

Purpose

The purpose of this work instruction is to navigate search criteria and search results in MIDAS CRM.

Trigger

Perform this procedure when searching data.

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:

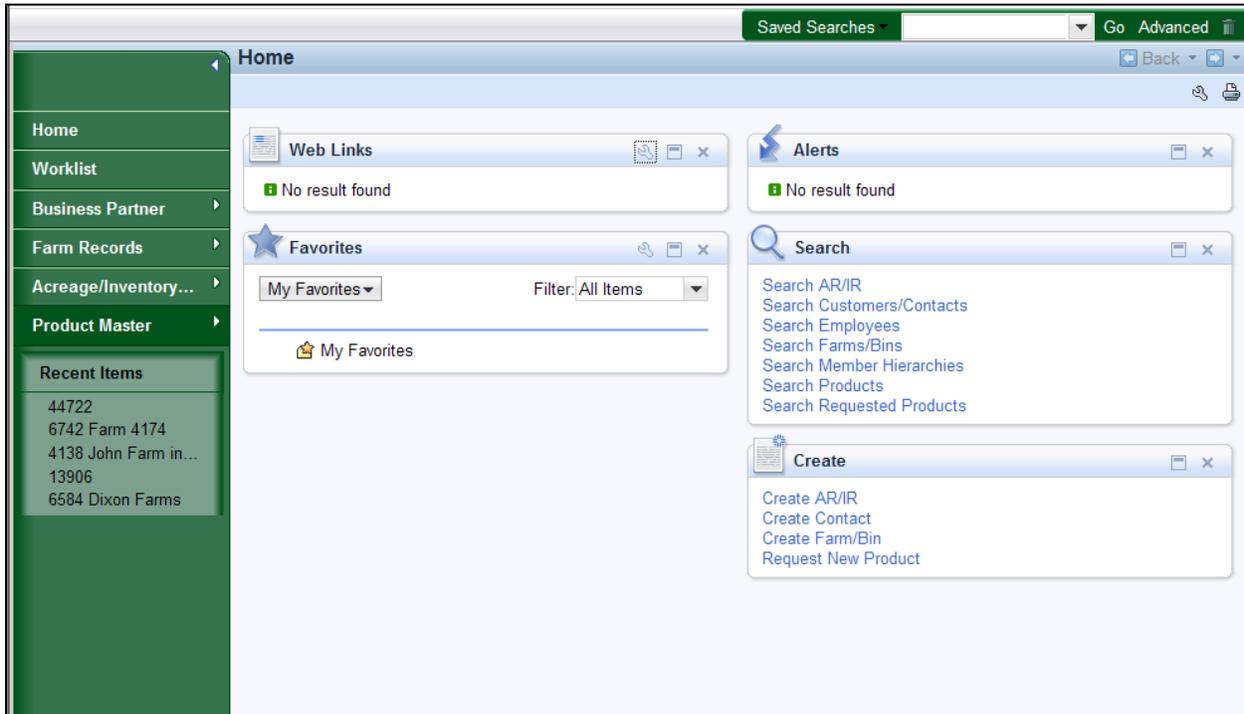
| Note type | Icon | Description |
|--------------------------------------|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A 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. |

| | | |
|----------------------------------------|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <p>A reference is available</p> |  | <p>Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.</p> |
|----------------------------------------|-----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|

Procedure

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

MIDAS CRM Homepage



2. Click Product Master button **Product Master**.

 MIDAS CRM has a robust search engine that allows you to manage search criteria and results.

