RE80: Create Business Partner Transaction Guide

This guide shows you how to use transaction RE80 (Real Estate Navigator) create a Business Partner while processing an Architectural Object (e.g. Property). This procedure occurs as part of a range of other actions (e.g. creating or maintaining a property) and is to be used in conjunction with the transaction guides for the relevant action. Before creating a Business Partner you should always search to ensure that the one you are creating does not already exist.

Use either the quick-step procedure below or the detailed procedure which follows.

Access the transaction using either:

- transaction code **RE80**, or
- the menu path: **Real Estate Management** > **Master Data** > **RE Navigator**.

Quick-step procedure

Follow the steps below to complete this transaction.

Step	Action
1.	Click the **Partners** tab from within any create or change screen for an architectural object to open the Partners screen (e.g. the **Architect. Object Property** *<88******>* **Change**: **Partners** screen).
2.	Click the **Assign New Partner** icon.
3.	Select a type of business partner to add (e.g. Owner). **Result**: The **Business Partner Search** dialog box displays.
4.	Enter search criteria for the Business Partner in either the fields in the **Partner, General** section (e.g. Name 1/Last Nm) or **Address Data** section (e.g. Street).
5.	Press Enter to search, and: • review the available list in the **Restrict Value Range (2)** dialog box if this displays, or • check to see if the message 'No values found' displays in the bottom left-hand corner of the screen. **Note**: If the item you are seeking to create displays in the **Restrict Value Range (2)** dialog box, double-click on it to select it and refer to the relevant Transaction Guide for the next steps to follow.
6.	Click the **Create in Role** radio button and press Enter. **Result**: Either: • additional icons will display in the **Business Partner Search** dialog box, or • the **Restrict Value Range (2)** dialog box will display. If this does display, close it down and the additional icons will display in the **Business Partner Search** dialog box.
7.	Click either the **Person** or the **Organization** icon. (Select **Person** if the Business Partner is an individual person, for all other entities select **Organization**.) **Result**: The **Create <Person/Organization>**: **Role <role name>** screen displays.
8.	In the **Name** section of the **Address** tab, complete the following fields: • Title (e.g. Mr). • Name/Names/First Name/Last Name. **Note**: To add more **Name** fields, you can click the **Addit. Fields** icon.

