



Purpose

The purpose of this work instruction is to show how multiple search criteria can be used together to refine a search for a Business Partner (BP) Customer Record.

Trigger

Perform this procedure when you need to find a BP Customer record but do not know a customer's full name as it appears in Business Partner.

Prerequisites

- The BP Customer record must be saved in Business Partner for the Search to be returned.
- If searching to verify that a Business Partner is not in the system, FSA policy dictates that the user must execute 4 searches: National Search in which State and County are blank, Search by TIN (if available), Search by Common Customer Name and/or First and Last Name, Search Inactive records.

Helpful Hints

- When reading this work instruction always start with the Note below each screen shot. The Note talks about what is shown in the screen shot, such as information that you will find in a particular assignment block. Once you have read the Note, look at the Step which will tell you the next action in the procedure.
- The search criteria window includes further available search criteria fields available to the user.
- "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:

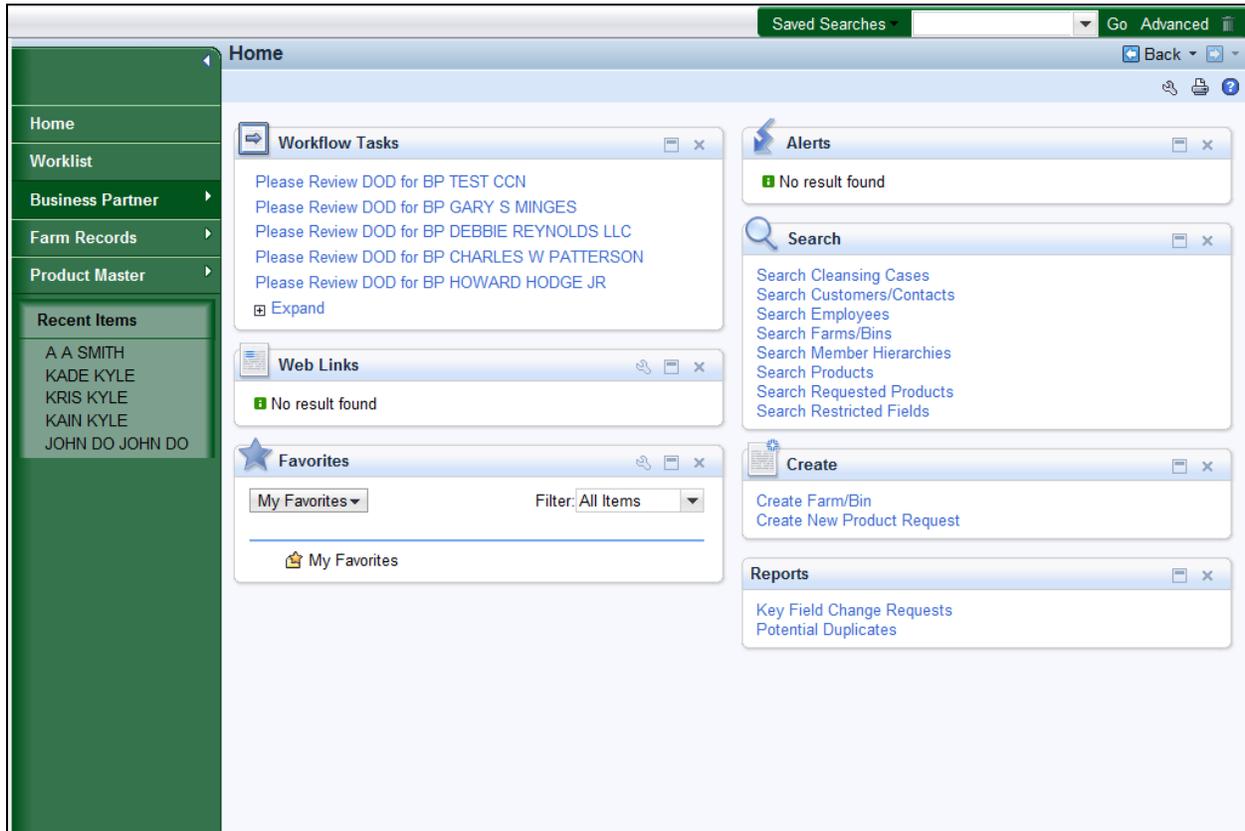
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the

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

 This procedure will search for a BP Customer Record by using multiple search criteria: Last Name, first letter of First Name, State, and two cities.

