## TMSD Work Management System Permanent Partner Creation Quick Card

## A. Create a New Organization

- 1. Use transaction VD01 (account group = "TMSD") and click on "Continue" (green check).
- 2. On the "Address" tab, enter only the organization or company information (telephone and fax numbers should be main/switchboard numbers, etc.).

|                      | Address Contact P   | erson                           |                 |
|----------------------|---------------------|---------------------------------|-----------------|
|                      | Verview             |                                 |                 |
|                      | Name                |                                 |                 |
|                      | Title               |                                 |                 |
|                      | Name                | Division 01                     |                 |
|                      |                     |                                 |                 |
|                      | Search Terms        |                                 | 1               |
|                      | Search term 1/2     | INTERNAL DIVISION               |                 |
|                      | Street Address      |                                 | Use the         |
| Lise the "PO Boy"    | Street/House number | Airport Drive 113 Suppl 100     | "Supplemental"  |
|                      | Postal Code/City    | 27932 Edenton                   | field for Ouite |
| tield for courier or | Country             | US USA Region NC North Carolina | field for Suite |
| MSC number           |                     |                                 | number/letter   |
|                      | PO Box Address      |                                 |                 |
|                      | PO Box              | 10-51-02                        |                 |
|                      | Postal code         |                                 |                 |
|                      |                     |                                 | _               |
|                      | Communication       |                                 |                 |
| Use dashes to        | Language            | English Dther communication     |                 |
| separate digits in   | Telephone           | 252-482-7977 Extension          |                 |
| the phone numbers    | Mobile Phone        |                                 |                 |
|                      | Fax                 | 252-482-8722 Extension 9        |                 |
| (no spaces and no    | E-Mail              |                                 |                 |
| parentheses)         | StandardComm.Mtd    |                                 |                 |
|                      | Comments            |                                 |                 |

3. Click on the "Save" button

## **B. Create a New Contact Person**

1. Use transaction VD02 and search for the desired organization/company by either the 5-digit customer number (A) or one of the search items (1 or 2) previously defined (B) or (C) such as "Internal" or "External".

|                                       | 🖙 Customer Change: Initial Screen |                        | ×                                    |                        |
|---------------------------------------|-----------------------------------|------------------------|--------------------------------------|------------------------|
|                                       | Customer 🛗 🗖                      |                        | Custom                               | er Number (A)          |
| Search Items (B)<br>from "binoculars" | Customer                          | Customer's sales areas | r (1)<br>Customers (by company code) | Customers by country/c |
| Postal Code/City                      |                                   |                        |                                      |                        |
| Country Region                        |                                   | Lustomer               |                                      |                        |
| ✓ ×                                   |                                   | Maximum No. of Hits    | 500                                  |                        |

## TMSD Work Management System Permanent Partner Creation Quick Card (continued)

2. Click on the "Contact Person" tab and enter the last name ("Name" column – include any suffixes, PE, etc., as appropriate) and first name ("First Name" column – include middle name/initial and/or nickname, as appropriate) of the contact person to be added, and double-click on the line.

| Addres  | S Contact Person |             |            |    |             |   |             |            |
|---|------------------|-------------|------------|----|-------------|---|-------------|------------|
| Contact Person /  |                  |             |            |    |             |   |             |            |
| Form of   | Name             | First name  | Telephone1 | De | Description | F | Description | Fax 🛄      |
| Mr.   | Edge, III, PE    | D.W. (Chad) |            |    |             |   |             | 2524828722 |
|   | Jennings, PE     | Jerry D.    |            |    |             |   |             |            |
|   |                  |             |            |    |             |   |             |            |
|   |                  |             |            |    |             |   |             |            |
|   |                  |             |            |    |             |   |             |            |
|   |                  |             |            |    |             |   |             |            |
|   |                  |             |            |    |             |   |             |            |
| Position: Name Department   |                  |             |            |    |             |   |             |            |
| 🕄 🖬 🗐 🗐 Home Address 🚰 Visiting Hours 🌮 Partner Function 🕈 Further Data |                  |             |            |    |             |   |             |            |

