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**

NOTE	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. Leave the following fields blank: **Customer Groups**, **Default Tax Code**, and **Customer Security Segment.**

4. Click **OK.**

On the second **Create Customer** screen:

NOTE	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. 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.

In the section at the bottom of the page:

5. Select **Contact Information** tab.

CAUTION	Required contact items: • Address • Phone OR Email

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.

NOTE	**Phone extension** and **Comments** are optional. **Visibility** field should remain unchecked.

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.

NOTE	**Country** and **Comments** are optional.

NOTE	Fields in the **Usage**, **Email**, **Instant Messenger**, and **Web Address** sections are optional.

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.**

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.

You have successfully completed this task.

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.