

CREATING A CONTACT PERSON FOR AN ESTABLISHED VENDOR

Purpose

This job aid will serve as a guide in creating a contact person for an established vendor in PeopleSoft CRM 9.0.



It is important to have a current accurate contact person listed for vendors.

Logging into CRM



Before beginning any steps below, navigate to <https://myohio.oaks.ohio.gov> and log in with your OAKS User ID and password.

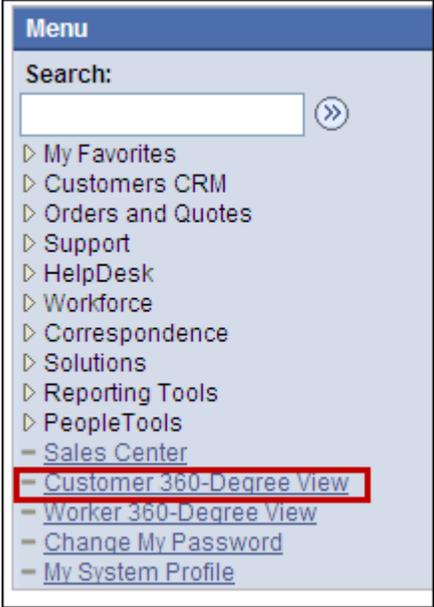
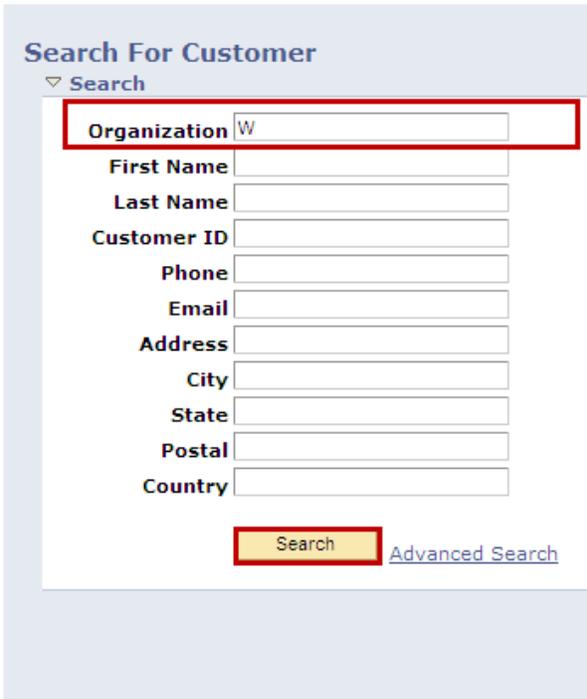
Step-by-Step	Screen
1. Click Launch Application link in the Customer Relations Management row of the OAKS Quick Access section.	

The OAKS Customer Relations Management (CRM) screen will display.



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Step-by-Step for Creating a Contact Person for an Established Vendor

Step-by-Step	Screen
<p>2. Click on the Customer 360-Degree View link.</p>	 <p>The screenshot shows a 'Menu' window with a search bar and a list of items. The item 'Customer 360-Degree View' is highlighted with a red box. Other items include My Favorites, Customers CRM, Orders and Quotes, Support, HelpDesk, Workforce, Correspondence, Solutions, Reporting Tools, PeopleTools, Sales Center, Worker 360-Degree View, Change My Password, and My System Profile.</p>
<p>3. Put the least amount of information that you can for this Search For Customer page.</p> <p>4. Click Search.</p> <p>The Advanced Search is similar to this Search, except it has more search options.</p>	 <p>The screenshot shows the 'Search For Customer' form. The 'Organization' field is highlighted with a red box and contains the letter 'W'. Other fields include First Name, Last Name, Customer ID, Phone, Email, Address, City, State, Postal, and Country. There are 'Search' and 'Advanced Search' buttons at the bottom.</p>

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- Click on the **Organization** name link. In this example the chosen organization is [Walnut Creek Foods](#).