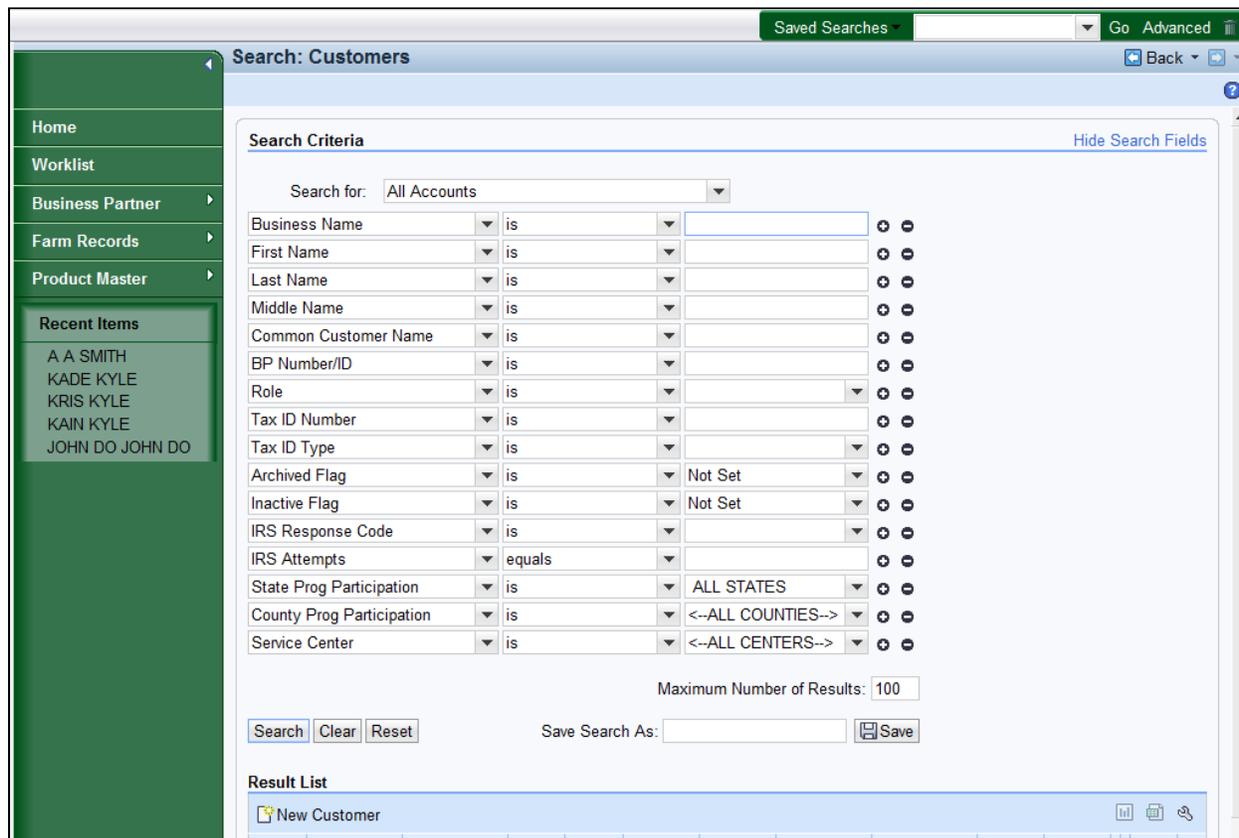


Accounts

A screenshot of a web application interface for "Accounts". The page has a dark green sidebar on the left with navigation links: Home, Worklist, Business Partner, Farm Records, Product Master, and a Recent Items section listing "A A SMITH", "KADE KYLE", "KRIS KYLE", "KAIN KYLE", and "JOHN DO JOHN DO". The main content area is light blue and contains a "Search" panel with links for "Search Cleansing Cases", "Search Customers/Contacts", "Search Documents", "Search Employees", "Search Member Hierarchies", and "Search Restricted Fields". To the right of the search panel is a "Reports" panel with links for "Key Field Change Requests" and "Potential Duplicates". At the top right of the main area, there are "Saved Searches" and "Go Advanced" buttons, and a "Back" button.

