

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	f	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	8	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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Home	Workflow Tasks	■ ×)	Alerts	E ×
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Business Partner				
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Product Master	Favorites		Search Farms/Bins Search Member Hierarchies	
Recent Items		N 🗆 X	Search Products	
NICHOLAS CHARL	My Favorites -	Filter: All Items 💌	Search Requested Products	
JAMES ALLEN	A Mu Faundara		Create	■ ×
	🖄 My Favorites		Create Farm/Bin	
			Create New Product Request	
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2. Click the Business Partner button Business Partner to go to the Accounts page.

Accounts

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	Accounts			🖸 Back 👻 🗔 👻
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Home	Connet	-	Consta	
Worklist	Search Search Customers/Contacts	■ ×	Create	×
Business Partner	Search Employees Search Member Hierarchies			
Farm Records				
Acreage/Inventory R ▸				
Product Master				
Recent Items				
NICHOLAS CHARL JAMES ALLEN				
JAMES ALLEN				

3. Click Search Customers/Contacts link <u>Search Customers/Contacts</u> to go to Search: Customers page.



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•	Search: Custon	ners					🖸 Back 🔻 🖸
Home	Search Criteria						Hide Search Fields
Worklist							
Business Partner	Search for:	All Accounts		•			
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lecent Items	BP Number/ID		▼ is	-		00	
NICHOLAS CHARL	Role		▼ is	-	•	00	
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				Maximum N	lumber of Results:	100	
	Search Clear I	Pocot		Save Search Ac:	ص (Savo	

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

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



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4	Search: Customers							
Home	Search Criteria							Hide
Worklist								
Business Partner	Search for: All Accou	nts			-			
	Business Name	-	is	Ψ.			00	
Farm Records	First Name	-	is	-	NICHOLAS		00	
Acreage/Inventory R▶	Last Name	-	is	-	CHARLES324		00	
Product Master	Middle Name	-	is	-			00	
	Common Customer Name	-	is	-			00	
Recent Items	BP Number/ID	-	is	-			00	
NICHOLAS CHARL	Role	-	is	-		-	00	
NICHOLAS CHARL JAMES ALLEN	Tax ID Number	-	is	-			00	
	Tax ID Type	-	is	-		-	00	
	Associated State	-	is	-		-	00	
	Associated County	-	is	-		-	00	
	Service Center	-	is	-		-	00	

5. Scroll down to the bottom of the page.

Search: Customers

1	Search: Customers							
	BP Number/ID	TIS IS	•		00			
Home	Role	▼ is	-	•	00			
Worklist	Tax ID Number	▼ is	•		00			
Business Partner	Tax ID Type	💌 is	•	•	00			
	Associated State	🔻 is	•	•	00			
Farm Records	Associated County	▼ is	-	•	00			
Acreage/Inventory R >	Service Center	▼ is	•	•	• •			
Product Master			Maximu	um Number of Results:	100			
Recent Items	Search Clear Reset	Sa	ve Search As:		Save			
NICHOLAS CHARL NICHOLAS CHARL JAMES ALLEN Result List: 1 Customer Found								
UNMED ALLEN	PNew Customer							
	8 Inac BP Nu Common	Customer N	ame Tax ID N	N Tax ID T Addre	City	State ZIP C.	Tele	
	800000 NICHOLA	AS CHARLES	324 NOTAXI	(ID No Tax I 1234	FRED	Maryl 21701	+1 (

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



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	Customer: NICHOLAS	CHARLES324					🖸 Back	• 🖸 •
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Business Partner	Edit							
Farm Records	General Data		N	Main Address and Co	ommunication I	Jata		- -
Acreage/Inventory R	Current Role:	Individual		Information Line:				
Acreage/Inventory K	BP Number /ID:	8000008164		Address Line:	1234 N CHUR	CH ST		
Product Master	Prefix:			PO Box:				
Recent Items	First Name:	NICHOLAS		City:	FREDERICK			
NICHOLAS CHARL	Middle Name:			State:	MD	Maryland		
JAMES ALLEN	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 CHARLES	324 C	ommunication Met	E-Mail			
	Language Preference:	English						-

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

Customer: NICHOLAS CHARLES324

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	Customer: NICHOLAS CHARLES324	-
8	Bave X Cancel Fact Sheet BPDF Fact Sheet More≠	₿ 🕜
Home	Acti Address Telephone/ Mobile E-Mail Current Valid From Valid To	
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Business Partner	Representative Capacity Relationships	
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Acreage/Inventory R	No result found	
Product Master	Program Participation Associated Counties	
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NICHOLAS CHARL	Acti Customer Type Organization Name General Program Interest Current Participant	
JAMES ALLEN	FSA CUSTOMER FREDERICK COUNTY FAR Has interest in the program Currently enrolled and parti	
	Attachments	
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8. Click the Relationships Relationships tab.



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Farm Records	New			a
Acreage/Inventory R	No result found			
Product Master	Program Participation Associated C	ounties		
Recent Items	Edit			
NICHOLAS CHARL		Organization Name	General Program Interest	Current Participant
JAMES ALLEN	FSA CUSTOMER	FREDERICK COUNTY FAR	Has interest in the program	Currently enrolled and parti
	Attachments			
				
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	Name Type	Cre	eated By	Created On

9. Click the New button PNew.

Customer: NICHOLAS CHARLES324

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	🗙 Cancel 🛛 🔚 Save & Ba	ck		🍫 X 🖨
Home	Relationships			
Worklist	Relationship:	Family Member		
Business Partner	Type of relationship:	ramity member		
Farm Records	Business Partner:			
Acreage/Inventory R ▶	BP Number/ID:			
Product Master	Valid from: Valid To:			
Recent Items NICHOLAS CHARL NICHOLAS CHARL JAMES ALLEN	Valid 10.			

