

Purpose

The purpose of this work instruction is to show how to create a Family Relationship between a Customer and an Employee.

Trigger

Perform this procedure when you need to document a Family Relationship between a Customer and an Employee to preclude the Employee from approving agreements for the Customer.

Prerequisites

- The Customer record must be saved before starting this procedure.
- The Employee record must be saved before starting this procedure.

Helpful Hints

- When creating the Customer-to-Employee Family Relationship you always start from the customer's record.
- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates the action is optional, and **C** indicates the action is conditional.
- The following notes may be used throughout this work instruction:

Note type	Icon	Description
A general note of information	(b)	This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note	4	Use this note to communicate to the end-user of something that MUST be



		completed or another trigger that should be started and is related to the procedure.
A critical note	\bigotimes	Use this note to specify something that MUST NOT be done during the procedure.
Contact someone	C	Use this icon to specify to the end- user the need to initiate a communication within the organization due to an event in the procedure.
A reference is available	\mathbf{P}	Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.



Procedure

1. Start the transaction from the MIDAS CRM Home Page.

Home

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Product Master Recent Items Missed Deadline:PI MICHAEL OLSON MIDERD REANSON	Missed Deadline Please update the CRP Cropland at the Tract level for Farm 4536 Expand Web Links R Is usual famile	Search Customers/Contacts Search Employees Search Farms/Binearchies Search Member Hierarchies Search Products	
136518 18-139-2881 136576 18-139-3514		Create	⊟ ×
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2. Click the **Business Partner** button

Business Partner

Accounts

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Home		
Worklist	Search	
Business Partner	Search Customers/Contacts Search Employees Search Member Hierarchies	
Farm Records		
Product Master		
Recent Items		
Missed Deadline:PI		
MILDRED BRANSON		
136518 18-139-2881 136576 18-139-3514		

3. Click the Search Customers/Contacts label Search Customers/Contacts.



Search: Customers

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Missed Deadline DI	Associated State	-	is 🔻	INDIANA	-	00								
MICHAEL OLSON	Associated County	-	is 🔻	SHELBY	-	00								
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136518 18-139-2881														
136576 18-139-3514			M	aximum Number of Re	sults	100								
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	Inactive BP Number/I	C	Comn	non Customer Name		Tax ID Nu	Tax ID Type	Address	City	State	ZIP Code	Teleph	E-Mail	
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4. As required, complete/review the following fields:

Field	R/O/C	Description
Common Customer Name	R	May be a common known name of a customer or their legal first and last name. In the case of a business, this will display the business name.
		Example: Michael S Olson

5. Click the Search button Search

Search: Customers

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Business Partner	Common Customer Name	-	is 🔻	MICHAEL S OLSON		00								
Farm Records	BP Number/ID	-	is 🔻			00								
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Product Master	Tax ID Number	-	is 🔻			00								
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Missed Deadline DI	Associated State	-	is 🔻	INDIANA	•	00								
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136518 18-139-2881														
136576 18-139-3514			Ma	iximum Number of Resu	lts:	100								
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	8000009982		MICH4	EL MICHAEL S OLSON		NOTAXID	No Tax Ide	1000 N	MILROY	Indiana	46156-9			-

6. Click the Common Customer Name from the Result List MICHAEL S



OLSON MICHAEL MICHAEL to go to the Customer page.

Customer: MICHAEL S OLSON

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1	Customer: MICHAEL S OLSON	l .				🖸 Back 👻 💟 👻
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Home) ^
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Business Partner	Edit					
	General Data		Main Address and Communica	tion Data		
Farm Records	Current Role:	Individual	Information Line:			
Product Master	BP Number / ID:	8000009982	Address Line:	1000 N MAIN RD		
Destrik	Prefix:		PO Box:			
Recent items	First Name:	MILDRED	City:	MILROY		
Missed Deadline:PI MICHAEL OLSON	Middle Name:		State:	IN	Indiana	
MILDRED BRANSON	Last Name:	BRANSON	ZIP Code:	46156-9549		
136518 18-139-2881	Suffix:		Country:	US	USA	
136576 18-139-3514	Last Name at Birth:		Telephone Number:			
	Legal Name:	Yes	E-Mail Address:			
	Common Customer Name:	MICHAEL S OLSON	Communication Method:	Post (letter)		
	Language Preference:	English				
	Data Origin:	SCIMS				
	Employee Type:	Not an employee				
	Tax ID Type:	No Tax Identification				-

