



**Purpose**

The purpose of this work instruction is to show how to display the details of a customer business partner.

**Trigger**

Perform this procedure when a review of customer business partner components is required.

**Prerequisites**

- The customer record must be saved in MIDAS CRM.

**Helpful Hints**

- The information in some of the assignment blocks (tabs) will differ if the customer is an organization instead of an individual.
- "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 <b>general</b> 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 <b>cautionary</b> note		Use this note to communicate to the end-user of something that <b>MUST</b> be completed or another trigger that should be started and is related to the procedure.
A <b>critical</b> note		Use this note to specify something that <b>MUST NOT</b> be done during the



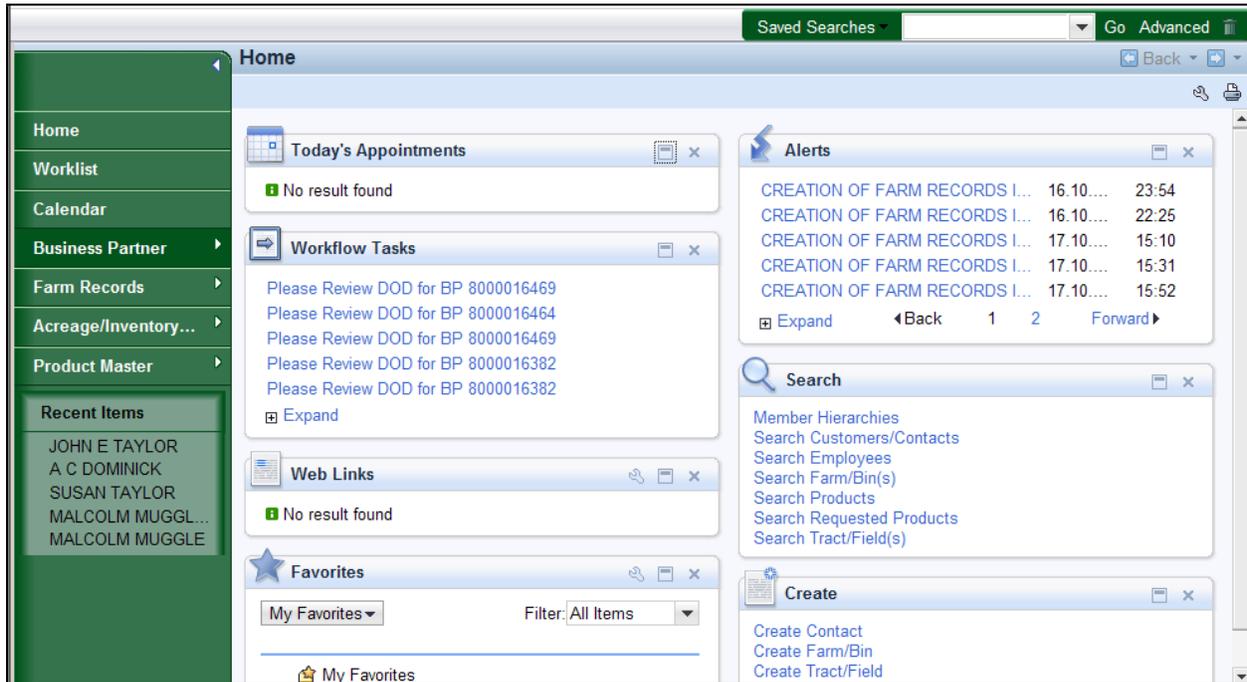
		procedure.
<b>Contact</b> someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A <b>reference</b> is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.



**Procedure**

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

**Home**



2. Click the **Business Partner** button Business Partner to go to the Accounts page.



## Accounts

3. Click the **Search Customers/Contacts** label [Search Customers/Contacts](#) to go to the Search: Customers page.

## Search: Customers



- As required, complete/review the following fields:

Field	R/O/C	Description
First Name	R	<b>Example:</b> John
Last Name	R	<b>Example:</b> Taylor

- Click the **Search** button [Search](#) to display the search results.