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

Search: Customers



The screenshot shows the 'Search: Customers' interface. On the left is a green navigation sidebar with links: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items (listing A A SMITH, KADE KYLE, KRIS KYLE, KAIN KYLE, JOHN DO JOHN DO). The main content area has a title bar 'Search: Customers' and a 'Saved Searches' dropdown. Below is the 'Search Criteria' section with a 'Search for:' dropdown set to 'All Accounts'. It lists 18 search fields with dropdown menus for operators (is, equals) and values. Fields include Business Name, First Name, Last Name, Middle Name, Common Customer Name, BP Number/ID, Role, Tax ID Number, Tax ID Type, Archived Flag, Inactive Flag, IRS Response Code, IRS Attempts, State Prog Participation, County Prog Participation, and Service Center. At the bottom, there are 'Search', 'Clear', and 'Reset' buttons, a 'Save Search As:' field, and a 'Save' button. The 'Result List' section at the bottom shows a single entry: 'New Customer'.

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

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



The Search page is divided into two sections. The search criteria located in the upper portion of the screen defines how the search will be performed. The Results table lists the number of records found based on the criteria entered.

Search: Customers

Search: Customers

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is	Smith	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALL STATES	
County Prog Participation	is	<--ALL COUNTIES-->	
Service Center	is	<--ALL CENTERS-->	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

5. Click the **Search** button to display the search results.

Search: Customers

Search: Customers Saved Searches Go Advanced

Search Criteria Hide Search Fields

Search for:

Business Name	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
First Name	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Last Name	is	<input type="text" value="SMITH"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Middle Name	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Common Customer Name	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
BP Number/ID	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Role	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Tax ID Number	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Tax ID Type	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Archived Flag	is	<input type="text" value="Not Set"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Inactive Flag	is	<input type="text" value="Not Set"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
IRS Response Code	is	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
IRS Attempts	equals	<input type="text"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
State Prog Participation	is	<input type="text" value="ALL STATES"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
County Prog Participation	is	<input type="text" value="<-ALL COUNTIES->"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>
Service Center	is	<input type="text" value="<-ALL CENTERS->"/>	<input type="button" value="⊕"/>	<input type="button" value="⊖"/>

Maximum Number of Results:

Save Search As:

Result List: More Than 100 Customers Found

6. Scroll down to display the **Result List** table to view the search results based on the criteria entered.



Search: Customers

Saved Searches
Go Advanced

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

- A A SMITH
- KADE KYLE
- KRIS KYLE
- KAIN KYLE
- JOHN DO JOHN DO

Search: Customers Back

IRS Response Code is

IRS Attempts equals

State Prog Participation is ALL STATES

County Prog Participation is <-ALL COUNTIES-->

Service Center is <-ALL CENTERS-->

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: More Than 100 Customers Found

New Customer

Ina...	BP Num...	Common...	Tax...	Pa...	Tax ID...	House...	State	Street	City	ZIP...	IR...	L...
<input type="checkbox"/>	8000114...	A A SMITH	NO...	<input type="checkbox"/>	No Ta...		Alabama	55545 US...	ONE...	3512...	IR...	0
<input type="checkbox"/>	8000112...	A L SMITH	NO...	<input type="checkbox"/>	No Ta...		Alabama	7609 CAR...	DORA	3506...	IR...	0
<input type="checkbox"/>	8000114...	A REID S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	1906 HOL...	PRA...	3606...	IR...	0
<input type="checkbox"/>	8000110...	ALFRED...	NO...	<input type="checkbox"/>	No Ta...		Alabama	PO BOX 236	PINS...	3512...	IR...	0
<input type="checkbox"/>	8000115...	ANN C S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	PO BOX 33	MILL...	3626...	IR...	0
<input type="checkbox"/>	8000114...	ANTHON...	NO...	<input type="checkbox"/>	No Ta...		Alabama	9735 WHI...	WA...	3518...	IR...	0
<input type="checkbox"/>	8000113...	BENNY S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	6522 AL H...	LET...	36047	IR...	0
<input type="checkbox"/>	8000117...	BETTYE J...	NO...	<input type="checkbox"/>	No Ta...		Alabama	PO BOX 253	HOL...	3508...	IR...	0
<input type="checkbox"/>	8000115...	BOBBY S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	402 PAYN...	LET...	3604...	IR...	0
<input type="checkbox"/>	8000113...	BOBBY E...	NO...	<input type="checkbox"/>	No Ta...		Alabama	2846 HAP...	MOR...	3511...	IR...	0
<input type="checkbox"/>	8000114...	BRIAN K...	567...	<input checked="" type="checkbox"/>	Social...		Maryland	12403 FIN...	MON...	2177...	W...	0
<input type="checkbox"/>	8000117...	BRUCE F...	NO...	<input type="checkbox"/>	No Ta...		Alabama	2330 NE...	ASH...	3625...	IR...	0
<input type="checkbox"/>	8000113...	BYRON S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	4008 CHA...	TALL...	3607...	IR...	0
<input type="checkbox"/>	8000115...	CAFFEY...	NO...	<input type="checkbox"/>	No Ta...		Alabama	230 COU...	LINE...	3626...	IR...	0