7. Scroll to display the **Relationships** assignment block.

Customer: MICHAEL S OLSON

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	ustomer: MICHAEL S OLSON			🖸 Back 👻
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Home				
Worklist				
Business Partner	Control Flags			
Farm Records	Archived: Inactive:			
Product Master	Addresses Address Types Communication Numbers E-Mails			
Recent Items	[] New			a 3
Missed Deadline:Pl	Actions Address	Current Valid From	Valid To	
MICHAEL OLSON	1000 N MAIN RD / MILROY IN 46156-9549	10-05-2012	12-31-9999	
136518 18-139-2881	Representative Capacity Relationships			
136576 18-139-3514	C New History Data			
	B No result found			
	Program Participation Associated Counties			
	Edit			a
	Actions Customer Type Organization Name	General Program	Interest Current Participa	ant
	FSA CUSTOMER SHELBY - IN COUNTY OFFICE	E Has interest in the	e program Currently enrolle	d and participating

8. Click the **Relationships** tab Relationships



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Product Master	Addresse	Address Ty	pes Communication Numbers	E-Mails						
Recent Items	[?New								a	
Missed Deadline:PI	Actions	Address			Current	Valid From		Valid To		
MICHAEL OLSON		1000 N M	AIN RD / MILROY IN 46156-954	9	\checkmark	10-05-2012		12-31-9999		
136518 18-139-2881	Represent	ative Capacity	Relationships							
136576 18-139-3514	[?New								a	
	Actions	Relationship		Full Name		Valid From		Valid To		
	Î	Has Contact	Person	BILL GARNER		04-10-2013		12-31-9999		
	Program	Participation	Associated Counties							
	Edit								a	
	Actions	Customer Ty	pe	Organization Name		General Program I	nterest	Current Participant		
		FSA CUSTO	MER	SHELBY - IN COUNTY OFFICE		Has interest in the	program	Currently enrolled and participat	ing	

9. Click the New button relationships page.

Customer: MICHAEL S OLSON

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Customer: MICHAEL S OLSON		🖸 Back 👻 🖸 👻
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Relationships		
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	Customer: MICHAEL S OLSON Cancel Relationships Relationship:	Customer: MICHAEL S OLSON Customer: MICHAEL S OLSON Cancel Relationships Relationship:

10. Click the **Relationship** dropdown icon



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Home	Relationships			
Worklist	Relationship:			
Business Partner				
Farm Records		Has Contact Person Has Family Member\Business Associate		
Product Master				
Recent Items				
MILDRED BRANSON				
MILDRED H HARRIS				
BC FARMS INC 140210 24-021-5752				

11. Click Has Family Member\Business Associate.

Customer: MICHAEL S OLSON

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	Customer: MICHAEL S OLSO	DN .			🔚 Back 👻 💟 👻
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Home	Relationships				
Worklist	Relationship:	Family Member\Business Associate	•		
Business Partner	Type of relationship:		-		
Farm Records	Business Partner:				
Product Master	BP Number/ID:				
	Valid from:				
Recent Items	Valid To:				
MILDRED BRANSON Missed Deadline PI					
MICHAEL OLSON					
136518 18-139-2881					
130310 10-133-3314					

12. Click the **Type of relationship** dropdown icon 🔽 to display a list of relationship types.



Family member relationships can only be created between Employee and Customer.



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Home	Relationships				
Worklist	Relationship:	Family Member\Business Associate	-		
Business Partner	Type of relationship:		-		
Farm Records	Business Partner:	Great Grandparent/Great Grandchild	-		
Product Master Recent Items MILDRED BRANSON Missed Deadline.PI MICHAEL OLSON 136618 18-139-2881	BP Number/ID: Valid from: Valid To:	Grandparent/Grandchild Sibling Spouse of Family Member Parental (parent/child) Spouse	v		
136576 18-139-3614					

13. Click the Relationship Type **Sibling** Sibling.

Customer: MICHAEL S OLSON

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Home	Relationships				
Worklist	Relationship	Family Member/Business Associate	•		
Business Partner	Type of relationship:	Sibling	•		
Farm Records	Business Partner:		٥		
Product Master	BP Number/ID:		Open Input Help		
	Valid from:				
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MILDRED BRANSON					
MICHAEL OLSON					
136518 18-139-2881					
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14. Click the **Business Partner** field Open Input Help button 🗇 to go to the Search Criteria window for an employee.