### Search: Customers

The screenshot shows the 'Search: Customers' interface. The search criteria are set to 'All Accounts'. The search results show a single entry for 'JOHN E TAYLOR' with BP Number 8000001960 and address 5678 E CHURCH ST, FREDERICK, Maryland, 21701.

- Select the Common Customer Name from the Result List (John E) [JOHN E](#) to go to the Customer: XXXX (Customer Details) page.



## Customer: XXXX (Customer Details)

**Customer: JOHN E TAYLOR**

Save | Cancel | New | Fact Sheet | More

Customer Details | Customer Profile | Roles | Identification Numbers

Edit

General Data	Main Address and Communication Data
Current Role: Individual	Information Line:
BP Number /ID: 8000001960	Street/House Num.: 5678 E CHURCH ST
Prefix:	PO Box:
First Name: JOHN	City: FREDERICK
Middle Name: E	State: MD Maryland
Last Name: TAYLOR	ZIP Code: 21701
Suffix:	Country: US USA
Last Name at Birth: TAYLOR	Telephone Number: 7013419976
Legal Name: Yes	E-Mail Address: JTaylorNSPI@gmail.com
Common Custome... JOHN E TAYLOR	Communication M. E-Mail
Language Preferen.. English	
Data Origin:	
MAL Loan Violation: 0	
Employee Type: Not an employee (default)	
Tax ID Type: Social Security Number	

- Click the **Customer Profile** tab **Customer Profile** to go to the Customer: XXXX (Customer Profile) page.



**Customer Details** - is divided into two parts: (1) General Data with the customer's name and tax ID; Main Address and Communication Data with the customer's address, phone, and email.



### Customer: XXXX (Customer Profile)

**Customer: JOHN E TAYLOR**

Save | Cancel | New | Fact Sheet | More

Customer Details | **Customer Profile** | Roles | Identification Numbers

[Edit](#)

Gender: Male      Gender Determinat..: Customer Declared  
 Birth Date: 12.05.1980      Birth Date Determi..: Customer Declared  
 Marital Status: Unknown N/A      Veteran: Unknown  
 Citizen Country: USA  
 Ethnicity: Not Hispanic or Latino      Ethnicity Determin..: Customer Declared  
 Resident Alien: Not Applicable      Deceased Flag:   
 Date of Death:

**Mail Indicators**

RMA Mail Indicator:       NRCS Mail Indicator:   
 RD Mail Indicator:       FSA Mail Indicator:

**Race**

Ac...	Race	Race Determination
	White - Origins in original peoples of Europe, the Middl...	Self Declared(Customer)

8. Scroll down to see the remain information.



**Customer Profile** - contains gender, birth date, marital status, ethnicity information as well as Date of Death.



## Customer: XXXX (Customer Profile)

Customer: JOHN E TAYLOR

Date of Death:

**Mail Indicators**

RMA Mail Indicator:  NRCS Mail Indicator:   
 RD Mail Indicator:  FSA Mail Indicator:

**Race**

Ac...	Race	Race Determination
	White - Origins in original peoples of Europe, the Middl...	Self Declared(Customer)

**Disability**

Ac...	Disability Type	Disability Determination
	No handicap	Self Declared(Customer)

**Control Flags**

Archive:   
 Inactive:

Addresses | Address Types | Address Independent Communication Numbers | Address Independent E-Mails

9. Scroll to the top of the page.



**Customer Profile** also includes Race and Disability information.

10. Click the **Roles** tab **Roles** to go to the Customer: XXXX (Roles) page.



**Customer: XXXX (Roles)**

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Customer Details | Customer Profile | **Roles** | Identification Numbers

Role	Valid From	Valid To	Changed By	Changed Date	Changed Time
Individual	19.09.2012	31.12.9999	Bruce Jackson	19.09.2012	18:41

Control Flags

Archive:   
Inactive:

Addresses | Address Types | Address Independent Communication Numbers | Address Independent E-Mails

New | History Data

Ac...	Address	Telephone/Ext.	Mobile	E-Mail
	5678 E CHURCH ST / FREDERICK...	+1 (7013419976)		
	1432 WYLON RD / FREDERICK...			

