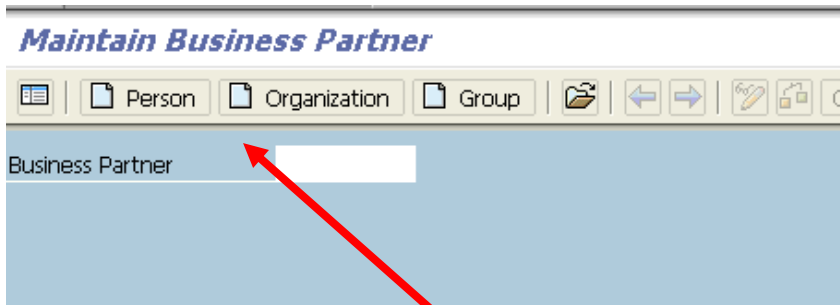


# Create a New Business Partner

Module: PSCD // Process: Data Structure Creation

Transactions Used: BP

**NOTE:** Prior to creating business partner, verify first that the business partner does not already exist in SAP by doing a search for the name or address.



## Overview

Business Partners are created for each utility licensee and franchisee, and for the individual contacts for these organizations. The business partner must be set up in SAP before an account can be created and billings and payments processed. Business partners are assigned roles based on how they will be used in the system. All business partners start with the General Business Partner role.

To create a business partner for licensee or franchisee, follow steps under A. To create a business partner to be used as a contact person, follow steps under B.

### A. Create Business Partners for licensees & franchisees

(To create business partners for contact persons, see B. below)

Licensees and franchisees will use their SAP customer number as their business partner number. Before setting up the business partner, find the appropriate customer number. If the customer number does not exist, create the customer record prior to creating the business partner.

1. Enter transaction code **BP**
2. Click on the type of business partner to be created—  
Person or Organization

# Create a New Business Partner

Module: PSCD // Process: Data Structure Creation

Transactions Used: BP

**Create Organization**

Person | Organization | Group | General Data

Business Partner: 577775 | Grouping: ZCUS Customer

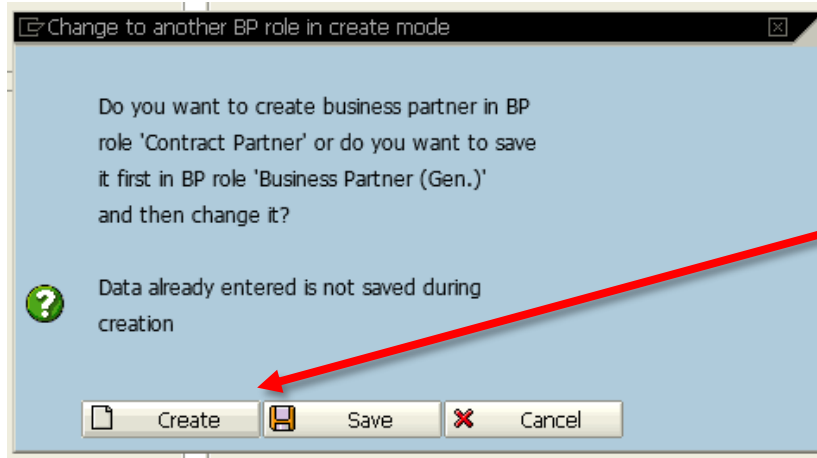
Create in BP role: MKK Contract Partner

## A. Create Business Partners for licensees & franchisees (cont.)

3. Complete the following:

- Business Partner: Enter the appropriate customer number
- Grouping: ZCUS Customer
- Create in BP role: MKK Contract Partner (New)

4. The following pop-up will appear; select *Create*.



# Create a New Business Partner

Module: PSCD // Process: Data Structure Creation

Transactions Used: BP

The screenshot shows the SAP Business Partner creation interface. The top navigation bar includes tabs for Address, Address Overview, Identification, Control, Payment Transactions, Status, and Wh. The main form is divided into several sections:

- Name:** Fields for Title, Name (containing "Communications Company"), and Salutation.
- Search Terms:** A field for Search Term 1/2.
- Standard Address:** Includes a "Print Preview" button and fields for Street Address (House no./street: 100 SE Main St, City/State/ZIP Code: Portland OR 97202, Country: US USA, Time zone, and Tax Jurisdiction: OR0000000).
- PO Box Address:** Fields for PO Box (12345), Postal Code (97203), and Company Postal Code.
- Communication:** Fields for Language (EN English), Telephone, Mobile Phone, Fax, E-Mail, and Standard Comm.Method. It also includes buttons for "Other Communication...", "Extension", and "Dependent -> Independent..".

## A. Create Business Partners for licensees & franchisees (cont.)

5. Complete the following:

- Name (line one)
- Name (line two if necessary)
- House no./street
- City/State/ZIP Code
- Tax Jurisdiction: Should always be OR0000000
- PO Box (if necessary)

### Communication section:

- Language: EN

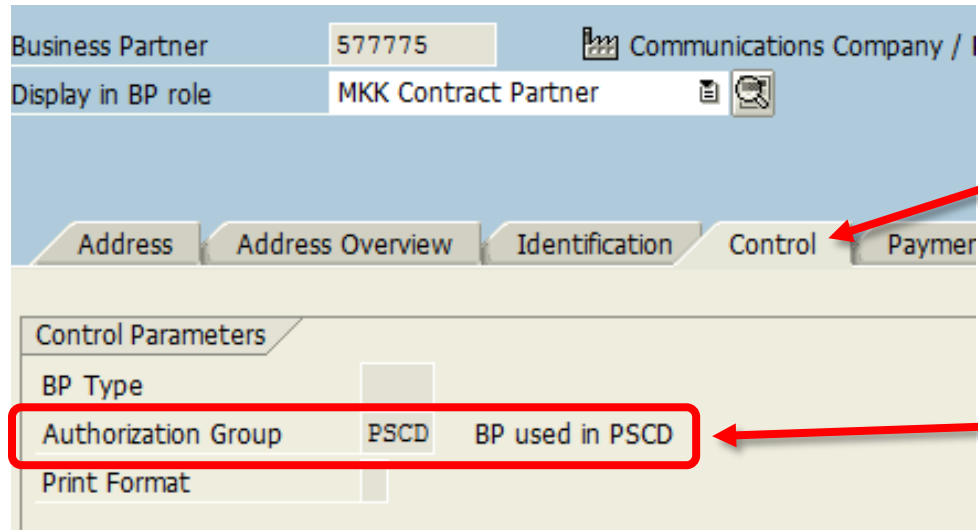
### Address-Independent Communication:

- Telephone information
- E-Mail
- Standard Communication Method: INT E-Mail

# Create a New Business Partner

Module: PSCD // Process: Data Structure Creation

Transactions Used: BP



The screenshot shows the SAP Business Partner control tab. At the top, the Business Partner number is 577775 and the company is Communications Company / I. The display role is MKK Contract Partner. Below the navigation tabs (Address, Address Overview, Identification, Control, Paymer), the Control Parameters section is visible. The 'Authorization Group' field is highlighted with a red box and contains the value 'PSCD'. To its right, the text 'BP used in PSCD' is displayed. Other fields include 'BP Type' and 'Print Format'.

