

Purpose

The purpose of this work instruction is to show how to display the details of a Representative Capacity.

Trigger

Perform this procedure when you need to review the details of a Representative Capacity.

Prerequisites

The Representative Capacity must be saved in MIDAS CRM.

Helpful Hints

- To see the details of a Representative Capacity, you must go into the customer record of the individual or organization who has granted the relationship. As an example, if an organization has given an individual Signature authority as the Director, you must go into the organization's customer record to view the details.
- "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 general note of information	f	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 cautionary note	<u> </u>	Use this note to communicate to the end-user of something that MUST be completed or another trigger that should be started and is related to the



		procedure.
A critical note	\bigotimes	Use this note to specify something that MUST NOT be done during the procedure.
Contact someone	C	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 reference 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

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Farm Records	Search Member Hierarchies		
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Recent Items EDWARD I RIDER BIG BRICK FAMILY CATHY R MATTHE 2404 18-139-1404			

3. Click Search Customers/Contacts link label Search Customers/Contacts.





This will reflect how to search and display an individual with a Representative Capacity.

Search: Customers

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4. As required, complete/review the following fields:

Field	R/O/C	Description
First Name	R	Business Partner's First Name
		Example: Ed*



We are using a Wild Card * to search with.

5. As required, complete/review the following fields:

Field	R/O/C	Description
Last Name	R	Business Partner's Last Name
		Example: Rid*

6. Click Search button Search



Search: Customers

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			EDWARD I RIDER										

7. Click EDWARD I RIDER link label EDWARD I RIDER in the Result List.

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8. Click Edit button in the Representative Capacity tab of the Relationship you would like to view.

To view the details of a Relationship, you must have an Edit icon in the Actions column. Notice that the only Relationship in the list of



Representative Capacities with an Edit icon is the one starting with "**Has**," "Has Non-FSA..." To make changes to or view details of a Relationship you must start from the Customer record of the individual or organization that has the relationship.

Customer: EDWARD I RIDER

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9. Click **Cancel** button **Cancel** to return to the Customer Page once you have viewed the relationship.

The details of the Non-FSA Signature Authority agreement in which Edward Rider grants Cathy Matthews Signature Authority for him are displayed.



Customer: EDWARD I RIDER

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10. Click BIG BRICK FAMILY FARM LLC link label BIG BRICK FAMILY FARM LLC

To view the details of a Relationship, you must have an Edit icon in the Actions column. Notice that the Relationship in the list of Representative Capacities starting with "Is," "Is Signature..." To make changes to or view details of this Relationship you must go to the Customer record of the individual or organization that has the relationship.



Customer: BIG BRICK FAMILY FARM LLC

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11. Click the Edit button in Representative Capacity to view the Relationship from the Customer page of Big Brick Family Farm LLC.

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EDWARD I RIDER					
2404 18-139-1404					

12. Click **Cancel** button **Cancel** to return to the Customer Page once you have viewed the relationship.





The details of the Signature Authority where Edward Rider holds the Power of Attorney for Big Brick Family Farm LLC are displayed.

Customer: BIG BRICK FAMILY FARM LLC

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13. Click EDWARD I RIDER link label EDWARD I RIDER to return to his Customer page.

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14. Click Home button Home



Result

You have displayed the details of a Representative Capacity.



Next Steps

Not applicable.