Representative Capacity | Relationships | Member Signatures

New | History Data

Actions	Relationship	Authorized Signatory	Status	Effective D...	Revoke...
	Is Guardianship	TOMMY TAYLOR		03.10.2012	31.12.9...

11. Click the **Identification Numbers** tab **Identification Numbers** to go to the Customer: XXXX (Identification Numbers) page.

 **Roles** - provides information the customer's current role and any past roles.



**Customer: XXXX (Identification Numbers)**

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Customer Details | Customer Profile | Roles | **Identification Numbers**

New | Edit List

Ac...	ID Type Description	ID Number	Valid From	Valid To
	SCIMS Core Customer ID	7201155	01.10.2011	31.12.9999

Control Flags

Archive:   
Inactive:

Addresses | Address Types | Address Independent Communication Numbers | Address Independent E-Mails

New | History Data

Ac...	Address	Telephone/Ext.	Mobile	E-Mail
	5678 E CHURCH ST / FREDERICK...	+1 (7013419976)		
	1432 WYLON RD / FREDERICK...			

Representative Capacity | Relationships | Member Signatures

New | History Data

Actions	Relationship	Authorized Signatory	Status	Effective D...	Revoke...
	Is Guardianship	TOMMY TAYLOR		03.10.2012	31.12.9...

12. Click the Control Flags tab **Control Flags**.



**Identification Numbers** - lists alternate Identification numbers from other systems or sources like SCIMS, Dun & Bradstreet Core Customer ID, or Surrogate ID.



### Customer: XXXX (Control Flags)

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Customer Details | Customer Profile | Roles | **Identification Numbers**

New | Edit List

Ac...	ID Type Description	ID Number	Valid From	Valid To
	SCIMS Core Customer ID	7201155	01.10.2011	31.12.9999

**Control Flags**

Archive:

Inactive:

Addresses | Address Types | Address Independent Communication Numbers | Address Independent E-Mails

New | History Data

Ac...	Address	Telephone/Ext.	Mobile	E-Mail
	5678 E CHURCH ST / FREDERICK...	+1 (7013419976)		
	1432 WYLON RD / FREDERICK...			

**Representative Capacity** | Relationships | Member Signatures

New | History Data

Actions	Relationship	Authorized Signatory	Status	Effective D...	Revoke...
	Is Guardianship	TOMMY TAYLOR		03.10.2012	31.12.9...

- Click the **Addresses** tab **Addresses** to go to the Customer: XXXX (Addresses) page.



#### Control Flags

- Archived - stored but cannot be reactivated
- Inactive - stored and can be reactivated



### Customer: XXXX (Addresses)

**Customer: JOHN E TAYLOR**

Save | Cancel | New | Fact Sheet | More

Customer Details | Customer Profile | Roles | **Identification Numbers**

Ac...	ID Type Description	ID Number	Valid From	Valid To
	SCIMS Core Customer ID	7201155	01.10.2011	31.12.9999

Control Flags

Archive:   
Inactive:

**Addresses** | Address Types | Address Independent Communication Numbers | Address Independent E-Mails

Ac...	Address	Telephone/Ext.	Mobile	E-Mail
	5678 E CHURCH ST / FREDERICK...	+1 (7013419976)		
	1432 WYLON RD / FREDERICK...			

Representative Capacity | Relationships | Member Signatures

Actions	Relationship	Authorized Signatory	Status	Effective D...	Revoke...
	Is Guardianship	TOMMY TAYLOR		03.10.2012	31.12.9...

- Click **Address Types** tab **Address Types** to go to the Customer: XXXX (Address Types) page.