## A. Create Business Partners for licensees & franchisees (cont.)

6. Click on the Control tab.

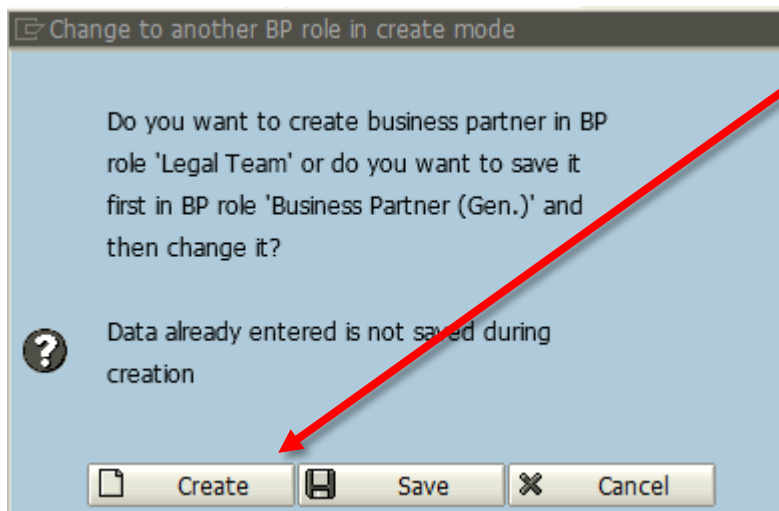
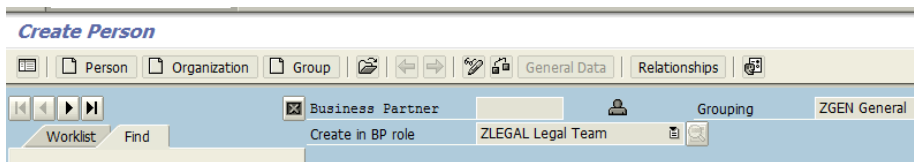
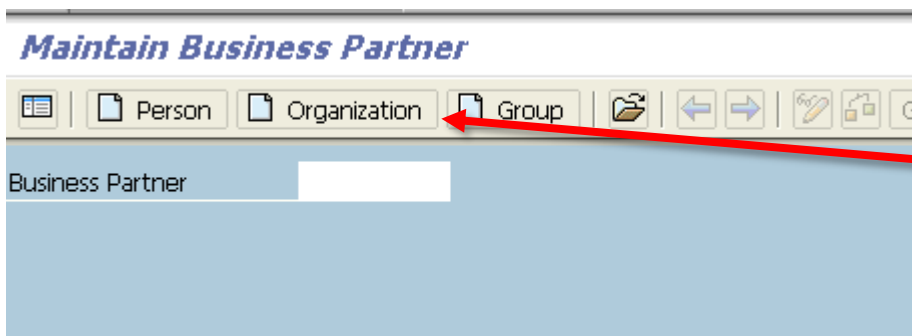
7. Enter the Authorization Group: PSCD

8. Click Save 

# Create a New Business Partner

Module: PSCD // Process: Data Structure Creation

Transactions Used: BP



## B. Create Business Partners for contact person

1. Enter transaction code **BP**
2. Click on the type of business partner to be created—Person or Organization
3. Complete the following:
  - Business Partner: Leave blank
  - Grouping: ZGEN General
  - Create in BP role: Select the appropriate role from drop-down list
  - Examples:
    - ZLEGAL Legal Team
    - ZTHIRD Third party preparer
    - ZWLCTR Wireless contractor
4. The following pop-up will appear; select *Create*:

# Create a New Business Partner

Module: PSCD // Process: Data Structure Creation

Transactions Used: BP

The screenshot displays the SAP Business Partner creation interface, specifically the 'Address' tab. The form is organized into several sections:

- Street Address:** Fields for House no./street, City/State/ZIP Code, Country (US, USA), Time zone (CST), and Tax Jurisdiction.
- PO Box Address:** Fields for PO Box and ZIP Code.
- Communication:** Fields for Telephone, Mobile Phone, Fax, and E-Mail, each with an Extension field and a right-pointing arrow. A 'Standard Comm.Method' dropdown is set to 'Dependent -> Independent..'. There is also an 'Other communication...' button.
- Comments:** A text area for additional notes.
- Validity Dates:** 'Address Valid From' (08/06/2015) and 'Address Valid To' (12/31/9999).
- External Address No.:** A field for an external reference number.
- Address-Independent Communication:** Fields for Telephone (503-111-2222), Mobile Phone, Fax, and E-Mail (joan.martin@portlandoregon.gov), each with an Extension field and a 'Ctry US' dropdown. A 'Standard Comm.Method' dropdown is set to 'INT E-Mail'.