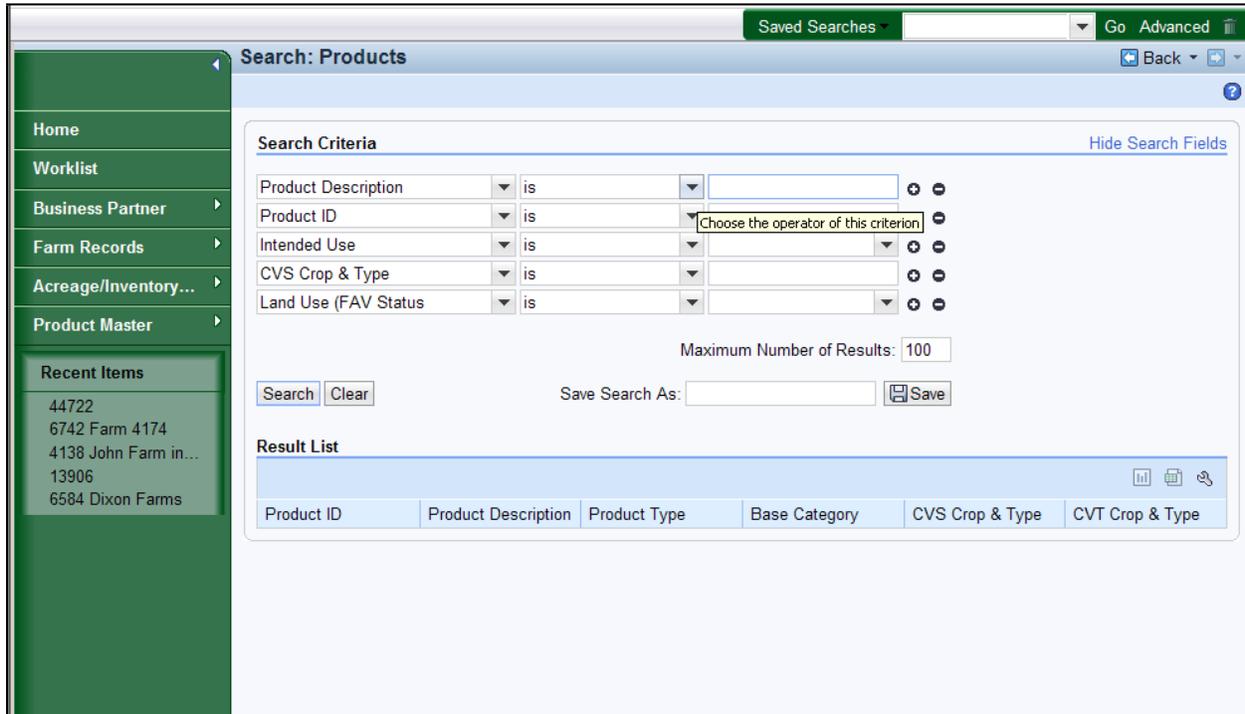


MIDAS CRM - Search Product Master

A screenshot of the MIDAS CRM web application interface. The page title is "Product Master". At the top right, there is a "Saved Searches" dropdown menu, a "Go" button, and an "Advanced" filter icon. Below the title bar, there is a navigation menu on the left with options: Home, Worklist, Business Partner, Farm Records, Acreage/Inventory..., and Product Master. Under "Product Master", there is a "Recent Items" section listing: 44722, 6742 Farm 4174, 4138 John Farm in..., 13906, and 6584 Dixon Farms. The main content area has two tabs: "Search" and "Create". The "Search" tab is active and contains two links: "Search Products" and "Search Requested Products". The "Create" tab contains a link: "Request New Product".

3. Click Search Products [Search Products](#) .

Search: Products



4. Click Search Criteria dropdown.
5. Click contains from the dropdown list.

 You have three options to select search criteria.

- "is" searches for the exact criteria but allows the use of wildcards.
- "contains" searches for the criteria anywhere in the results.
- "starts with" searches for the criteria at the beginning of the result.

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

| Field | R/O/C | Description |
|-------|-------|--------------------------|
| | R | Example: wheat |

 This search will return results that "contain" the word "wheat"

7. Click Copy Line  button.

 Add a row to duplicate or add new search criteria.

8. **Click** Search Criteria dropdown

9. **Click** list item

10. **Click** Search Criteria dropdown list

 Adding the same criterion will search for both items (wheat and XXX).

11. **Click** Remove Line button .

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

| Field | R/O/C | Description |
|----------------------------|-------|------------------------|
| Maximum Number of Results: | R | Example: 200 |

 You may need to cautiously increase the Maximum Number of Results to get a full search return.

