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:

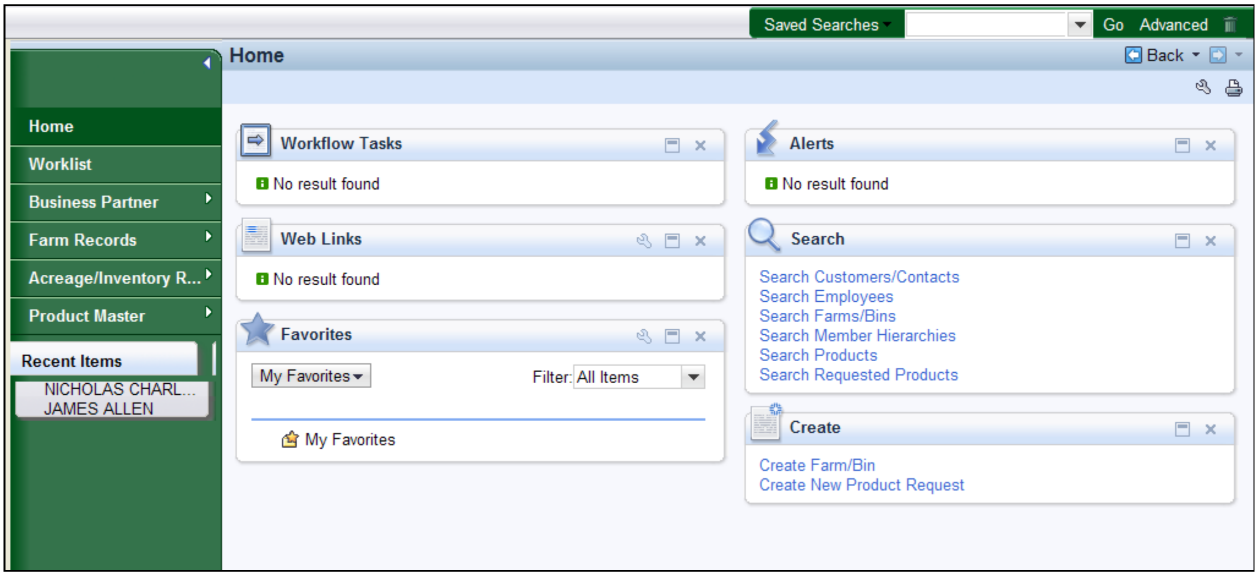
Note type	Icon	Description
A **general** note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A **cautionary** note		Use this note to communicate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

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

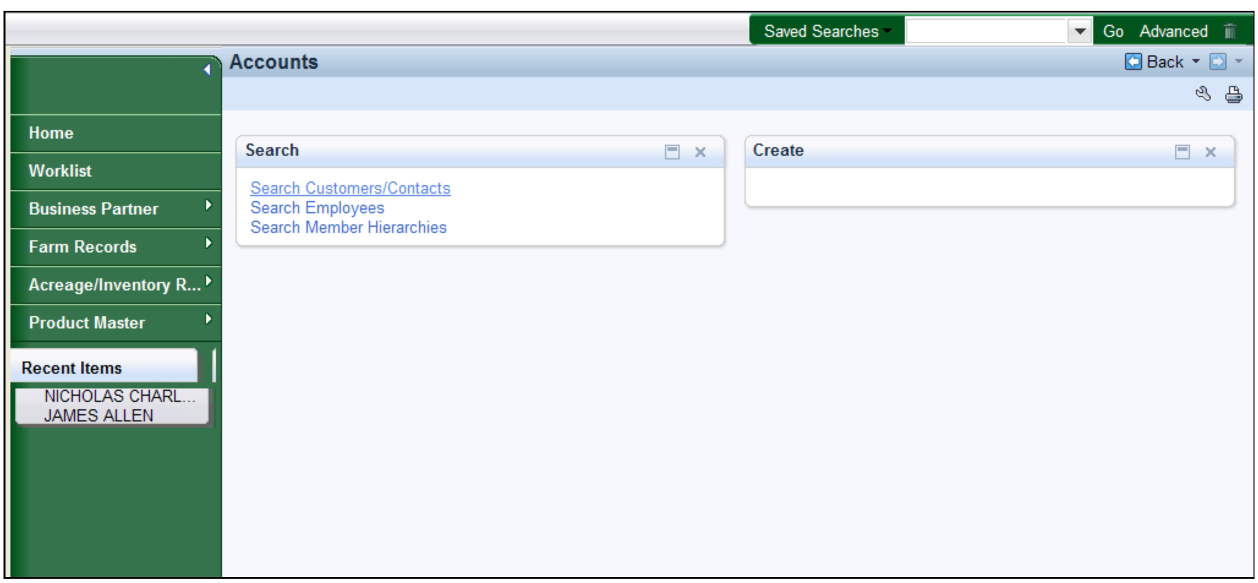
1. Start the transaction from the MIDAS CRM Home Page.

Home



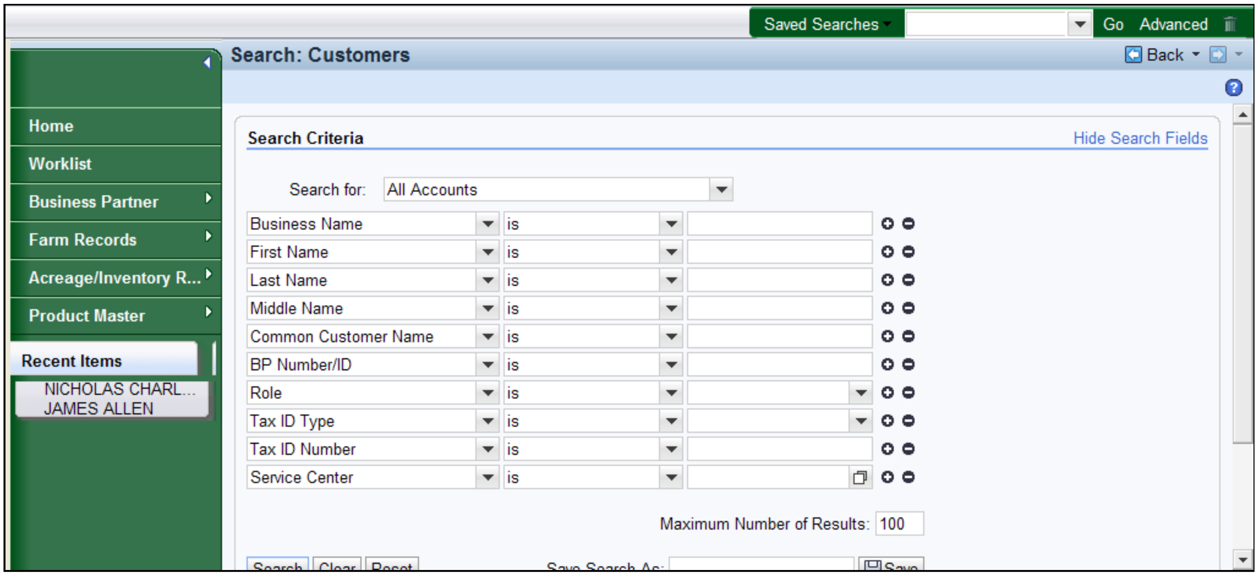
2. Click the Business Partner button **Business Partner** to go to the Accounts page.

