

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.

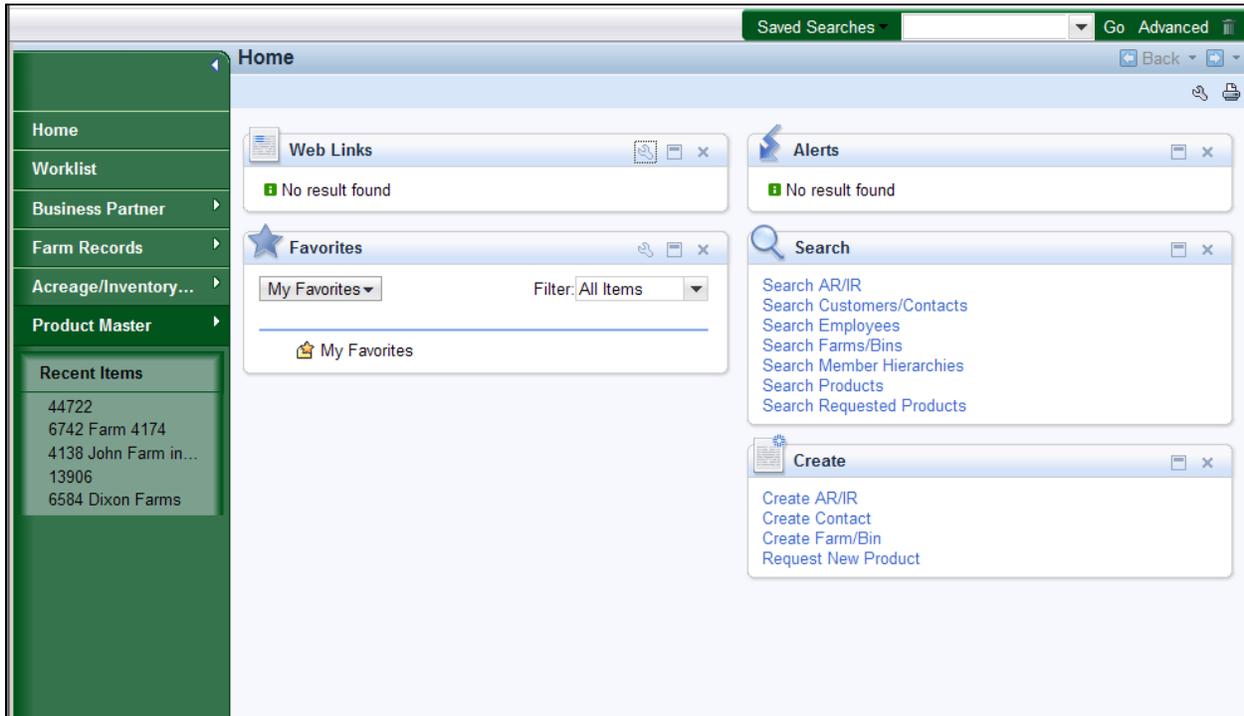


<p>A reference is available</p>		<p>Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.</p>
--	---	--