**Addresses** - lists all the addresses associated with the customer.



## Customer: XXXX (Address Types)

The screenshot shows the software interface for Customer: JOHN E TAYLOR. The left sidebar contains navigation options: Home, Worklist, Calendar, Business Partner, Farm Records, Acreage/Inventory..., Product Master, and Recent Items (listing JOHN E TAYLOR, A C DOMINICK, SUSAN TAYLOR, MALCOLM MUGGL..., and MALCOLM MUGGLE). The main content area has tabs for Customer Details, Customer Profile, Roles, and Identification Numbers. The Identification Numbers tab is active, showing a table with one entry: SCIMS Core Customer ID 7201155, Valid From 01.10.2011, Valid To 31.12.9999. Below this is the Control Flags section with Archive and Inactive checkboxes. The next section is Addresses, with the Address Types sub-tab active. It shows a table with two entries: Standard Address (5678 E CHURCH ST / FREDERICK MD 21701) and Shipping Address (1432 WYLON RD / FREDERICK MD 21701). Below that is the Representative Capacity section with tabs for Relationships and Member Signatures. The Member Signatures tab is active, showing a table with one entry: Is Guardianship TOMMY TAYLOR, Effective D... 03.10.2012, Revoke... 31.12.9...

### 15. Click the **Address Independent Communication Numbers** tab

**Address Independent Communication Numbers** to go to the Customer: XXXX (Address Independent Communication Numbers) page.

 **Address Types** - list of addresses associated with the customer by the address type (Billing, Mailing, Primary, Shipping, Standard, Street). The Primary address includes the Congressional Voting District.



## Customer: XXXX (Address Independent Communication Numbers)

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Customer Details | Customer Profile | Roles | **Identification Numbers**

New | Edit List

Ac...	ID Type Description	ID Number	Valid From	Valid To
	SCIMS Core Customer ID	7201155	01.10.2011	31.12.9999

Control Flags

Archive:   
Inactive:

Addresses | Address Types | **Address Independent Communication Numbers** | Address Independent E-Mails

Edit List

Ac...	Type	Country	Number	Extension	Do Not...	Standard	State	County
	Telephone	US	7013419976		<input type="checkbox"/>	<input checked="" type="checkbox"/>		
	Mobile Phone	US	7014433232		<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Representative Capacity | Relationships | Member Signatures

New | History Data

Actions	Relationship	Authorized Signatory	Status	Effective D...	Revoke...
	Is Guardianship	TOMMY TAYLOR		03.10.2012	31.12.9...

16. Click the **Representative Capacity** tab **Representative Capacity** to go to the Customer: XXXX (Representative Capacity) page.

**Address Independent Communication Numbers** - phone numbers associated with the customer. **Address Independent E-Mails** - list customer emails.



## Customer: XXXX (Representative Capacity)

Customer: JOHN E TAYLOR

Addresses | Address Types | Address Independent Communication Numbers | **Address Independent E-Mails**

Ac... | E-Mail | Standard

JTaylorNSPI@gmail.com

**Representative Capacity** | Relationships | Member Signatures

New | History Data

Actions	Relationship	Authorized Signatory	Status	Effective D...	Revoke...
	Is Guardianship	TOMMY TAYLOR		03.10.2012	31.12.9...
	Has Spousal...	SUSAN TAYLOR		20.09.2012	31.12.9...
	Is FSA Power...	WYLON FARMS	Active(Approved)	10.10.2012	31.12.9...

**Program Participation** | Associated Counties | FLP Customer

Edit

Ac...	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	FREDRICK COUNTY OF...	Has interest in the program	Currently enrolled and pa...
	FARM LOAN PROGRAM...	FREDRICK COUNTY OF...	Has interest in the program	Not currently participating

**Member Share Percentage**

Member share history

- Click the **Relationships** tab **Relationships** to go to the Customer: XXXX (Relationships) page.

**Representative Capacity** - lists the fiduciary relationships a customer is partner to. Shown here the customer "Is" the guardian for customer Tommy Taylor. The customer's wife "Has" Spousal Signature authority and can sign for her husband.