◀ Back 1 2 3 4 5 6 7 8 Forward ▶

7. Scroll up to the Search Criteria to select a new search parameter.

The initial search on a last name of SMITH produced more than eight (8) pages of results.

Thursday, March 05, 2015

BP_Search_Customer_Business_Partner_Record_v4.udc

8/30

Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALL STATES	
County Prog Participation	is	<--ALL COUNTIES-->	
Service Center	is	<--ALL CENTERS-->	

Maximum Number of Results: 100

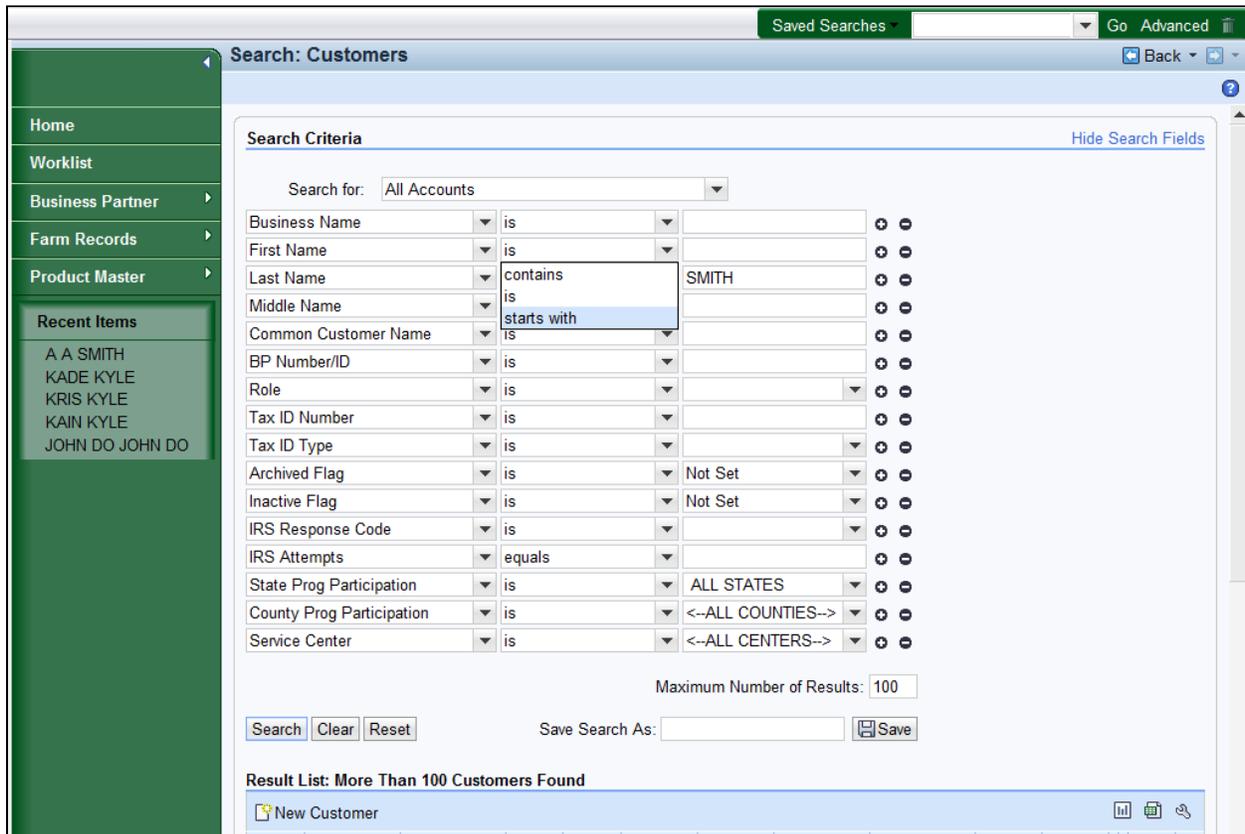
Search Clear Reset Save Search As: Save

Result List: More Than 100 Customers Found

New Customer

- Click the **First Name** dropdown list button to display a list of Search Definitions and select "starts with".