Create Company

Search Results View All | First 1-25 of 50 | Last

Organization	Address	City	State	Postal	Country
W. CARL FELL	405 W FIRST ST, SPENCERVILLE, OH, 45887-1160, USA	SPENCERVILLE	OH	45887-1160	USA
W. GERRIETS INTERNATIONAL INC	29 HUTCHINSON RD, ALLEN TOWN, NJ, 08501, USA	ALLEN TOWN	NJ	08501	USA
WS ENTERPRISE LLC	521 MEADOW SPRING RD, MAUMEE, OH, 43537, USA	MAUMEE	OH	43537	USA
WADSWORTH SLAWSON NW	3430 BRIARFIELD BLVD, MAUMEE, OH, 43537, USA	MAUMEE	OH	43537	USA
WAGNER & BROWN LTD	3400 W 7TH ST, BIG SPRING, TX, 79720-8001, USA	BIG SPRING	TX	79720-8001	USA
WALE A FAFADE INC	23 LOCHNESS LN, PATASKALA, OH, 43062, USA	PATASKALA	OH	43062	USA
WALNUT CREEK FOODS	PO BOX 240, WALNUT CREEK, OH, 44687-0240, USA	WALNUT CREEK	OH	44687-0240	USA

The **360-Degree View** page is displayed.

360-Degree View 08/31/2010 11:03:30AM EDT

Refresh | New Search | [Personalize](#)

360-Degree View | **Relationship Viewer** | Tasks | Call Reports

*Role: Company | Actions: Add Case | Go

Summary

Customer WALNUT CREEK FOODS

Phone

Email

Address PO BOX 240, WALNUT CREEK, OH, 44687-0240, USA

Extension

Status Active

Activities

*Date Filter: 7 - View All

First | Previous | Next | Last | Left | Right

Overview of - WALNUT CREEK FOODS

- Support Cases - (0)
 - [View All](#)
 - [Add Case](#)
 - [Search Cases](#)
- Interactions - (4)

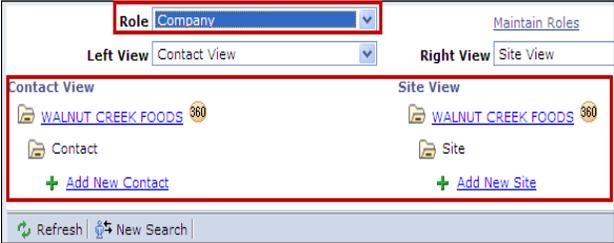
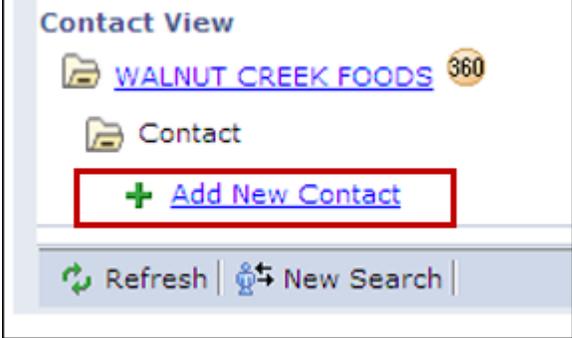
Support Cases

No Support Cases to display.

