

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		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.

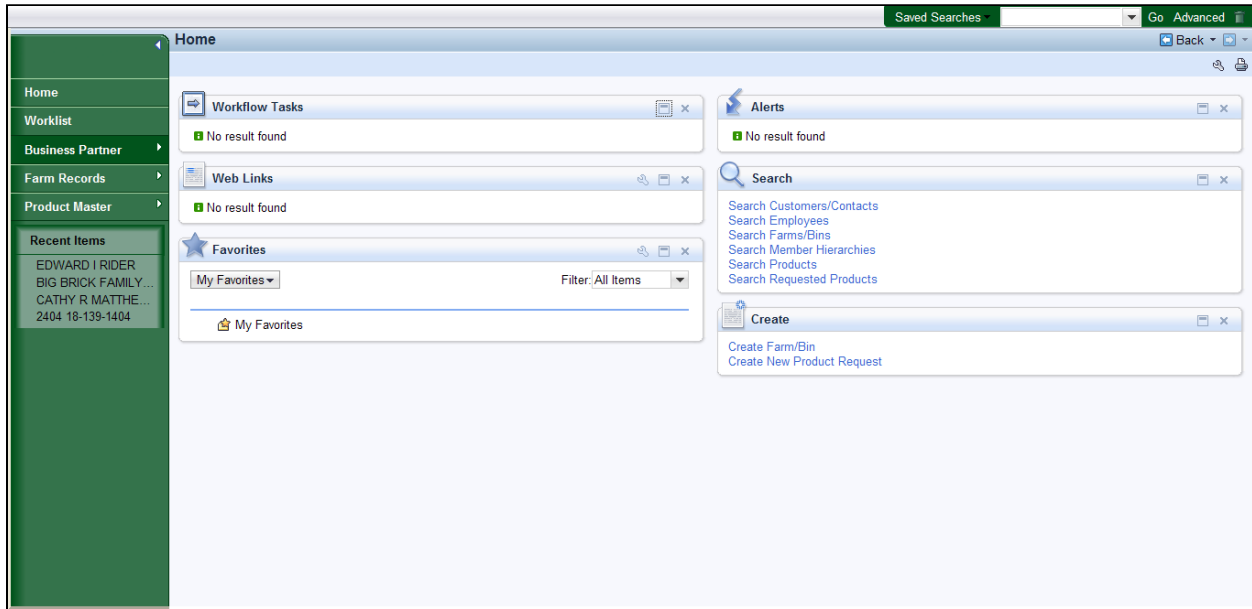


<p>Contact someone</p>		<p>Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.</p>
<p>A reference is available</p>		<p>Use this note to specify that more information is available in another location. You may reference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

Procedure

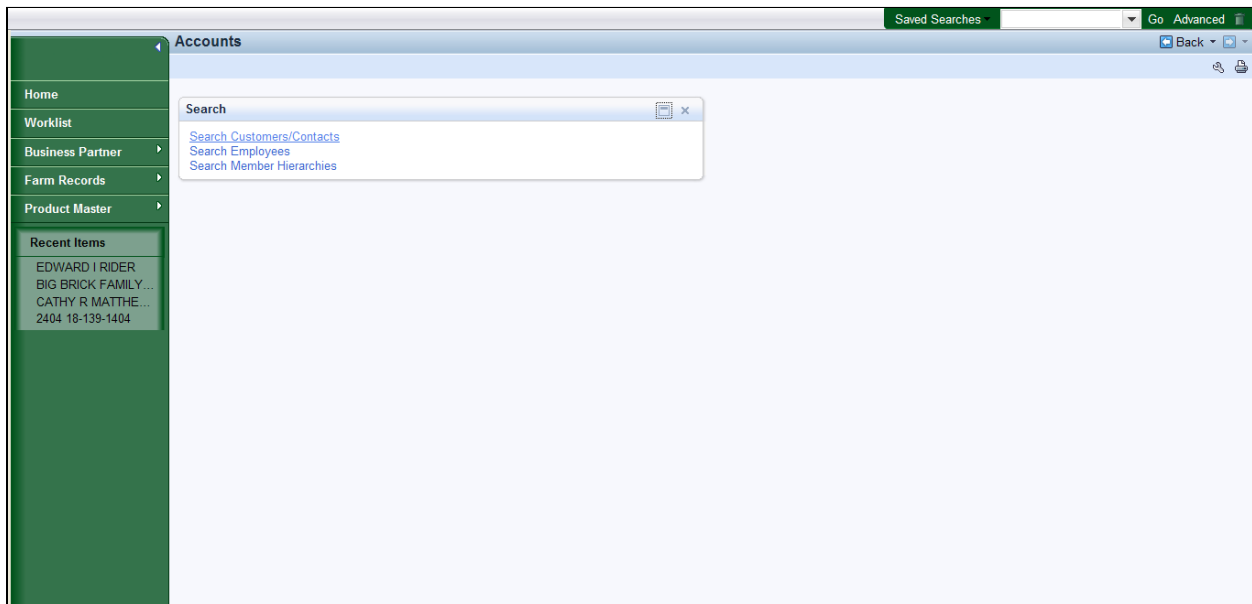
1. Start the transaction from the MIDAS CRM Home Page.