Search: Customers



Search: Customers

Search for: All Accounts

Business Name	is	
First Name	is	
Last Name	contains	SMITH
Middle Name	is	
Common Customer Name	starts with	
BP Number/ID	is	
Role	is	
Tax ID Number	is	
Tax ID Type	is	
Archived Flag	is	Not Set
Inactive Flag	is	Not Set
IRS Response Code	is	
IRS Attempts	equals	
State Prog Participation	is	ALL STATES
County Prog Participation	is	<-ALL COUNTIES-->
Service Center	is	<-ALL CENTERS-->

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: More Than 100 Customers Found

New Customer

9. Select **startswith** **starts with** from the First Name search parameter list.

 We are changing the Search Definition, how we perform the search ("is," "contains," and "starts with"). On the First Name search line we are going to change the Search Definition from "is" to "starts with."

- "Is" requires the entry in the customer record to match the search value exactly.
- "Starts with" means the entry only has to start with the Search Value.

As an example if we search with "is" for a First Name of "Bert," only customers with the first name of "Bert" are returned. Using "starts with" instead we would get the people with the first name of "Bert" but also get "Bertha" and "Bertie."



Search: Customers

Search: Customers
Saved Searches
Go Advanced

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
- A A SMITH
- KADE KYLE
- KRIS KYLE
- KAIN KYLE
- JOHN DO JOHN DO

Search Criteria
Hide Search Fields

Search for: All Accounts

Business Name	is	
First Name	starts with	
Last Name	is	SMITH
Middle Name	is	
Common Customer Name	is	
BP Number/ID	is	
Role	is	
Tax ID Number	is	
Tax ID Type	is	
Archived Flag	is	Not Set
Inactive Flag	is	Not Set
IRS Response Code	is	
IRS Attempts	equals	
State Prog Participation	is	ALL STATES
County Prog Participation	is	<-ALL COUNTIES-->
Service Center	is	<-ALL CENTERS-->

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: More Than 100 Customers Found

New Customer

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

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

Search: Customers

Search: Customers
Go Advanced

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
 - A A SMITH
 - KADE KYLE
 - KRIS KYLE
 - KAIN KYLE
 - JOHN DO JOHN DO

Search Criteria
Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALL STATES	
County Prog Participation	is	<--ALL COUNTIES-->	
Service Center	is	<--ALL CENTERS-->	

Maximum Number of Results: 100

Save Search As:

Result List: More Than 100 Customers Found

11. Click the **Search** button to display the search results.

Thursday, March 05, 2015

BP_Search_Customer_Business_Partner_Record_v4.udc

12/30



Search: Customers

Search: Customers Saved Searches Go Advanced

Search Criteria Hide Search Fields

Search for:

Business Name	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
First Name	starts with	A	<input type="button" value="X"/>	<input type="button" value="O"/>
Last Name	is	SMITH	<input type="button" value="X"/>	<input type="button" value="O"/>
Middle Name	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Common Customer Name	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
BP Number/ID	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Role	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Tax ID Number	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Tax ID Type	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Archived Flag	is	Not Set	<input type="button" value="X"/>	<input type="button" value="O"/>
Inactive Flag	is	Not Set	<input type="button" value="X"/>	<input type="button" value="O"/>
IRS Response Code	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
IRS Attempts	equals	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
State Prog Participation	is	ALL STATES	<input type="button" value="X"/>	<input type="button" value="O"/>
County Prog Participation	is	<--ALL COUNTIES-->	<input type="button" value="X"/>	<input type="button" value="O"/>
Service Center	is	<--ALL CENTERS-->	<input type="button" value="X"/>	<input type="button" value="O"/>

