

Purpose

Use this procedure to create a contact for a Customer Business Partner.

Trigger



Perform this procedure when you have a new contact for a Customer Business Partner.




Prerequisites

- The record for the customer to which the Contact will be linked must be in business partner.

Helpful Hints

- You can associate more than one contact to a Customer Business Partner.
- "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:

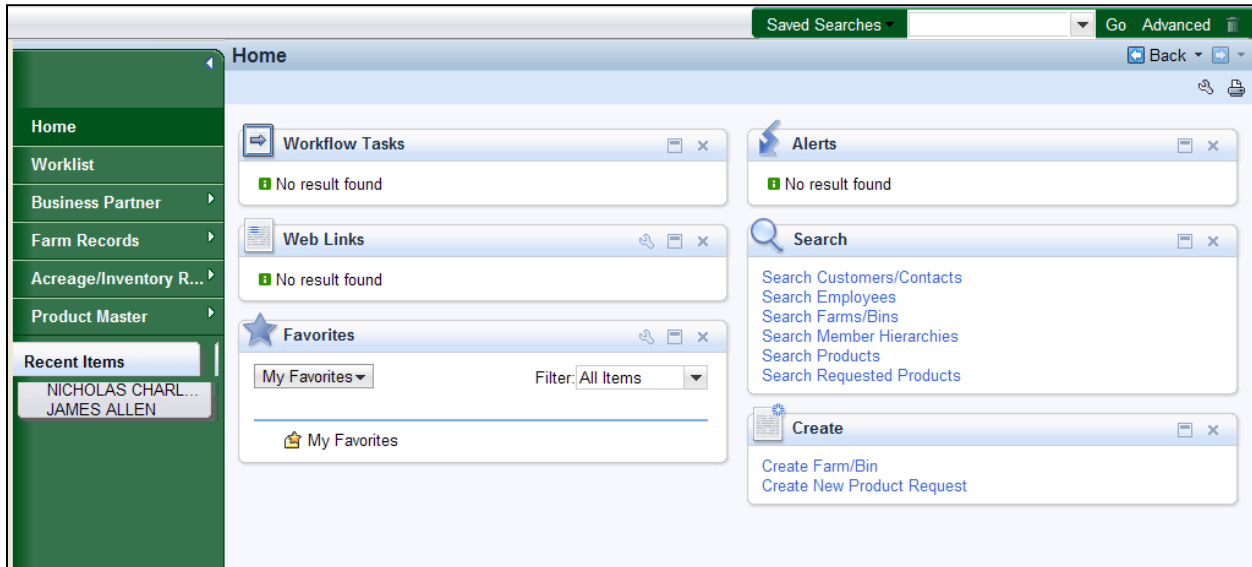
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the end-user of something that MUST be completed or another trigger that should be started and is related to the procedure.

Acritical 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

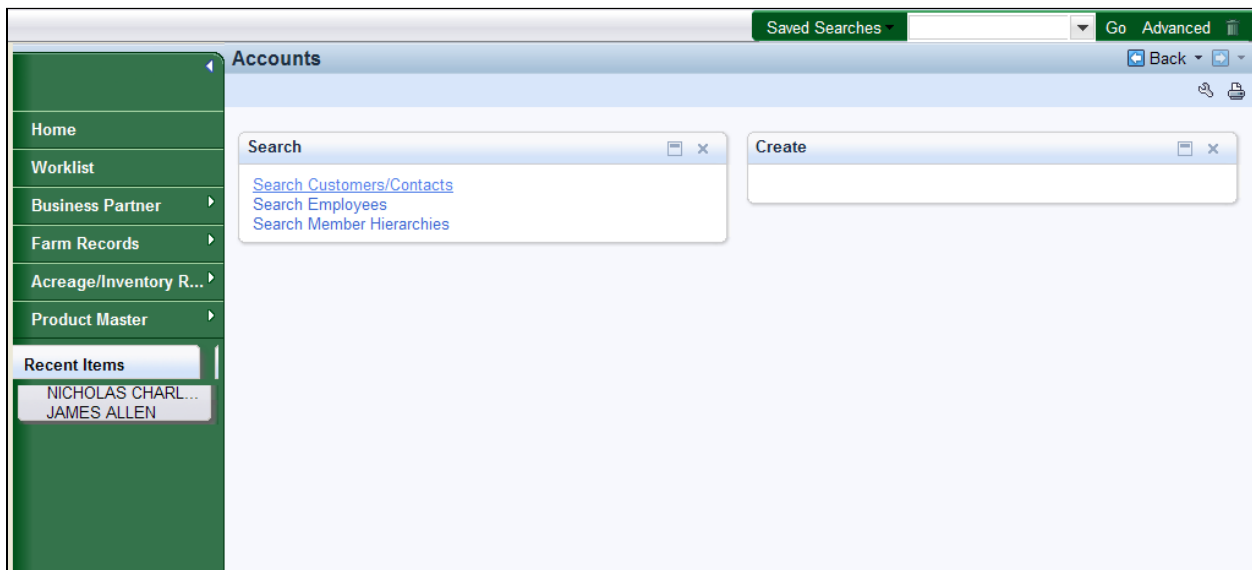
1. Start the transaction from the MIDAS CRM Home Page.