Search Criteria

Last Name	-	is	•		00	
First Name	•	is	•	Choose the val	ue of this criterion	
User	-	is	-			
Search Clear Rese	et		Maxim	um Number of F	Results: 100	
Search Clear Rese Result List	ət		Maxim	um Number of F	Results: 100	
Search Clear Rese Result List	ət		Maxim	um Number of F	Results: 100	<u>اا</u> هر

15. As required, complete/review the following fields:

Field	R/O/C	Description
Last Name	R	Business Partner's Last Name
		Example:
		Young
First Name	R	Business Partner's First Name
		Example:
		Samuel

REMEMBER: This will only be a Business Partner that is an FSA Employee.

16. Click the **Search** button **Search**.



Search Criteria

Last Name	-	is	-	Young	00	
First Name	-	is	-	Samuel	00	
User	-	is	-			
Search Clear I	Reset		Max	imum Number of	Results: 100	
Search Clear F	Reset ployee Found		Max	imum Number of	Results: 100	
Search Clear I Result List: 1 Em	Reset ployee Found		Max	imum Number of	Results: 100	III &
Search Clear F Result List: 1 Em Last Name	Reset ployee Found First Name	Employee ID	Max	imum Number of	Results: 100 Manager	া। এ User Name

17. Click the **Box** in front of the Employee's name from Result List (YOUNG) YOUNG to go to the Customer Relationship page.

Customer: MICHAEL S OLSON

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Home	Relationships				
Worklist	Relationshin:	Family Member/Business Associate	•		
Business Partner	Type of relationship:	Sibling	-		
Farm Records	Business Partner:	SAMUEL YOUNG	đ		
Product Master	BP Number/ID: Valid from:	71221	a		
Recent Items	Valid To:		1		
MILDRED BRANSON Missed Deadline:PI MICHAEL OLSON 136518 18-139-2881 136576 18-139-3514					

18. Click the **Valid From** field Select the **Calendar** button **1** to select a Valid From date.



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Home	Relationships			
Worklist	Relationshin	Family Member/Business Associate		
Business Partner	Type of relationship:	Sibling -		
Farm Records	Business Partner:	SAMUEL YOUNG		
Product Master	BP Number/ID: Valid from: Valid To:	71221		
MILORED BRANSON Missed Deadline:PI MICHAEL OLSON 136518 18-139-2881 136576 18-139-3514		13 26 50 27 26 50 50 50 14 1 2 3 4 6 0 7 15 6 9 10 17 12 13 14 16 6 7 16 6 10 10 17 18 19 10 14 16 10 17 18 19 20 14 16 10 17 18 19 20 14 24 25 27 27 22 25 27 26 27 27 26 27 26 27 26 27 26 27 26 27 27 26		

19. Click the date that the relationship became effective.

Customer: MICHAEL S OLSON

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Home	Relationships				
Worklist	Relationship:	Family Member\Business Associate	•		
Business Partner	Type of relationship:	Sibling	-		
Farm Records	Business Partner:	SAMUEL YOUNG	ø		
Product Master	BP Number/ID:	71221			
	Valid from:	04-10-2013	E 2		
Recent Items	Valid To:		62		
MILDRED BRANSON Missed Deadline:PI MICHAEL OLSON 136518 18-139-2881 136576 18-139-3514					

20. As required, complete/review the following fields:

Field	R/O/C	Description
Valid To	R	Expiration date
		Example: 12-31-9999

If the relationship has a pre-determined end date it can be entered in the Valid To field. If the end date is unknown, enter 12-31-9999 and it can be updated if the family relationship ends.



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Business Partner	Type of relationship:	Sibling	-		
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MILDRED BRANSON					
Missed Deadline:PI MICHAEL OLSON					
136518 18-139-2881					
136576 18-139-3514					

21. Click the Save & Back button Save & Back

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The message status will remain red until all required entries are completed.

Customer: MICHAEL S OLSON

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MILDRED BRANSON	Actions	Address		Current	Valid From	Valid To	
Missed Deadline:PI		1000 N MAIN RD / MILROY IN 4615	6-9549	\leq	10-05-2012	12-31-9999	
MICHAEL OLSON 136518 18-139-2881	Represent	tative Capacity Relationships					
136576 18-139-3514	[?New						۵ 🖨
	Actions	Relationship	Full Name		Valid From	Valid To	
	21	Has Contact Person	BILL GARNER		04-10-2013	12-31-9999	
	Î	Family Member\Business Associate	SAMUEL YOUNG		04-10-2013	12-31-9999	
	Program	Participation Associated Counties					
	Edit						1
	Actions	Customer Type	Organization Name		General Program Interest	Current Participant	



Result

You have created a Family Relationship between a Customer and an Employee.



Next Steps