Set Up Customer Portal Account Overview

This Quick Reference Guide (QRG) is designed to walk a **Customer Billing Specialist** and **Customer Contract Specialist** through the process of requesting the creation of a customer portal account for their customers in Workday. By the end of this QRG, you will be able to submit a request for setting up a customer portal account. Once the request is submitted, the Customer Administrators will complete the request. The customer will receive an email, and you will receive a notification as soon as the customer portal account is created.

Set Up Customer Portal Account

On the Workday **Home** screen:

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

On the **Create Request** screen:

3. In the Request Type field, type **Customer Portal Account Creation** and press enter.
4. Click the **OK** button to proceed.

On the **Customer Portal Account Creation** screen:

5. Complete the following required questions:
   - What Customer is this for?
   - Please list the Customer Contact(s) who need a Customer Portal Account created
   - Please describe the need for a Customer Portal Account for this Customer

NOTE	If you don't know the Customer ID, you can use the **Find Customers with Facet Search** Report.

6. Under **Attachments**, add any supporting documentation to the field or select the **Select Files** button to browse your documents. This step is optional.
7. Click the **Submit** button.

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