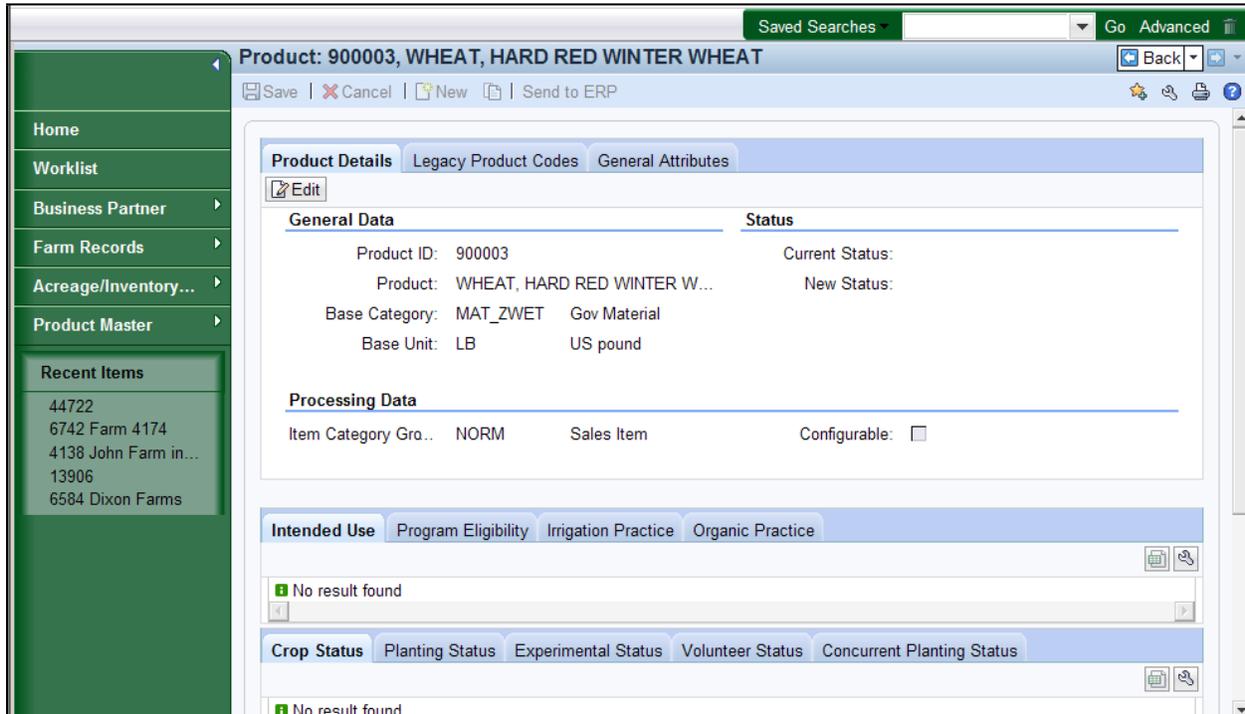
13. **Press** "Return".

14. **Click** Search button .

15. **Double-click** 900003 link label [900003](#).

 The number of results appears at the top of the results screen

Product: 900003, WHEAT, HARD RED WINTER WHEAT



Product: 900003, WHEAT, HARD RED WINTER WHEAT

Save | Cancel | New | Send to ERP

Product Details | Legacy Product Codes | General Attributes

Edit

| General Data | | Status | |
|----------------|-----------------------------|-----------------|--|
| Product ID: | 900003 | Current Status: | |
| Product: | WHEAT, HARD RED WINTER W... | New Status: | |
| Base Category: | MAT_ZWET | Gov Material | |
| Base Unit: | LB | US pound | |

Processing Data

| | | | |
|----------------------|------|------------|----------------------------------------|
| Item Category Gro... | NORM | Sales Item | Configurable: <input type="checkbox"/> |
|----------------------|------|------------|----------------------------------------|

Intended Use | Program Eligibility | Irrigation Practice | Organic Practice

No result found

Crop Status | Planting Status | Experimental Status | Volunteer Status | Concurrent Planting Status

No result found

16. Click Back button  Back .

 Once selected, the record is available for Review

Search: Products

Saved Searches ▾
Go Advanced 

- Home
- Worklist
- Business Partner
- Farm Records
- Acreage/Inventory...
- Product Master
- Recent Items
- 900003 WHEAT, H...
44722
- 6742 Farm 4174
- 4138 John Farm in...
13906

