

Purpose

The purpose of this Work Instruction is to demonstrate the alerts process in CRM Worklist and the Alerts assignment block.

Trigger

Business Partner or Farm Records alert appears in your worklist.

Helpful Hints

- Alerts must be processed from the CRM Worklist or the Alert assignment block on the CRM Homepage.
- "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

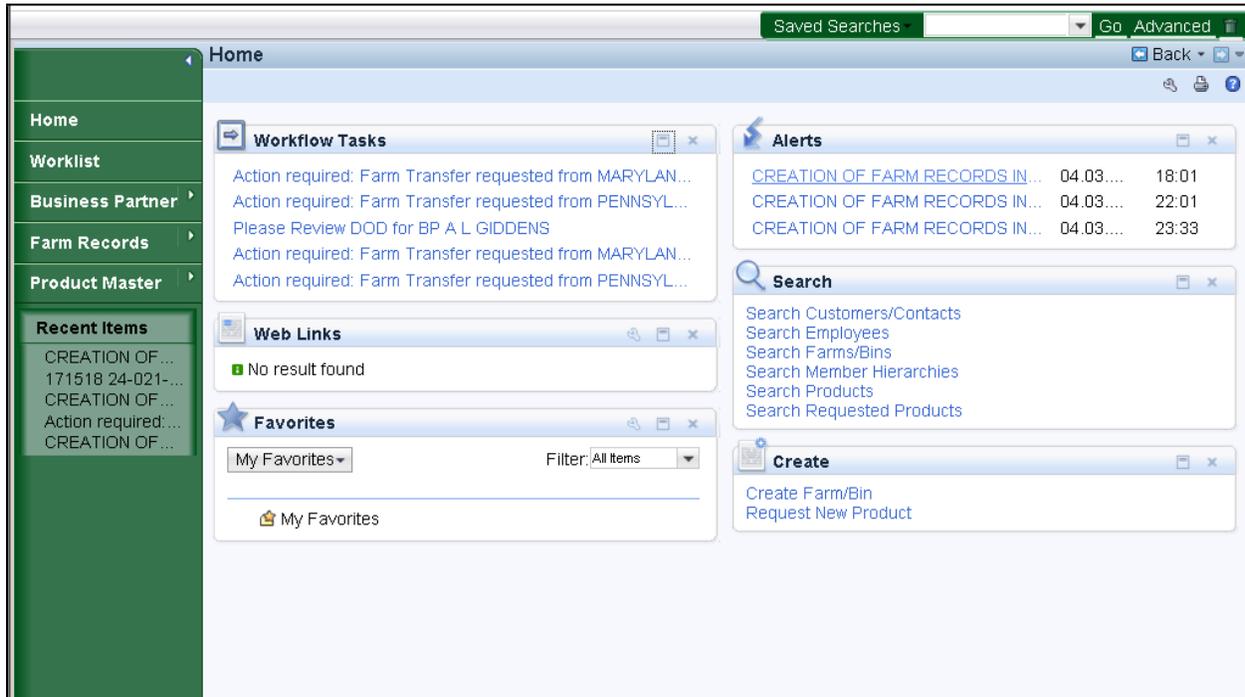


		organization due to an event in the procedure.
A reference is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

Procedure

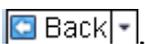
1. {Start the transaction from the MIDAS CRM Home Page.}

Home



2. Click CREATION OF FARM RECORDS IN NON ADMIN COUNTY (The triggering application determined you as a recipient) link
[CREATION OF FARM RECORDS IN...](#)

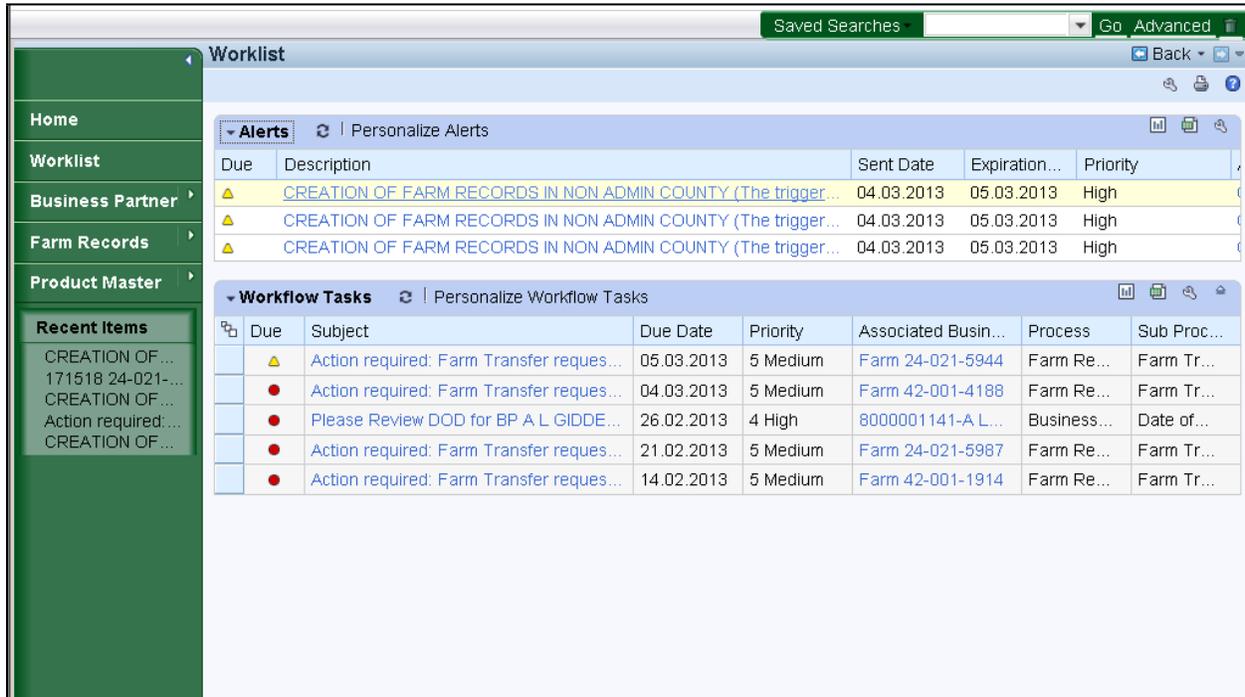
 Alerts can be processed from the Homepage Alerts assignment block or the Worklist.