10. Click the Relationship dropdown list.



			Saved Searches *	Go Advanced m
	Customer: NICHOLA	AS CHARLES324		🕞 Back 👻 💽 👻
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Home	Relationships			
Worklist	Relationship:	Family Member		
Business Partner	Type of relationship:	Family Member		
Farm Records	Business Partner:	Has Contact Person		
Acreage/Inventory R ▸	BP Number/ID: Valid from:			
Product Master	Valid To:			
Recent Items NICHOLAS CHARL NICHOLAS CHARL JAMES ALLEN				

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

Customer: NICHOLAS CHARLES324

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Home	Relationships			
Worklist	Relationship:	Has Contact Person	•	
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Acreage/Inventory R ▶	Valid from: Valid To:		67 67	
Product Master Recent Items NICHOLAS CHARL NICHOLAS CHARL JAMES ALLEN				

12. Click the Contact field.



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Home	Relationships			
Worklist	Relationship:	Has Contact Person		
Business Partner	Contact:			
Farm Records	Contact Number/ID:			
Acreage/Inventory R	Valid from: Valid To:			
Product Master Recent Items NICHOLAS CHARL NICHOLAS CHARL JAMES ALLEN				

13. Click the Open Input Help button 🗇.

Search Criteria

Business Name	-	is	-		00
irst Name	-	is	-		00
ast Name	-	is	-		00
/iddle Name	-	is	-		00
Common Customer Name	-	is	•		00
3P Number/ID	-	is	•		00
Role	-	is	•		00
ax ID Type	-	is	•		00
ax ID Number	-	is	•		00
Service Center	-	is	•	FREDERICK COUNTY	00
Search Clear Reset			Ma	ximum Number of Results:	: 100

14. Click the Search for dropdown list.



Search Criteria

Search for:	All Account	ts							
Business Name		All Accounts						00	
First Name	Customer Contact							00	
Last Name	Contact	-	is	-				00	
Middle Name		-	is	-				00	
Common Custor	ner Name	-	is	-				00	
BP Number/ID		-	is	-				00	
Role		-	is	-			-	00	
Tax ID Type		-	is	-			-	00	
Tax ID Number		•	is	•				00	
Service Center		•	is	-	FRE	DERICK COUNT	Y۵	00	
Search Clear	Reset			Ma	iximur	Number of Res	ults:	100	

15. Select Contact from the drop down list.



Search Criteria

Search for:	Contact			•			
First Name	•	is	•		00		
ast Name	•	is	•		00		
Contact Number/I	•	is	•		00		
Customer Number		is	•		00		
lity	-	is	-		00		
esult List							
esult List PNew Contact							

16. Click the New Contact button Prevented in the New Contact



General Data		Main Address and Com	nmunica	tion Dat	a	
Contact Number/ID:		Information Line:				
Prefix:	•	Address Line:				
First Name:*	Nancy	PO Box:				
Middle Name:		City:				
Last Name:*		State:		٥		
Suffix:	-	ZIP Code:				
		Country:	US	đ	USA	
		Telephone Number:				
		E-Mail Address:				
		Communication Meth	Post (I	etter)		
Votes						

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

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



General Data		Main Address and Com	municati	on Dat	a	
Contact Number/ID:		Information Line:				
Prefix:	-	Address Line:				
First Name:*	Nancy	PO Box:				
Middle Name:		City:				
Last Name:*	Charles	State:		đ		
Suffix:	•	ZIP Code:				
		Country:	US	٥	USA	
		Telephone Number:				
		E-Mail Address:				
		Communication Meth	Post (let	ter)		
Votes						

18. Click the OK button **OK**



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



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	🗙 Cancel 🛛 🝓 Save & Ba	ck		star 🕹 🕹
Home	Relationships			
Worklist				
Business Partner	Relationship:	Has Contact Person		
	Contact:	NANCY CHARLES / FREDERICK MD 223		
Farm Records	Contact Number/ID:	10000010		
Acreage/Inventory R	Valid from:	05.12.2012		
Product Master	Valid To:	31.12.9999		
Recent Items				
NICHOLAS CHARL				
NICHOLAS CHARL				
JAMES ALLEN				

19. Click Save & Back button Save & Back

Customer: NICHOLAS CHARLES324

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Home	Representative Capacity Relationship	ps		
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Business Partner	Acti Relationship	Fullname	Valid From	Valid To
Farm Records	🕼 🗊 Has Contact Person	NANCY CHARLES / FREDE.	05.12.2012	31.12.9999
Acreage/Inventory R	Program Participation Associated	Counties		
Product Master	Acti Customer Type	Organization Name	General Program Interest	Current Participant
Recent Items	FSA CUSTOMER	FREDERICK COUNTY FAR	. Has interest in the program	Currently enrolled and parti
NICHOLAS CHARL NICHOLAS CHARL JAMES ALLEN	Attachments			
JAMES ALLEN				I
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	B No result found			

20. Click Save button Save.



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Home	Workflow Tasks	X	Alerts	
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Business Partner			No result found	_
Farm Records	Web Links	R 🗖 🖉	Q Search	
Acreage/Inventory R ▶	No result found		Search Customers/Contacts Search Employees	
Product Master	Favorites	& 🗆 &	Search Farms/Bins Search Member Hierarchies	
Recent Items NICHOLAS CHARL	My Favorites -	Filter: All Items	Search Products Search Requested Products	
NICHOLAS CHARL JAMES ALLEN	🖄 My Favorites		Create	
	· · · · · · · · · · · · · · · · · · ·		Create Farm/Bin Create New Product Request	
21. Click Home	Home			

21. Click Home button



Result



Next Steps

You have successfully create a contact.