



Purpose

The purpose of this work instruction is to show how to create a Spousal Signature.

Trigger



Perform this procedure when requested by a customer.




Prerequisites

- The customer records for both spouses must be in Business Partner.

Helpful Hints

- Start from the customer record of the spouse who is granting spousal signature authority. That is, if the husband is granting signature authority to his wife, start with the husband's customer record.
- Creating a spousal signature for one spouse does not automatically create a spousal signature for the other spouse. That is if the husband grants his wife spousal signature authority it does not automatically grant him authority to sign for his wife.
- "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

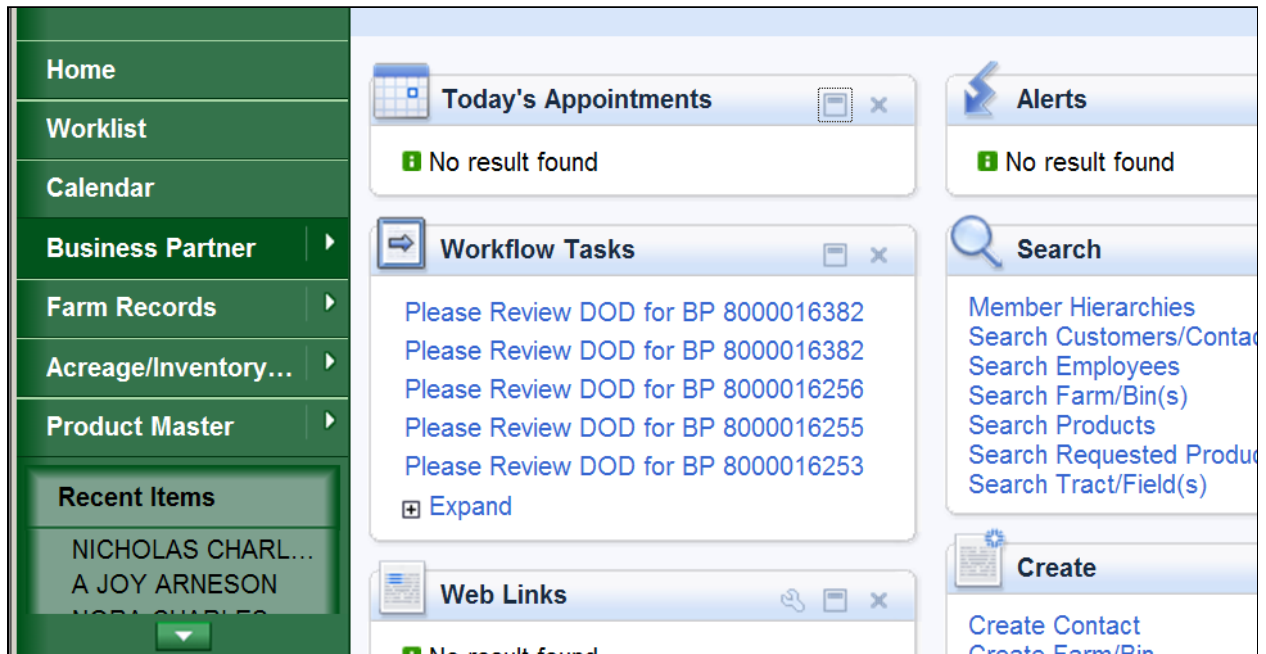
		procedure.
Acritical note		Use this note to specify something that MUST NOT be done during the procedure.
Contact someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A reference is available		Use this note to 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.