Search: Products Back ▾ 

Search Criteria Hide Search Fields

| | | | |
|-----------------------|----------|-------|-----|
| Product Description | contains | wheat | ⊕ ⊖ |
| Product ID | is | | ⊕ ⊖ |
| Intended Use | is | | ⊕ ⊖ |
| CVS Crop & Type | is | | ⊕ ⊖ |
| Land Use (FAV Status) | is | | ⊕ ⊖ |

Maximum Number of Results: 200

Save Search As:

Result List: 52 Products Found

| Product ID | Product Descripti... | Product Type | Base Category | CVS Crop & Type | CVT Crop & Type | Personalize |
|------------|----------------------|--------------|---------------|-----------------|-----------------|-------------------------------------------------------------------------------------|
| 100016 | Wheat | Material | Gov Material | | |  |
| 900003 | WHEAT, HARD... | Material | Gov Material | | |  |
| 900004 | WHEAT, SOFT... | Material | Gov Material | | |  |
| 900005 | WHEAT, SOFT... | Material | Gov Material | | |  |
| 900137 | BUCKWHEAT, | Material | Gov Material | | |  |
| 1100051 | WHEAT, HARD... | Material | Gov Material | 0011-HRS | 0011-0543 |  |
| 1100065 | WHEAT, HARD... | Material | Gov Material | 0011-HRW | 0011-HRW |  |

17. Click Personalize button .



The results list display can be customized to meet your needs. The display changes will be saved and updated again.

Thursday, January 03, 2013

Search_MIDAS_CRM.udc

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Personalization

?

You can choose which columns should be displayed in the table. In addition, you can determine the order in which the columns are displayed. You can also define the relative (percentage) or absolute (pixel) width of each column compared to the available screen area. If you enter a number without a unit of measurement, the width is automatically determined in pixels. If you want to define the relative width, add '%' after the number.

Default View:

Table Navigation

Table Navigation: Scrolling Paging Both

Number of Visible Rows Before Scrolling:

Number of Rows Before Paging:

Available Columns

| | Name |
|--------------------------|------------------------|
| <input type="checkbox"/> | Base Category ID |
| <input type="checkbox"/> | Base Unit ID |
| <input type="checkbox"/> | Base Unit |
| <input type="checkbox"/> | Item Category Group ID |
| <input type="checkbox"/> | Item Category Group |
| <input type="checkbox"/> | Division ID |
| <input type="checkbox"/> | Division |
| <input type="checkbox"/> | Configurable |
| <input type="checkbox"/> | Alternative ID Type |
| <input type="checkbox"/> | Select table row ID |

Displayed Columns

| Up | Down | | Name | Width |
|--------------------------|--------------------------|--------------------------|---------------------|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Product ID | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Product Description | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Product Type | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Base Category | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | CVS Crop & Type | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | CVT Crop & Type | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |

18. Click Select table row link label .

19. Click add button .

20. Click Save button .

Search: Products

Search: Products Saved Searches Go Advanced 

[Back](#) 

Search Criteria [Hide Search Fields](#)

Product Description  

Product ID  

Intended Use  

CVS Crop & Type  

Land Use (FAV Status)  

Maximum Number of Results:

Save Search As:

Result List: 52 Products Found   

| Product ID | Product Desc... | Product Type | Base Category | CVS Crop & T... | CVT Crop & T... | Altern |
|------------|-----------------|--------------|---------------|-----------------|-----------------|----------------------------|
| 100016 | Wheat | Material | Gov Material | | | Open Chart |
| 900003 | WHEAT, HAR... | Material | Gov Material | | | |
| 900004 | WHEAT, SOF... | Material | Gov Material | | | |
| 900005 | WHEAT, SOF... | Material | Gov Material | | | |
| 900137 | BUCKWHEAT, | Material | Gov Material | | | |
| 1100051 | WHEAT, HAR... | Material | Gov Material | 0011-HRS | 0011-0543 | |
| 1100065 | WHEAT, HAR... | Material | Gov Material | 0011-HRW | 0011-HRW | |

21. Click Open/Close Chart button .

 Search Results may also be viewed as a chart.

