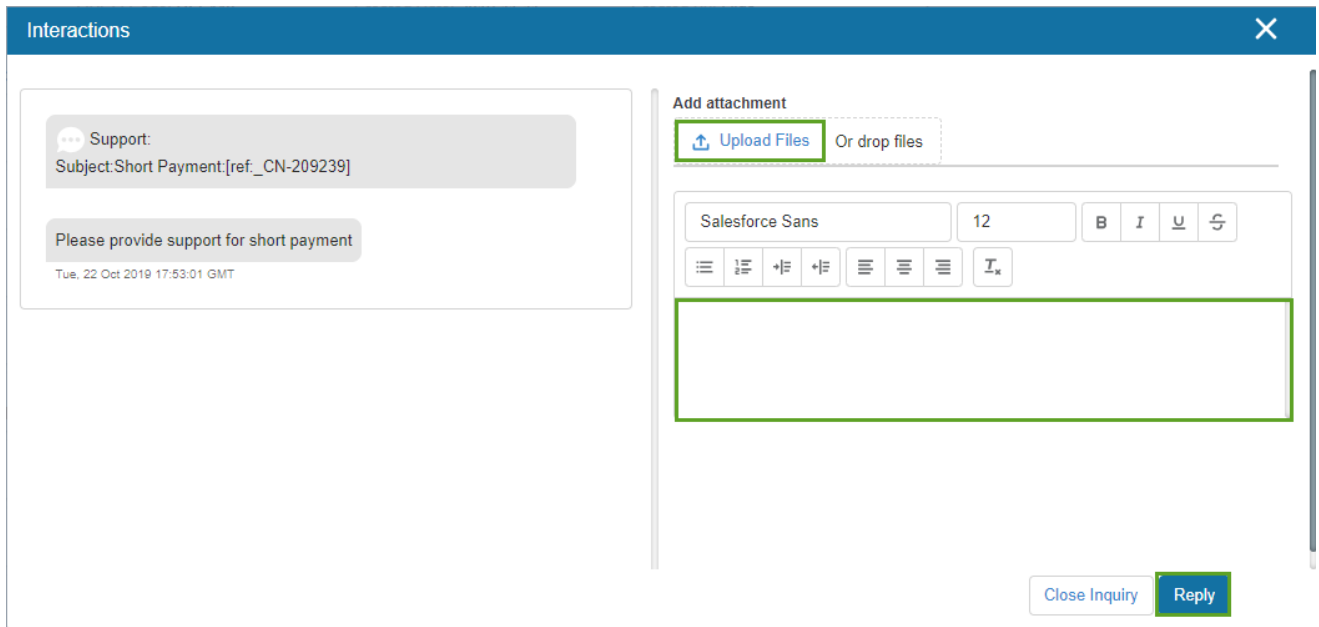


The screenshot shows the Sysco SPIRIT navigation bar with tabs for Home, Invoice, Purchase Order, Payment, Vendor Inquiry (selected), Vendor Portal, and Help. Below the navigation bar is a list of vendor inquiries. The first inquiry has Case Number CN-457131, Process AP Canada CB\_CBill, and Topic Remittance requests. The second inquiry has Case Number CN-457078, Process AP Canada Inquiries, and Topic Invalid Cash Discount. Each row includes a checkbox, case details, and a View link.