## B. Create Business Partners for contact person

5. Complete the following:

- Name (Organization) line one
- Name (Organization) line two
- First name (Person)
- Last name (Person)
- Address-Independent Communication
- Telephone information
- E-Mail
- Standard Communication Method: INT E-Mail or LET Post (Letter)

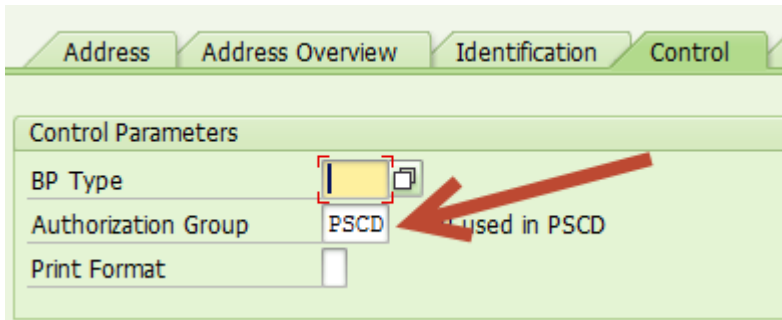
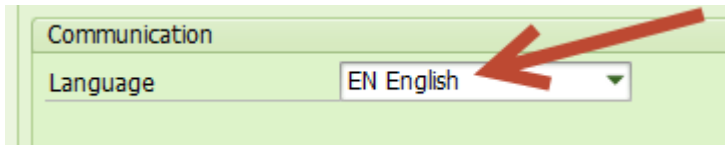
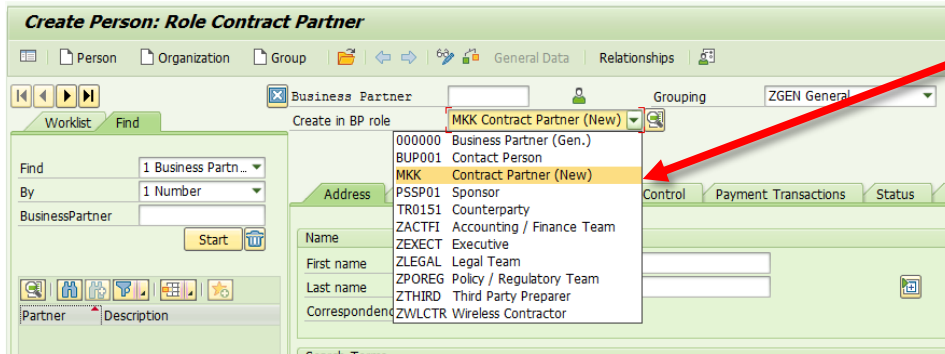
6. Click Save button and notate assigned BP #.


# Create a New Business Partner

Module: PSCD // Process: Data Structure Creation

Transactions Used: BP

## B. Create Business Partners for contact person



7. If the contact person will be an additional or alternative correspondence recipient, Contract Partner role will need to be assigned as well following the below steps
  - a) Click the change button 
  - b) Click to open the drop down list in "Create in BP role" field.
  - c) Click to select the MKK Contract Partner
  - d) Click "Create" in the pop up window
  - e) Verify that "Contract Partner (New)" is showing up in the Create in BP role field.
  - f) Select "English" in the Language field. The Language field is under Name Section for Persons and under Communication section for Organizations.
  - g) Click on the Control tab. Input "PSCD" in the Authorization Group field.
  - h) Click Save.
  - i) Message displays: *Changes have been saved.*