Work with Trading Partner

Overview

Work with Trading Partner program allows you to create and maintain various attributes related to a trading partner. CRM functions available to this program are dependent on the User's Group security and CRM options in CRM Program Registration.

A trading partner can be filtered by the status or by Trading Partner Levels as defined in control file TMSFN/TP-TL1 to TMSFN/TP-TL5.

From the main Work with Trading Partner panel you can:

Add or maintain a new trading partner

Add or maintain the trading account details of a trading partner

Examples

This section illustrates examples concerning:

Example 1: Add a new Trading Partner and Trading Account details

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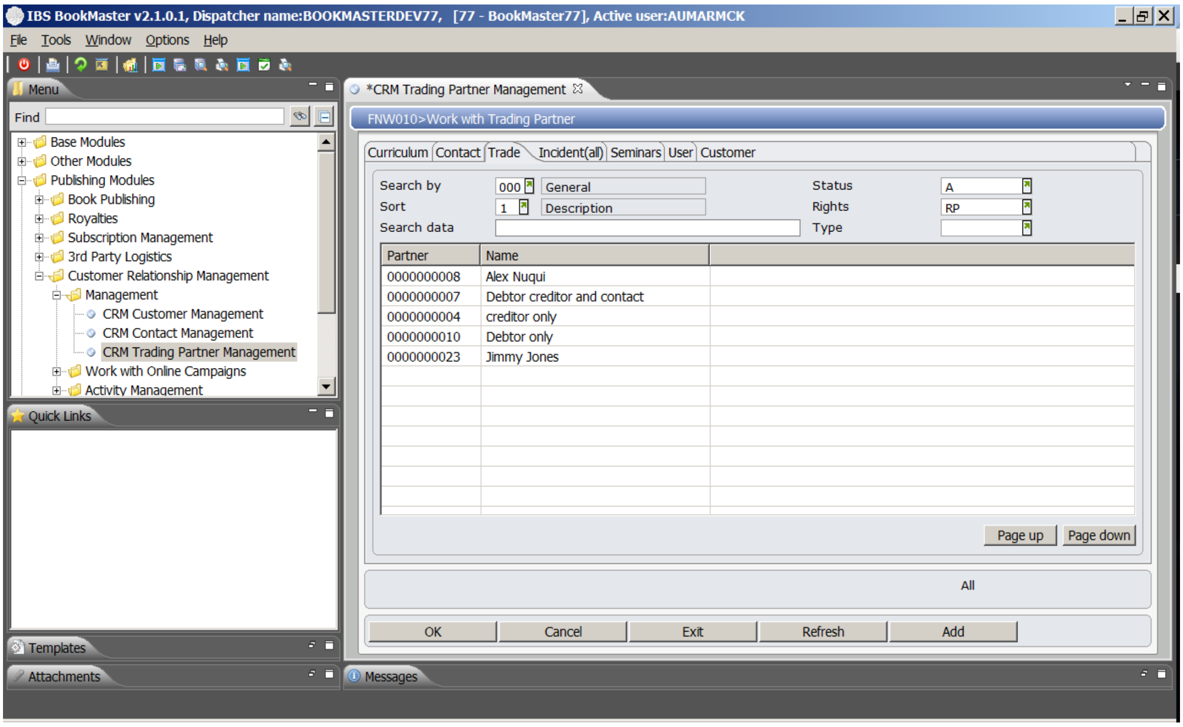
This example describes how to add a new Trading Partner and the trading account details for it.

1. Select option **CRM Trading Partner Management** from Publishing Modules>Customer Relationship Management>Management.

FNW010 Work with Trading Partner main panel is displayed.



Functions

Add — Allows you to add a new trading partner.

Note Tabs and Options available in *Work with Trading Partner* are dependent on the setup in CRM Program Registration and User's Group security. Please refer to CRM Program Registration document for information on setting these up.