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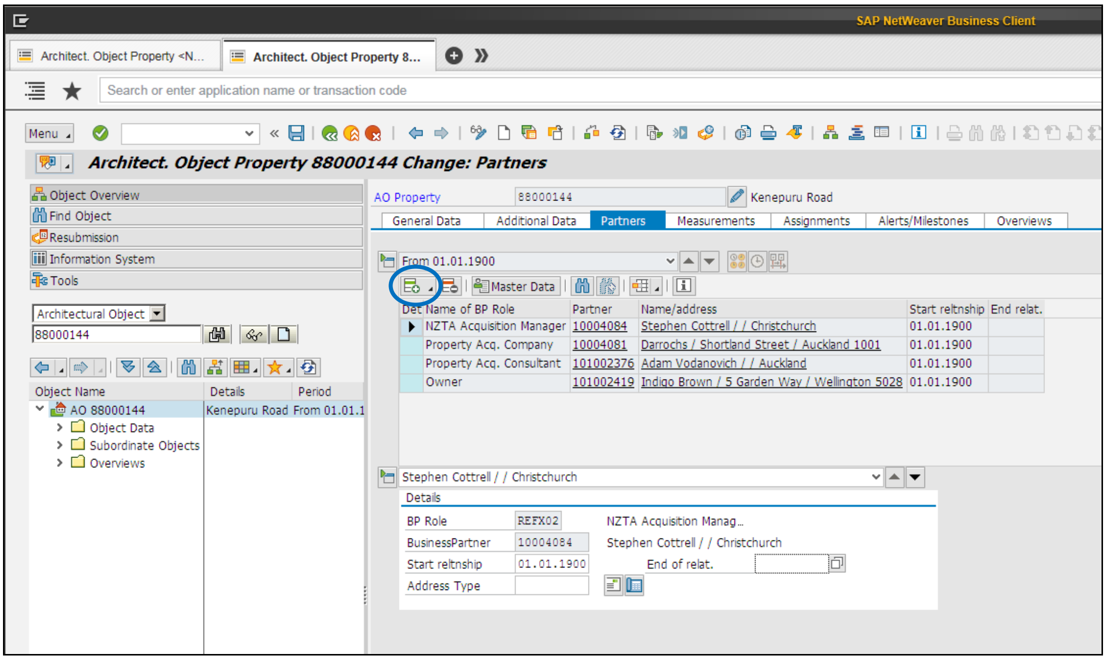
Step	Action
9.	Complete the Search Term 1/2 fields (e.g. Acme) in the **Search Term** section of the **Address** tab.
10.	In **Street Address** section of the **Address** tab, complete the following fields: • Street/House number (e.g. Magnate Crescent/4). • Postal Code/City (e.g. 6000/Wellington). • Country (e.g. NZ). **Note**: To add more **Address** fields, you can click the **More Fields** icon.
11.	In the **PO Box Address** section of the **Address** tab, complete the following fields: • PO Box (e.g. 5555). • Postal code (e.g. 1000). **Note**: To show a different city for a P.O. Box number, you can click the **More Fields** icon.
12.	In the **Communications** section of the **Address** tab, complete the following fields: • Telephone (e.g. 04 555 4000) and, if required, Extension (e.g. 1050). • Mobile Phone (e.g. 027 113332221111). • Fax (if required) • Email (e.g. Donald@Trump.com) • Standard Comm. Method (e.g. E-Mail). • Comments, if required.
13.	Click on the **Control** tab.
14.	Complete the Authorization Group field (e.g. 8800 for Property General) in the **Control Parameters** section of the **Control** tab.
15.	Click on the **Payment Transactions** tab, if bank details are required (e.g. if the Business Partner is required to pay, or will receive money). If no bank details are required, go to step 17.
16.	Complete the following columns in the **Bank Details** section of the **Payment Transactions** tab, if required: • ID (e.g. 01). • Ctry (e.g. NZ). • Bank key (e.g. 5554444). • Bank acct (e.g. 060554222). • Account Holder (e.g. Donald Trump). • Account Name (e.g. D Trump). **Note**: A Business Partner may have more than one bank account loaded, so each is given an ID. The ID of the bank account selected in the Lease agreement, is used to clear open items.
17.	Click **Back.** You will be returned to the architectural object that you were creating or maintaining. **Note**: The new business partner will not be allocated a number until the architectural object is saved. In the interim it will be numbered '##1'.

Detailed procedure

Follow the steps below to complete this transaction.

1. Click the **Partners** tab from within any create or change screen for an architectural object to open the Partners screen (e.g. the **Architect. Object Property** *<88******>* **Change**: **Partners** screen).

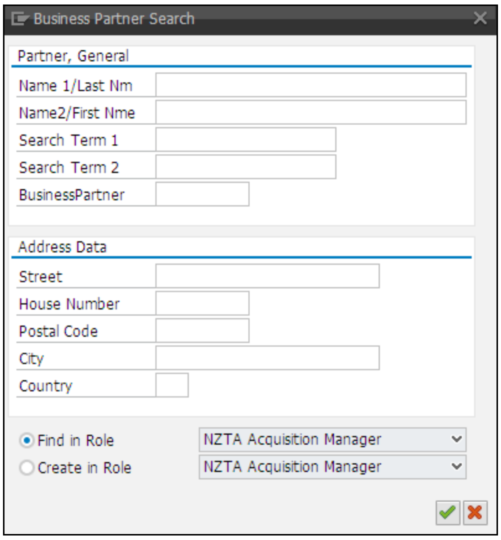


2. Click the **Assign New Partner** icon (circled above).

3. Select a type of business partner to add (e.g. Owner).

Result: The **Business Partner Search** dialog box displays.

4. Enter search criteria for the Business Partner in either the fields in the **Partner, General** section (e.g. Name 1/Last Nm) or **Address Data** section (e.g. Street).

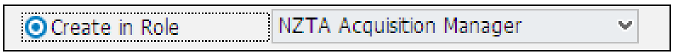


5. Press Enter to search, and:

   - review the available list in the **Restrict Value Range (2)** dialog box if this displays, or
   - check to see if the message ‘No values found’ displays in the bottom left-hand corner of the screen.

