

## Purpose

The purpose of this work instruction is to show how to produce and display a Customer Fact Sheet. The fact sheet is a more robust representation of the information on the current FSA-156EZ and Subsidiary Print.

## Trigger

Perform this procedure when you wish to produce a summary of Customer data. In the initial release the information will be restricted to Farm Records, Acreage Reports, and Inventory Reports. In later releases the information included will expand.

## Prerequisites

- Customer record must be in Business Partner.
- Associated Farm Records, Inventory Reports, and Acreage Reports must be saved in MIDAS.

## Helpful Hints

- "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 <b>general</b> 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 <b>cautionary</b> note		Use this note to communicate to the end-user of something that <b>MUST</b> be completed or another trigger that should be started and is related to the



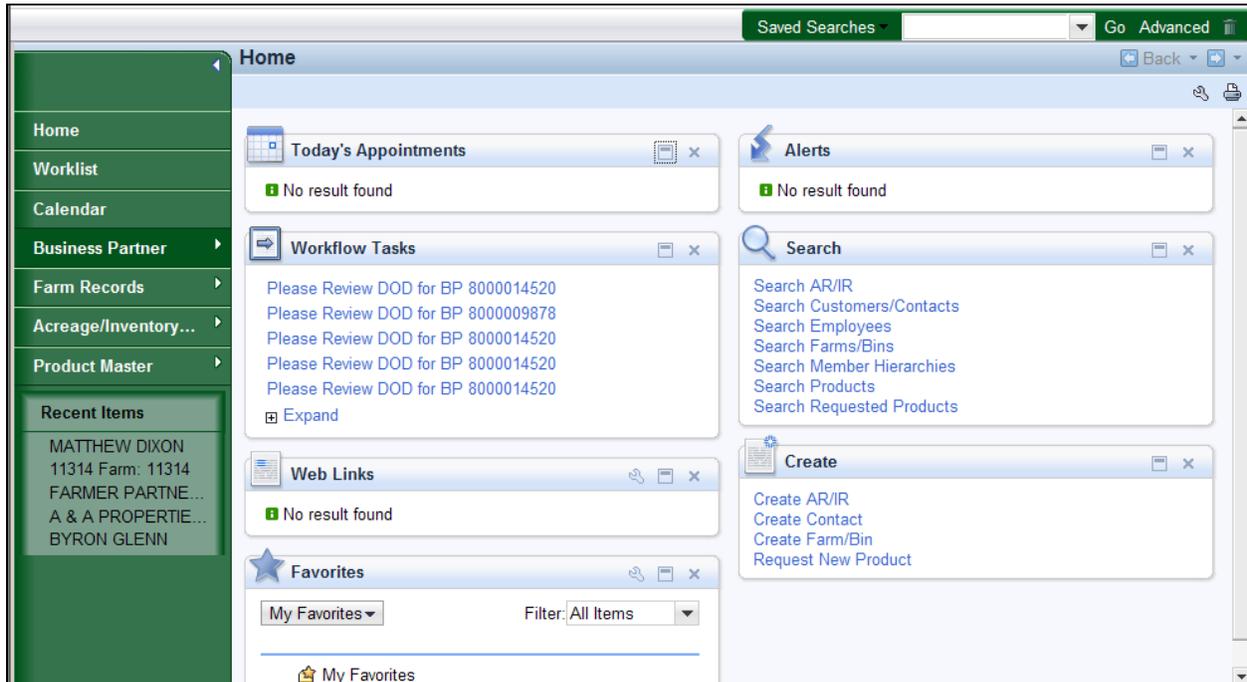
		procedure.
<b>Acritical</b> note		Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
<b>Contact</b> someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A <b>reference</b> is 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.

