

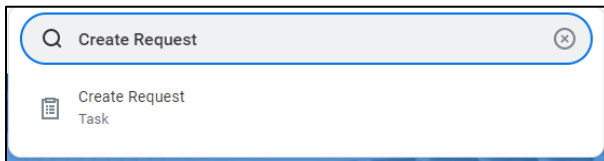
Set Up Customer Portal Account Overview

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. Once the portal account has been set up, the customer will receive an email, and you will receive a notification.

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

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