3. Click the Back button .

 Select the Back button at the top of the screen or the Back link in the Alert Actions menu bar to return to the Alerts assignment block.

4. Click the Worklist  button.

Worklist



The screenshot shows the Worklist application interface. On the left is a navigation menu with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main content area is divided into two sections: Alerts and Workflow Tasks.

Alerts Section:

Due	Description	Sent Date	Expiration...	Priority
	CREATION OF FARM RECORDS IN NON ADMIN COUNTY (The trigger...	04.03.2013	05.03.2013	High
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	CREATION OF FARM RECORDS IN NON ADMIN COUNTY (The trigger...	04.03.2013	05.03.2013	High

Workflow Tasks Section:

Due	Subject	Due Date	Priority	Associated Busin...	Process	Sub Proc...
	Action required: Farm Transfer reques...	05.03.2013	5 Medium	Farm 24-021-5944	Farm Re...	Farm Tr...
	Action required: Farm Transfer reques...	04.03.2013	5 Medium	Farm 42-001-4188	Farm Re...	Farm Tr...
	Please Review DOD for BP A L GIDDE...	26.02.2013	4 High	8000001141-A L...	Business...	Date of...
	Action required: Farm Transfer reques...	21.02.2013	5 Medium	Farm 24-021-5987	Farm Re...	Farm Tr...
	Action required: Farm Transfer reques...	14.02.2013	5 Medium	Farm 42-001-1914	Farm Re...	Farm Tr...

- Click [CREATION OF FARM RECORDS IN NON ADMIN COUNTY \(The triggering application determined you as a recipient\)](#) link



Select the hyperlink in the Description column to access the Alert.



Alert: CREATION OF FARM RECORDS IN NON ADMIN COUNTY (The triggering application determined you as a recipient)

Alert: CREATION OF FARM RECORDS IN NON ADMIN COUNTY (The triggering application determined you as a recipient)

Back Complete Reject Forward To... Reserve

Alert Details

Description: CREATION OF FARM RECORDS IN NON ADMIN CC Escalated: No
 Status: Read Escalated To:
 Sent Date and Time: 04.03.2013 18:01 Escalated On:
 Expiration Date: 05.03.2013 18:01
 Priority: High

Description

Dear User,
 New Farm Record 342105 has been created for ADAMS COUNTY - PA. If you have any questions regarding this New Farm Record please contact Ramakrishna Vellanki.

Subsequent Actions

No result found

Recipients

Full Name	Reason
Ram Annadi	Ram Annadi (The triggering application determined you as a...

6. Click the Recipients **Recipients** button.
 - Click Recipients to expand the Assignment Block to view all recipients of the Alert.
7. Click the Recipients button **Recipients**.
8. Click the Reject **Reject** button
 - Click the Reject button to remove the Alert from your Worklist.



Worklist

Worklist

Alerts | Personalize Alerts

Due	Description	Sent Date	Expiration...	Priority
▲	CREATION OF FARM RECORDS IN NON ADMIN COUNTY (The trigger...	04.03.2013	05.03.2013	High
▲	CREATION OF FARM RECORDS IN NON ADMIN COUNTY (The trigger...	04.03.2013	05.03.2013	High

Workflow Tasks | Personalize Workflow Tasks

Due	Subject	Due Date	Priority	Associated Busin...	Process	Sub Proc...
▲	Action required: Farm Transfer reques...	05.03.2013	5 Medium	Farm 24-021-5944	Farm Re...	Farm Tr...
●	Action required: Farm Transfer reques...	04.03.2013	5 Medium	Farm 42-001-4188	Farm Re...	Farm Tr...
●	Please Review DOD for BP A L GIDDE...	26.02.2013	4 High	8000001141-A L...	Business...	Date of...
●	Action required: Farm Transfer reques...	21.02.2013	5 Medium	Farm 24-021-5987	Farm Re...	Farm Tr...
●	Action required: Farm Transfer reques...	14.02.2013	5 Medium	Farm 42-001-1914	Farm Re...	Farm Tr...

Recent Items

- CREATION OF ...
- 171518 24-021-...
- CREATION OF ...
- Action required:...
- CREATION OF ...

9. Click the Home **Home** button.



Result

You have successfully processed an alert in CRM.



Next Steps