

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		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		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		Use this note to specify something that MUST NOT be done during the procedure.
Contact someone		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		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

2. Click the **Business Partner** button .

Accounts

3. Click the **Search Customers/Contacts** label [Search Customers/Contacts](#).



Search: Customers

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: Customers

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



OLSON **MICHAEL** **MICHAEL S** to go to the Customer page.

Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Save | Cancel | Fact Sheet | PDF Fact Sheet | More

Customer Details | Customer Profile | Roles | Identification Numbers

General Data

Current Role:	Individual	Information Line:	
BP Number / ID:	800009982	Address Line:	1000 N MAIN RD
Prefix:		PO Box:	
First Name:	MILDRED	City:	MILROY
Middle Name:		State:	IN Indiana
Last Name:	BRANSON	ZIP Code:	46156-9549
Suffix:		Country:	US USA
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

Customer: MICHAEL S OLSON

Save | Cancel | Fact Sheet | PDF Fact Sheet | More

Control Flags

Archived:

Inactive:

Addresses | Address Types | Communication Numbers | E-Mails

Actions	Address	Current	Valid From	Valid To
	1000 N MAIN RD / MILROY IN 46156-9549	<input checked="" type="checkbox"/>	10-05-2012	12-31-9999

Representative Capacity | Relationships

No result found

Program Participation | Associated Counties

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	SHELBY - IN COUNTY OFFICE	Has interest in the program	Currently enrolled and participating

8. Click the **Relationships** tab **Relationships**.



Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Save | Cancel | Fact Sheet | PDF Fact Sheet | More

Control Flags

Archived:
Inactive:

Addresses | Address Types | Communication Numbers | E-Mails

New

Actions	Address	Current	Valid From	Valid To
	1000 N MAIN RD / MILROY IN 46156-9549	<input checked="" type="checkbox"/>	10-05-2012	12-31-9999

Representative Capacity | Relationships


New

Actions	Relationship	Full Name	Valid From	Valid To
	Has Contact Person	BILL GARNER	04-10-2013	12-31-9999

Program Participation | Associated Counties

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	SHELBY - IN COUNTY OFFICE	Has interest in the program	Currently enrolled and participating

9. Click the **New** button  to go to the Customer Relationships page.

Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Cancel

Relationships

Relationship:

10. Click the **Relationship** dropdown icon .



Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Relationships

Relationship:

Recent Items:

- MILDRED BRANSON
- MICHAEL OLSON
- MILDRED H HARRIS
- BC FARMS INC
- 140210 24-021-5752

11. Click **Has Family Member\Business Associate**.

Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Relationships

Relationship:

Type of relationship:

Business Partner:


BP Number/ID:

Valid from:

Valid To:

Recent Items:

- MILDRED BRANSON
- Missed Deadline: PL...
- MICHAEL OLSON
- 136518 18-139-2881
- 136576 18-139-3514

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.



Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Relationships

Relationship: Family Member/Business Associate

Type of relationship: **Sibling**

Business Partner:

BP Number/ID:

Valid from:

Valid To:

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

Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Relationships

Relationship: Family Member/Business Associate

Type of relationship: Sibling

Business Partner:

BP Number/ID:

Valid from:

Valid To:

Open Input Help

14. Click the **Business Partner** field Open Input Help button to go to the Search Criteria window for an employee.

Search Criteria

Search Criteria [Hide Search Fields](#)

Last Name	▼	is	▼		+ -
First Name	▼	is	▼	Choose the value of this criterion	
User	▼	is	▼		+ -

Maximum Number of Results:

Result List

Last Name	First Name	Employee ID	Phone	E-Mail	Manager	User Name
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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 Criteria

Search Criteria
[Hide Search Fields](#)

Last Name	▼	is	▼	Young	+ -
First Name	▼	is	▼	Samuel	+ -
User	▼	is	▼		+ -

Maximum Number of Results:

Result List: 1 Employee Found

Last Name	First Name	Employee ID	Phone	E-Mail	Manager	User Name
YOUNG	SAMUEL	71221				

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

Customer: MICHAEL S OLSON
Go Advanced

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
 - MILDRED BRANSON
 - Missed Deadline: PI...
 - MICHAEL OLSON
 - 136518 18-139-2881
 - 136576 18-139-3514

Relationships

Relationship:	Family Member/Business Associate
Type of relationship:	Sibling
Business Partner:	SAMUEL YOUNG
BP Number/ID:	71221
Valid from:	<input type="text"/>
Valid To:	<input type="text"/>

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



Customer: MICHAEL S OLSON

19. Click the date that the relationship became effective.

Customer: MICHAEL S OLSON

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.



Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Relationships

Relationship: Family Member/Business Associate

Type of relationship: Sibling

Business Partner: SAMUEL YOUNG

BP Number/ID: 71221

Valid from: 04-10-2013

Valid To: 12-31-9999

21. Click the **Save & Back** button .



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

Customer: MICHAEL S OLSON

Customer: MICHAEL S OLSON

Control Flags

Archived:

Inactive:

Addresses

Actions	Address	Current	Valid From	Valid To
	1000 N MAIN RD / MILROY IN 46156-9549	<input checked="" type="checkbox"/>	10-05-2012	12-31-9999

Representative Capacity

Relationships

Actions	Relationship	Full Name	Valid From	Valid To
	Has Contact Person	BILL GARNER	04-10-2013	12-31-9999
	Family Member/Business Associate	SAMUEL YOUNG	04-10-2013	12-31-9999

Program Participation

Associated Counties

Home

22. Click the **Home** button to return to the Home screen.



Result

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



Next Steps