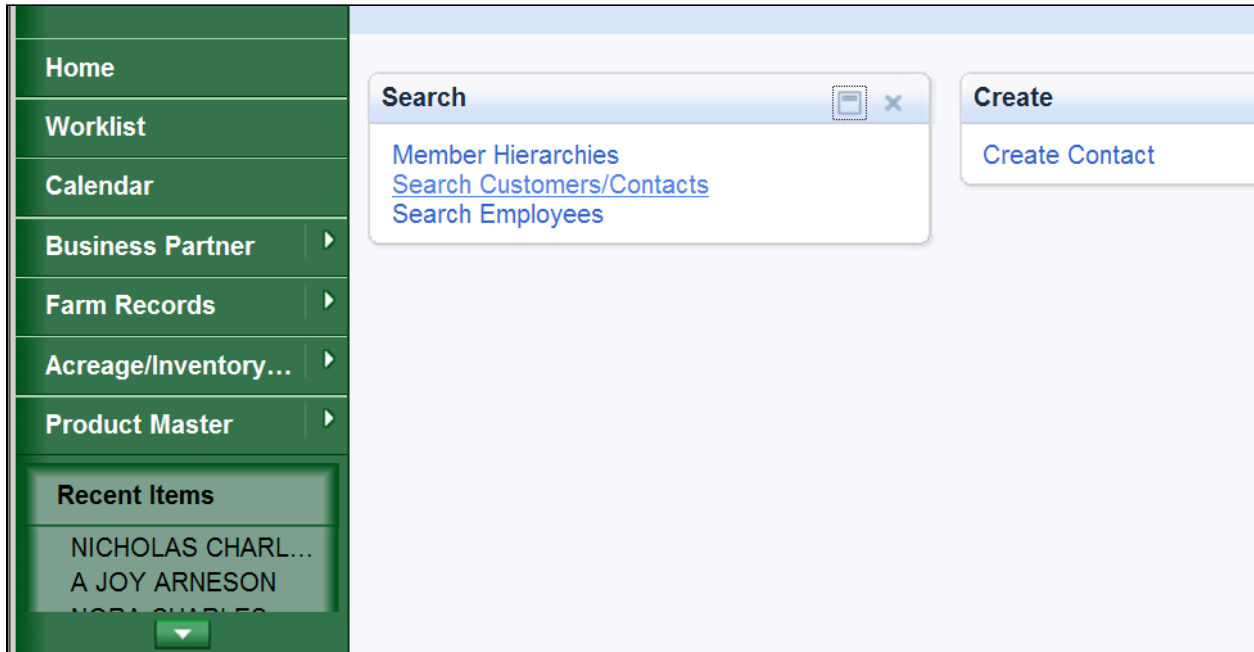
Home



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

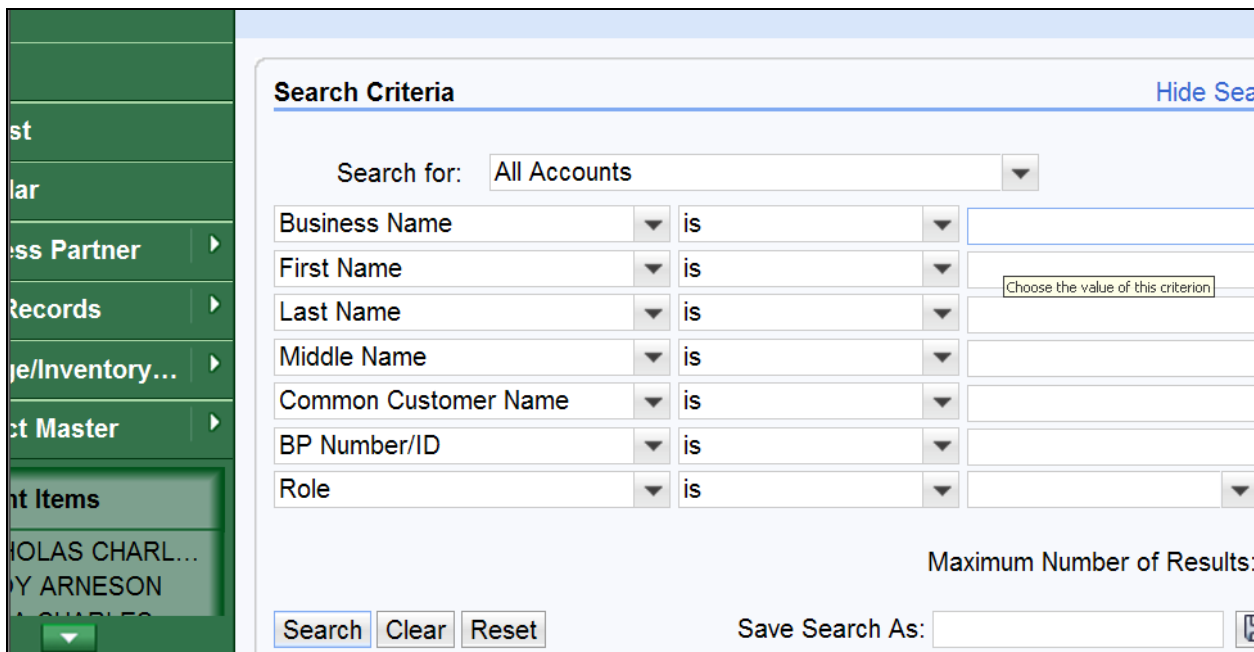


Accounts




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

Search: Customers





4. Click in the **First Name** field to select it.

 We will be searching for the spouse who is granting signature authority. In this example the husband is granting signature authority to his wife so we will be searching for the husband's customer record.