Search: Products

Search: Products Go Advanced

Home
Worklist
Business Partner
Farm Records
Acreage/Inventory...
Product Master

Recent Items
900003 WHEAT, H...
44722
6742 Farm 4174
4138 John Farm in...
13906

Search Criteria Hide Search Fields

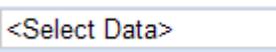
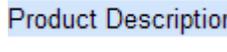
Product Description contains wheat
Product ID is
Intended Use is
CVS Crop & Type is
Land Use (FAV Status) is

Maximum Number of Results: 200

Search Clear Save Search As: Save

Result List: 52 Products Found

| Product ID | Product Desc... | Product Type | Base Category | CVS Crop & T... | CVT Crop & T... | Alternative ID... |
|------------|-----------------|--------------|---------------|-----------------|-----------------|-------------------|
| 100016 | Wheat | Material | Gov Material | | | |
| 900003 | WHEAT, HAR... | Material | Gov Material | | | |
| 900004 | WHEAT, SOF... | Material | Gov Material | | | |
| 900005 | WHEAT, SOF... | Material | Gov Material | | | |
| 900137 | BUCKWHEAT, | Material | Gov Material | | | |
| 1100051 | WHEAT, HAR... | Material | Gov Material | 0011-HRS | 0011-0543 | |
| 1100065 | WHEAT, HAR... | Material | Gov Material | 0011-HRW | 0011-HRW | |

22. Scroll  to  the bottom of the display list.
23. Click Search: Products dropdown list  .
24. Click Product Description  .
 -  Select data to create the chart

Search: Products

Search: Products

| | | | | | |
|---------|---------------|----------|--------------|----------|-----------|
| 1100051 | WHEAT, HAR... | Material | Gov Material | 0011-HRS | 0011-0543 |
| 1100065 | WHEAT, HAR... | Material | Gov Material | 0011-HRW | 0011-HRW |
| 1100068 | WHEAT, SOF... | Material | Gov Material | 0011-SWS | 0011-0544 |
| 1101342 | WHEAT, SOF... | Material | Gov Material | 0011-SWW | 0011-1040 |
| 1101343 | WHEAT, SOF... | Material | Gov Material | 0011-SWS | 0011-1040 |

Product Description | Pie Chart | 100% | Close Chart



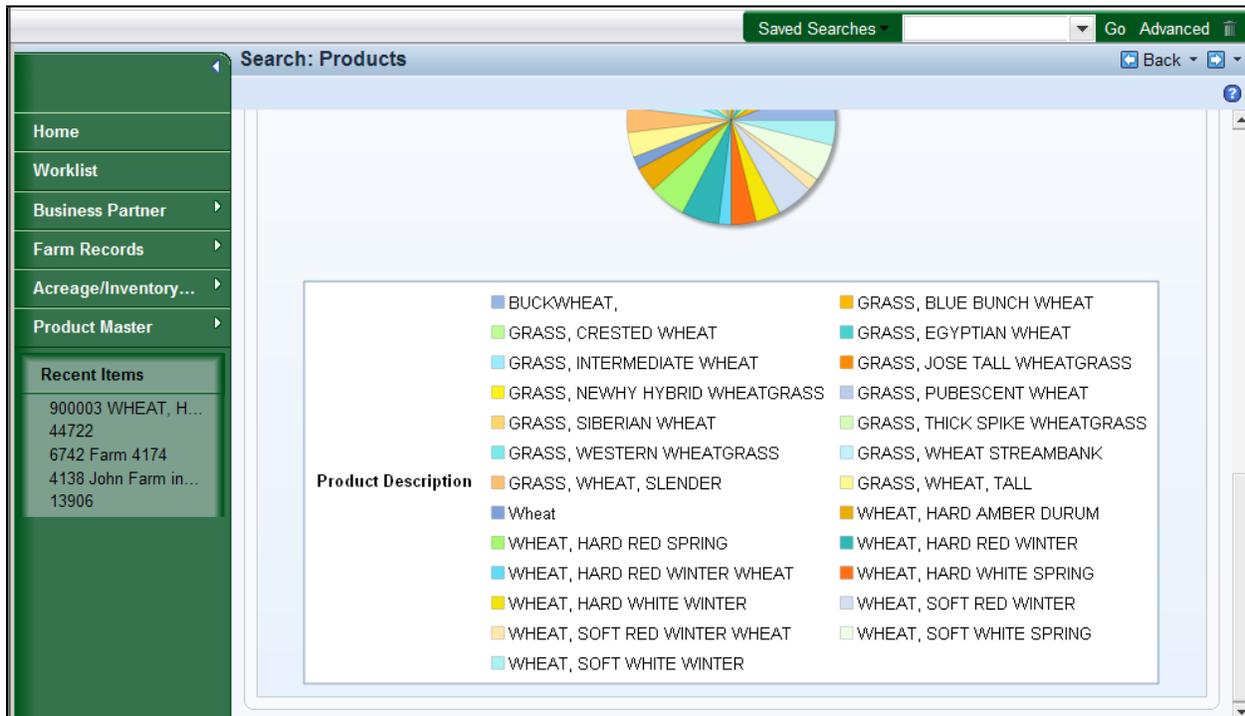
■ BUCKWHEAT, ■ GRASS, BLUE BUNCH WHEAT
 ■ GRASS, CRESTED WHEAT ■ GRASS, EGYPTIAN WHEAT