Procedure

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

MIDAS CRM Homepage



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

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

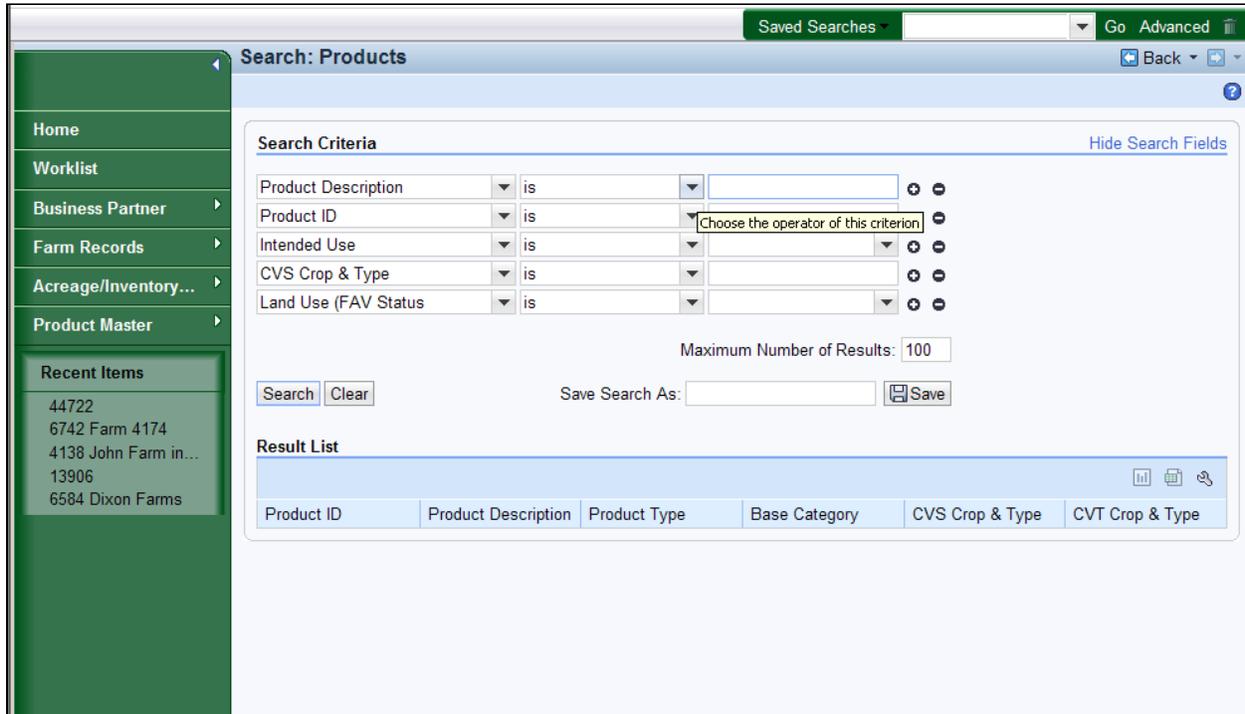


MIDAS CRM - Search Product Master

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" search icon. Below the title bar, there are two main panels: "Search" and "Create". The "Search" panel contains two links: "Search Products" and "Search Requested Products". The "Create" panel contains a link: "Request New Product". On the left side, there is a dark green navigation sidebar with the following menu items: "Home", "Worklist", "Business Partner", "Farm Records", "Acreage/Inventory...", "Product Master", and "Recent Items". The "Recent Items" section lists five entries: "44722", "6742 Farm 4174", "4138 John Farm in...", "13906", and "6584 Dixon Farms".

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

Search: Products



Search: Products

Search Criteria

Product Description is

Product ID is Choose the operator of this criterion

Intended Use is

CVS Crop & Type is

Land Use (FAV Status) is

Maximum Number of Results: 100

Search Clear Save Search As: Save

Result List

Product ID	Product Description	Product Type	Base Category	CVS Crop & Type	CVT Crop & Type
------------	---------------------	--------------	---------------	-----------------	-----------------

- Click Search Criteria dropdown.
- 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.

- As required, complete/review the following fields:

Field	R/O/C	Description
Product Description	R	Example: wheat

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

- Click Copy Line  button.

 Add a row to duplicate or add new search criteria.

8. **Click** Search Criteria dropdown list .

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

9. **Click** Remove Line  button.