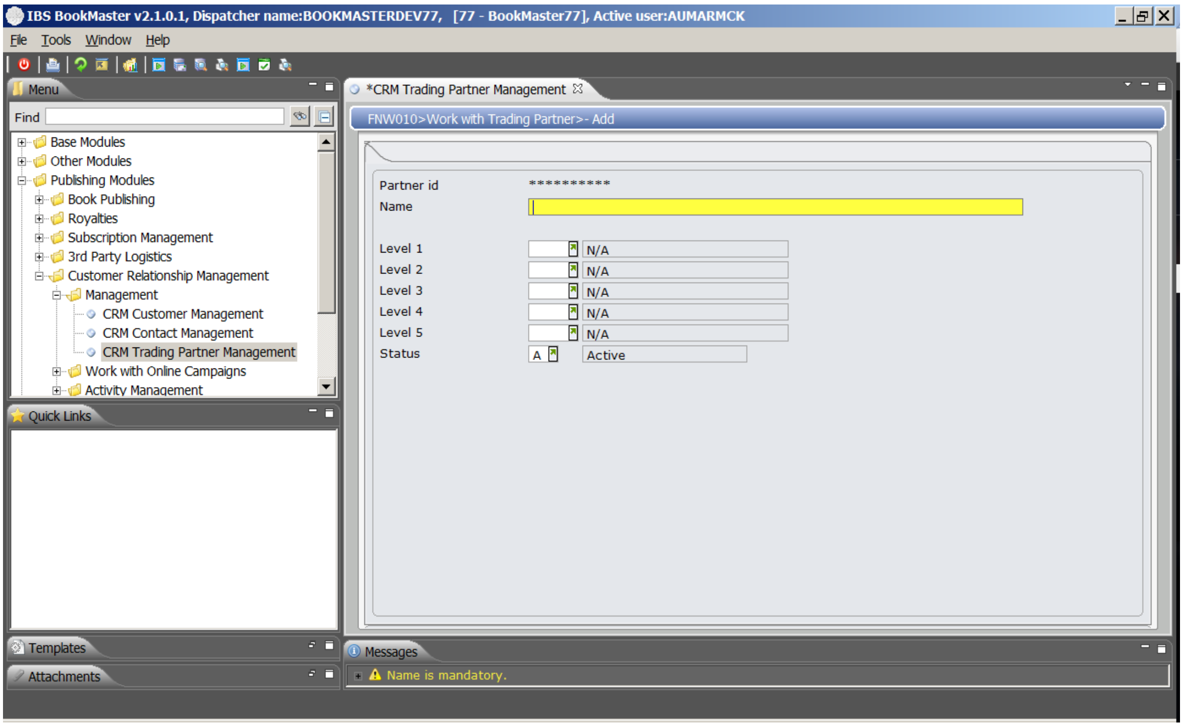
Options

Partner — Access Work with Trading Partner in change view to maintain the selected trading partner.

Accounts — Access FNW020 Trading Account in change view to maintain the trading accounts for the selected trading partner.

2. Click **Add** to add a new trading partner.

FNW010-Work with Trading Partner panel is displayed in Add view.