Accounts



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

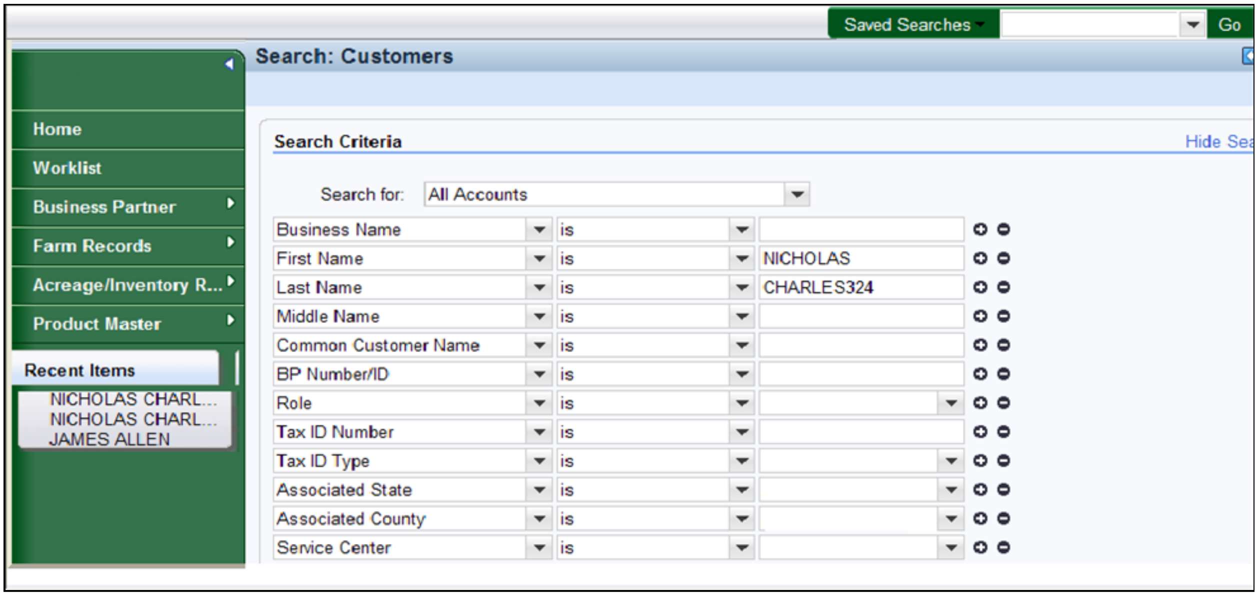
Search: Customers



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

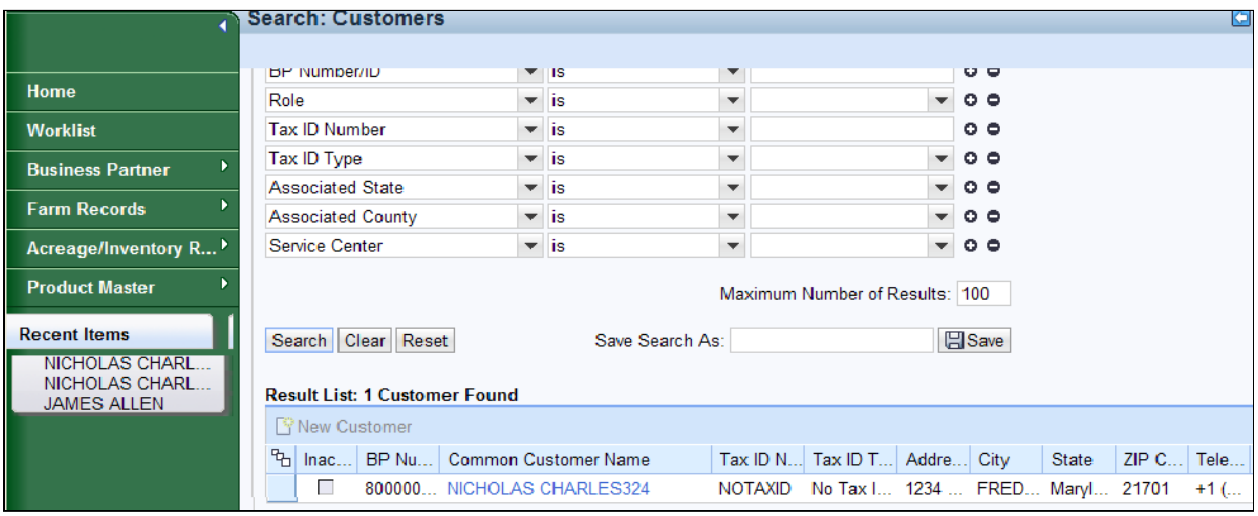
Field	R/O/C	Description
First Name	R	**Example:** nicholas
Last Name	R	**Example:** charles324