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

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

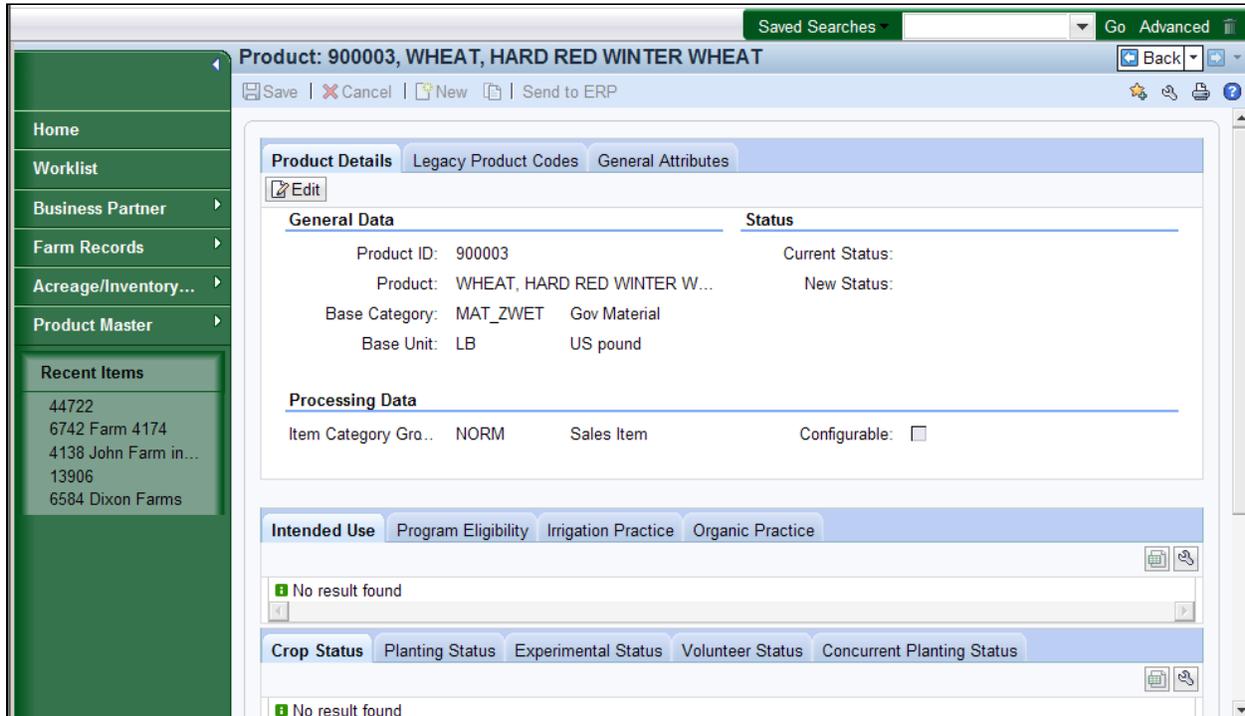
 You may need to cautiously increase the Maximum Number of Results to get a full search return.

11. **Press** "Return".

12. **Click** Search button.

13. **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

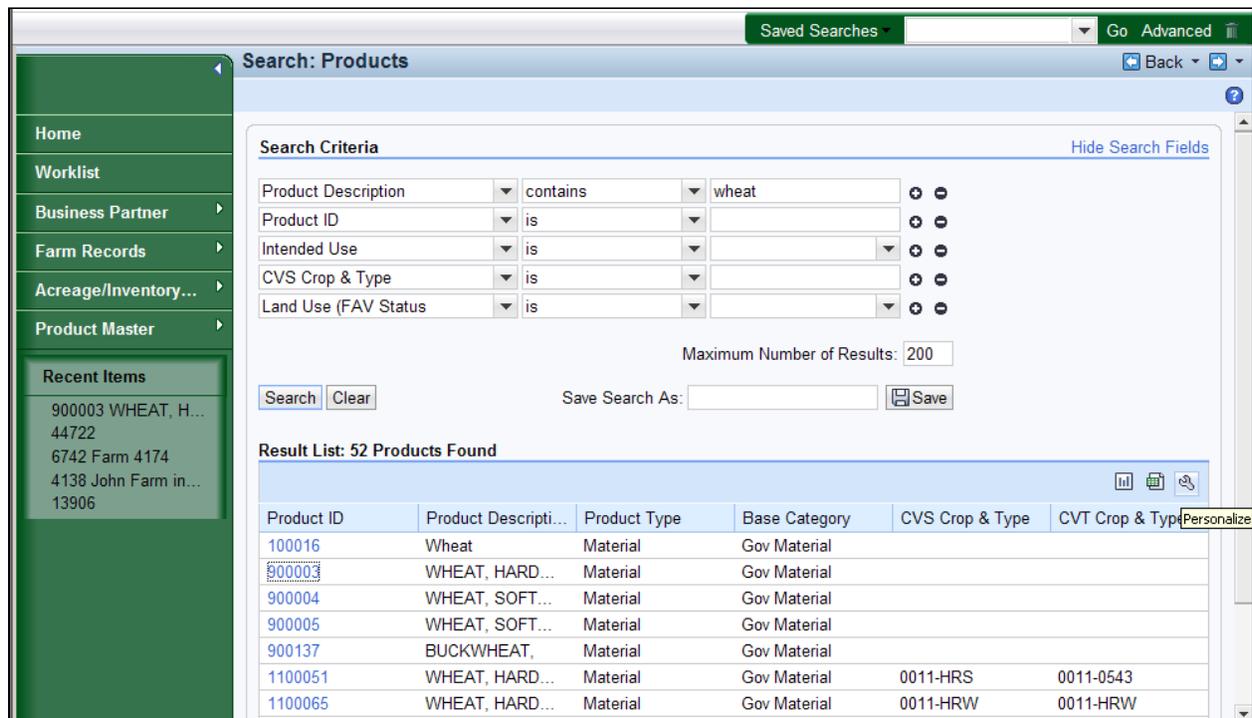
Crop Status | Planting Status | Experimental Status | Volunteer Status | Concurrent Planting Status