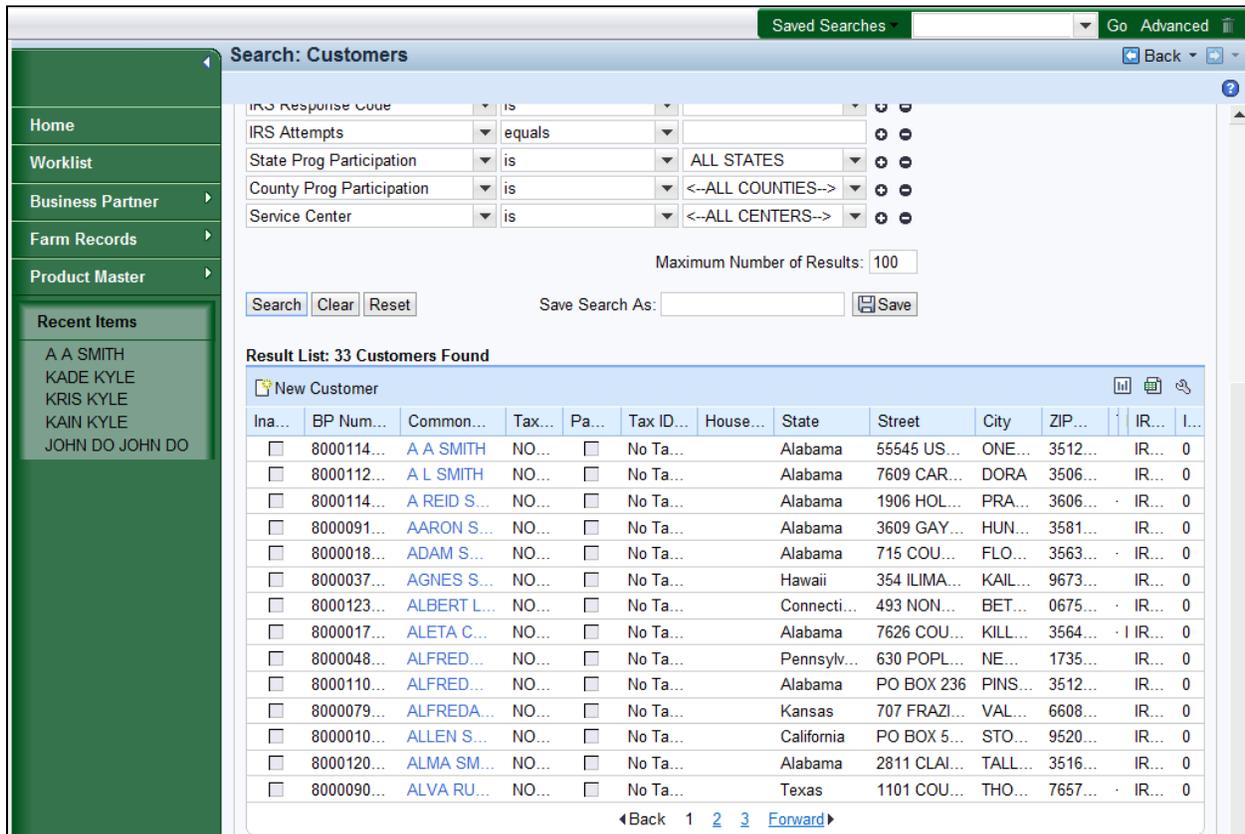
Maximum Number of Results:

Save Search As:

Result List: 33 Customers Found

12. Scroll down to display the **Result List** table to view the search results.

Search: Customers



Search: Customers

IRS Response Code is equals
 State Prog Participation is ALL STATES
 County Prog Participation is <-ALL COUNTIES-->
 Service Center is <-ALL CENTERS-->

