# Request: Customer or Customer Invoice Create

Contents



## Request to Create a New Customer or Customer Invoice

This job aid provides guidance on submitting a request to **create a New Customer** or to **create a Customer Invoice**, either using an existing Customer or using a New Customer created in Section 1. The Customer and/or Customer Invoice is created in Workday.

A **Customer** is an external organization or individual that receives goods or services from the University and is billed for payment.

A **Customer Invoice** is the official billing document issued by the University to request payment for goods or services provided.

## How to Create the Request

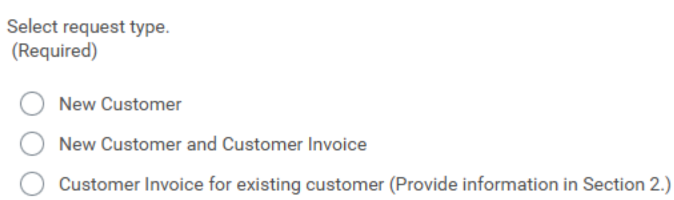
There are two sections to this Request.

**Section 1** is to be completed only to request a **new Customer** in Workday.

**Section 2** is to be completed to request a **customer invoice** for an existing customer or for the new customer requested in Section 1.

IMPORTANT: Please complete all applicable information. If any details are missing, the request will be sent back for completion.

Select a Request Type:



Select request type.
(Required)

- New Customer
- New Customer and Customer Invoice
- Customer Invoice for existing customer (Provide information in Section 2.)

 Updated: **January 2026**

## Section 1 – Create Customer:

1. Enter the full name of the proposed customer.

Provide the Customer's name.

2. Enter the cost center name and ID for which this Customer will be associated.

Provide the Cost Center ID and the Cost Center name associated with the Customer.

3. Enter the first and last name of the customer's contact person.

Provide the name and title of the contact person for the Customer.

4. Workday allows for a preferred method of payment by the customer. For this customer select the preferred method of payment. If method of payment for the new customer is ACH/Wire, please submit a request for incoming funds notification to provide the banking information.

   The link for the Incoming Funds Notification job aid is included here.

Select Customer's method of payment.
If method of payment for the new customer is ACH/Wire , please submit a request for incoming funds notification to provide banking information.
The link for job aid is included below.

Job aid for incoming funds notification

- ◯ Check
- ◯ ACH
- ◯ Wire
- ◯ Unknown

5. Enter the primary address for the customer including the zip code.

Provide the customer's primary address with the zip code.

6. Enter the phone number – include area code and extension if applicable for the customer.

Provide the customer's primary phone number and extension.

7. Enter the email address for the customer if applicable.

Provide the customer contact's e-mail address.

8. **For multiple Customers:** If requesting multiple customers upload an Excel file with columns indicating the customer information:
    a. Customer's name,
    b. Cost Center name and ID,
    c. customer's address,
    d. contact person's name,
    e. customer contact information
    f. customer preferred method of payment.

For multiple Customers: upload an Excel file containing the customer information including Customer's name, Cost Center name and ID, customer's address, contact person's name, e-mail, phone number and customer's method of payment.

Drop files here

or

Select files

Section 2 – Customer Invoice:

1. Enter the customer name. If this invoice is for new customer to be created from Section 1 indicate this in the text box. If this is for an existing customer include the Customer ID if known.

Provide the Customer's name.

2. Enter the applicable Cost Center name and ID.

Provide the Cost Center ID and Cost Center Name.

3. Enter the applicable revenue category for the funds to be received.

Provide the Revenue Category.