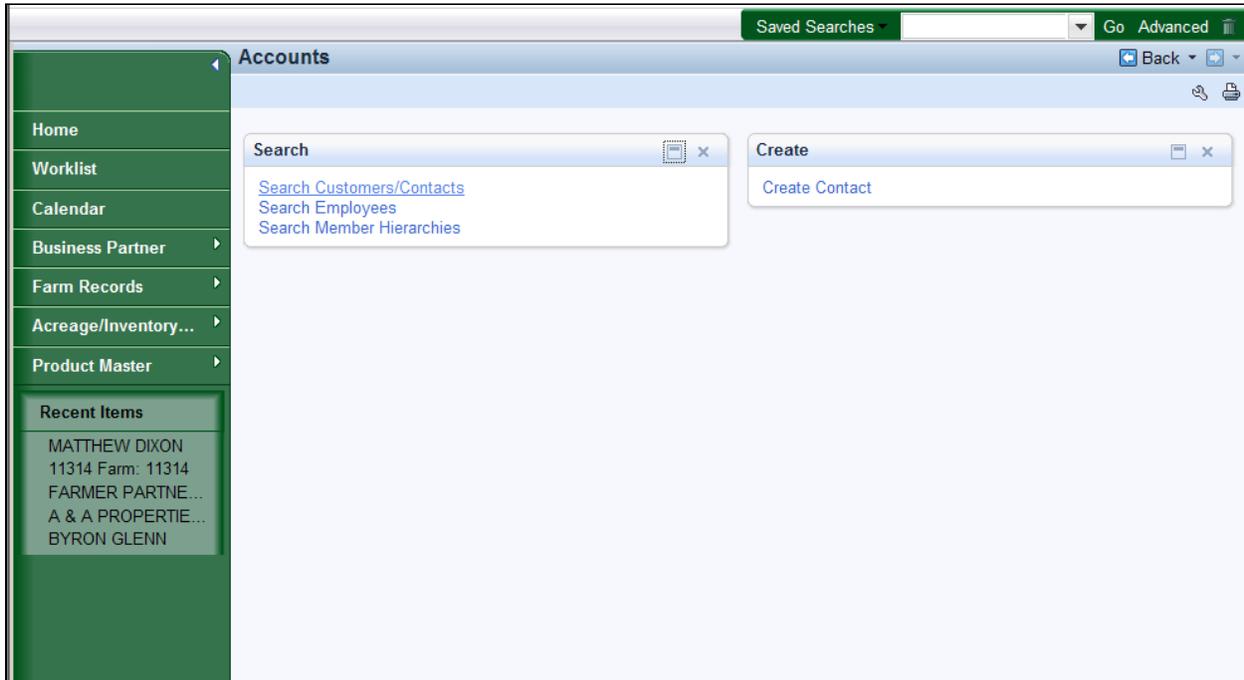
**Home**



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

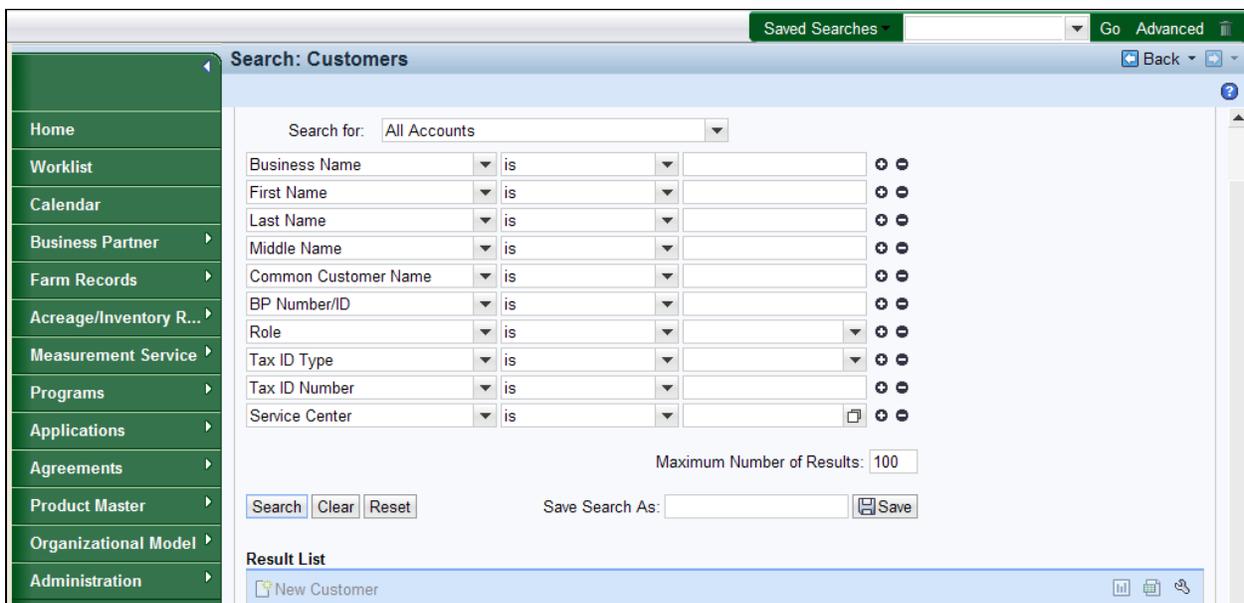


## Accounts



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

## Search: Customers



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





## Customer: MATTHEW DIXON

**Customer: MATTHEW DIXON**

Save | Cancel | **Fact Sheet** | PDF Fact Sheet | More ▾

**Customer Details** | Customer Profile | Roles | Identification Numbers

[Edit](#)

General Data	Main Address and Communication Data
Current Role: Individual	Information Line:
BP Number /ID: 8000000503	Street/House Num.: 10 MAIN STREET
Prefix:	PO Box:
First Name: MATTHEW	City: FREDERICK
Middle Name:	State: MD Maryland
Last Name: DIXON	ZIP Code: 21701
Suffix:	Country: US USA
Last Name at Birth:	Telephone Number:
Legal Name: No	E-Mail Address:
Common Custome... MATTHEW DIXON	Communication M. Post (letter)
Language Preferen... English	
Data Origin:	
MAL Loan Violation: 0	
Employee Type: Not an employee (default)	
Tax ID Type: No Tax Identification	

7. Click the **Fact Sheet** button **Fact Sheet** to go to the Account Fact Sheet.

## Account Fact Sheet

**Account Fact Sheet**

Save | Cancel | **Fact Sheet** | PDF Fact Sheet | More ▾

**Farm Records**

Farm Number	Farm Description	Farm Administrative S...	Farm Administrative C...	Operator Name