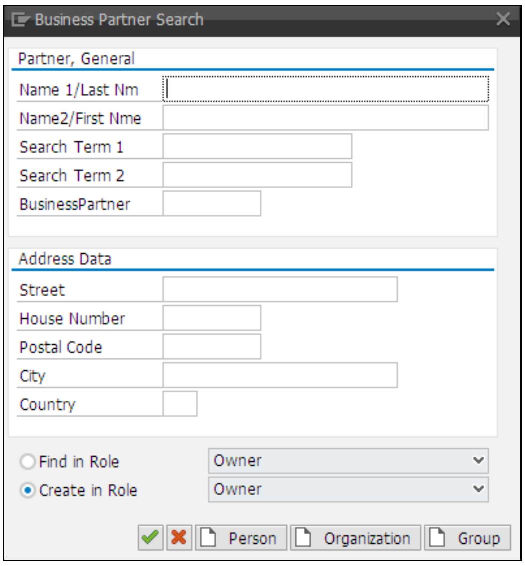
   Note: If the item you are seeking to create displays in the **Restrict Value Range (2)** dialog box, double-click on it to select it and refer to the relevant Transaction Guide for the next steps to follow.

6. Click the **Create in Role** radio button and press Enter.



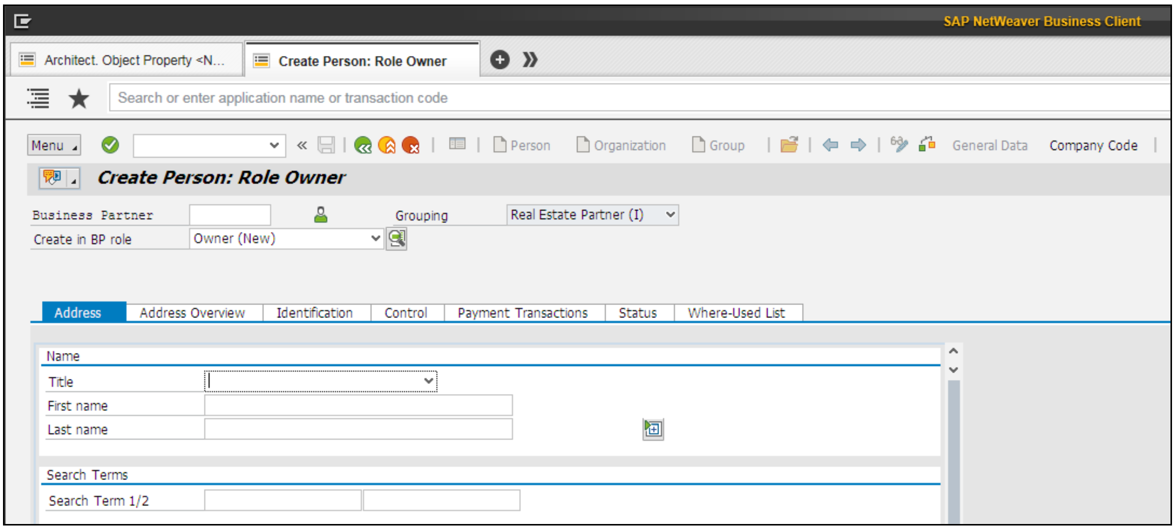
   Result: Either:

   - additional icons will display directly in the **Business Partner Search** dialog box, or
   - the **Restrict Value Range (2)** dialog box will display. If this does display, close it down and the additional icons will display in the **Business Partner Search** dialog box.



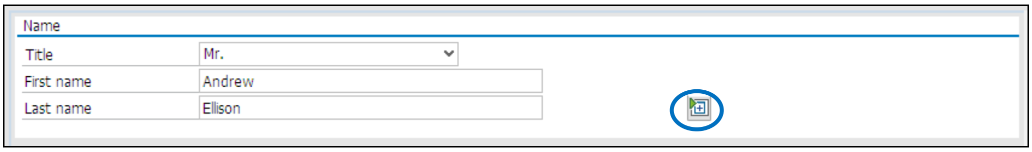
7. Click either the **Person** or the **Organization** icon. (Select **Person** if the Business Partner is an individual person, for all other entities select **Organization**.)

   Result: The **Create <Person/Organization>**: **Role <role name>** screen displays.



