

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		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		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		Use this note to specify something that MUST NOT be done during the procedure.
Contact 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 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

2. Click Business Partner button

Accounts

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

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 .



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

Customer: EDWARD I RIDER

Cancel Save & Back

Non FSA Power-Of-Attorney

Actions	Relationship	Full Name	Address
	Has Non-FSA Attorney in Fact	CATHY R MATTHEWS	FLAT ROCK IN 47234-9771

Effective Date: 04/17/2013
 OGC Review Date: 04/17/2013
 Status: Active
 Signature Count: 1
 Receiving Office: SHELBY COUNTY - IN

Revoked/Cancelled Date: 12/31/9999
 Revoked/Cancelled Reason:
 Source: SAP

Stipulations:

Attach Document: Attach

9. Click **Cancel** button 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

Customer: EDWARD I RIDER

Save | Cancel | Fact Sheet | PDF Fact Sheet | More+

Control Flags

Archived:
Inactive:

Addresses | Address Types | Communication Numbers | E-Mails

New

Actions	Address	Current	Valid From	Valid To
	8241 MAIN ST. / SAINT PAUL IN 47272-8703	<input type="checkbox"/>	02/09/2002	12/31/9999

Representative Capacity | Relationships

New | History Data

Actions	Type	Business Partner	Status	Effective Date	Revoked/Canc...
	Has Non-FSA Attorney i...	CATHY R MATTHEWS	Active	04/17/2013	12/31/9999
	Is Signature Authority	BIG BRICK FAMILY FARM LLC	Active	04/17/2013	12/31/9999

Program Participation | Associated Counties | [BIG BRICK FAMILY FARM LLC](#)

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	DECATUR COUNTY FARM SERVICE A...	Has interest in the program	Currently enrolled and participating
	FSA CUSTOMER	SHELLBY COUNTY FARM SERVICE AG...	Has interest in the program	Currently enrolled and participating
	FARM LOAN PROGRAM CUSTOMER	DECATUR COUNTY FARM SERVICE A...	Has interest in the program	Currently enrolled and participating

Attachments

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Name	Type	Created By	Created On
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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

Customer: BIG BRICK FAMILY FARM LLC

Save | Cancel | Fact Sheet | PDF Fact Sheet | More+

Addresses | Address Types | Communication Numbers | E-Mails

New

Actions	Address	Current	Valid From	Valid To
	8334 MAIN ST. / DANVILLE IN 46122-1006		04/05/2012	12/31/9999

Representative Capacity | Relationships | Member Signatures

New | History Data

Actions	Type	Business Partner	Status	Effective Date	Revoked/Cancelled Date
	Has Signature Authority	EDWARD I RIDER	Active	04/17/2013	12/31/9999

Program Participation | Associated Counties

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	SHELBY COUNTY FARM SERVICE AG...	Has interest in the program	Currently enrolled and participating

Member Share Percentage

Member Share History

Hierarchy Node	Description	Valid From	Valid To	Share Percentage	Account share Sta...	Determination Date	Position Title Name
No result found							

Attachments

Folder | Attachment | URL | With Template | More+

Name	Type	Created By	Created On
No result found			

Change History

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

Customer: BIG BRICK FAMILY FARM LLC

Customer: BIG BRICK FAMILY FARM LLC

Cancel | Save & Back

Signature Authority

Relationship Member: EDWARD I RIDER

Effective Date: 04/17/2013

Rep Capacity: Director


Receiving Office: SHELBY COUNTY - IN

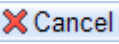
Status: Active

Revoked/Cancelled Date: 12/31/9999

Revoked Reason/Cancelled Rea..

Source: SAP

Attach Document: 

- Click **Cancel** button  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

Customer: BIG BRICK FAMILY FARM LLC

Save | Cancel | Fact Sheet | PDF Fact Sheet | More+

Addresses Address Types Communication Numbers E-Mails

Actions	Address	Current	Valid From	Valid To
	8334 MAIN ST. / DANVILLE IN 46122-1006	<input checked="" type="checkbox"/>	04/05/2012	12/31/9999

Representative Capacity Relationships Member Signatures

New | History Data

Actions	Type	Business Partner	Status	Effective Date	Revoked/Cancelled Date
	Has Signature Authority	EDWARD I RIDER	Active	04/17/2013	12/31/9999

Program Participation Associated Counties [EDWARD I RIDER](#)

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	SHELLBY COUNTY FARM SERVICE AG...	Has interest in the program	Currently enrolled and participating

Member Share Percentage

Member Share History

Hierarchy Node	Description	Valid From	Valid To	Share Percentage	Account share Sta...	Determination Date	Position Title Name
No result found							

Attachments

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Name	Type	Created By	Created On
No result found			

Change History

13. Click EDWARD I RIDER link label [EDWARD I RIDER](#) to return to his Customer page.

Customer: EDWARD I RIDER

Customer: EDWARD I RIDER

Save | Cancel | Fact Sheet | PDF Fact Sheet | More+

Control Flags

Archived:
Inactive:

Addresses Address Types Communication Numbers E-Mails

New

Actions	Address	Current	Valid From	Valid To
	8241 MAIN ST. / SAINT PAUL IN 47272-8703	<input checked="" type="checkbox"/>	02/09/2002	12/31/9999

Representative Capacity Relationships

New | History Data

Actions	Type	Business Partner	Status	Effective Date	Revoked/Canc...
	Has Non-FSA Attorney i...	CATHY R MATTHEWS	Active	04/17/2013	12/31/9999
	Is Signature Authority	BIG BRICK FAMILY FARM LLC	Active	04/17/2013	12/31/9999

Program Participation Associated Counties

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
	FSA CUSTOMER	DECATUR COUNTY FARM SERVICE A...	Has interest in the program	Currently enrolled and participating
	FSA CUSTOMER	SHELLBY COUNTY FARM SERVICE AG...	Has interest in the program	Currently enrolled and participating
	FARM LOAN PROGRAM CUSTOMER	DECATUR COUNTY FARM SERVICE A...	Has interest in the program	Currently enrolled and participating

Attachments

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Name	Type	Created By	Created On
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14. Click Home button .



Result

You have displayed the details of a Representative Capacity.



Next Steps

Not applicable.