6584	Dixon Farms	24	021	8000000503
11202		24	031	8000000503
11299	Farm: 11299	24	031	8000000503
11309		42	001	8000000503
11314	Farm: 11314	24	021	8000000503

Expand | ◀ Back 1 2 Forward ▶

**Acreage Report**

Acreage Report N...	Description	Employee Respo...	Farm	Year	Crop Land Ratio
8000000669			6584	2010	1.000
8000000674			6584	2011	1.000
8000000675			6584	2012	0.926
8000001291			6584	2013	0.000
8000001398			6584	2014	0.000

Expand | ◀ Back 1 2 3 Forward ▶

**Inventory Report**

Inventor...	Descrip...	Creatio...	Employ...	Producer	Certifier	Default...	Fiscal...	Sales...	Service...	User St...
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8. Scroll down to display the listed Farm Records, Acreage Reports and Inventory Reports.

## Account Fact Sheet

The screenshot shows the 'Account Fact Sheet' interface. On the left is a green navigation sidebar with options: Home, Worklist, Calendar, Business Partner, Farm Records, Acreage/Inventory..., Product Master, and Recent Items. The main content area is titled 'Account Fact Sheet' and includes a 'Back' button and a 'Back to Previous Page' link. Below this is a summary table with two rows of data. Further down are two expandable report sections: 'Acreage Report' and 'Inventory Report', each with a table of data and a 'Back' button.