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

Field	R/O/C	Description
First Name	R	Example: Nicholas

6. Click in the **Last Name** field to select it.

Search: Customers

Search Criteria Hide Search

Search for:

Business Name	is	
First Name	is	Nicholas
Last Name	is	
Middle Name	is	
Common Customer Name	is	
BP Number/ID	is	
Role	is	

Maximum Number of Results:

Save Search As:

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

Field	R/O/C	Description
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Field	R/O/C	Description
	R	Example: Charles

Search: Customers

st

lar

ss Partner ▶

Records ▶

ge/Inventory... ▶

st Master ▶

nt Items

NICHOLAS CHARL...

Y ARNESON

CHARLES

Search Criteria [Hide Search](#)

Search for:

Business Name	▼	is	▼	
First Name	▼	is	▼	Nicholas
Last Name	▼	is	▼	Charles
Middle Name	▼	is	▼	
Common Customer Name	▼	is	▼	
BP Number/ID	▼	is	▼	
Role	▼	is	▼	▼

Maximum Number of Results:

Save Search As:

- Click the **Search** button Search to display the search results for the criteria used.



Search: Customers

- st
- lar
- Business Partner
- Records
- Inventory...
- Master
- Items
- NICHOLAS CHARL...
- Y ARNESON
- CHARLES

Middle Name	is	
Common Customer Name	is	
BP Number/ID	is	
Role	is	

Maximum Number of Results:

Save Search As:

Result List

BP Number/ID	Common Name	Street/House Number	City	State
8000002228	NICHOLAS	5678 MARTINI COURT	FREDERICK	Maryl

- Select the Common Customer Name from the Result List (Nicholas Charles) **NICHOLAS** to go to the Customer: XXXX page.

Customer: XXXX

Save | Cancel | New | Determined acres | more

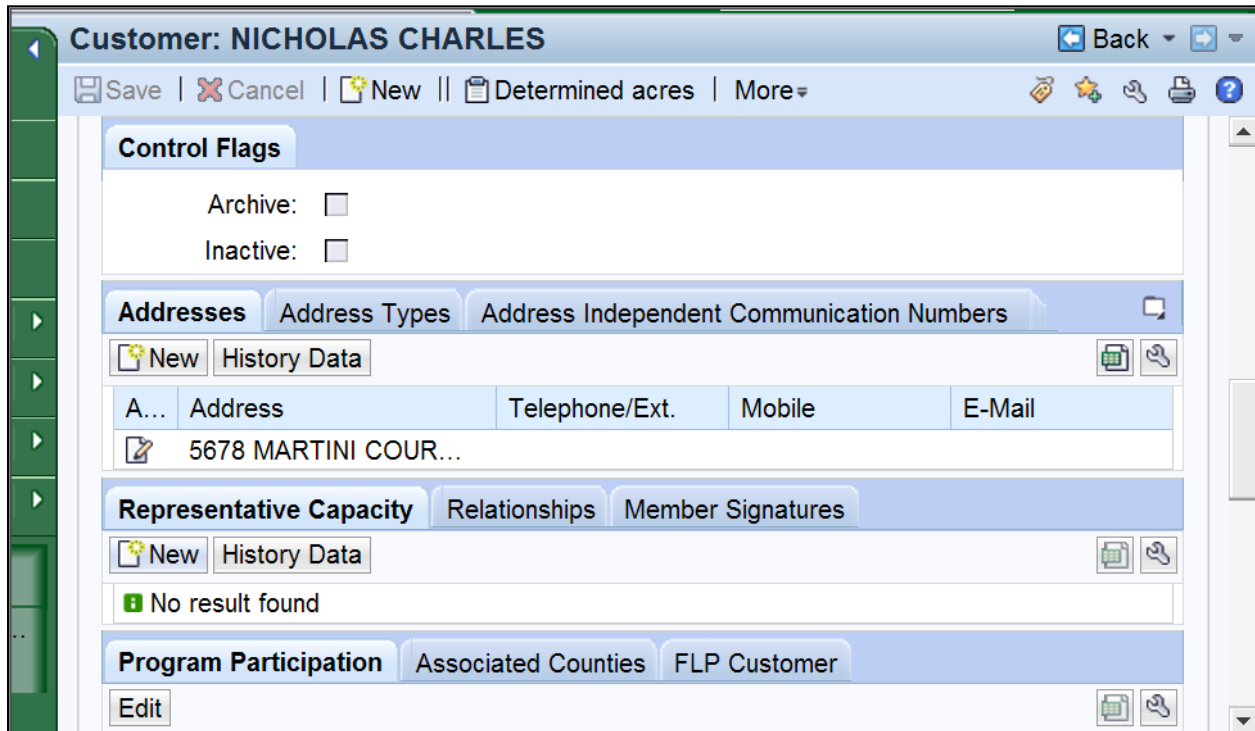
Customer Details | Customer Profile | Roles | Identification Numbers