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 33 Customers Found

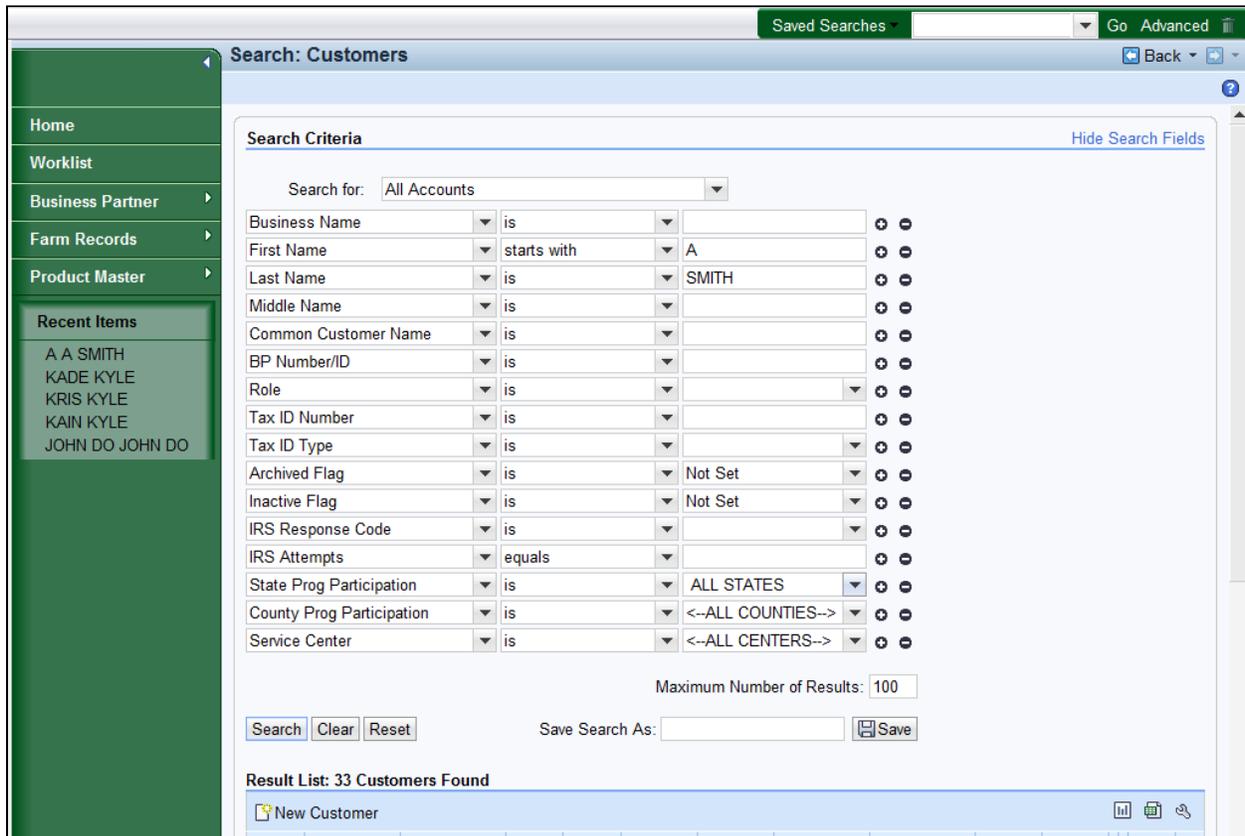
Ina...	BP Num...	Common...	Tax...	Pa...	Tax ID...	House...	State	Street	City	ZIP...	IR...	L...
<input type="checkbox"/>	8000114...	A A SMITH	NO...	<input type="checkbox"/>	No Ta...		Alabama	55545 US...	ONE...	3512...	IR...	0
<input type="checkbox"/>	8000112...	A L SMITH	NO...	<input type="checkbox"/>	No Ta...		Alabama	7609 CAR...	DORA	3506...	IR...	0
<input type="checkbox"/>	8000114...	A REID S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	1906 HOL...	PRA...	3606...	IR...	0
<input type="checkbox"/>	8000091...	AARON S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	3609 GAY...	HUN...	3581...	IR...	0
<input type="checkbox"/>	8000018...	ADAM S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	715 COU...	FLO...	3563...	IR...	0
<input type="checkbox"/>	8000037...	AGNES S...	NO...	<input type="checkbox"/>	No Ta...		Hawaii	354 ILIMA...	KAIL...	9673...	IR...	0
<input type="checkbox"/>	8000123...	ALBERT L...	NO...	<input type="checkbox"/>	No Ta...		Connecti...	493 NON...	BET...	0675...	IR...	0
<input type="checkbox"/>	8000017...	ALETA C...	NO...	<input type="checkbox"/>	No Ta...		Alabama	7626 COU...	KILL...	3564...	IR...	0
<input type="checkbox"/>	8000048...	ALFRED...	NO...	<input type="checkbox"/>	No Ta...		Pennsylv...	630 POPL...	NE...	1735...	IR...	0
<input type="checkbox"/>	8000110...	ALFRED...	NO...	<input type="checkbox"/>	No Ta...		Alabama	PO BOX 236	PINS...	3512...	IR...	0
<input type="checkbox"/>	8000079...	ALFREDA...	NO...	<input type="checkbox"/>	No Ta...		Kansas	707 FRAZI...	VAL...	6608...	IR...	0
<input type="checkbox"/>	8000010...	ALLEN S...	NO...	<input type="checkbox"/>	No Ta...		California	PO BOX 5...	STO...	9520...	IR...	0
<input type="checkbox"/>	8000120...	ALMA SM...	NO...	<input type="checkbox"/>	No Ta...		Alabama	2811 CLAI...	TALL...	3516...	IR...	0
<input type="checkbox"/>	8000090...	ALVA RU...	NO...	<input type="checkbox"/>	No Ta...		Texas	1101 COU...	THO...	7657...	IR...	0