Home



2. Click the Business Partner button  to go to the Accounts page.

Accounts



3. Click Search Customers/Contacts link [Search Customers/Contacts](#) to go to Search: Customers page.



Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is		⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
Tax ID Type	is		⊕ ⊖
Tax ID Number	is		⊕ ⊖
Service Center	is		⊕ ⊖

Maximum Number of Results: 100

Search Clear Reset Save Search As Save

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

Field	R/O/C	Description
First Name	R	Example: nicholas
Last Name	R	Example: charles324



Search: Customers

Search: Customers

Search Criteria

Search for: All Accounts

Business Name	is		
First Name	is	NICHOLAS	
Last Name	is	CHARLES324	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Associated State	is		
Associated County	is		
Service Center	is		

5. Scroll down to the bottom of the page.

Search: Customers

Search: Customers

BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Associated State	is		
Associated County	is		
Service Center	is		

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 1 Customer Found

Inac...	BP Nu...	Common Customer Name	Tax ID N...	Tax ID T...	Addre...	City	State	ZIP C...	Tele...
<input type="checkbox"/>	800000...	NICHOLAS CHARLES324	NOTAXID	No Tax I...	1234 ...	FRED...	Maryl...	21701	+1 (...)

6. Select the Common Customer Name from NICHOLAS CHARLES324
 NICHOLAS CHARLES324 from the results list.



Customer: NICHOLAS CHARLES324

Customer: NICHOLAS CHARLES324

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

Customer Details | Customer Profile | Roles | Identification Numbers

General Data | Main Address and Communication Data

Current Role: Individual	Information Line:
BP Number /ID: 8000008164	Address Line: 1234 N CHURCH ST
Prefix:	PO Box:
First Name: NICHOLAS	City: FREDERICK
Middle Name:	State: MD Maryland
Last Name: CHARLES324	ZIP Code: 21701
Suffix:	Country: US USA
Last Name at Birth:	Telephone Number: 800-000-0000
Legal Name: Yes	E-Mail Address: nickcharlespi@gmail.com
Common Customer ... NICHOLAS CHARLES324	Communication Met... E-Mail
Language Preference: English	

7. Scroll down to the Relationships Tab section of the page.

Customer: NICHOLAS CHARLES324

Customer: NICHOLAS CHARLES324

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Acti...	Address	Telephone/...	Mobile	E-Mail	Current	Valid From	Valid To
	1234 N CHURCH ST / FREDERICK...				<input checked="" type="checkbox"/>	12.11.2012	31.12.9999

Representative Capacity | Relationships

No result found

Program Participation | Associated Counties

Acti...	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	FREDERICK COUNTY FAR...	Has interest in the program	Currently enrolled and parti...

