Change Customer Summary Overview

This Quick Reference Guide (QRG) is designed to walk a **Customer Billing Specialist, Customer Contract Specialist, or Customer Administrator** through the process of changing a customer summary in Workday.

You may need to change the customer's name or status. A customer may request a name change (merger, last name change, etc.). You may also need to change the customer's status such as changing their status from Active to Hold for delinquent payment. This is NOT how to put an invoice in a Hold status.

NOTE	**Remember:** The Customer ID will always start with "**CST-**" and the Customer Name has the Customer ID in parentheses at the end of the name. Ex. Dragonfly Inn (CST-00893). If you need to find the customer number, you can use the **Find Customers with Facet Search** report.

Procedure

On the Workday **Home** screen:

1. Type **Change Customer Summary** in the search field.
2. Select the **Change Customer Summary** task from the search results.

On the **Change Customer Summary** screen:

3. Select the **Customer** for whom you want to change the customer summary.
4. Select **OK** to proceed.
5. On the second **Change Customer Summary** screen, complete or change the following required fields:
   - **Customer Name** – will auto-populate based on Step 3. Can change if needed.

NOTE	The Customer Name will always have the Customer number at the end. Ex. Dragonfly Inn (CST-00893).

   - **Status** – will auto-populate with the existing customer status. Can change if needed.
   - **Reason** –Only required if changing the status.
   - **Customer Category** – will auto-populate with the existing customer category.

NOTE	**Reason description** and **Children** fields are optional. **Customer Group, Restricted to Companies** and **Customer Security Segment** fields should be left blank.

6. Select **Submit** to submit the request.

You have successfully completed this task. It will now be routed based on the configuration.