Search: Customers



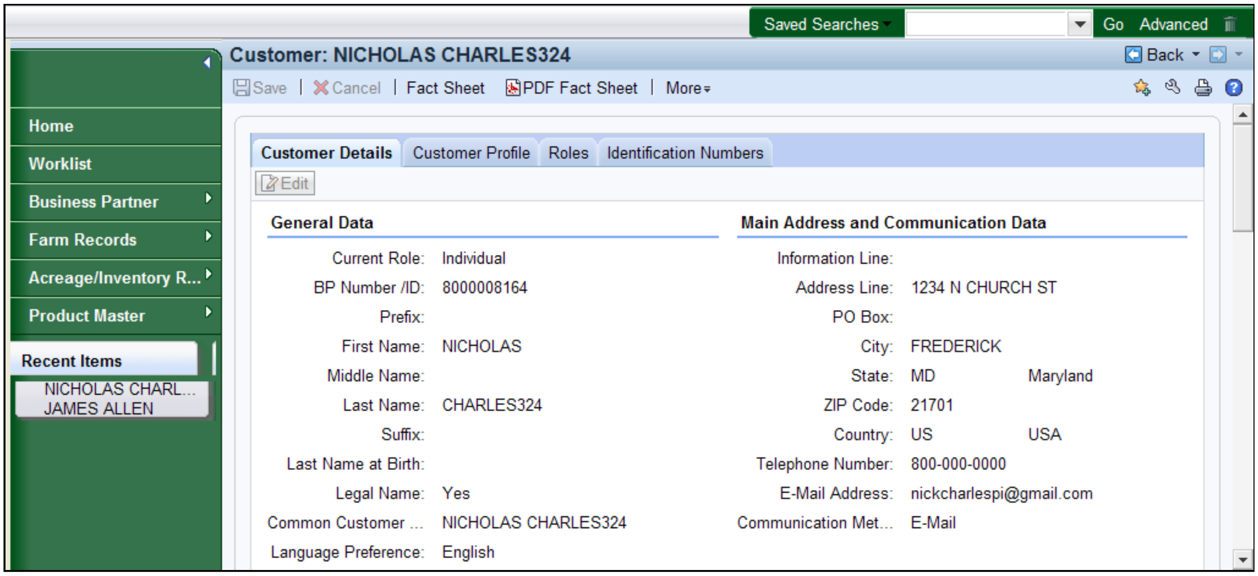
5. Scroll down to the bottom of the page.

Search: Customers



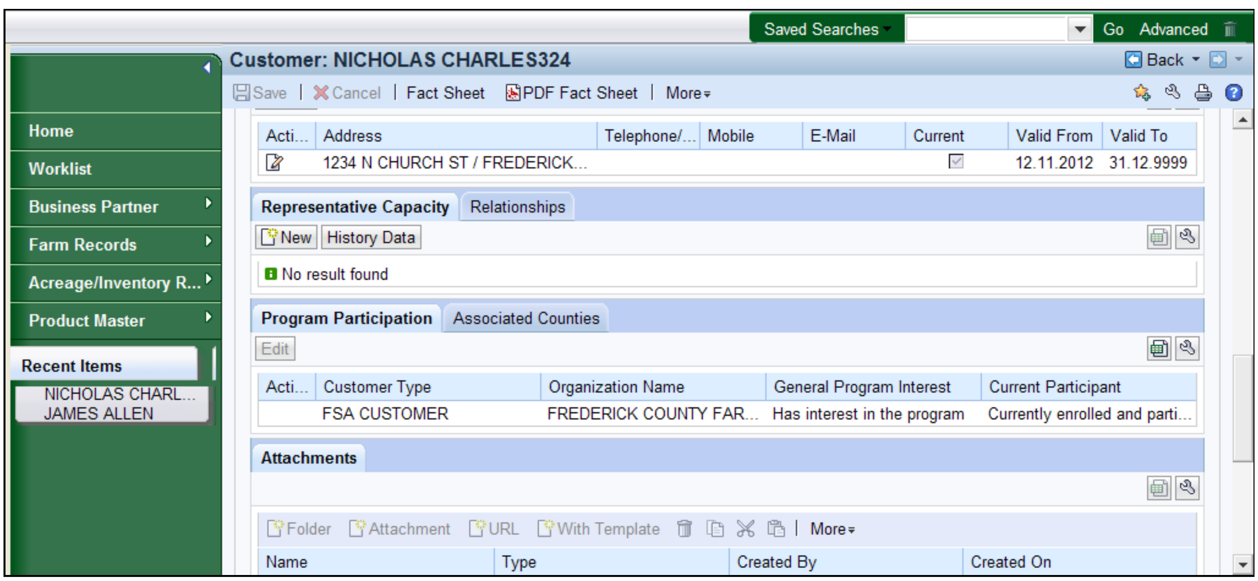
6. Select the Common Customer Name from NICHOLAS CHARLES324 NICHOLAS CHARLES324 from the results list.

Customer: NICHOLAS CHARLES324



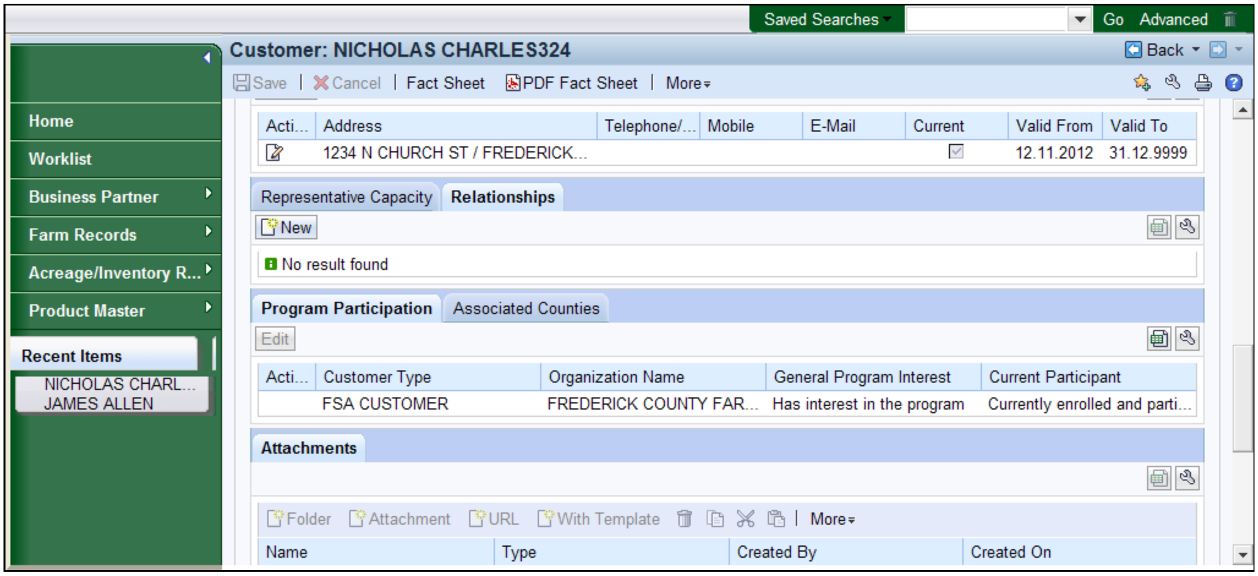
7. Scroll down to the Relationships Tab section of the page.