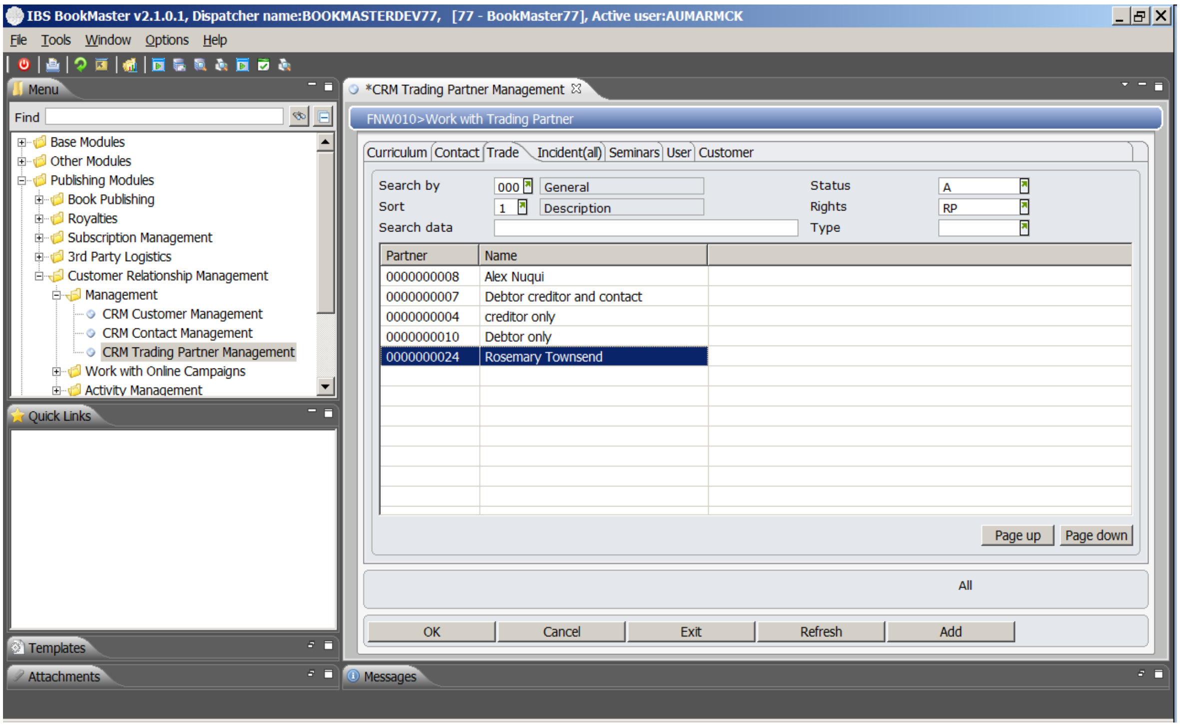


Relevant Fields

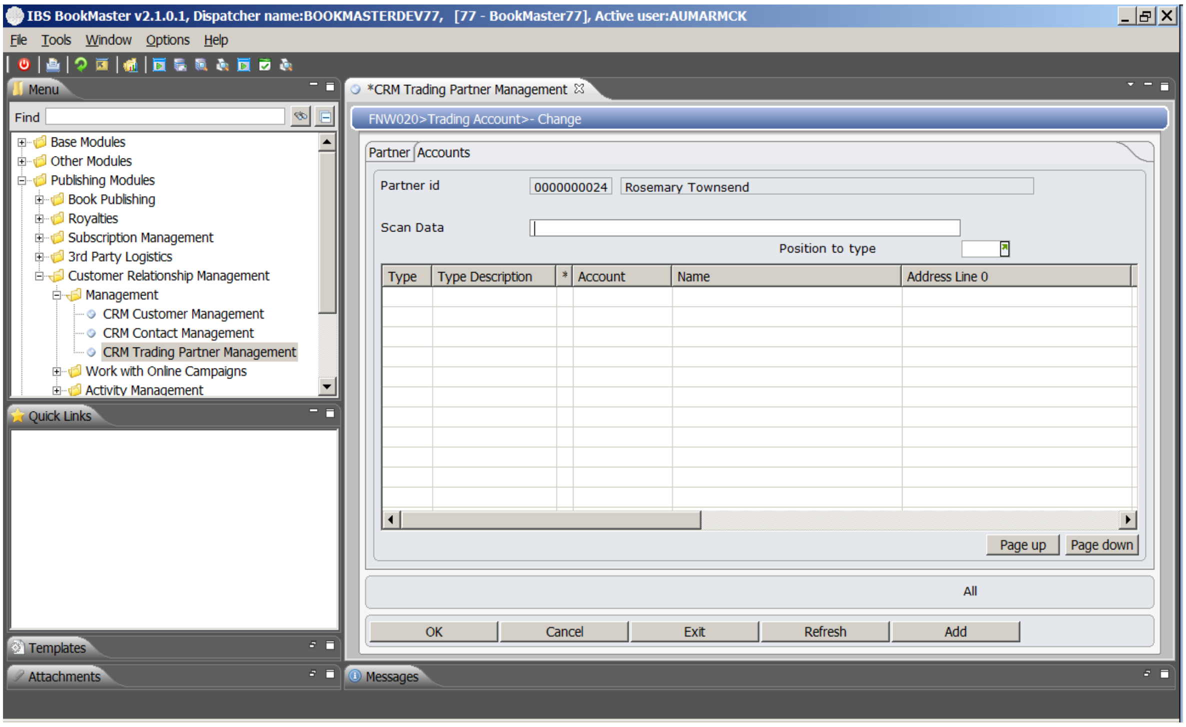
Partner ID	Partner ID is a 10 digit system generated ID for the trading partner. The setting for the ID is defined in control number field FN-TRDID.
Name	Trading Partner name; allows a maximum of 60 characters.
Level 1 - 5	These 5 levels are used to identify hierarchy levels of the trading partner and can be utilised in the filtering of the trading partners for selection. Control files TMSFN/TP-TL1 to TMSFN/TP-TL5 are used to maintain these settings.
Status	The status will default to Active for a new partner.