No result found

14. Click Back button  Back .

 Once selected, the record is available for Review

Search: Products



Search: Products

Search Criteria

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 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	

15. Click Personalize button.



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

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: [Standard View] ▼ Save As Delete

Table Navigation

Table Navigation: Scrolling Paging Both

Number of Visible Rows Before Scrolling:

Number of Rows Before Paging:

Available Columns

Name
Base Category ID
Base Unit ID
Base Unit
Item Category Group ID
Item Category Group
Division ID
Division
Configurable
Alternative ID Type
Select table row D

▶

◀

Displayed Columns

Up	Down	Name	Width
		Product ID	
		Product Description	
		Product Type	
		Base Category	
		CVS Crop & Type	
		CVT Crop & Type	

Save Reset to Default Cancel

16. Click Select table row D link.

17. Click add ▶ button.

18. Click Save Save button.

Search: Products

Search: Products Saved Searches ▾ Go Advanced 

[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:

Save Search As:

Result List: 52 Products Found   

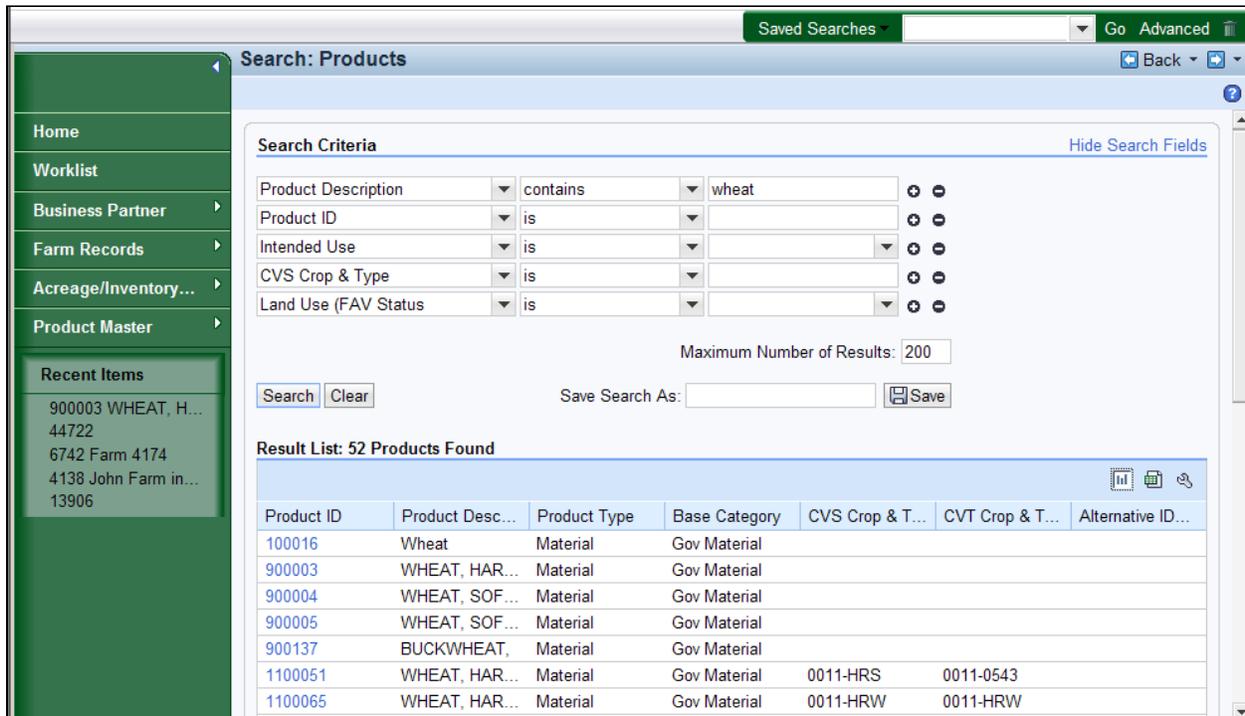
Product ID	Product Desc...	Product Type	Base Category	CVS Crop & T...	CVT Crop & T...	Altern 
100016	Wheat	Material	Gov Material			
900003	WHEAT, HAR...	Material	Gov Material			
900004	WHEAT, SOF...	Material	Gov Material			
900005	WHEAT, SOF...	Material	Gov Material			
900137	BUCKWHEAT,	Material	Gov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

