

#### Purpose

The purpose of this work instruction is to show how to revoke or cancel a Representative Capacity Relationship.

#### Trigger

Perform this procedure when requested by a customer or when circumstances require that a Representative Capacity Relationship be revoked in Business Partner.

#### Prerequisites

• Representative Capacity Relationships are saved in Business Partner.

#### **Helpful Hints**

- "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	<b>f</b>	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 <b>MUST</b> 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 <b>MUST NOT</b> 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 <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.

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



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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
		<b>Example:</b> Edward
Last Name	R	Business Partner's Last Name
		Example: Rider

5. Click the Search button Search



#### **Search: Customers**

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6. Click the Common Customer Name EDWARD I RIDER EDWARD I RIDER to go to the Customer Page.

# **Customer: EDWARD I RIDER**

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	2	Has Non-FSA Attorney i	J H BAILE	Y	Acti	/e		04/05/2013	12/31/9999	
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7. Click the Edit button i on the Representative Capacity that will be revoked.
It may be necessary to scroll to display the Representative Capacity tab.



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**8.** As required, complete/review the following fields:

Field	R/O/C	Description
Revoked/Cancelled Date:	R	Date that a Fiduciary Relationship was cancelled <b>Example:</b> 04/05/2013



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9. Click the Select Date button in the Revoked/Canceled Date field.

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**10.** Click the correct **Revoked/Canceled** date from the calendar.



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**11.** Click the **Revoked/Cancelled Reason** dropdown icon

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12. Click the **Revoked by Grantor or Grantee** option Revoked by Grantor or Grantee



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13. Click the Save & Back button Save & Back

## Submit Relationship

Is all the data displayed complete and accurate? Active representative capacity data cannot be modified after it is submitted. It can only be revoked. Are you sure you wish to continue?
Yes No

14. Click the Yes button Yes if all information is complete and accurate.



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**15.** Click the **History Data** button History Data to display the now ended Representative Capacity Relationship.

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**16.** Click the **Back** button **Back**.



This reflects all Representative Capacity Relationships that have ended.



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17. Click the **Home** button

to return to the Home Screen.



Result

You have revoked or cancelled a Representative Capacity Relationship.



# **Next Steps**

N/A