3. Enter the relevant information for the new trading partner.

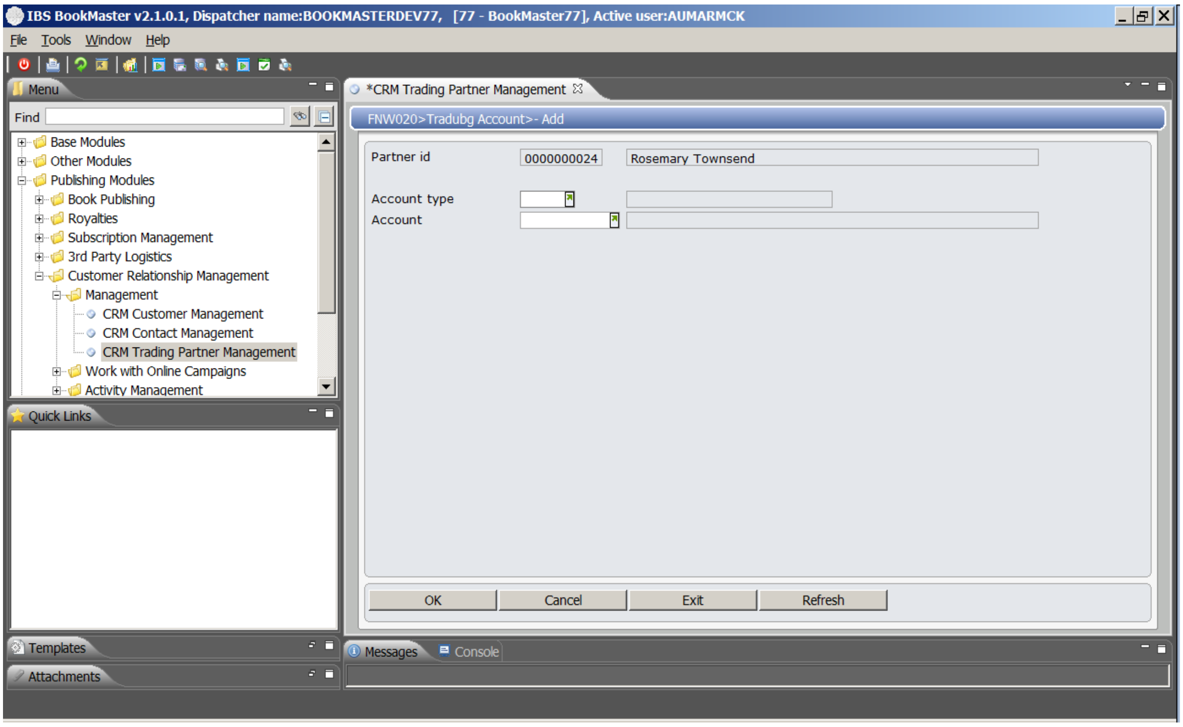
4. Click OK to save the new trading partner.



5. To add the trading account details for the newly created trading partner, right click on the trading partner and click on option Accounts.



6. Click Add to enter the account details for the trading partner.



Relevant Fields

Account type	Select from the dropdown menu the type of account being created. The account types defined in control file TMSFN/TL-TYP indicate if it is Contact, Creditor or Debtor.
Account	Use the dropdown menu to select an account for the selected account type or add a new account.

7. Click OK to save the account details.