



Alternate Bill-to Contact on the Award Billing in
WD28

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Agenda

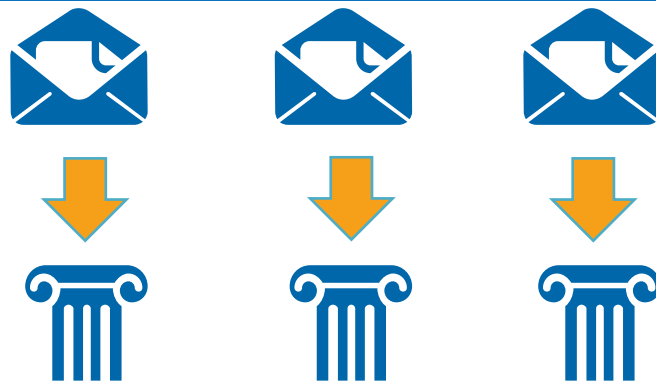
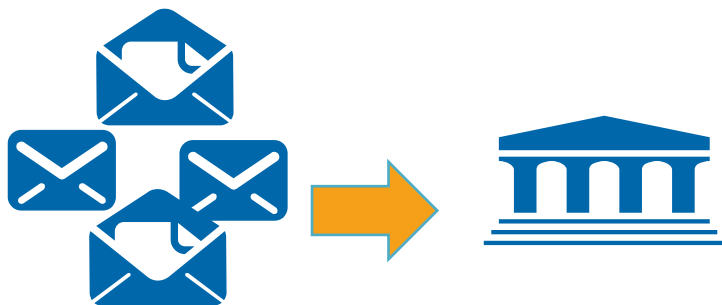
- Feature Overview
- Details
- Customer Impacts
- Additional Information



Feature Overview

Feature Overview

- Bill-To Emails for Sponsors
- Alternate email contacts can be assigned to an Award
 - Billing Schedule
 - Customer Invoices
 - Customer Invoices Adjustments



- Benefit
 - Now you have the option to set Bill-To Emails by Award Billing Schedule
 - Manage Bill-To Emails per Customer Invoice.



Details

Set Bill-To Contact on Sponsor

- Sponsor
 - Sponsor Contact
 - Add email contacts

Add Contact

Business Entity Bill & Melinda Gates Foundation

Name | Contact Information

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

Email

Email Address *

Type *

Primary Work ☒

Primary Home ☐

Use For

Visibility ☒ Public

Comments

Sponsor Contacts | Settlement Bank Account

Add **Set Up Bill-To Contacts**

1 3 items

Bill-To Contact on Sponsor - Continues

- Sponsor
 - Sponsor Contact
 - Set Up Bill-To Contacts
 - Set Primary
 - Set Default
 - Set the type of document to email

Sponsor Contacts | Settlement Bank Account

1 Add 2 Set Up Bill-To Contacts

3 items

Business Entity Bill & Melinda Gates Foundation

3 items

Contact	Primary Bill-To Contact	Default Bill-To Contact	Email Address	Email Documents	Comment
Morgan LaFey	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morgan.LaFey@workday.com	X Customer Invoice	
Author King	<input type="checkbox"/>	<input type="checkbox"/>	Author.King@workday.com		
Lance du Lac	<input type="checkbox"/>	<input type="checkbox"/>	Lance.duLac@workday.com		

Bill-To Contact on Sponsor - Continue

- Sponsor
 - Document Options set Invoice delivery Method
 - Bill-to Contact Emails on Invoice

Note: Different email recipients selections will affect the invoice delivery.

