

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**

 <p>NOTE</p>	<p>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.</p> <p>Leave the following fields blank: Customer Groups, Default Tax Code, and Customer Security Segment.</p>
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4. Click **OK**.

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On the second **Create Customer** screen:

 <p>NOTE</p>	<p>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.</p> <p>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.</p>
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In the section at the bottom of the page:

5. Select **Contact Information** tab.

 <p>CAUTION</p>	<p>Required contact items:</p> <ul style="list-style-type: none">• Address• Phone OR Email
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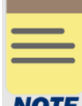
6. Select **Add** under **Phone**.

- 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.

 <p>NOTE</p>	<p>Phone extension and Comments are optional.</p> <p>Visibility field should remain unchecked.</p>
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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.

 <p>NOTE</p>	<p>Country and Comments are optional.</p>
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 <p>NOTE</p>	Fields in the Usage , Email , Instant Messenger , and Web Address sections are optional.
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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**.

 <p>CAUTION</p>	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.
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You have successfully completed this task.

 <p>NOTE</p>	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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 <p>NOTE</p>	Activity Stream is available on the Customer once it’s been created. Activity Stream allows you to tag colleagues within your area in comments and see all related business process events and comments. This should NOT be used instead of an AskFinance ticket. Click HERE to learn more about Activity Stream and comments.
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