19. Click Open/Close Chart  button.



Search Results may also be viewed as a chart.

Search: Products



Search: Products

Search Criteria

Product Description contains wheat

Product ID is

Intended Use is

CVS Crop & Type is

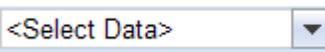
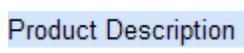
Land Use (FAV Status) is

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	

20. Scroll  to  the bottom of the display list.
21. Click Search: Products dropdown list .
22. 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



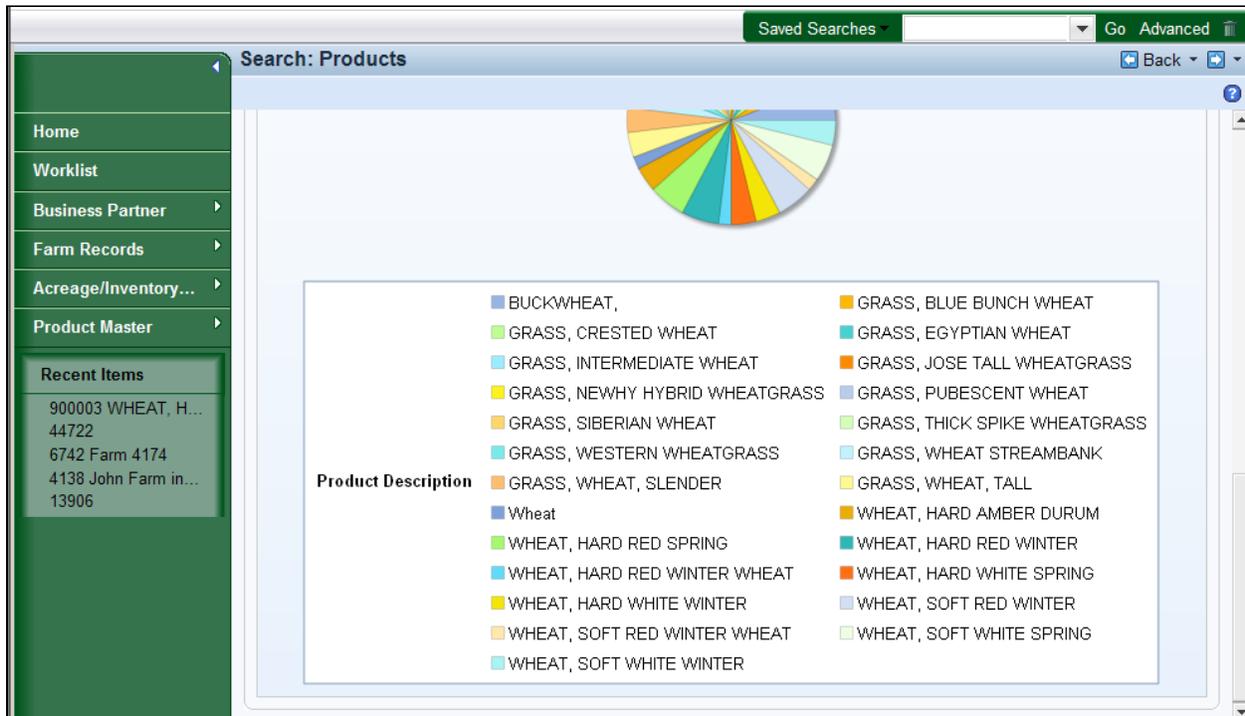
BUCKWHEAT, GRASS, BLUE BUNCH WHEAT
 GRASS, CRESTED WHEAT GRASS, EGYPTIAN WHEAT

23.

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

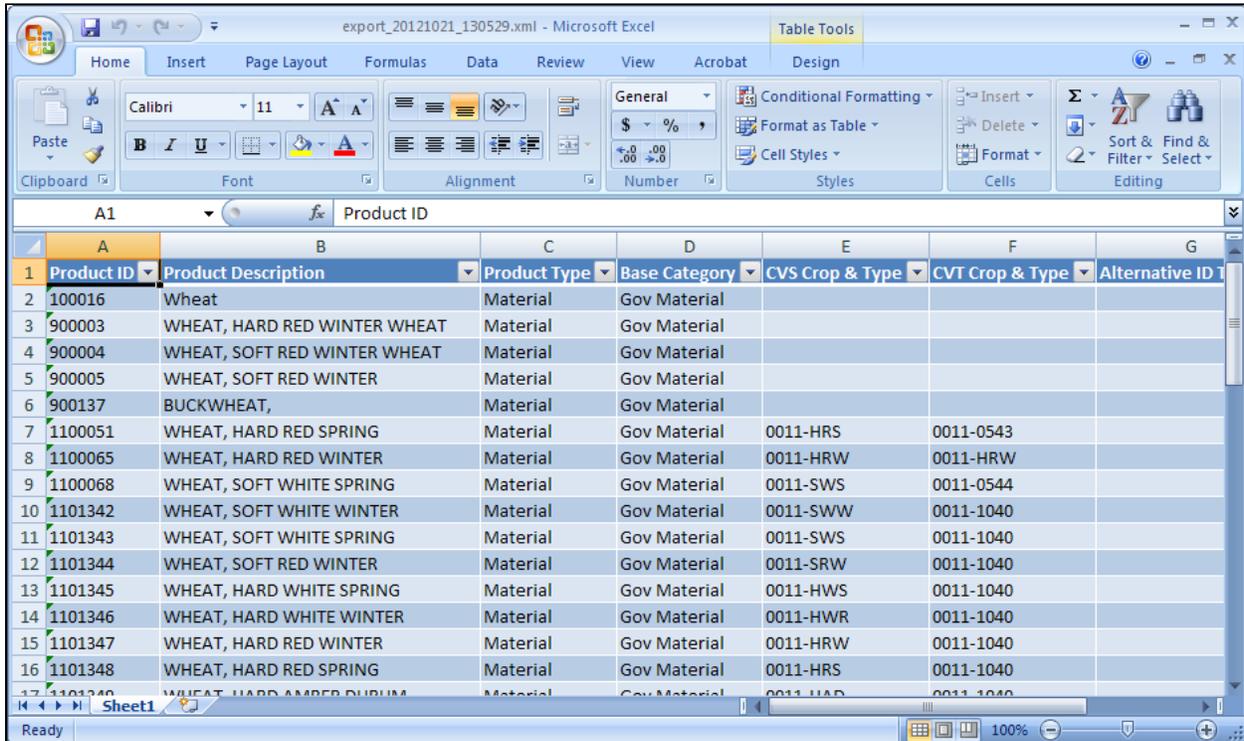
24. Scroll up  to  complete.

25. Click Close Chart  button.

26. Click  button.

 Search Results can be easily exported to an Excel spreadsheet.