Customer: NICHOLAS CHARLES324



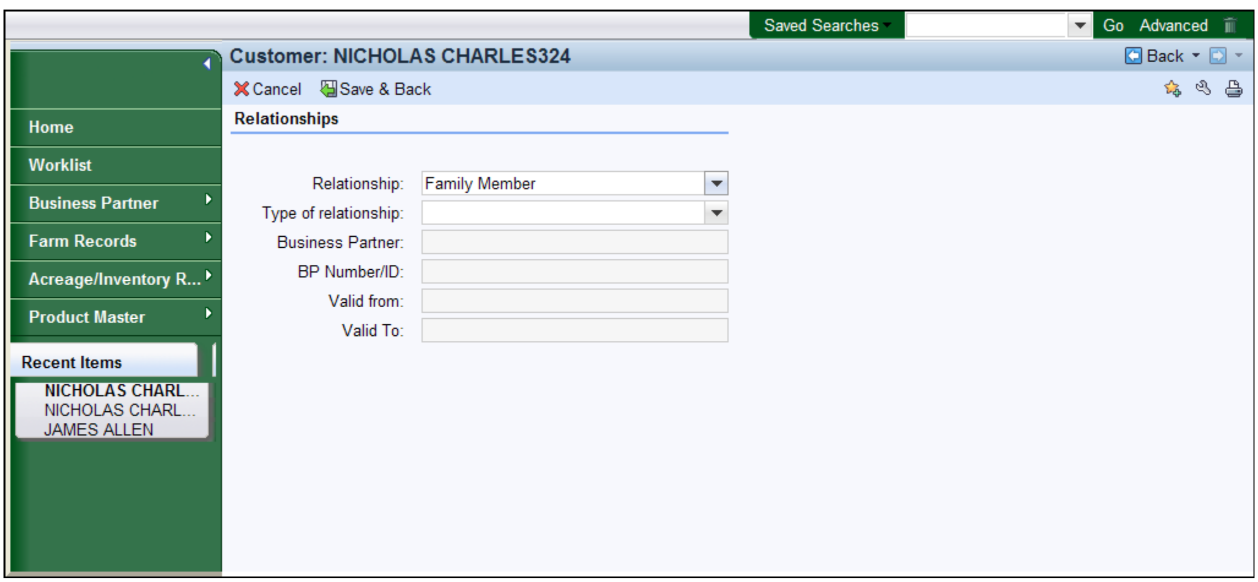
8. Click the Relationships Relationships tab.

Customer: NICHOLAS CHARLES324



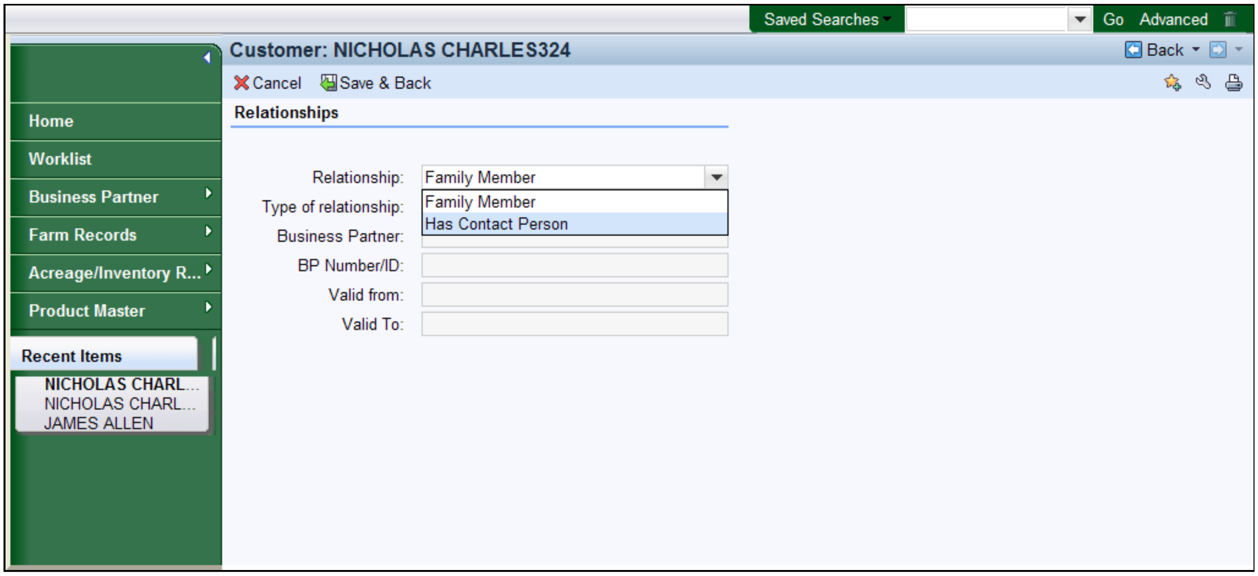
9. Click the New button New.

Customer: NICHOLAS CHARLES324



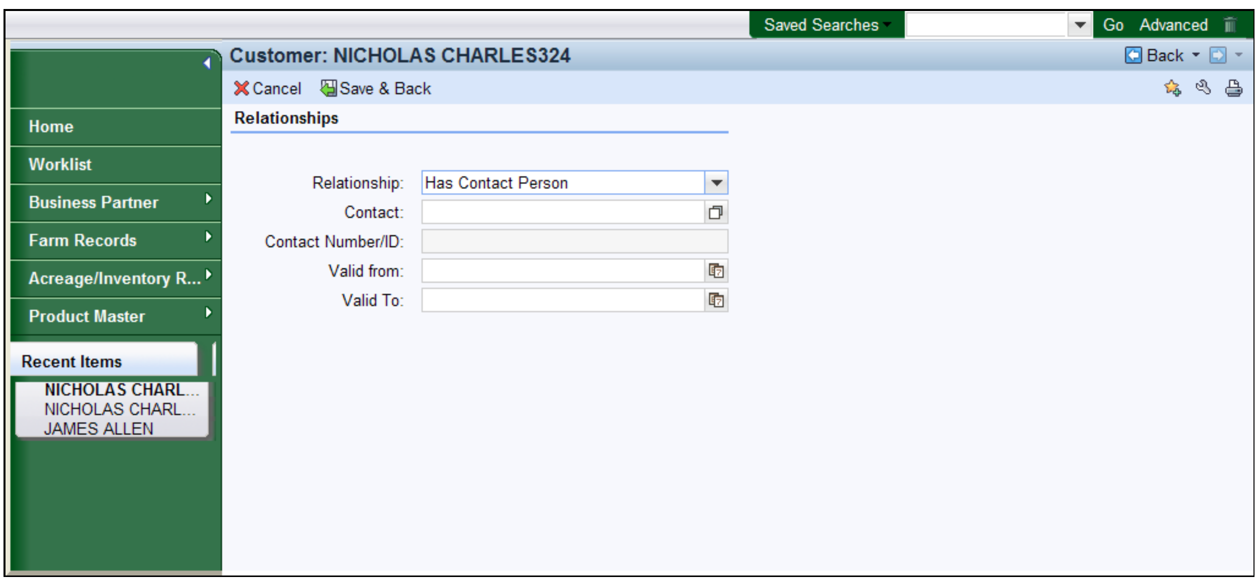
10. Click the Relationship dropdown list.