25.

Scroll to the chart at the bottom of the screen.

 Select the type of chart from the dropdown list.

Search: Products

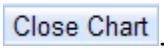


Search: Products

Product Description

- BUCKWHEAT,
- GRASS, CRESTED WHEAT
- GRASS, INTERMEDIATE WHEAT
- GRASS, NEWHY HYBRID WHEATGRASS
- GRASS, SIBERIAN WHEAT
- GRASS, WESTERN WHEATGRASS
- GRASS, WHEAT, SLENDER
- Wheat
- WHEAT, HARD RED SPRING
- WHEAT, HARD RED WINTER WHEAT
- WHEAT, HARD WHITE WINTER
- WHEAT, SOFT RED WINTER WHEAT
- WHEAT, SOFT WHITE WINTER
- GRASS, BLUE BUNCH WHEAT
- GRASS, EGYPTIAN WHEAT
- GRASS, JOSE TALL WHEATGRASS
- GRASS, PUBESCENT WHEAT
- GRASS, THICK SPIKE WHEATGRASS
- GRASS, WHEAT, TALL
- WHEAT, HARD AMBER DURUM
- WHEAT, HARD RED WINTER
- WHEAT, HARD WHITE SPRING
- WHEAT, SOFT RED WINTER
- WHEAT, SOFT WHITE SPRING

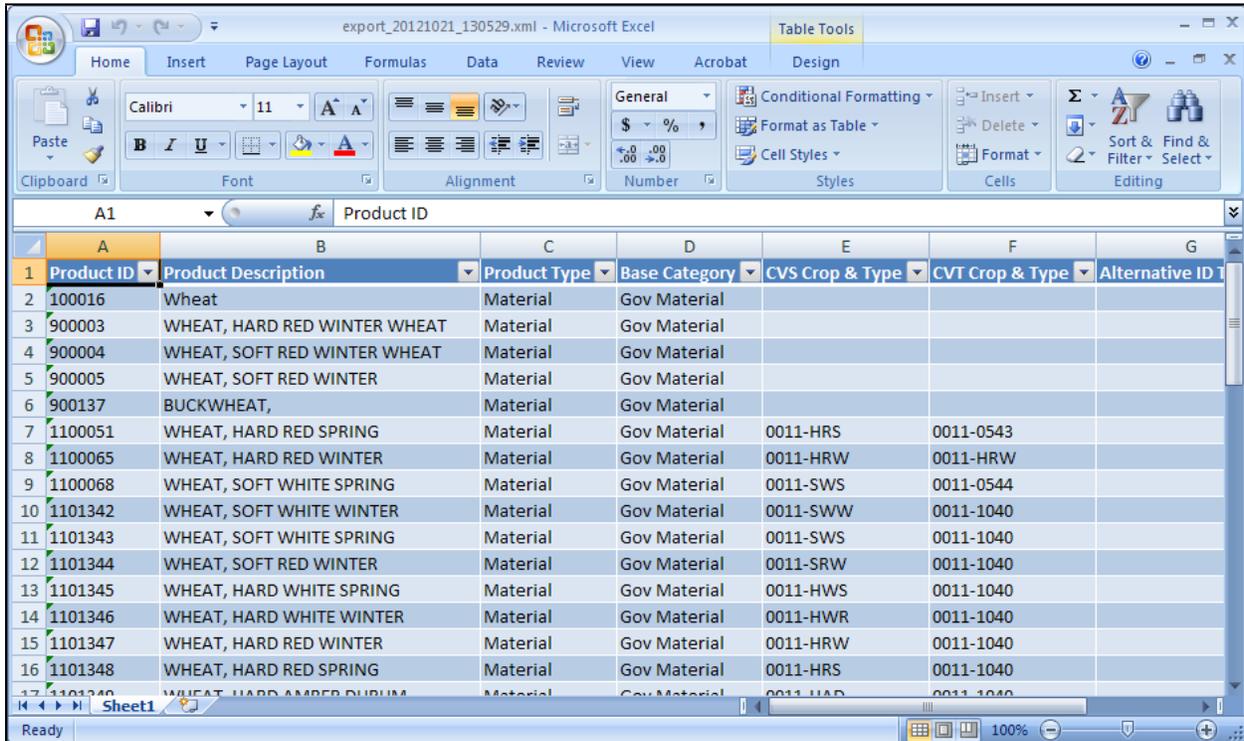
26. Scroll up  to  complete.