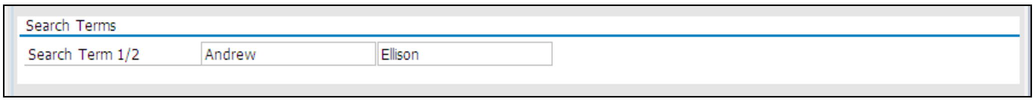
8. In the **Name** section of the **Address** tab, complete the following fields:

   - Title (e.g. Mr).
   - Name/Names/First Name/Last Name.



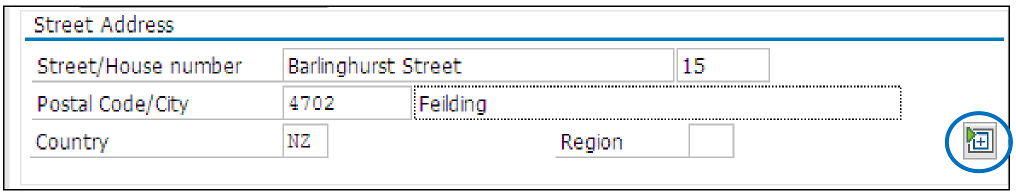
   Note: To add more Name field, you can click the **Addit. Fields** icon (circled above).

9. Complete the Search Term 1/2 fields (e.g. Acme) in the **Search Term** section of the **Address** tab:



10. In **Street Address** section of the **Address** tab, complete the following fields:

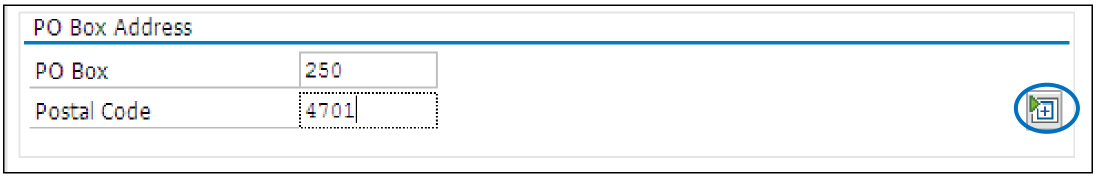
    - Street/House number (e.g. Magnate Crescent/4).
    - Postal Code/City (e.g. 6000/Wellington).
    - Country (e.g. NZ).



    Note: To add more Name field, you can click the **More Fields** icon (circled above).

11. In the **PO Box Address** section of the **Address** tab, complete the following fields:

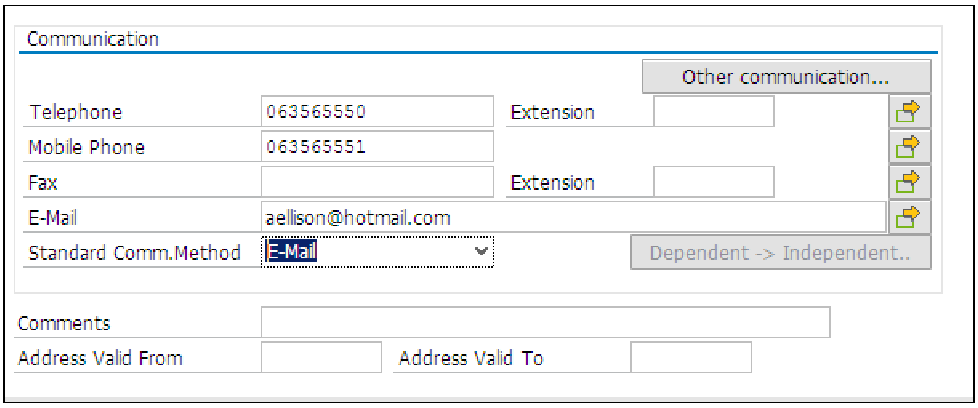
- PO Box (e.g. 5555).
- Postal code (e.g. 1000).



Note: To add more Name field, you can click the **More Fields** icon (circled above).