Customer: NICHOLAS CHARLES324



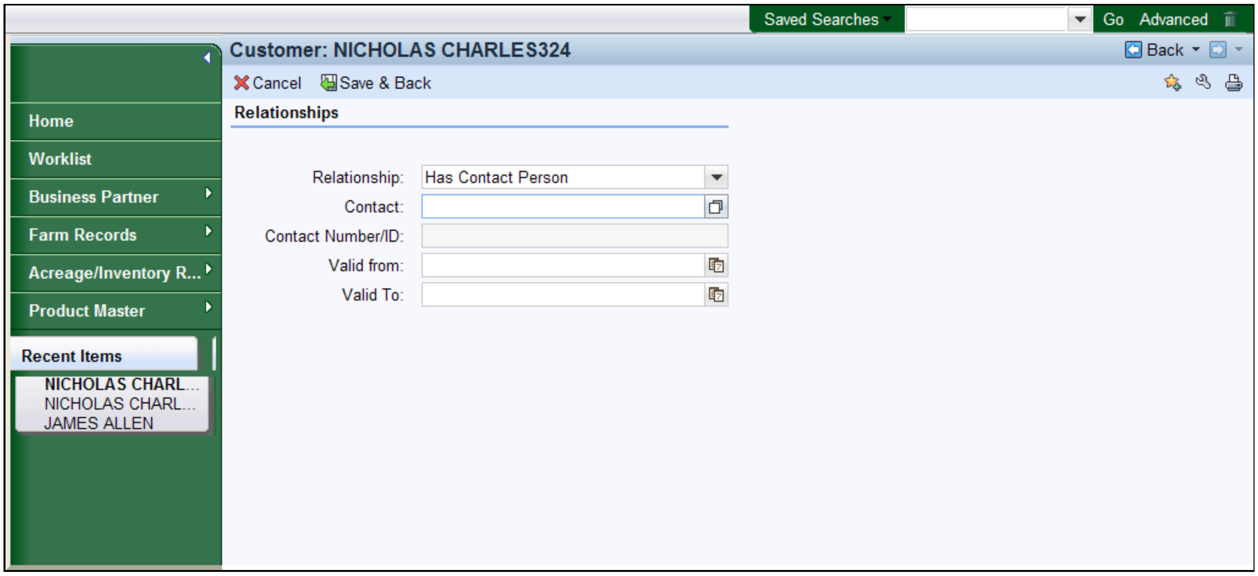
11. Select the Has Contact Person list item Has Contact Person option.

Customer: NICHOLAS CHARLES324



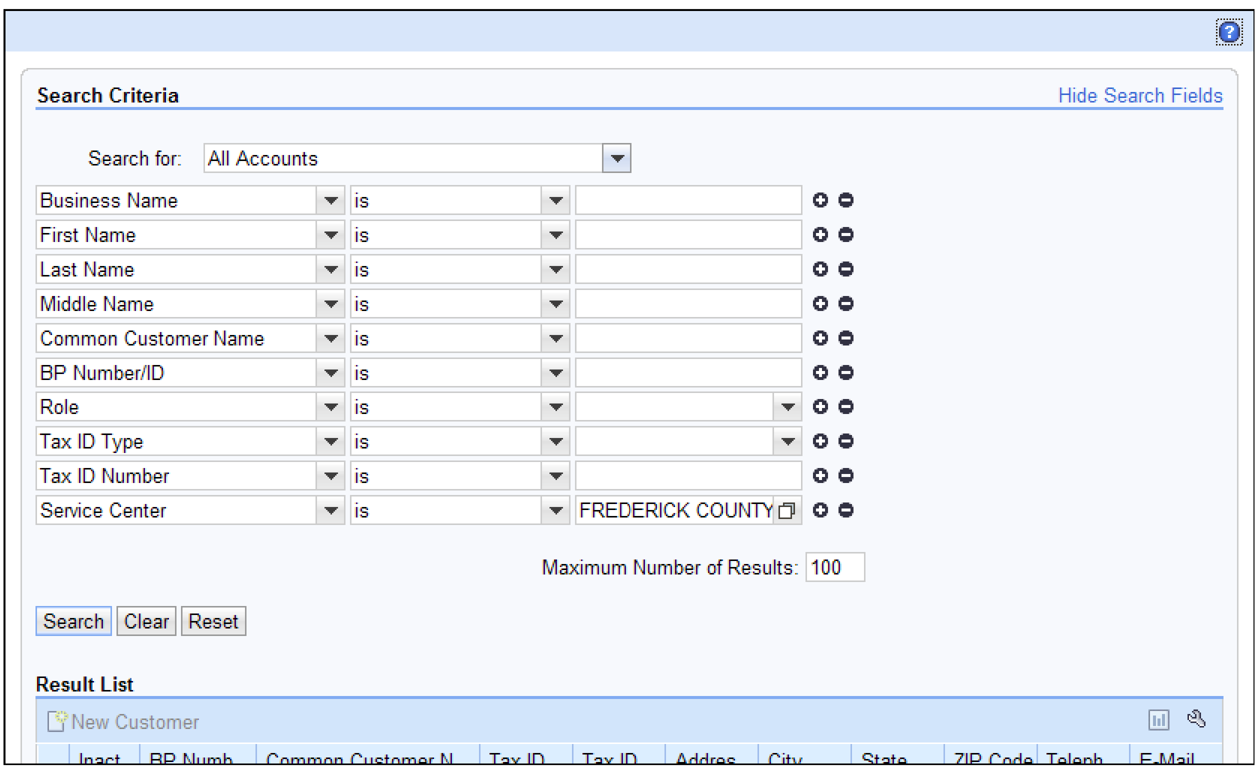
12. Click the Contact field.

