

**Amend Customer Contract Overview**

This Quick Reference Guide (QRG) is designed to walk a **Customer Contract Specialist** through the process of amending a customer contract in Workday. You can amend details of existing customer contracts to update information such as the contract amount, the contract status, update worktags. When you use the Amend Contract procedure, it will create a new version of the contract.

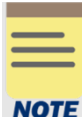
**Procedure**

On the Workday **Home** screen:


1. Type **Find Customer Contracts** in the search field.
2. Select the **Find Customer Contracts** report from the Search Results.

On the **Find Customer Contracts** screen:

3. Complete the following fields to navigate to the appropriate customer contract:
  - **Companies**
  - **Sold-To Customer**
  - **Bill-To Customer**

 <p><b>NOTE</b></p>	<p>The Customer Name will always have the Customer number at the end. Ex. Dragonfly Inn (CST-00893).</p>
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- **Currency**
- **Contract Number**
- **Contract Name**
- **Contract Type**
- **Contract Status**
- **Contract Effective Date On or After**
- **Contract Effective Date On or Before**
- **Is On Hold** – select this check box to view customer contracts that are on hold

 <p><b>NOTE</b></p>	<p>All fields on the <b>Find Customer Contracts</b> screen are optional, however they assist in narrowing down the search.</p>
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4. Select **OK** to display results.

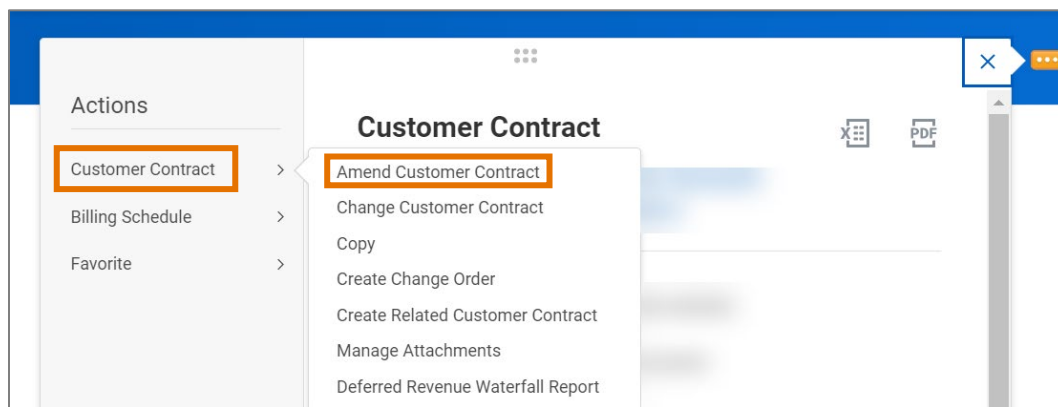
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On the second **Find Customer Contracts** screen:

5. Identify the contract that you want to amend.
6. Select the **Related Actions** button (...) next to the identified customer contract title.



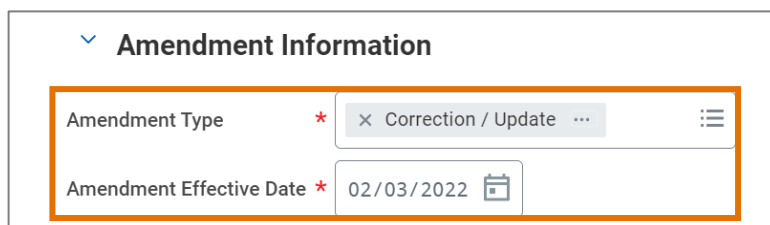
7. Select **Customer Contract > Amend Customer Contract**.



On the **Create Customer Contract Amendment** screen:

Complete the following required fields under the **Amendment Information** section:

8. Select the appropriate **Amendment Type**.
9. Enter the **Amendment Effective Date**.

A screenshot of the "Amendment Information" section. It contains two required fields, both marked with a red asterisk. The first field is "Amendment Type", which is a dropdown menu currently showing "Correction / Update" and a three-dot menu icon. The second field is "Amendment Effective Date", which is a date picker showing "02/03/2022" and a calendar icon. Both fields are enclosed in an orange border.

The required details in the **Contract Information, Contract Detail, Additional Information and Contract Amounts and Balances** sections will auto-populate based off the current version of the contract. They can be edited as required. All other fields are optional.


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10. Enter/revise information in the fields that you want to amend on the Contract Header and within the Contract Lines.

In the section at the bottom of the page:

11. Select the (+) icon to add a **Goods and Services** line if necessary and the (-) icon to remove a line.
12. To change the status of a contract line, under the Additional Information subtab, scroll all the way to the right to update the status of a contract line. Note that no contract lines can be in an active status to update the Contract itself to complete.

 <p><b>NOTE</b></p>	<p>The following information is required:</p> <p>In the <b>Line Details</b> sub-tab</p> <ul style="list-style-type: none"><li>• <b>Revenue Category</b></li><li>• <b>Line Type</b></li><li>• <b>Quantity</b></li><li>• <b>Unit of Measure</b></li></ul> <p>In the <b>Notes</b> sub-tab:</p> <ul style="list-style-type: none"><li>• <b>Invoice Memo Line</b> – This memo appears on the resulting accounting journal once invoices associated with the contract have been generated.</li></ul>
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13. Click **Submit** to submit the request.

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