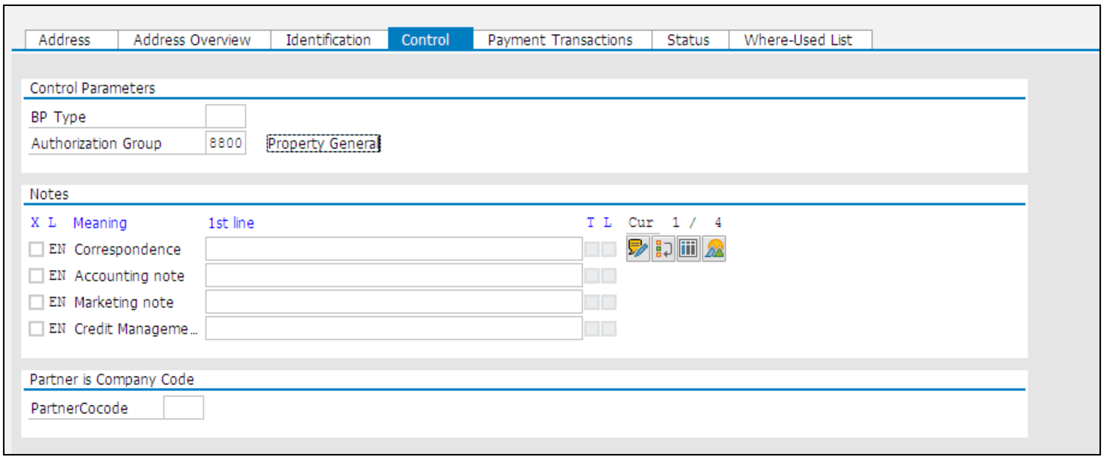
12. In the **Communications** section of the **Address** tab, complete the following fields:

- Telephone (e.g. 04 555 4000) and, if required, Extension.
- Mobile Phone (e.g. 027 113332221111).
- Fax (e.g. if known).
- Email (e.g. Donald@Trump.Com).
- Standard Comm. Method (e.g. E-Mail).
- Comments, if required.



13. Click on the **Control** tab.

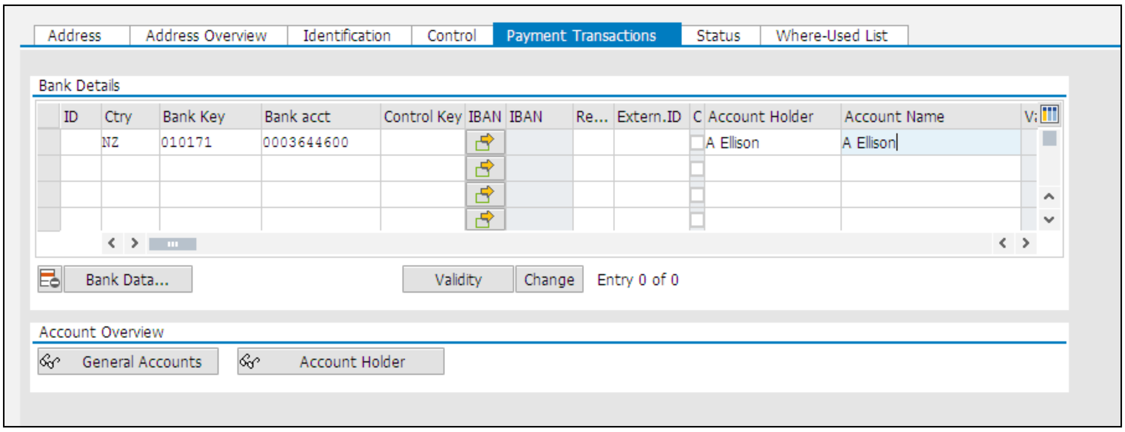
14. Complete the Authorization Group field (e.g. 8800 for Property General) in the **Control Parameters** section of the **Control** tab.



15. Click on the **Payment Transactions** tab.

16. In the **Payment Transactions** tab, **Bank Details** section, complete the following columns, if required:

    - Ctry (e.g. NZ).
    - Bank key (e.g. 5554444).
    - Bank acct (e.g. 060554222).
    - Account Holder (e.g. Donald Trump).
    - Account Name (e.g. D Trump).



Note: A Business Partner may have more than one bank account loaded, so each is given an ID. The ID of the bank account selected in the Lease agreement, is used to clear open items.

17. Click **Back**. You will be returned to the architectural object that you were creating or maintaining.

Note: The new business partner will not be allocated a number until the architectural object is saved. In the interim it will be numbered '##1'.