## Customer: XXXX (Relationships)

Customer: JOHN E TAYLOR

Addresses | Address Types | Address Independent Communication Numbers | Address Independent E-Mails

Relationships

Relationship	Fullname	Valid From	Valid To
Family Member	SUSAN TAYLOR	19.09.2012	31.12.9999
Family Member	LARRY TAYLOR	19.09.2012	31.12.9999
Family Member	TOMMY TAYLOR	03.10.2012	31.12.9999

Program Participation

Customer Type	Organization Name	General Program Interest	Current Participant
FSA CUSTOMER	FREDRICK COUNTY OF...	Has interest in the program	Currently enrolled and pa...
FARM LOAN PROGRAM...	FREDRICK COUNTY OF...	Has interest in the program	Not currently participating

- Click the **Edit** icon  on the Family Member Relationship to be reviewed to go to the Customer: XXXX (Relationships) page.

 **Relationships** - provide information on relationship links between multiple Business Partners.



## Customer: XXXX (Relationships)

Customer: JOHN E TAYLOR

Relationships

Relationship: Family Member

Type of relationship: Spouse of Family Members

Business Partner: SUSAN / FREDERICK MD 21701

BP Number/ID: 8000001961

Valid from: 19.09.2012

Valid To: 31.12.9999

Recent Items:

- JOHN E TAYLOR
- A C DOMINICK
- SUSAN TAYLOR
- MALCOLM MUGGL...
- MALCOLM MUGGLE

19. Click the **Back** button to go to the Customer: XXXX (Relationships) page.

**Relationships** - shows the details for the relationship (our customer is married to Susan Taylor)



**Customer: XXXX (Relationships)**

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Addresses | Address Types | Address Independent Communication Numbers | **Address Independent E-Mails**

Ac... | E-Mail | Standard

JTaylorNSPI@gmail.com

Representative Capacity | **Relationships** | Member Signatures

New

Ac...	Relationship	Fullname	Valid From	Valid To
	Family Member	SUSAN TAYLOR	19.09.2012	31.12.9999
	Family Member	LARRY TAYLOR	19.09.2012	31.12.9999
	Family Member	TOMMY TAYLOR	03.10.2012	31.12.9999

Program Participation | Associated Counties | FLP Customer

Edit

Ac...	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	FREDRICK COUNTY OF...	Has interest in the program	Currently enrolled and pa...
	FARM LOAN PROGRAM...	FREDRICK COUNTY OF...	Has interest in the program	Not currently participating

Member Share Percentage

Member share history

20. Click the **Program Participation** tab **Program Participation** to go to the Customer: XXXX (Program Participation) page.



## Customer: XXXX (Program Participation)

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Addresses | Address Types | Address Independent Communication Numbers | **Address Independent E-Mails**

Ac...	E-Mail	Standard
JTaylorNSPI@gmail.com		<input checked="" type="checkbox"/>

Representative Capacity | **Relationships** | Member Signatures

New

Ac...	Relationship	Fullname	Valid From	Valid To
	Family Member	SUSAN TAYLOR	19.09.2012	31.12.9999
	Family Member	LARRY TAYLOR	19.09.2012	31.12.9999
	Family Member	TOMMY TAYLOR	03.10.2012	31.12.9999

**Program Participation** | Associated Counties | FLP Customer

Edit

Ac...	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	FREDRICK COUNTY OF...	Has interest in the program	Currently enrolled and pa...
	FARM LOAN PROGRAM...	FREDRICK COUNTY OF...	Has interest in the program	Not currently participating

**Member Share Percentage**

Member share history

- Click the **Associated Counties** tab **Associated Counties** to go to the Customer: XXXX (Associated Counties) page.



**Program Participation** - contains program participation and legacy link information.



**Customer: XXXX (Associated Counties)**

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Addresses | Address Types | Address Independent Communication Numbers | **Address Independent E-Mails**

Edit List

Ac...	E-Mail	Standard
JTaylorNSPI@gmail.com		<input checked="" type="checkbox"/>

Representative Capacity | **Relationships** | Member Signatures

New

Relationship	Fullname	Valid From	Valid To
Family Member	SUSAN TAYLOR	19.09.2012	31.12.9999
Family Member	LARRY TAYLOR	19.09.2012	31.12.9999
Family Member	TOMMY TAYLOR	03.10.2012	31.12.9999

Program Participation | **Associated Counties** | FLP Customer

Edit

Ac...	Address	State	County
	5678 E CHURCH ST / FREDERICK...	Maryland	Frederick

Member Share Percentage

Member share history

Hierarchy Node	Description	Valid From	Valid To	Share Percentage	Account share Status	Determination Date	Posit
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22. Click the **FLP Customer** tab **FLP Customer** to go to the Customer: XXXX (FLP Customer) page.

