

Overview

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

After a created customer has been approved, you will be prompted to setup customer contacts if needed. When adding customer contacts, you can include their name and contact information (email, phone number, Instant Messenger, or web address) and then setup bill-to contact information. Your customer contacts can be used to setup document delivery preferences preferences and are available for use when creating invoices.


 <p><b>NOTE</b></p>	<p><b>Remember:</b> 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 <b>Find Customers with Facet Search</b> report.</p>
--	--

Table of Contents

Procedure: Add Customer Contacts.....1

Procedure: Set Up Bill-To Contacts .....3

Procedure: Edit Customer Contacts.....4

Procedure: Edit Bill-To Contacts.....4


Procedure: Add Customer Contacts

On the Workday **Home** screen:

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

On the **Edit Customer** screen:

3. Type the customer’s name in the Customer field and select the Customer from the available options.

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

4. Click **OK**.

## Add/Edit Customer Contacts– Quick Reference Guide

On the **Customer** screen:

5. Select **Addresses and Contacts** tab.
6. Select **Customer Contacts** tab.

Happy Days Events (CST-01103) Customer

Customer ID CST-01103 Address 123 Happy Street  
Troy, VA 22974  
United States of America

Approval Status Approved

Overview **Addresses and Contacts** Contracts Invoices and Payments Assigned Roles Custom Reports Process History

Contact Information **Customer Contacts** Connection Map Document Delivery

Add Set Up Bill-To Contacts

7. Click **Add**.

On the **Add Contact** Screen:

8. Type **First Name** and **Last name** and any other the appropriate fields in the Name tab.
9. Select **Contact Information** Tab.

**Add Contact**

Business Entity


Name **Contact Information**

Country \* United States of America

10. Click **Add** under the type of Contact Information you want to include with this contact.

## Add/Edit Customer Contacts– Quick Reference Guide

11. Repeat Step 10 to **Add** another type of Contact Information – if needed.

 <p><b>NOTE</b></p>	<p>All types of contact information, <b>Phone, Address, Email, Instant Messenger, and Web Address</b> are optional.</p> <p>It is recommended that you do <i>NOT</i> add an <b>Address</b>, as that information will not be available to use when invoicing.</p> <p>An Email must be added to the Customer Contact if you want to email this contact any documents including invoices or statements.</p> <p>To be able to Setup a Customer Contact as a Bill-To Contact, the Customer Contact must have an email address added. If your Customer Contact does not have an email address or you do not plan on sending invoices via email, you can enter <a href="mailto:uva-ar-invoices@virginia.edu">uva-ar-invoices@virginia.edu</a> as the email. [See <a href="#">FAQ</a> for more information]</p>
--	--

12. Click **OK**.
13. Click **Done**.


You have successfully completed this task.

### Procedure: Set Up Bill-To Contacts

1. Follow Steps 1-4 in the Add Customer section to get to the Customer screen.

On the **Customer** screen:

2. Click **Set Up Bill-To Contacts**.
3. Select the **Primary Bill-to Contact** checkbox for the contact that should be the primary contact for the company.
4. Select the **Default Bill-to Contact** checkbox for the contact that you want to default when creating customer invoices.

 <p><b>NOTE</b></p>	<p><b>Email Documents and Comments</b> are optional.</p> <p>Use the <b>Email Documents</b> field to select the documents you want emailed to that contact. You will need to complete the Document Delivery task as well to ensure the document gets emailed. It can be left blank if you do not plan on sending any documents via email.</p>
--	--

5. Click **OK**.
6. Click **Done**.

You have successfully completed this task.

### Procedure: Edit Customer Contacts

1. Follow Steps 1-4 in the **Add Customer** section to get to the Customer screen.

On the **Customer** screen:

2. Find the Customer Contact that you want to edit in the table.
3. Click **Edit** in that row of the table.
4. Make edits in the **Name** and **Contact Information** tabs.
5. Click **OK**.

You have successfully completed this task.

### Procedure: Edit Bill-To Contacts

1. Follow Steps 1-4 in the **Add Customer** section to get to the Customer screen.

On the **Customer** screen:

1. Click **Set Up Bill-To Contacts**.
2. Make edits in the **Primary Bill-To Contact, Default Bill-To Contact, Email Documents, or Comments** fields.
3. Click **OK**.
4. Click **Done**.

You have successfully completed this task.