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

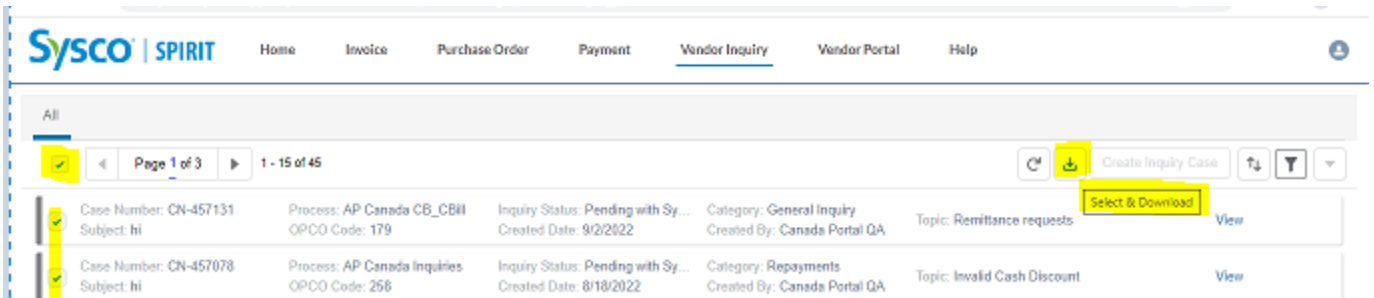
- To add an attachment, click the **Upload Files** button.  **Note:** File size cannot exceed 8MB.
- To reply, enter any comments in the comments window and click the **Reply** button.



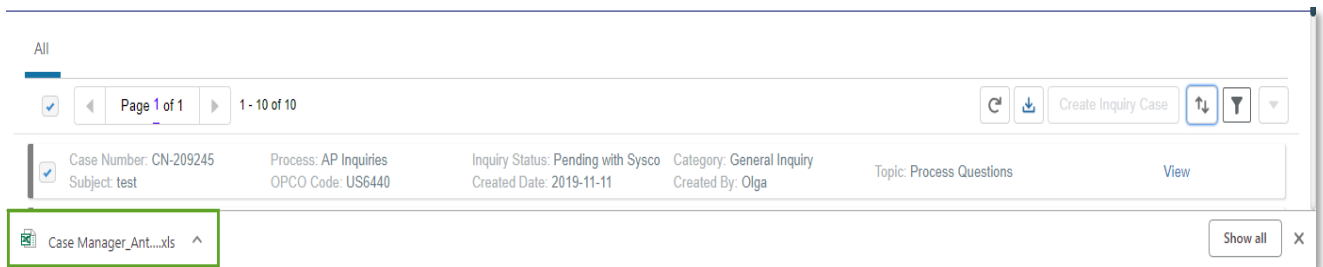
The screenshot shows the Interactions pop-up window. On the left, there is a support message from 'Support' with the subject 'Short Payment[ref:\_CN-209239]' and the text 'Please provide support for short payment' dated 'Tue, 22 Oct 2019 17:53:01 GMT'. On the right, there is an 'Add attachment' section with an 'Upload Files' button and a text area for a reply. The text area contains 'Salesforce Sans' and '12' with formatting options (B, I, U, S). Below the text area is a large empty text box. At the bottom right, there are 'Close Inquiry' and 'Reply' buttons.