Customer: NICHOLAS CHARLES324



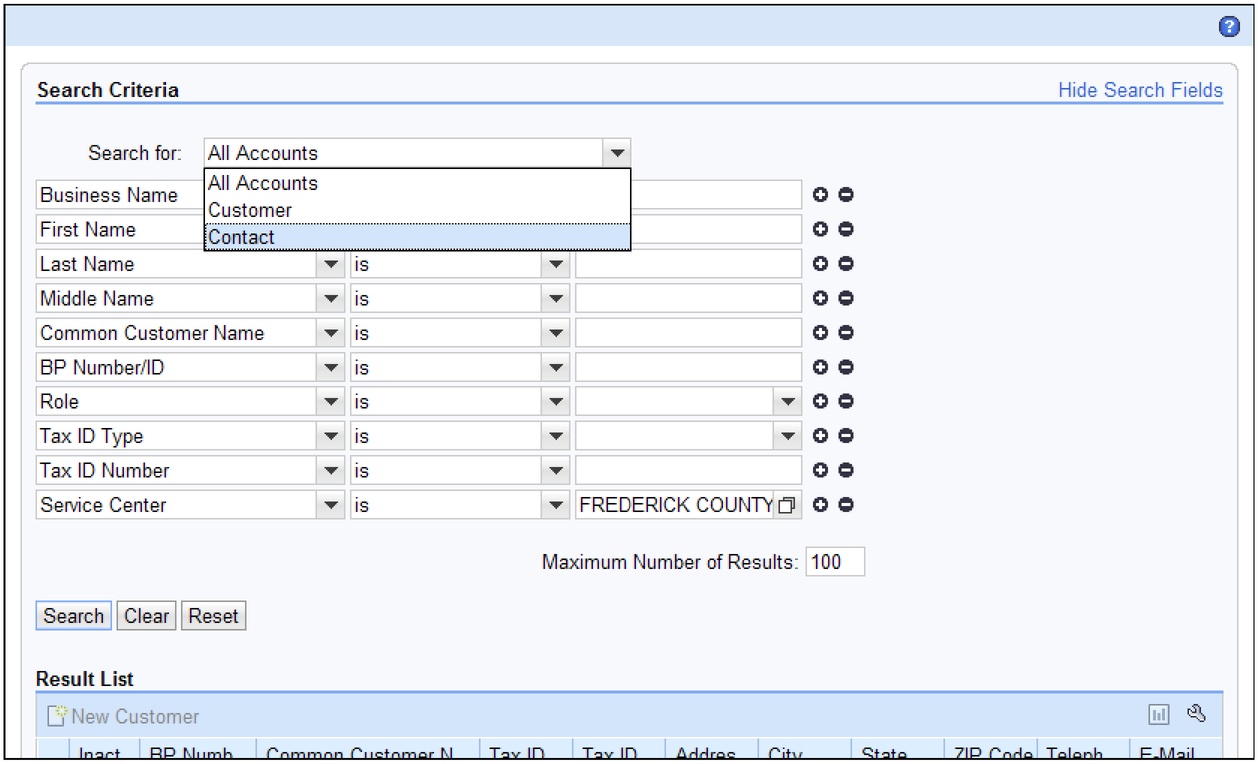
13. Click the Open Input Help button .

Search Criteria



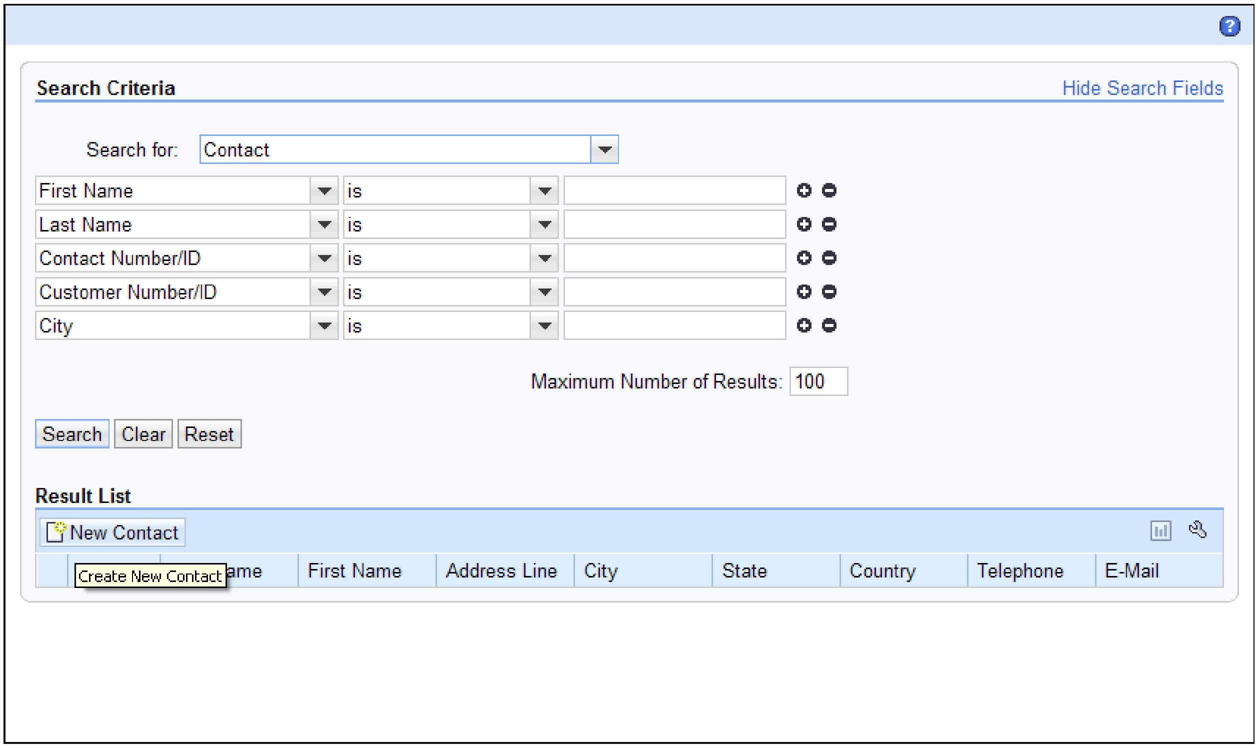
14. Click the Search for dropdown list.

