# **Add/Edit Customer Contacts**Quick Reference Guide



#### **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 preferances and are available for use when creating invoices.



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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# **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.



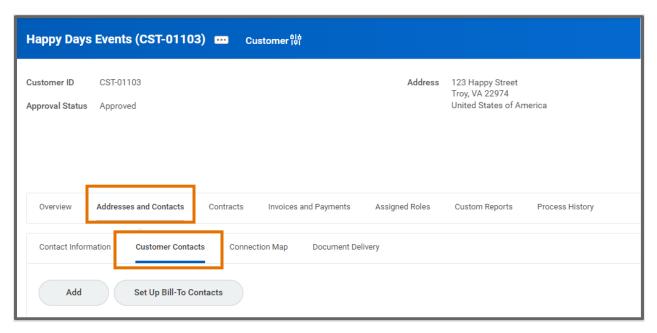
The Customer Name will always have the Customer number at the end. Ex. Dragonfly Inn (CST-00893).

4. Click OK.

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#### On the **Customer** screen:

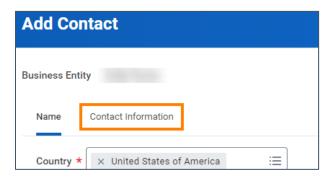
- 5. Select Addresses and Contacts tab.
- 6. Select Customer Contacts tab.



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.



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

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



All types of contact information, **Phone, Address, Email, Instant Messenger**, and **Web Address** are optional.

It is recommended that you do *NOT* add an **Address**, as that information will not be available to use when invoicing.

An Email must be added to the Customer Contact if you want to email this contact any documents including invoices or statements.

- 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:

- 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.



Email Documents and Comments are optional.

Use the **Email Documents** 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.

- 5. Click OK.
- 6. Click Done.

You have successfully completed this task.

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# **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 it 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.