27. Click Close Chart button .

28. Click button .

 Search Results can be easily exported to an Excel spreadsheet.

Microsoft Excel - export_20121021_130529.xml

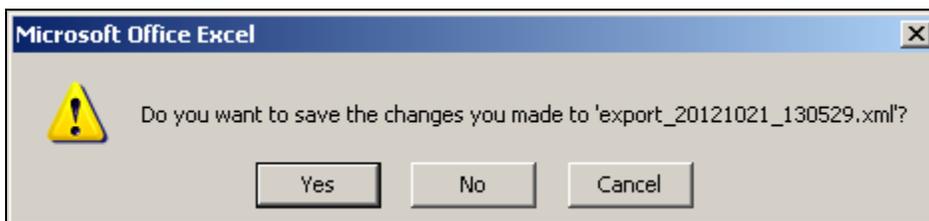


| | A | B | C | D | E | F | G |
|----|------------|------------------------------|--------------|---------------|-----------------|-----------------|----------------|
| 1 | Product ID | Product Description | Product Type | Base Category | CVS Crop & Type | CVT Crop & Type | Alternative ID |
| 2 | 100016 | Wheat | Material | Gov Material | | | |
| 3 | 900003 | WHEAT, HARD RED WINTER WHEAT | Material | Gov Material | | | |
| 4 | 900004 | WHEAT, SOFT RED WINTER WHEAT | Material | Gov Material | | | |
| 5 | 900005 | WHEAT, SOFT RED WINTER | Material | Gov Material | | | |
| 6 | 900137 | BUCKWHEAT, | Material | Gov Material | | | |
| 7 | 1100051 | WHEAT, HARD RED SPRING | Material | Gov Material | 0011-HRS | 0011-0543 | |
| 8 | 1100065 | WHEAT, HARD RED WINTER | Material | Gov Material | 0011-HRW | 0011-HRW | |
| 9 | 1100068 | WHEAT, SOFT WHITE SPRING | Material | Gov Material | 0011-SWS | 0011-0544 | |
| 10 | 1101342 | WHEAT, SOFT WHITE WINTER | Material | Gov Material | 0011-SWW | 0011-1040 | |
| 11 | 1101343 | WHEAT, SOFT WHITE SPRING | Material | Gov Material | 0011-SWS | 0011-1040 | |
| 12 | 1101344 | WHEAT, SOFT RED WINTER | Material | Gov Material | 0011-SRW | 0011-1040 | |
| 13 | 1101345 | WHEAT, HARD WHITE SPRING | Material | Gov Material | 0011-HWS | 0011-1040 | |
| 14 | 1101346 | WHEAT, HARD WHITE WINTER | Material | Gov Material | 0011-HWR | 0011-1040 | |
| 15 | 1101347 | WHEAT, HARD RED WINTER | Material | Gov Material | 0011-HRW | 0011-1040 | |
| 16 | 1101348 | WHEAT, HARD RED SPRING | Material | Gov Material | 0011-HRS | 0011-1040 | |
| 17 | 1101349 | WHEAT, HARD AMBER DURUM | Material | Gov Material | 0011-HAD | 0011-1040 | |

29. Click B / 3 text box **WHEAT, HARD RED WINTER WHEAT**.

30. Click Close button .

Microsoft Office Excel



31. Click No button .

 You will have the option to save the spreadsheet for future use.