General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number /... 80000...	Street/Hous.. 5678 MARTINI C...
Prefix:	PO Box:
First Name: NICHOLAS	City: FREDERICK
Middle Name:	State: MD Maryland
Last Name: CHARLES	ZIP Code: 21701
Suffix:	Country: US USA
Last Name a...	Telephone N..
Legal Name: Y...	E-Mail Addr.. NickCharlesPI@gmail.com



10. Scroll down to the **Representative Capacity** tab.


Customer: XXXX (Representative Capacity)



11. Click the **New** button  for the Representative Capacity tab to go to the Customer: XXXX (Fiduciary Relationships) page.



Customer: XXXX (Fiduciary Relationships)

12. Click the **Relationship** dropdown list icon  to display a list of Relationships.
13. Select Has Spousal Signature **Has Spousal Signature** from the dropdown list for Relationship.

Customer: XXXX (Spousal Signature)

14. Click the **Spousal ID** field Open Input Help icon  to go to the Search Criteria window.



Search Criteria

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Search Criteria
[Hide Search Fields](#)

Search for: All Accounts ▼

Business Name	▼	is	▼		⊕	⊖
First Name	▼	is	▼	Choose the value of this criterion	⊕	⊖
Last Name	▼	is	▼		⊕	⊖
Middle Name	▼	is	▼		⊕	⊖
Common Customer Name	▼	is	▼		⊕	⊖
BP Number/ID	▼	is	▼		⊕	⊖
Role	▼	is	▼	▼	⊕	⊖
City	▼	is	▼		⊕	⊖

Maximum Number of Results: 100

Search
Clear
Reset

Result List

New Customer
|

I...	BP N...	Common Custo...	Street/...	City	State	ZIP C...	Telep...	E-Mail
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15. Click in the **First Name** field Choose the value of this criterion to select it.

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

Field	R/O/C	Description
First name	R	<p>Example: Nora</p>

17. Click in the **Last Name** field to select it.



Search Criteria

?

Search Criteria [Hide Search Fields](#)

Search for: All Accounts ▼

Business Name	▼	is	▼		⊕	⊖
First Name	▼	is	▼	Nora	⊕	⊖
Last Name	▼	is	▼		⊕	⊖
Middle Name	▼	is	▼		⊕	⊖
Common Customer Name	▼	is	▼		⊕	⊖
BP Number/ID	▼	is	▼		⊕	⊖
Role	▼	is	▼	▼	⊕	⊖
City	▼	is	▼		⊕	⊖

Maximum Number of Results: 100

Result List

+ New Customer ⌂ ↻

I...	BP N...	Common Custo...	Street/...	City	State	ZIP C...	Telep...	E-Mail
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18. As required, complete/review the following fields:

Field	R/O/C	Description
	R	<p>Example: Charles</p>



Search Criteria

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Search Criteria [Hide Search Fields](#)

Search for: All Accounts ▼

Business Name	▼	is	▼		+	-
First Name	▼	is	▼	Nora	+	-
Last Name	▼	is	▼	Charles	+	-
Middle Name	▼	is	▼		+	-
Common Customer Name	▼	is	▼		+	-
BP Number/ID	▼	is	▼		+	-
Role	▼	is	▼		+	-
City	▼	is	▼		+	-

Maximum Number of Results: 100

Result List

+ New Customer [grid] [refresh]

I...	BP N...	Common Custo...	Street/...	City	State	ZIP C...	Telep...	E-Mail
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19. Click the **Search** button Search to list the Customers meeting the search criteria.



Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for: All Accounts ▼

Business Name	▼	is	▼	<input type="text"/>	⊕	⊖
First Name	▼	is	▼	Nora	⊕	⊖
Last Name	▼	is	▼	Charles	⊕	⊖
Middle Name	▼	is	▼	<input type="text"/>	⊕	⊖
Common Customer Name	▼	is	▼	<input type="text"/>	⊕	⊖
BP Number/ID	▼	is	▼	<input type="text"/>	⊕	⊖
Role	▼	is	▼	<input type="text"/>	⊕	⊖
City	▼	is	▼	<input type="text"/>	⊕	⊖

Maximum Number of Results:

Result List

New Customer

I...	BP N...	Common Custo...	Street/...	City	State	ZIP C...	Telep...	E-Mail
<input type="checkbox"/>	8000...	NORA CHARLES	5678...	FRED...	Maryland	21701		Nora...