Attachments

Name	Type	Created By	Created On

8. Click the Relationships Relationships tab.



Customer: NICHOLAS CHARLES324

9. Click the New button .

Customer: NICHOLAS CHARLES324

10. Click the Relationship dropdown list.



Customer: NICHOLAS CHARLES324

Customer: NICHOLAS CHARLES324

Relationships

Relationship: Family Member

Type of relationship: Family Member
Has Contact Person

Business Partner: [Empty]

BP Number/ID: [Empty]

Valid from: [Empty]

Valid To: [Empty]

- Select the Has Contact Person list item
Has Contact Person option.

Customer: NICHOLAS CHARLES324

Customer: NICHOLAS CHARLES324

Relationships

Relationship: Has Contact Person

Contact: [Empty]

Contact Number/ID: [Empty]

Valid from: [Empty]

Valid To: [Empty]

- Click the Contact field.



Customer: NICHOLAS CHARLES324

13. Click the Open Input Help button .

Search Criteria

14. Click the Search for dropdown list.



Search Criteria

Search Criteria Hide Search Fields

Search for:

Business Name	<input type="text" value="All Accounts"/>	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
First Name	<input type="text" value="Customer"/>	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
Last Name	<input type="text" value="Contact"/>	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
Middle Name	<input type="text" value=""/>	<input type="text" value="is"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
Common Customer Name	<input type="text" value=""/>	<input type="text" value="is"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
BP Number/ID	<input type="text" value=""/>	<input type="text" value="is"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
Role	<input type="text" value=""/>	<input type="text" value="is"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
Tax ID Type	<input type="text" value=""/>	<input type="text" value="is"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
Tax ID Number	<input type="text" value=""/>	<input type="text" value="is"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>	
Service Center	<input type="text" value=""/>	<input type="text" value="is"/>	<input type="text" value="FREDERICK COUNTY"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>

Maximum Number of Results:

Result List

Inact	BP Num	Common Customer N	Tax ID	Tax ID	Address	City	State	ZIP Code	Teleph	E-Mail
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15. Select Contact from the drop down list.



Search Criteria

Search Criteria Hide Search Fields

Search for:

First Name	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Last Name	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Contact Number/ID	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Customer Number/ID	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
City	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>

Maximum Number of Results:

Result List

<input type="button" value="Create New Contact"/>	Name	First Name	Address Line	City	State	Country	Telephone	E-Mail
---	------	------------	--------------	------	-------	---------	-----------	--------