Home



2. Click the **Business Partner** button 

Accounts



3. Click the **Search Customers/Contacts** link [Search Customers/Contacts](#).



Search: Customers

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

Field	R/O/C	Description
First Name	R	Business Partner's First Name Example: Edward
Last Name	R	Business Partner's Last Name Example: Rider

5. Click the **Search** button .



Search: Customers

Search: Customers

Search for: All Accounts

Business Name is
 First Name is EDWARD
 Last Name is RIDER
 Middle Name is
 Common Customer Name is
 BP Number/ID is
 Role is
 Tax ID Number is
 Tax ID Type is
 Associated State is INDIANA
 Associated County is SHELBY
 Service Center is ALL CENTERS

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 1 Customer Found

Inactive	BP Numbe...	Common Customer Name	Tax ID Number	Tax ID Type	Address Line	City	State	ZIP Code	Telephone	E-Mail
<input type="checkbox"/>	8000005769	EDWARD I RIDER	NOTAXID	No Tax ID Type	8241 MAIN...	SAINT PAUL	Indiana	47272-8703	+1 (800)...	

- Click the **Common Customer Name** EDWARD I RIDER [EDWARD I RIDER](#) to go to the 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...
<input checked="" type="checkbox"/>	Has Non-FSA Attorney i...	CATHY R MATTHEWS	Active	04/17/2013	12/31/9999
<input checked="" type="checkbox"/>	Has Non-FSA Attorney i...	J H BAILEY	Active	04/05/2013	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

Folder Attachment URL With Template More+

- Click the **Edit** button  on the Representative Capacity that will be revoked.



It may be necessary to scroll to display the Representative Capacity tab.



Customer: EDWARD I RIDER

Customer: EDWARD I RIDER

Cancel Save & Back

Non FSA Power-Of-Authority

Actions	Relationship	Full Name	Address
	Has Non-FSA Attorney in Fact	J H BAILEY	MORRISTOWN IN 46161-9707

Effective Date: 04/05/2013
 OGC Review Date: 04/05/2013
 Status: Active
 Signature Count: 1
 Receiving Office: SHELBY COUNTY - IN

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

Stipulations:

Attach Document:

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

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



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	J H BAILEY	MORRISTOWN IN 46161-9707

Effective Date: 04/05/2013
 OGC Review Date: 04/05/2013
 Status: Active
 Signature Count: 1
 Receiving Office: SHELBY COUNTY - IN

Stipulations:

Attach Document:

Revoked/Cancelled Date:
 Revoked/Cancelled Reason:
 Source: SAP

Select Date

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

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	J H BAILEY	MORRISTOWN IN 46161-9707

Effective Date: 04/05/2013
 OGC Review Date: 04/05/2013
 Status: Active
 Signature Count: 1
 Receiving Office: SHELBY COUNTY - IN

Stipulations:

Attach Document:

Revoked/Cancelled Date:
 Revoked/Cancelled Reason:
 Source: SAP

April 2013

Mo	Tu	We	Th	Fr	Sa	Su
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

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



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	J H BAILEY	MORRISTOWN IN 46161-9707

Effective Date: 04/05/2013
 OGC Review Date: 04/05/2013
 Status: Active
 Signature Count: 1
 Receiving Office: SHELBY COUNTY - IN

Revoked/Cancelled Date: 04/15/2013
 Revoked/Cancelled Reason:
 Source: SAP

Attach Document: Attach

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

Customer: EDWARD I RIDER

Customer: EDWARD I RIDER

Cancel Save & Back

Non FSA Power-Of-Attorney

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Effective Date: 04/05/2013
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 Signature Count: 1
 Receiving Office: SHELBY COUNTY - IN

Revoked/Cancelled Date: 04/15/2013
 Revoked/Cancelled Reason:
 Source: SAP

Attach Document: Attach

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



Customer: EDWARD I RIDER

Customer: EDWARD I RIDER

Save & Back

Non FSA Power of Attorney

Actions	Relationship	Full Name	Address
	Has Non-FSA Attorney in Fact	J H BAILEY	MORRISTOWN IN 46161-9707

Effective Date: 04/05/2013
 OGC Review Date: 04/05/2013
 Status: Active
 Signature Count: 1
 Receiving Office: SHELBY COUNTY - IN

Revoked/Cancelled Date: 04/15/2013
 Revoked/Cancelled Reason: Revoked by Grantor or Grantee
 Source: SAP

Stipulations:

Attach Document:

13. Click the **Save & Back** button .

Submit Relationship

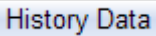
Is all the data displayed complete and accurate? Active representative capacity data cannot be modified after it is submitted. It can only be revoked. Are you sure you wish to continue?

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



Customer: EDWARD I RIDER

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

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

Customer: EDWARD I RIDER

Type	Business Partner	Effective Date	Revoked/Cancelled Date
Has Non-FSA Attorney in Fact	J H BAILEY	04/05/2013	04/15/2013

16. Click the **Back** button .

 This reflects all Representative Capacity Relationships that have ended.



Customer: EDWARD I RIDER

Customer: EDWARD I RIDER

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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...
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Program Participation | Associated Counties

Edit

Actions	Customer Type	Organization Name	General Program Interest	Current Participant
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Attachments

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Name	Type	Created By	Created On
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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