3. Enter the contact person's specific individual information and click on the "Back" button ( 😋 ).

|                     | Visiting Hours  | 💼 Business /   | Address           | 💼 Hom  | e Address     | Partner F | unctions   | Additional Data |  |  |
|---------------------|---|----------------|-------------------|--------|---------------|-----------|------------|-----------------|--|--|
|                     | Customer  | 53530          | Division          | 01     |               | E         | denton     |                 |  |  |
|                     | Contact person  | 0000071805     |                   |        | Gender        | un        | known 🗈    |                 |  |  |
|                     | Denartment  |                |                   |        | Date of hirth |           |            |                 |  |  |
|                     | Eunction  |                |                   |        | Marital Statu | <         | 1          |                 |  |  |
|                     | Power of att  |                |                   |        | marriar orato |           |            |                 |  |  |
|                     | Higher nartner  |                |                   |        |               |           |            |                 |  |  |
|                     | Ren number  |                |                   |        |               |           |            |                 |  |  |
|                     | Trop. Harrison  |                |                   |        |               |           |            |                 |  |  |
|                     | Call frequency  |                |                   |        | Advertisin    | g mat     |            |                 |  |  |
|                     | Buying habits   |                |                   |        |               |           |            |                 |  |  |
|                     | Remarks   |                |                   |        |               |           |            |                 |  |  |
| Lies the "Eurotion" | Preview   |                |                   |        |               |           |            |                 |  |  |
|                     | Person  |                |                   |        |               |           |            |                 |  |  |
| field for position  | Title   | Mr.            |                   |        |               |           |            |                 |  |  |
|                     | Last name   | Jennings, PE   |                   |        |               |           |            |                 |  |  |
|                     | Firstname   | Jerry D.       |                   |        |               |           |            |                 |  |  |
|                     | Academic Title  |                |                   |        |               |           |            |                 |  |  |
|                     | Format  | Jerry D. Jenni |                   |        |               |           |            |                 |  |  |
|                     | Function  | Division Engir | Division Engineer |        |               |           |            |                 |  |  |
|                     | Department  |                |                   |        |               |           |            |                 |  |  |
|                     | Room Number   |                | Floor             |        | E             | Juilding  |            | <b>N</b>        |  |  |
|                     |   |                |                   |        |               |           |            |                 |  |  |
|                     | Communication   | /              |                   |        |               |           |            |                 |  |  |
|                     | Language  | English        | ĩ                 | 1      |               | Other     | rcommunica | ition           |  |  |
|                     | Telephone   |                |                   | Extens | ion           |           |            | <b>-</b>        |  |  |
|                     | Mobile Phone  |                |                   |        |               |           |            | <b>\$</b>       |  |  |
|                     | Fax   |                |                   | Extens | ion           |           |            | <b>\$</b>       |  |  |
|                     | E-Mail  | jjennings@no   | :dot.gov          |        |               |           |            | <b>\$</b>       |  |  |
|                     | Comm. Meth  | E-Mail         | Ē                 | 1      |               |           |            |                 |  |  |
|                     |   |                |                   |        |               |           |            |                 |  |  |
|                     | Company   |                |                   |        |               |           |            |                 |  |  |
|                     | Division 01 / 113 Airport Drive, 100 / Edenton NC 27932 |                |                   |        |               |           |            |                 |  |  |
|                     |   |                |                   |        |               |           |            |                 |  |  |

- 4. Repeat Steps 2 and 3 for additional contact persons within the same organization/company or go to Step 5.
- 5. Click on the "Save" button ( $\blacksquare$ ).

NOTE 1 – User must have administrative privileges to use either transaction VD01 or VD02.

NOTE 2 – organization and/or contact person information can always be updated using transaction VD02.