

Create Customer Overview

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

When billing someone outside the University for goods/services provided by the University, you will use the Customer Accounts functional area to create an invoice. If they are not already a customer in Workday, then you will need to create a customer.

Procedure

Before you start to create a customer, check to make sure the customer does not already exist.

Type **View Customer** in the Search field.


Type the **Customer’s Name** in the Customers field. If no customer comes up, you can proceed with the following steps to create a customer.

On the Workday **Home** screen:

1. Enter **Create Customer** in the search field.
2. Select the **Create Customer** task from the Search Results.


On the **Create Customer** screen:

3. Complete the following fields:
 - **Customer Name** – enter the name of the customer.
 - **Status** – will auto-populate as **Active**.
 - **Customer Category** – select the relevant customer category from the drop-down list.
 - Interagency is for other VA state institutions.
 - Other is for non-profits or foundations.
 - **Payment Terms** – select **Net 30**
 - **Accept All/These Currencies** – select **All These Currencies**
 - Enter **USD** in the blank field to the right
 - **Default Currency** - select **USD**

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|  <p>NOTE</p> | <p>Optional field: Create Customer from Business Entity. If the customer already exists as a Supplier, you can bring over the contact information from the Supplier file when creating the customer.</p> <p>Leave the following fields blank: Customer Groups, Default Tax Code, and Customer Security Segment.</p> |
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4. Click **OK**.

On the second **Create Customer** screen:


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|  NOTE | <p>Under the Proposed section, Status field will auto-populate. Reason and Reason Description are fields that will be used only if you are changing the status from Active.</p> <p>Under the Summary section, Customer Category field will auto-populate based on selections made on the previous screen. Restricted to companies, Customer Group, Children and Customer Security Segment should be left blank.</p> |
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In the section at the bottom of the page:

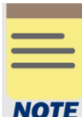
5. Select **Contact Information** tab.

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|  CAUTION | <p>Required contact items:</p> <ul style="list-style-type: none"> • Address • Phone OR Email |
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6. Select **Add** under **Phone**.
 - A. Complete the following fields.
 - **Country Phone Code** – will auto-populate.
 - **Phone Number** – type the phone number of the customer.
 - **Phone Device** – select the relevant phone device from the drop-down list.
 - **Primary** – One phone number must be marked as primary by selecting the check box.
 - **Type** – will auto-populate.
 - **Use For** – will auto-populate.

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|  NOTE | <p>Phone extension and Comments are optional.</p> <p>Visibility field should remain unchecked.</p> |
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7. Select **Add** under **Address**.
 - A. Complete the following fields.
 - **Effective Date** – will auto-populate.
 - **Country** – will auto-populate.
 - **Address Line 1** – type the address of the customer.
 - **City** – type the city of the customer.
 - **State** – type the state of the customer.
 - **Postal Code** – type the postal code of the customer.
 - **Primary** – One address must be marked as primary by selecting the check box.
 - **Use For** – will auto-populate.


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|  NOTE | <p>Country and Comments are optional.</p> |
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|  NOTE | Fields in the Usage, Email, Instant Messenger, and Web Address sections are optional. |
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The other tabs in the bottom section:

- **Related Worktags** – leave all fields blank.
- **Credit & Collections** – leave all fields blank.
- **Payment Details** – items will auto-populate from the first Customer screen.
- **Banking** – leave all fields blank.
- **Tax Information** – leave all fields blank.
- **Notes** – Optional – can add any internal notes about customer.
- **Attachments** – Optional – can add any attachments related to customer.
- **Connection Map** – leave all fields blank.
- **Assigned Roles** – leave all fields blank.

8. Select **Submit**.

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|  CAUTION | The Customer request will be routed to the Customer Administrator for approval. Once the Customer request is approved, you will see a to-do step in your inbox prompting you to Setup Document Delivery & Customer Contacts if necessary. If a customer contact is not necessary or the customer would like to receive the statement via mail, you can begin invoicing the customer. |
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You have successfully completed this task.

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|  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. |
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