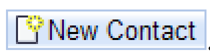
Search Criteria



15. Select Contact from the drop down list.

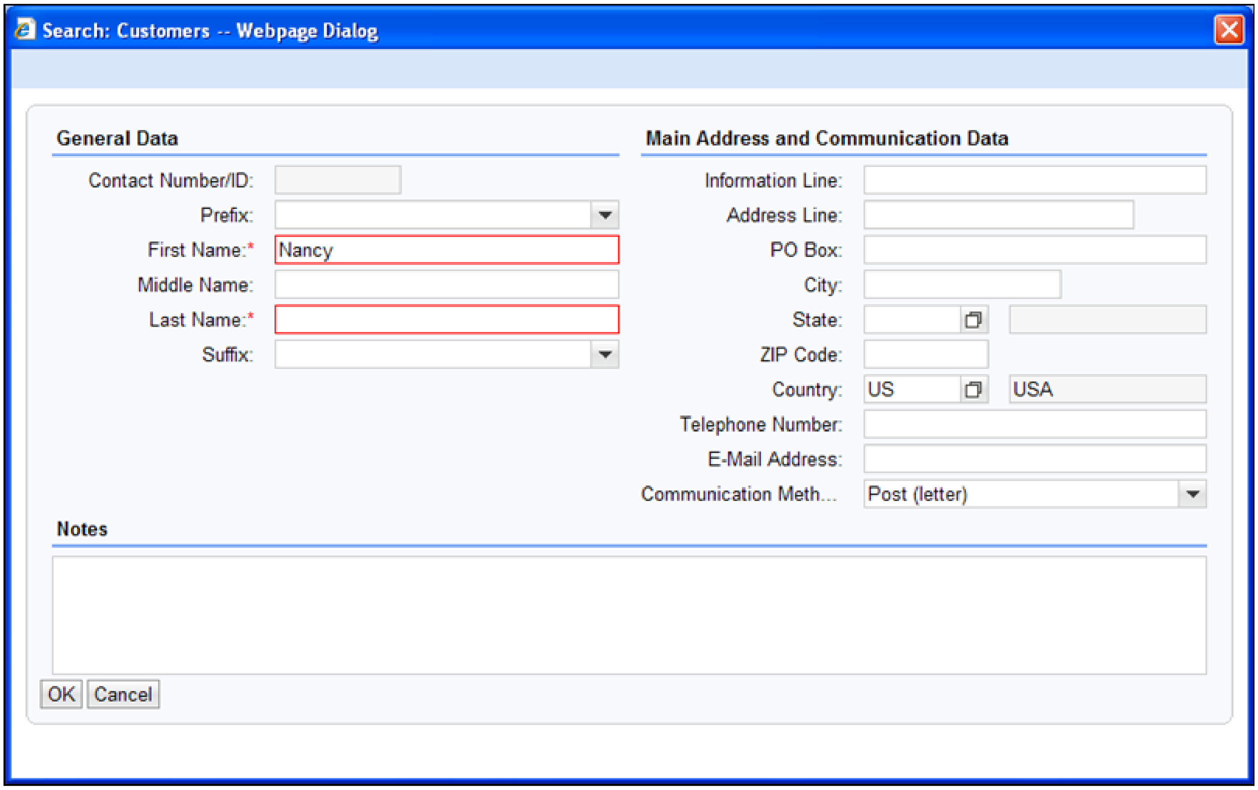
Search Criteria



16. Click the New Contact button 

.