Search: Products

32. Click Save Search As: text box

Frequently used or important searches can be saved as queries or "Saved Searched"

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

| Field | R/O/C | Description |
|-----------------|-------|--------------------------|
| Save Search As: | R | Example: Wheat |

34. Click Save button

35. Click Expand message area link label

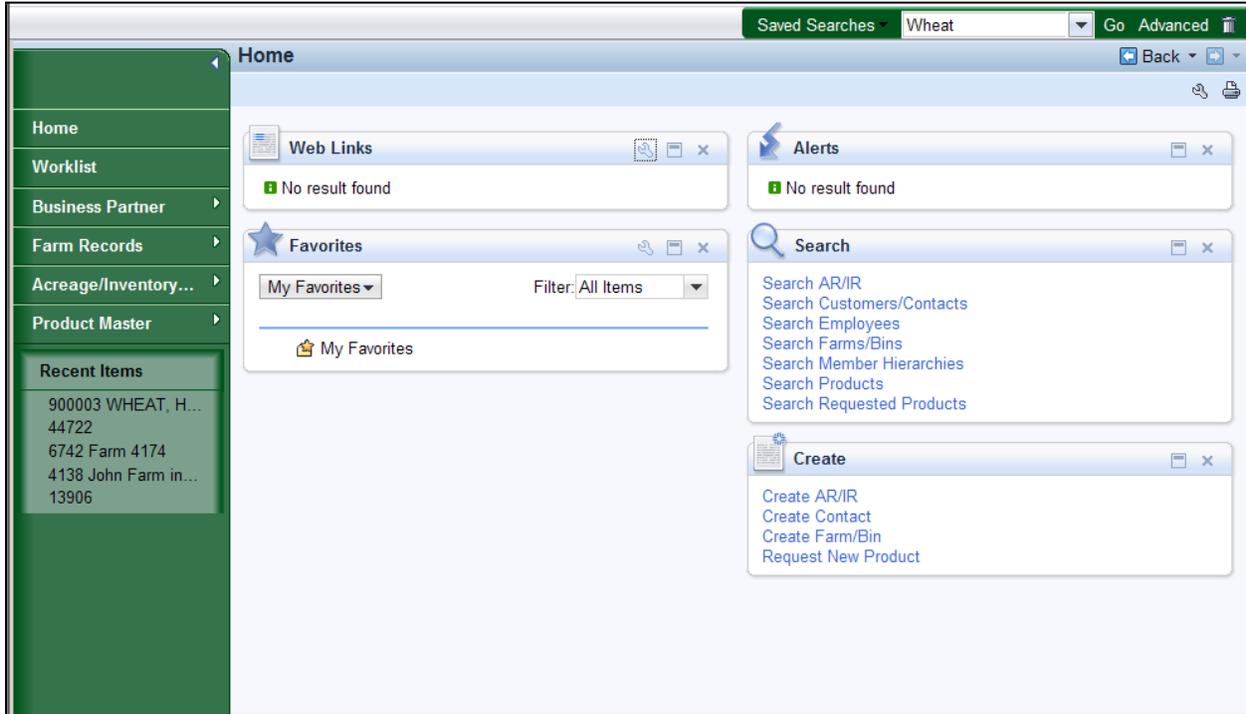
Notice the information notification confirming your successful completion.

36. Click Search 'Wheat' has been saved label Search 'Wheat' has been saved

37. Click Home button

-  Once complete, Saved Searches can be conveniently accessed from the CRM Homepage and throughout MIDAS CRM in the Header.

Home



38. Click dropdown list

39. Click list item

-  A list of Saved Searches are accessible from the Saved Searches field in the Header

40. Click Delete button 

-  Saved Searches are easy to use and conveniently easy to delete when no longer necessary.

41. Click Home button



Result

You have successfully completed a MIDAS CRM search.



Next Steps

You have %s.