Microsoft Excel - export_20121021_130529.xml

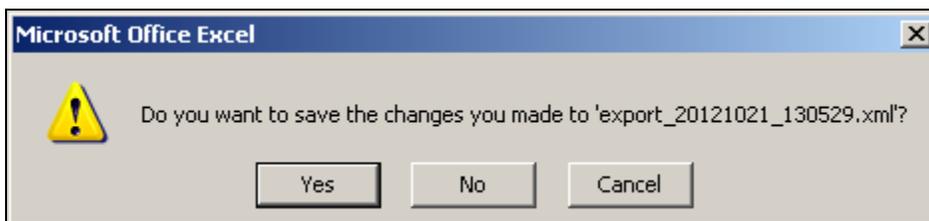


	A	B	C	D	E	F	G
1	Product ID	Product Description	Product Type	Base Category	CVS Crop & Type	CVT Crop & Type	Alternative ID
2	100016	Wheat	Material	Gov Material			
3	900003	WHEAT, HARD RED WINTER WHEAT	Material	Gov Material			
4	900004	WHEAT, SOFT RED WINTER WHEAT	Material	Gov Material			
5	900005	WHEAT, 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	

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

28. Click Close  button.

Microsoft Office Excel

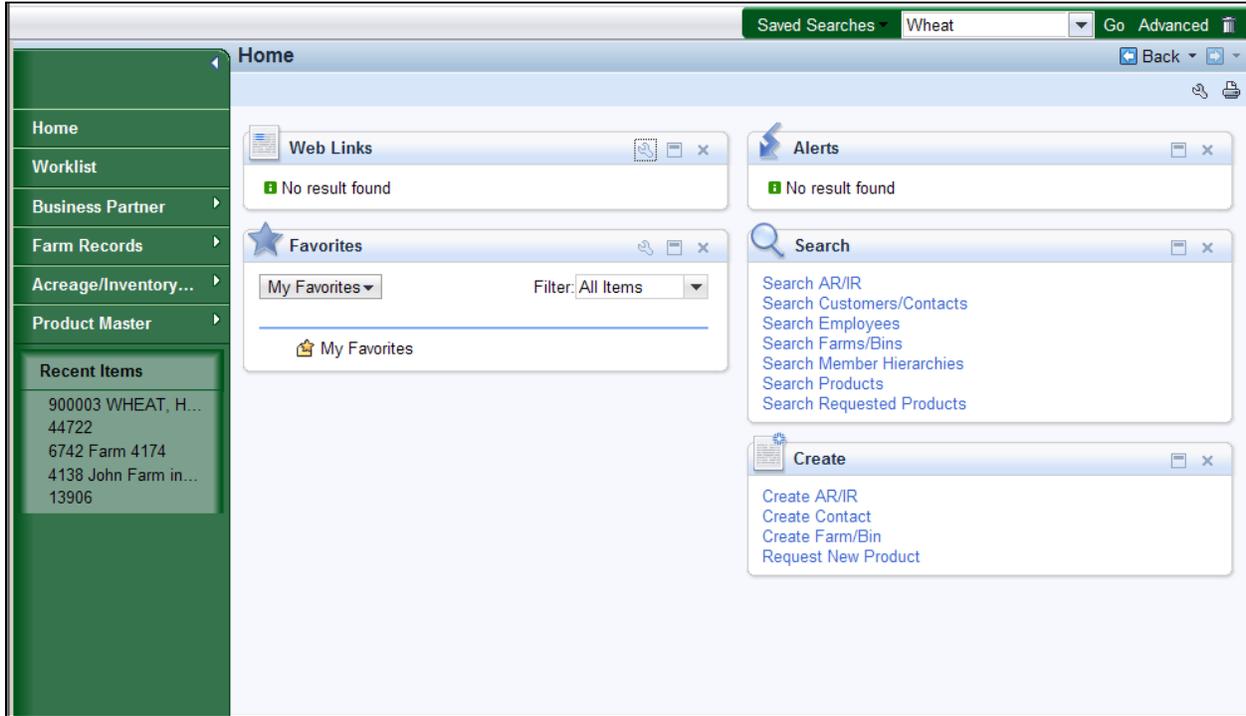


29. Click No  button.

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

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

Home



36. Click dropdown list

37. Click list item

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

38. Click Delete  button.

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

39. Click Home button.



Result

You have successfully completed a MIDAS CRM search.



Next Steps