 **Associated Counties** - Lists addresses and counties associated with the customer. Associated Counties was previously called Legacy Link (in SCIMS).



**Customer: XXXX (FLP Customer)**

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Addresses | Address Types | Address Independent Communication Numbers | **Address Independent E-Mails**

Edit List

Ac...	E-Mail	Standard
JTaylorNSPI@gmail.com		<input checked="" type="checkbox"/>

Representative Capacity | **Relationships** | Member Signatures

New

Ac...	Relationship	Fullname	Valid From	Valid To
	Family Member	SUSAN TAYLOR	19.09.2012	31.12.9999
	Family Member	LARRY TAYLOR	19.09.2012	31.12.9999
	Family Member	TOMMY TAYLOR	03.10.2012	31.12.9999

Program Participation | Associated Counties | **FLP Customer**

Edit

Ac...	Geographic State	Geographic County	Service Center
	MARYLAND	FREDERICK	FREDRICK COUNTY OFFICE

Member Share Percentage

Member share history

Hierarchy Node	Description	Valid From	Valid To	Share Percentage	Account share Status	Determination Date	Posit
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23. Scroll to the bottom of the page.



**FLP Customer** - contains FLP program participation information.



## Customer: XXXX (Attachments)

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Attachments

Folder | Attachment | URL | With Template | More

Name	Type	Created By	Created On
No result found			

Change History

User	Date	Time	Table	Field	Old Value	New Value	Table...	Obj...	Key...
Bruce J...	17...	14:11	ZTAB000...		24	*** Created ***	24	00...	
Bruce J...	17...	14:09	ZTAB000...		10000172	*** Created ***	100...	00...	
Bruce J...	17...	14:04	ZTAB000...		10000193	*** Created ***	100...	00...	
Bruce J...	17...	14:04	ZTAB000...		10000192	*** Created ***	100...	00...	
Bruce J...	17...	14:00	ADRU	Table for...		*** Created ***		80...	

Expand | Page 1 | Back | 1 | 2 | 3 | 4 | 5 | Forward | 26

24. Click the **Change History** tab **Change History** to the Customer: XXXX (Change History) page.

 **Attachments** - lists the documents attached to the customer record whether directly or through a fiduciary relationship.



## Customer: XXXX (Change History)

Customer: JOHN E TAYLOR

Save | Cancel | New | Fact Sheet | More

Hierarchy Node	Description	Valid From	Valid To	Share Percentage	Account share Status	Determination Date	Posit
No result found							

Attachments

Folder | Attachment | URL | With Template | More

Name	Type	Created By	Created On
No result found			

Change History

User	Date	Time	Table	Field	Old Value	New Value	Table...	Obj...	Key...
Bruce J...	17...	14:11	ZTAB000...		24	*** Created ***	24	00...	
Bruce J...	17...	14:09	ZTAB000...		10000172	*** Created ***	100...	00...	
Bruce J...	17...	14:04	ZTAB000...		10000193	*** Created ***	100...	00...	
Bruce J...	17...	14:04	ZTAB000...		10000192	*** Created ***	100...	00...	
Bruce J...	17...	14:00	ADRU	Table for...		*** Created ***		80...	

Page 1 | Back | 1 | 2 | 3 | 4 | 5 | Forward | 26

25. Scroll to the top of the page.



**Change History** - shows what changes were made to the customer record, when they were made, and, most importantly, who made them.

26. Click the **Home** button  to go to the Home page.



## Result

You have displayed a customer business partner record.



## Next Steps

Not applicable.