Alternate Name | **Document Options** | Attachments | Notes | More ▾

Document Language Preferences

Preferred Locale select one ▾

Preferred Language (empty)

Invoices

Invoice Delivery Method ✕ Email ▮ **1**

Email Recipients ✕ All Customer Contact Emails ▮ **2**

Statements

Statement Delivery Method

Email Recipients

☐ Invoice Contact Emails

☐ Customer Primary Email

☐ Statement Contact Emails

☐ All Customer Contact Emails

☐ Dunning Letter Contact Emails

☐ Parent Customer Primary Email


☒ **Bill-To Contact Emails on Invoice** ⋮

☐ Remit-from Customer ▾

OK Cancel


Bill-To Contact on Award Billing Schedule

- Bill – To Contact available

Billing Schedule  Schedule Status Draft

Billing and Schedule Information

Company ★ A200.1 Alma Mater University (USA)

Bill To Sponsor ★ National Institute of Automation 

Bill-To Contact

Currency ★ USD

Award 100004: 01/01/2014 (version 0)

Schedule Type

Schedule Description


Schedule On Hold ☐


Auto-Submit Invoices for Approval ☒

Contract Lines 4 Items

Line	Status	Award	Revenue Category
100004 Cost Reimbursable Grants (Line 4)	Active	100004: 01/01/2014 (version 0)	Reimbursable
100004 Cost Reimbursable Grants (Line 3)	Active	100004: 01/01/2014 (version 0)	Reimbursable
100004 Cost Reimbursable Grants (Line 2)	Active	100004: 01/01/2014 (version 0)	Cost Reimbursable Grants
100004 Cost Reimbursable Grants (Line 1)	Active	100004: 01/01/2014 (version 0)	Cost Reimbursable Grants

← Bill-To Contact

- ☐ Kashi Hatake 
- ☐ Naruto Uzumaki
- ☐ Sakura Haruno
- ☐ Sasuke Uchiha

Billing Schedule  Billing Schedule ID BILLING_SCHEDULE-16-32 Billing Type Transaction

Billing/Invoice Information

Company A200.1 Alma Mater University (USA)

Bill To Sponsor National Institute of Automation

Bill-To Contact Naruto Uzumaki

Currency USD

Award 100004: 01/01/2014 (version 0)

Schedule Type (empty)

Schedule Description (empty)

Schedule On Hold

Auto-Submit Invoices for Approval Yes

Bill-To Contacts on Award Customer Invoice

- Bill – To Contact available Create & Change

View Customer Invoice 9660

Invoice Status Approved

Payment Status Unpaid

Invoice Information

Company A200.1 Alma Mater University (USA)

Customer National Institute of Automation

Invoice Number 9660

Invoice Type (empty)

Invoice Date 10/01/2015

Bill-To Address (empty)

Bill-To Contact **Naruto Uzumaki**

Ship-To Customer (empty)

Ship-To Address (empty)

Billing Schedule National Institute of Automation

Change Customer Invoice

Customer Invoice

Invoice Number 9660

Invoice Information

Company A200.1 Alma Mater University (USA)

Customer National Institute of Automation

Invoice Date 10 / 01 / 2015

Invoice Type Standard

Bill-To Contact

X Sasuke Uchiha

X Naruto Uzumaki

search

← Bill-To Contact

☐ Kashi Hatake

☒ **Naruto Uzumaki**

☐ Sakura Haruno

☒ **Sasuke Uchiha**

Create Customer Invoice Credit Adjustment

Invoice Adjustment Information

Company X G200.1 Grants Management University

Bill-To Customer X National Institute of Automation

Sold-To Customer X National Institute of Automation

Adjustment Date 10 / 02 / 2015

Invoice Type X Standard

Bill-To Address

Bill-To Contact X Naruto Uzumaki
X Sasuka Haruno

☒ Credit (Decrease Amount Due)

Adjustment Reason X Miscellaneous

Related Invoices 966 0, National Institute of Automation - 10/01/2015

Apply Adjustment Immediately ☒

Security

- Sponsor
 - Set Up: Customer Contacts
 - Add Sponsor Contacts
 - Set Bill-To Contacts

Customer Impact

- No uptake required
- Customer Training Material should be updated

Additional Information

- What's New WD27
 - <https://community.workday.com/node/194703>
- Administrator Guide
 - [Set Up Bill-To Contacts](#)



Thank You