NORA CHARLES

20. Select the Common Customer Name from the Result List (Nora Charles) [NORA CHARLES](#) to go to the Customer: XXXX (Fiduciary Relationship) page.



Customer: XXXX (Spousal Signature)

Customer: NICHOLAS CHARLES029

Back Save & Back

Spousal Signature

Spousal ID: NORA CHARLES

Effective Date: 11-20-2012

Signature Authority: [dropdown]

Receiving Office: [dropdown]

Status: Active

Revoked/Cancelled Date: 12-31-9999

Revoked Reason: [dropdown]

Attach Document: Attach

21. Click the **Signature Authority** dropdown list icon  to display the options.

Customer: XXXX (Spousal Signature)

Customer: NICHOLAS CHARLES029

Back Save & Back

Spousal Signature

Spousal ID: NORA CHARLES

Effective Date: 11-20-2012

Signature Authority: [dropdown menu open]

Receiving Office: [dropdown]

Status: Yes

Revoked/Cancelled Date: 12-31-9999

Revoked Reason: [dropdown]

Attach Document: Attach

22. Select Yes from the Signature Authority dropdown.



Customer: XXXX (Spousal Signature)

Customer: NICHOLAS CHARLES029

Back Save & Back

Back

▼ Spousal Signature

Spousal ID: NORA CHARLES

Effective Date:* 11-20-2012

Signature Authority:* Yes

Receiving Office:

Status: Active

Revoked/Cancelled Date:* 12-31-9999

Revoked Reason:

Attach Document: Attach

23. Click the **Receiving Office** field Open Input Help icon  to go to the Search Criteria window.

Service Center Search

State:

County:

Search

Service Center	Name
No result found	

24. Click the State dropdown list icon  to display the list of states



Service Center Search

25. Scroll down to the Receiving Office State.

Service Center Search

26. Select the Receiving Office State (Maryland) **Maryland**.

Service Center Search

27. Click the **County** dropdown list icon  to display the list of County



Offices.

28. Scroll down to the County Office.

Service Center Search

29. Select the County Office (Frederick) **Frederick**.

30. Click the **Search** button **Search** to display the County Office Service Center number.

Service Center Search

Service Center	Name
62641	FREDRICK COUNTY, MD

31. Select the Service Center (Frederick County, MD) **62641** to populate the County Office Name in the **Receiving Office** field.



Customer: XXXX (Spousal Signature)

Customer: NICHOLAS CHARLES029

Back Save & Back

Spousal Signature

Spousal ID: NORA CHARLES

Effective Date: 11-20-2012

Signature Authority: Yes

Receiving Office: 62641

Status: Active

Attach Document: Attach

Revoked/Cancelled Date: 12-31-9999

Revoked Reason:

32. Click the **Save & Back** button to display the Save Confirmation window.

Submit Spousal Signature

Are you sure you want to submit the spousal signature?

Yes No

33. Click the **Yes** button to confirm saving the spousal signature and to go to the Customer: XXXX page.



Customer: XXXX (Representative Capacity)

The screenshot shows a software window with a green sidebar on the left. The main content area has several tabs: 'Control Flags', 'Addresses', 'Representative Capacity', and 'Program Participation'. Under 'Representative Capacity', there is a table with columns: 'Acti...', 'Relations...', 'Authorized Signatory', 'Status', 'Effecti...', and 'Rev...'. One row is highlighted in yellow, showing 'Has Spou...' in the 'Relations...' column and 'NORA CHARLES F...' in the 'Authorized Signatory' column.

34. Click the Authorized Signatory (Nora Charles)


[NORA CHARLES F...](#) to go to her Customer page.

Customer: XXXX (Representative Capacity)

This screenshot is similar to the previous one but shows a different row highlighted in yellow. The 'Relations...' column shows 'Is Spous...' and the 'Authorized Signatory' column shows 'NICHOLAS CHARLE...'. The green sidebar on the left is visible, showing options like 'Home', 'Worklist', 'Calendar', 'Business Partner', 'Farm Records', 'Acreage/Inventory...', 'Product Master', and 'Recent Items'.



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

 On the wife's, Nora's, customer record we see her listed as being spousal signator for her husband Nicholas but he is not shown as having spousal signature for her. To grant him spousal signature we would need to repeat the same process starting with the wife's customer record.



Result

You have created a spousal signature.



Next Steps

If you wish to create a spousal signature of the other spouse, you must start with the other spouse's customer record and follow the same process.