Add Interaction Note

Current Actions

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<p>6. Click on the Relationship Viewer tab.</p>	 <p>The screenshot shows the '360-Degree View' interface. At the top, there are 'Refresh' and 'New Search' buttons. Below that, there are three tabs: '360-Degree View', 'Relationship Viewer' (highlighted with a red box), and 'Tasks'. Underneath the tabs, there is a '*Role' dropdown menu set to 'Company'. Below the role menu, there is a 'Summary' section with the text 'Customer WALNUT CREEK FOODS'.</p>
<p>7. Use the drop-down arrow beside the Role box to choose "Company."</p> <p>The Contact View and Site View fields are displayed.</p>	 <p>The screenshot shows the 'Role' dropdown menu set to 'Company'. Below it, there are two tabs: 'Left View' (set to 'Contact View') and 'Right View' (set to 'Site View'). The 'Contact View' section shows a folder icon for 'WALNUT CREEK FOODS' with a '360' badge, a 'Contact' link, and a '+ Add New Contact' link. The 'Site View' section shows a folder icon for 'WALNUT CREEK FOODS' with a '360' badge, a 'Site' link, and a '+ Add New Site' link. The 'Refresh' and 'New Search' buttons are at the bottom.</p>
<p>8. Click on the + Add New Contact link under Contact View.</p>	 <p>The screenshot shows the 'Contact View' interface. It features a folder icon for 'WALNUT CREEK FOODS' with a '360' badge, a 'Contact' link, and a '+ Add New Contact' link (highlighted with a red box). At the bottom, there are 'Refresh' and 'New Search' buttons.</p>

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The **Create Contact Of (ORGANIZATION NAME)** page is displayed.

Create Contact Of WALNUT CREEK FOODS

SetID OSSC Ohio

Company
Name [WALNUT CREEK FOODS](#)
Currency US Dollar

Purchasing Options

<input type="checkbox"/> Sold To Customer	This company can make purchases.
<input type="checkbox"/> Bill To Customer	This company can receive bills.
<input type="checkbox"/> Ship To Customer	This company can receive shipments.

Contact Info Entries

Contact Info Entry Business [Display Entry](#)

Contact Info

Description Business				Address	
Phone				Address Business More...	
Type	Country Code	Number	Ext/PIN	PO BOX 240	
Business				WALNUT CREEK, OH	
				44687-0240	
Email					
Type	Email Address				
Business					

Contact

[Search Existing Person](#)

Format for United States

Prefix

*First Name		Middle Name	
*Last Name		Suffix	

Contact Info Entries

Contact Info

*Description Home

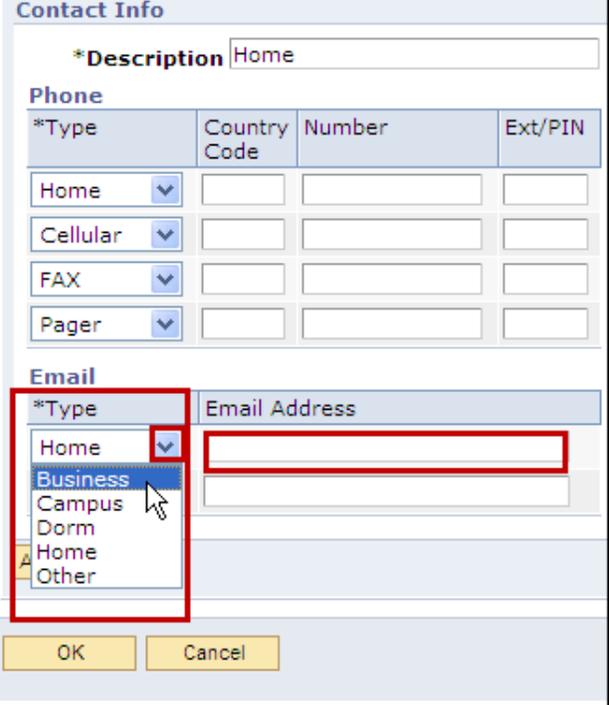
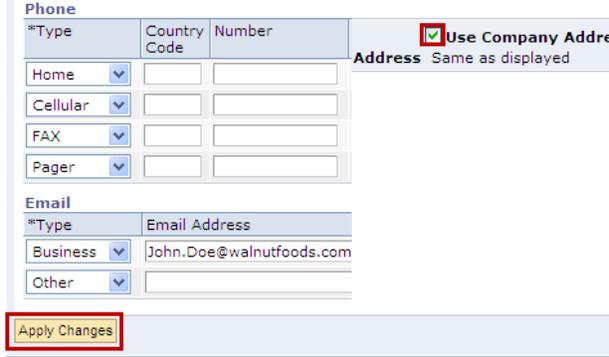
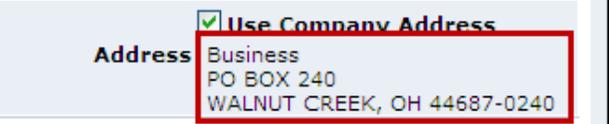
Phone				Address	
*Type	Country Code	Number	Ext/PIN	<input type="checkbox"/> Use Company Address	
Home				Look up Address More...	
Cellular				*Type Home	
FAX				*Country United States	
Pager				Address 1	
				Address 2	
				Address 3	
				City	
				State	
				Postal	