## 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.



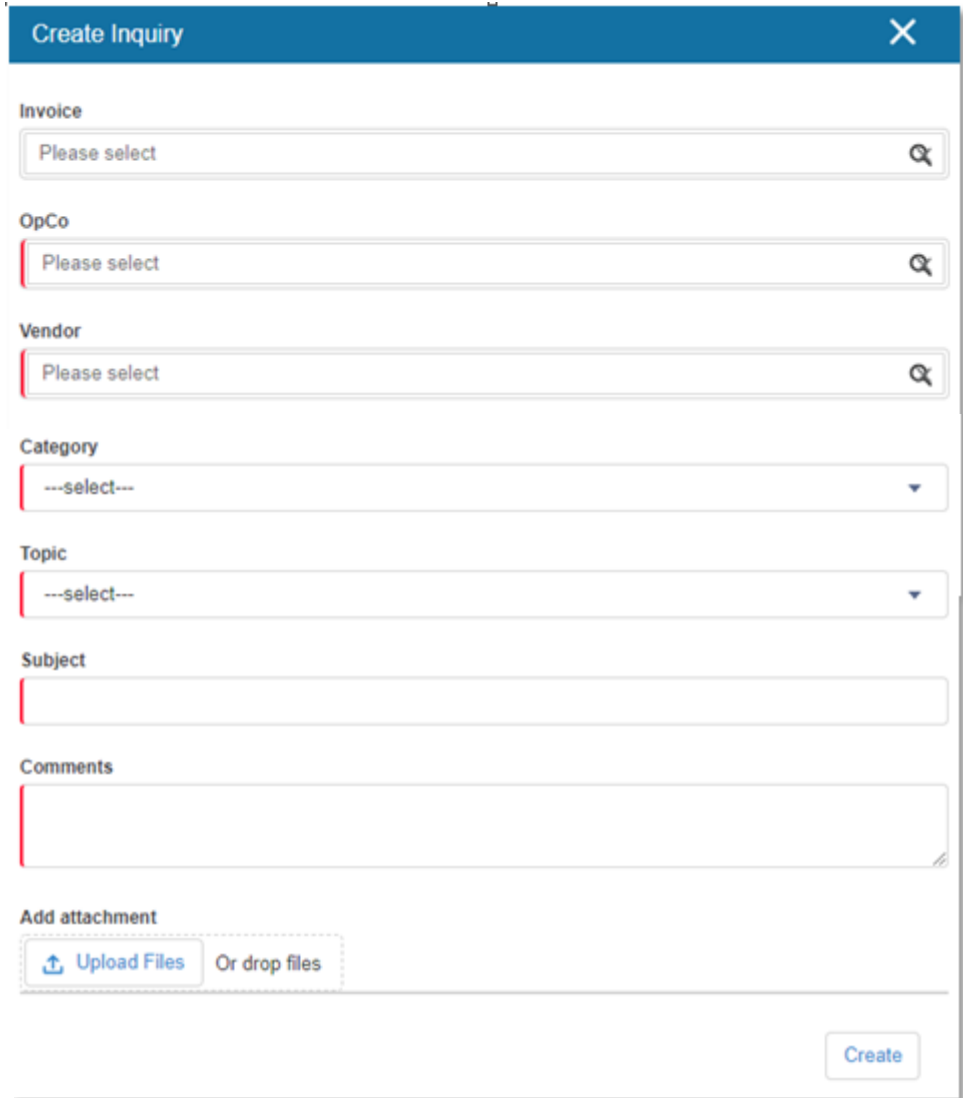
Excel file opens with fields Case Number, Subject, Process, OpCo Code, Inquiry Status, Created Date, Category, Created By, and Topic. Suppliers have the ability to sort and filter data as needed in Excel.

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)
<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	

## 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	<input type="text" value="11254900"/>	Sysco Fiscal Year/Period YYYYpp	<input type="text"/>
OpSite	<input type="text" value="---Select---"/>	Document Type	<input type="text" value="---Select---"/>
Payment Reference	<input type="text"/>	Opco PO Number	<input type="text"/>
CB/Cbill Invoice Number	<input type="text"/>	Opco Invoice Number	<input type="text"/>

Search   Reset   Download

Click Search to find the documents based on search criteria.

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

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

<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 ×

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.*



# Additional Features

Sysco SPIRIT User Manual

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

Show 10 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 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

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

Show 10 entries

Search: 22469

<input type="checkbox"/>	Document Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
<input type="checkbox"/>	Samples and Returns Backup	Toronto	2246984		4082175	78881	202001	02/24/2022
<input type="checkbox"/>	Samples and Returns Backup	Toronto	2246984		4065517	78881	202001	02/24/2022
<input type="checkbox"/>	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

<input type="checkbox"/>	Document Type	OpSite	CB/Cbill Invoice Number	Opco PO Number	Opco Invoice Number	Payment Reference	Fiscal Year/Period	Doc Date
<input 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
<input type="checkbox"/>	SAMPLES AND RETURNS	Central Ontario	2883190		1484733	102037	202203	09/10/2021
<input type="checkbox"/>	MISCELLANEOUS	Central Ontario	2883190		1483586	102037	202203	09/10/2021

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

Search Download

Click Reset to clear the previous selection.

Show 10 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 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

# Appendix

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