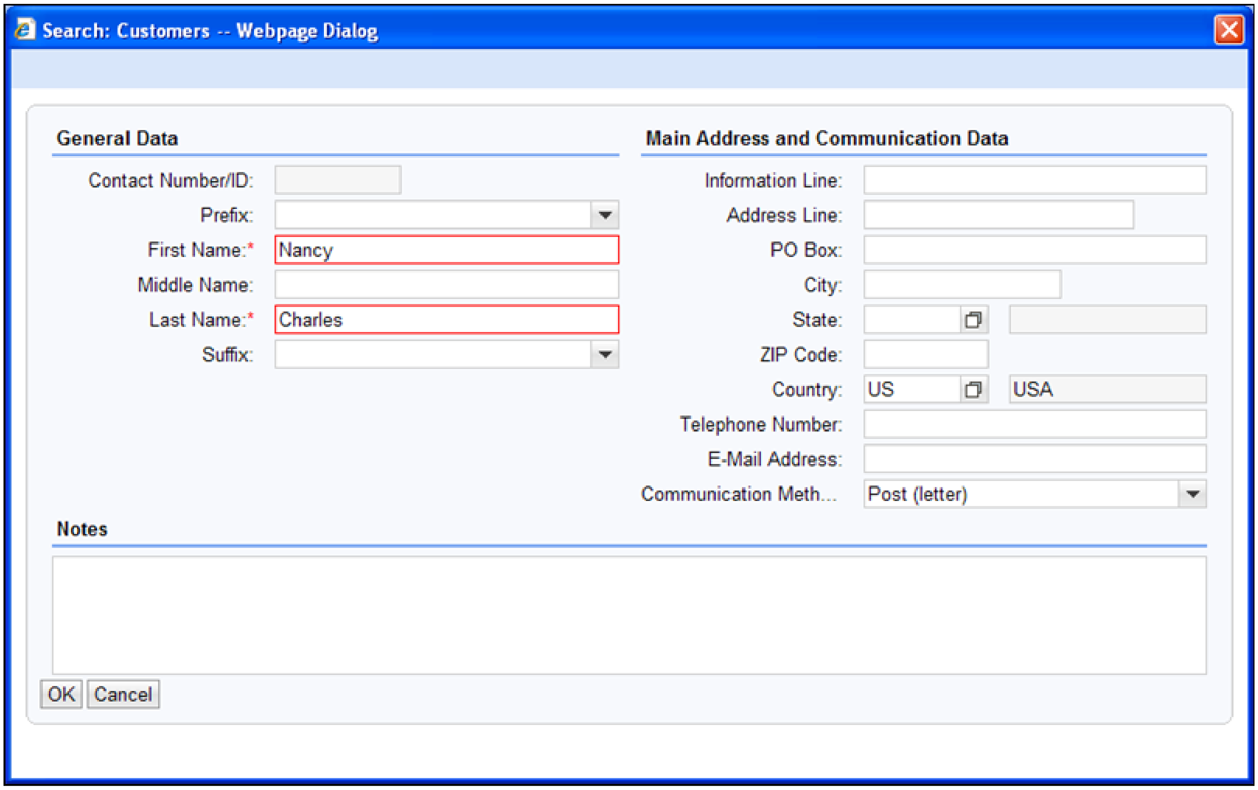
Search: Customers



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

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

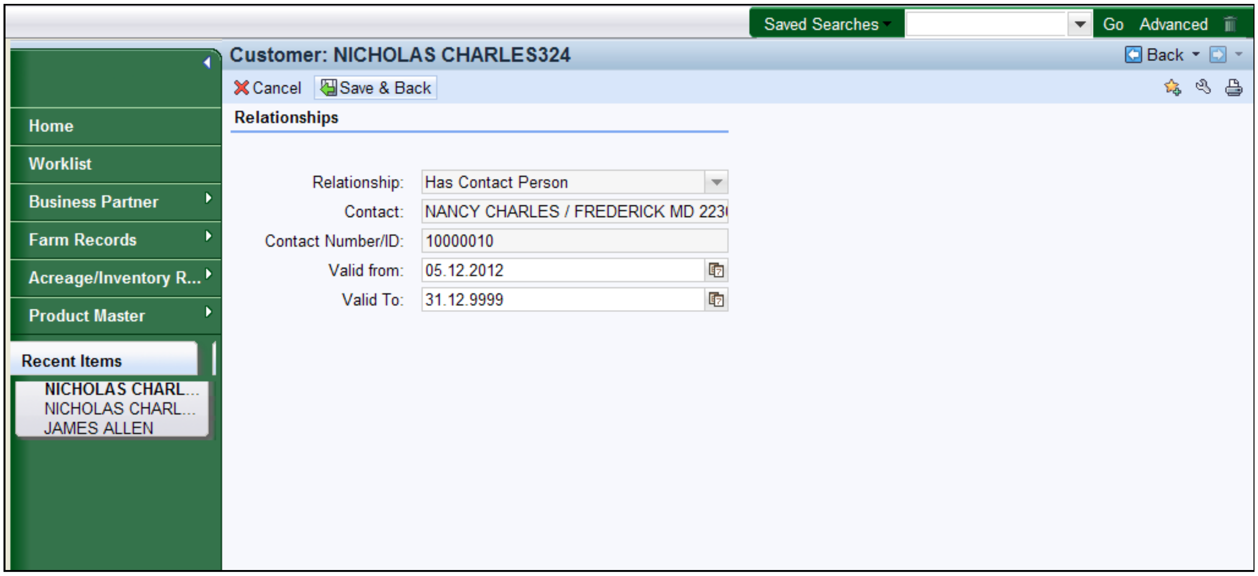
Search: Customers



18. Click the OK button OK.

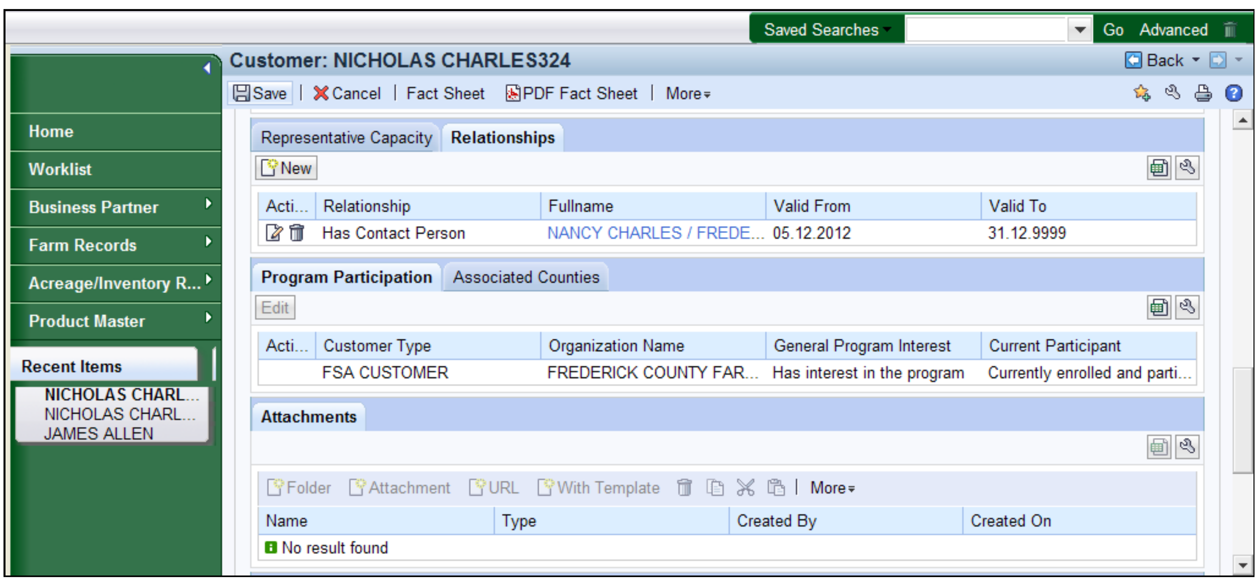
The contact is added and will be displayed on the Has Contact Person Relationship screen.

Customer: NICHOLAS CHARLES324



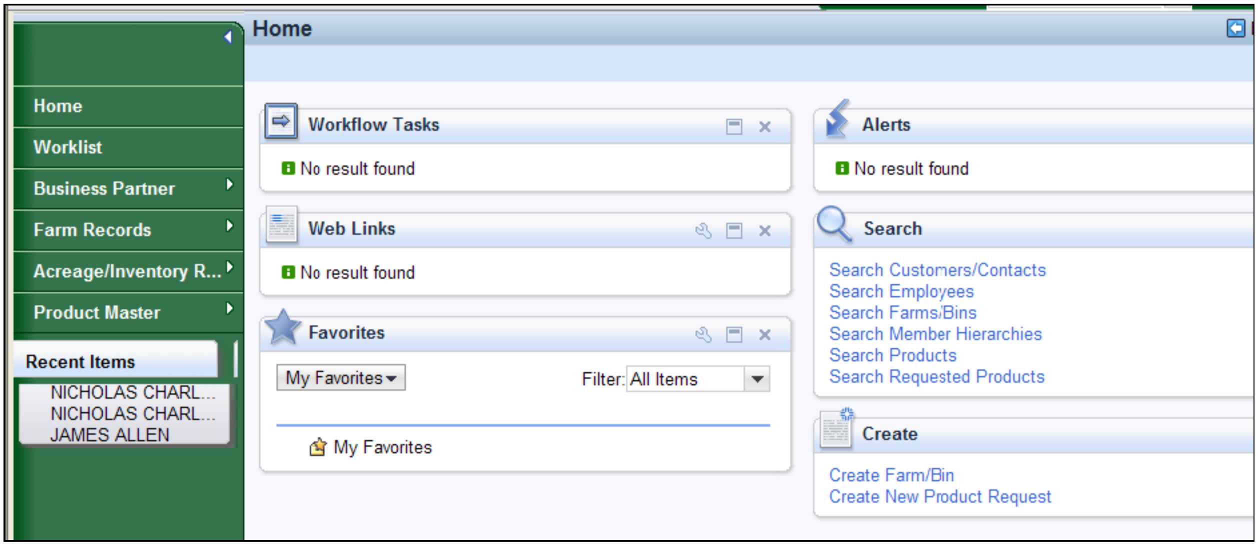
19. Click Save & Back button Save & Back.

Customer: NICHOLAS CHARLES324



20. Click Save button Save.

Customer: NICHOLAS CHARLES324



21. Click Home button 

.

Result

Next Steps

You have successfully create a contact.