16. Click the New Contact button .



Search: Customers

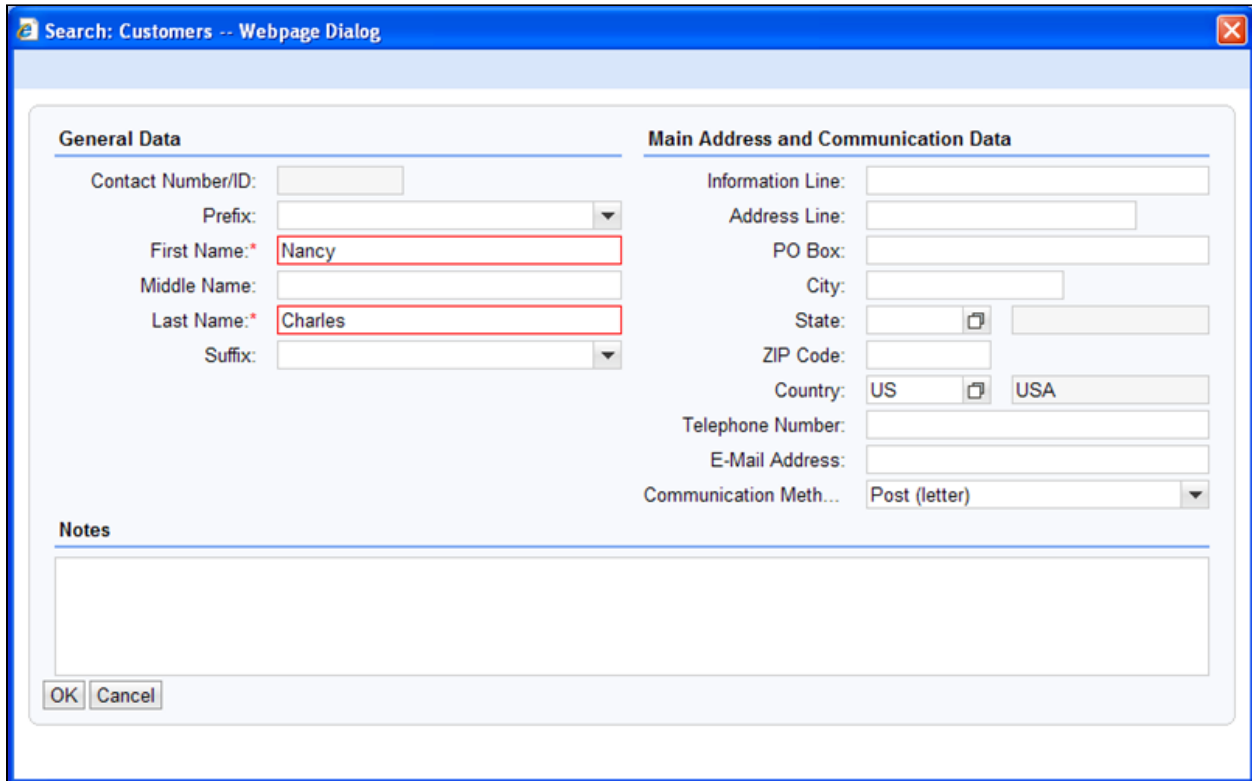
Search: Customers -- Webpage Dialog ✖

General Data	Main Address and Communication Data
Contact Number/ID: <input type="text"/>	Information Line: <input type="text"/>
Prefix: <input type="text"/> ▼	Address Line: <input type="text"/>
First Name:* <input style="border: 1px solid red;" type="text" value="Nancy"/>	PO Box: <input type="text"/>
Middle Name: <input type="text"/>	City: <input type="text"/>
Last Name:* <input style="border: 1px solid red;" type="text"/>	State: <input type="text"/> <input type="checkbox"/>
Suffix: <input type="text"/> ▼	ZIP Code: <input type="text"/>
	Country: <input type="text" value="US"/> <input type="checkbox"/> <input type="text" value="USA"/>
	Telephone Number: <input type="text"/>
	E-Mail Address: <input type="text"/>
	Communication Meth... <input type="text" value="Post (letter)"/> ▼
<p>Notes</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

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

Field	R/O/C	Description
First Name:	R	Example: Nancy
Last Name:	R	Example: Charles

Search: Customers



Search: Customers -- Webpage Dialog

General Data

Contact Number/ID:

Prefix:

First Name:*

Middle Name:

Last Name:*

Suffix:

Main Address and Communication Data

Information Line:

Address Line:

PO Box:

City:

State:

ZIP Code:

Country:

Telephone Number:

E-Mail Address:

Communication Meth...:

Notes

OK Cancel

18. Click the OK button .



The contact is added and will be displayed on the Has Contact Person Relationship screen.



Customer: NICHOLAS CHARLES324

Customer: NICHOLAS CHARLES324

Relationships

Relationship: Has Contact Person

Contact: NANCY CHARLES / FREDERICK MD 223

Contact Number/ID: 10000010

Valid from: 05.12.2012

Valid To: 31.12.9999

Save & Back

19. Click Save & Back button

Customer: NICHOLAS CHARLES324

Customer: NICHOLAS CHARLES324

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

Representative Capacity Relationships

New

Acti...	Relationship	Fullname	Valid From	Valid To
	Has Contact Person	NANCY CHARLES / FREDE...	05.12.2012	31.12.9999

Program Participation Associated Counties

Edit

Acti...	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	FREDERICK COUNTY FAR...	Has interest in the program	Currently enrolled and parti...

Attachments

Folder Attachment URL With Template More

Name	Type	Created By	Created On
No result found			

Save

20. Click Save button



Customer: NICHOLAS CHARLES324

21. Click Home button 



Result



Next Steps

You have successfully create a contact.