Email	
*Type	Email Address
Home	
Other	

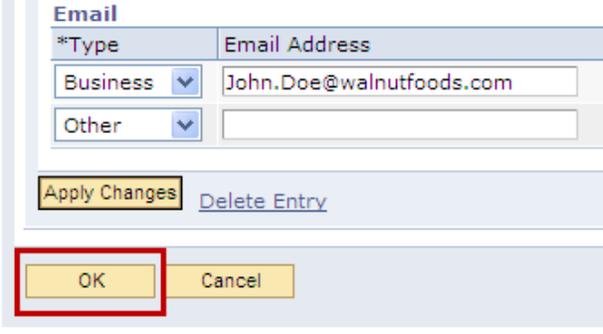
[Apply Changes](#)

OK Cancel

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<p>9. Enter First Name and Last Name of contact under the Contact field. (Enter John Doe)</p>	
<p>10. Use the drop-down arrow under Home to select "Business."</p> <p>11. Add the contact's e-mail address in the box below Email Address. (Enter John.Doe@walnutfoods.com)</p>	
<p>12. Check the box to the left of Use Company Address.</p> <p>13. Click Apply Changes.</p>	
<p>Changes are updated.</p>	

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<p>14. Click OK.</p>	
<p>The 360-Degree View page is redisplayed.</p> <p>15. Use the drop-down arrow in the Role box to choose "Company" to verify the new contact's name and e-mail.</p>	
<p>The contacts' name is listed under Contact View.</p> <p>16. Click on the 360 icon to transfer to the 360-Degree View page.</p>	

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The **360-Degree View** page is redisplayed with the new contact information.



The **First Name**, **Last Name** and **Email** of the new contact are listed under **Summary**.

The screenshot shows the '360-Degree View' interface for a contact person. At the top, the title '360-Degree View' is displayed on the left, and the date and time '08/31/2010 1:15:18PM EDT' are on the right. Below the title bar, there are navigation options: 'Refresh', 'New Search', 'Notification', and 'Correspond'. A 'Personalize' link is also present. The main navigation area includes '360-Degree View', 'Relationship Viewer', 'Tasks', and 'Call Reports'. The current view is '360-Degree View', and the role is 'Contact of WALNUT CREEK FOODS'. The 'Actions' menu is open, showing 'Add Case' and a 'Go' button. The 'Summary' section is expanded, showing the following information: 'First Name John', 'Last Name Doe', 'Customer WALNUT CREEK FOODS', 'Phone', 'Email John.Doe@walnutfoods.com', 'Address PO BOX 240, WALNUT CREEK, OH, 44687-0240, USA', 'Extension', and 'Status Active'. The 'Activities' section is also expanded, showing a 'Date Filter' set to '7 - View All' and a list of activities: 'Overview of - John Doe', 'Support Cases - (0)', 'Interactions - (0)', and 'Current Actions'. The 'Support Cases' section is collapsed and shows 'No Support Cases to display.' The 'Add Interaction Note' and 'Current Actions' sections are also collapsed.