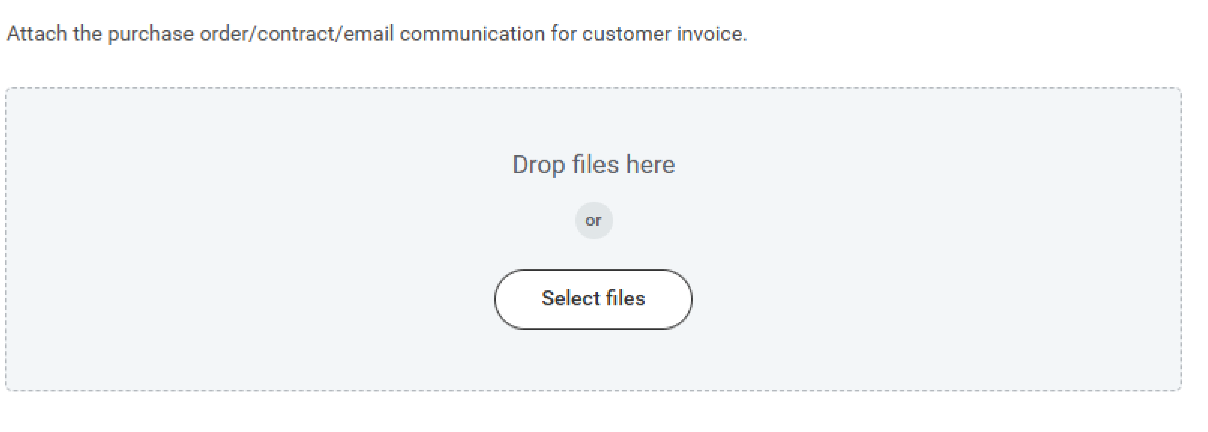
4. Enter the appropriate invoice description for the invoice including product or services provided.

Provide the invoice description including product or services provided.

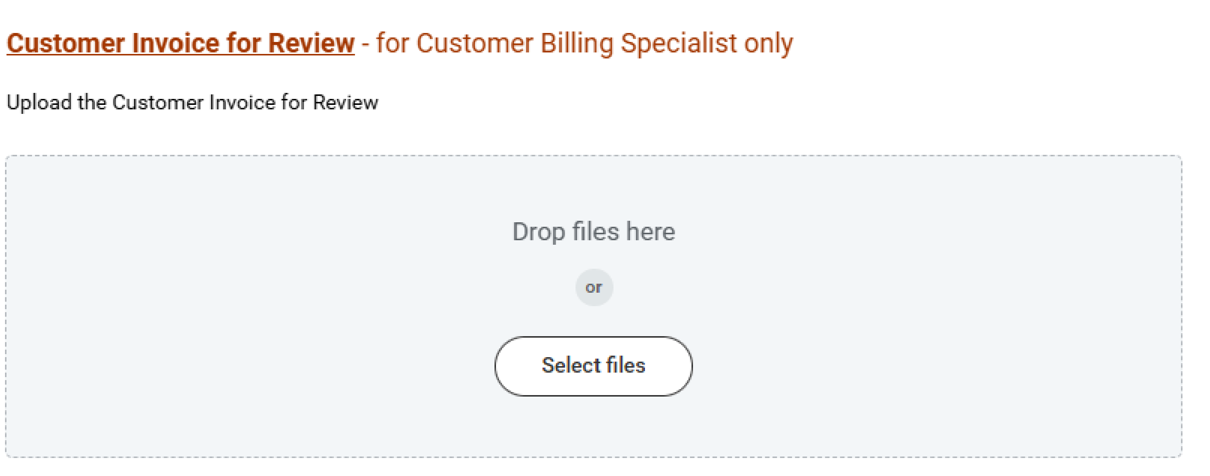
5. Enter the invoice amount, including unit price and quantity if applicable.

Provide the invoice amount. Include unit price and quantity if applicable.

6. All customer invoices should have some justification for why they should be created. Attach any purchase order, contract, email or other communication for the customer invoice.




7. This section is for the Billing Specialist to upload the customer invoice which is created in Workday and ready to be sent to the customer. Once the invoice is created the initiator of the request is notified that the invoice is completed. The completed request business process may be found in the notification (the bell on the Workday ribbon) or the Archive. The business process has the customer invoice available to be downloaded.




## Approval Steps

Once the request has been submitted the Customer Administrator will create the new customer if applicable to the type of request. The Billing Specialist will create the customer invoice, either from the new customer requested (if applicable) or from an existing customer. All invoices created are approved by the Customer Accounts Manager.

When the Request is successfully completed the initiator of the request is notified using the notifications bell on the Workday ribbon.


Instructions on where to find the new customer created or the customer invoice created is provided in the notification.