Account ID	Farm	Value	Code	Account ID
11309		42	001	8000000503
11314	Farm: 11314	24	021	8000000503

Acreage Report N...	Description	Employee Respo...	Farm	Year	Crop Land Ratio
8000000669			6584	2010	1.000
8000000674			6584	2011	1.000
8000000675			6584	2012	0.926
8000001291			6584	2013	0.000
8000001398			6584	2014	0.000

Inventor...	Descrip...	Creatio...	Employ...	Producer	Certifier	Default...	Fiscal...	Sales...	Service...	User St...
800000...		07/31/...	Brian...	MATT...			2008	FA00	O 500...	In Pro...
800000...		07/25/...	Brian...	MATT...			2011	FA00	O 500...	In Pro...
800000...		07/25/...	Brian...	MATT...			2010	FA00	O 500...	In Pro...
800000...		07/31/...	Brian...	MATT...			2009	FA00	O 500...	In Pro...
800000...		07/31/...	Brian...	MATT...			2012	FA00	O 500...	In Pro...

9. Click the Back button Back to go to the Customer: XXXX page.



**Customer: XXXX**

The screenshot shows a web application interface for a customer fact sheet. The title bar reads "Customer: MATTHEW DIXON". Below the title bar are navigation buttons: "Save", "Cancel", "Fact Sheet", "PDF Fact Sheet", and "More". There are also utility icons for "Back", "Home", "Print", and "Help".

The main content area is divided into two columns:

General Data	Main Address and Communication Data
Current Role: Individual	Information Line:
BP Number /ID: 8000000503	Street/House Num.: 10 MAIN STREET
Prefix:	PO Box:
First Name: MATTHEW	City: FREDERICK
Middle Name:	State: MD Maryland
Last Name: DIXON	ZIP Code: 21701
Suffix:	Country: US USA
Last Name at Birth:	Telephone Number:
Legal Name: No	E-Mail Address:
Common Custome.. MATTHEW DIXON	Communication M. Post (letter)
Language Preferen.. English	
Data Origin:	
MAL Loan Violation: 0	
Employee Type: Not an employee (default)	
Tax ID Type: No Tax Identification	

On the left side of the interface is a green sidebar menu with the following items: Home, Worklist, Calendar, Business Partner, Farm Records, Acreage/Inventory..., Product Master, and Recent Items. The "Recent Items" section lists: MATTHEW DIXON, 11314 Farm: 11314, FARMER PARTNE..., A & A PROPERTIE..., and BYRON GLENN.

- Click the PDF Fact Sheet button  PDF Fact Sheet to display the Fact Sheet in PDF format.



**http://midverdb.fmfiad.fmmi.usda.gov:8000/sap(bD1FTiZjPTE0MCZpPTE  
mZT1UVWxLUVVOTFUwOU9RbDImTXpSZ - Windows Internet Explorer**

Form Number :  
Version Number :

USDA FSA United States Department of Agriculture Farm Service Agency

Program year:2012  
Date : 11/06/2012

MATTHEW  
DIXON  
10 MAIN STREET  
FREDERICK MD 21701  
USA

**Account Overview :**

Farm Records for account 800000503

Farm Number	Farm Description	Farm Admin. State	Farm Admin. County	Operator Name
6584	Dixon Farms	24	021	800000503
11202		24	031	800000503
11299	Farm: 11299	24	031	800000503
11309		42	001	800000503
11314	Farm: 11314	24	021	800000503
11318		24	031	800000503
11319	BPwMC	24	031	800000503

Acreage reports for account 800000503

Acr Rpt No.	Description	Emp Resp	Farm	Year	Crop Land Ratio
800000669			6584	2010	0.600
800000674			6584	2011	0.600
800000675			6584	2012	0.556
800001291			6584	2013	0.267
800001398			6584	2014	0.222
800001938			6584	2019	0.600
800001970			6584	2069	0.044
800001939			6584	2015	0.600

11. Click the **Exit** button  to go to the Customer: XXXX page.

12. Click the **Home** button  to go to the Home page.



## Result

You have produced and displayed a Customer Fact Sheet.



## Next Steps

Not applicable.