13. Scroll up to the Search Criteria area to enter a new search parameter.

 The second search on a first name starting with the letter (A) and Last Name (SMITH) produced 33 customer records found.

Using the two search criteria, Last Name and first letter of the First Name has reduced the Result List to a three pages. We want to narrow the search and will enter additional search criteria to filter the search results further.

Search: Customers



Search: Customers

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALL STATES	
County Prog Participation	is	<--ALL COUNTIES-->	
Service Center	is	<--ALL CENTERS-->	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 33 Customers Found

New Customer

14. Click the **State Program Participation** dropdown list button to display the list of alternate search criteria.



We will further restrict the search by adding a value for the State Program Participation of the Customer.



Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALL STATES	
County Prog Participation	is		
Service Center	is		

Max

Save Search As:

Result List: 33 Customers Found

New Customer

15. Select **ALABAMA** from the **State Program Participation** list items.



Search: Customers

Search: Customers Saved Searches Go Advanced

Search Criteria Hide Search Fields

Search for:

Business Name	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
First Name	starts with	A	<input type="button" value="X"/>	<input type="button" value="O"/>
Last Name	is	SMITH	<input type="button" value="X"/>	<input type="button" value="O"/>
Middle Name	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Common Customer Name	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
BP Number/ID	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Role	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Tax ID Number	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Tax ID Type	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
Archived Flag	is	Not Set	<input type="button" value="X"/>	<input type="button" value="O"/>
Inactive Flag	is	Not Set	<input type="button" value="X"/>	<input type="button" value="O"/>
IRS Response Code	is	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
IRS Attempts	equals	<input type="text"/>	<input type="button" value="X"/>	<input type="button" value="O"/>
State Prog Participation	is	ALABAMA	<input type="button" value="X"/>	<input type="button" value="O"/>
County Prog Participation	is	<-ALL COUNTIES-->	<input type="button" value="X"/>	<input type="button" value="O"/>
Service Center	is	<-ALL CENTERS-->	<input type="button" value="X"/>	<input type="button" value="O"/>

Maximum Number of Results:

Save Search As:

Result List: 33 Customers Found

16. Click the **Search** button to display the search results.



Search: Customers

Search: Customers Saved Searches Go Advanced

[Back](#)

Search Criteria [Hide Search Fields](#)

Search for:

Business Name	is	<input type="text"/>		
First Name	starts with	A		
Last Name	is	SMITH		
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"/>		
Tax ID Number	is	<input type="text"/>		
Tax ID Type	is	<input type="text"/>		
Archived Flag	is	Not Set		
Inactive Flag	is	Not Set		
IRS Response Code	is	<input type="text"/>		
IRS Attempts	equals	<input type="text"/>		
State Prog Participation	is	ALABAMA		
County Prog Participation	is	<--ALL COUNTIES-->		
Service Center	is	<--ALL CENTERS-->		

Maximum Number of Results:

Save Search As:

Result List: 7 Customers Found

[New Customer](#)

17. Scroll down to display the **Result List** table to view the search results.



Search: Customers

Saved Searches
Go Advanced

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

A A SMITH

KADE KYLE

KRIS KYLE

KAIN KYLE

JOHN DO JOHN DO

Search: Customers Back

Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALABAMA	
County Prog Participation	is	<-ALL COUNTIES-->	
Service Center	is	<-ALL CENTERS-->	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 7 Customers Found

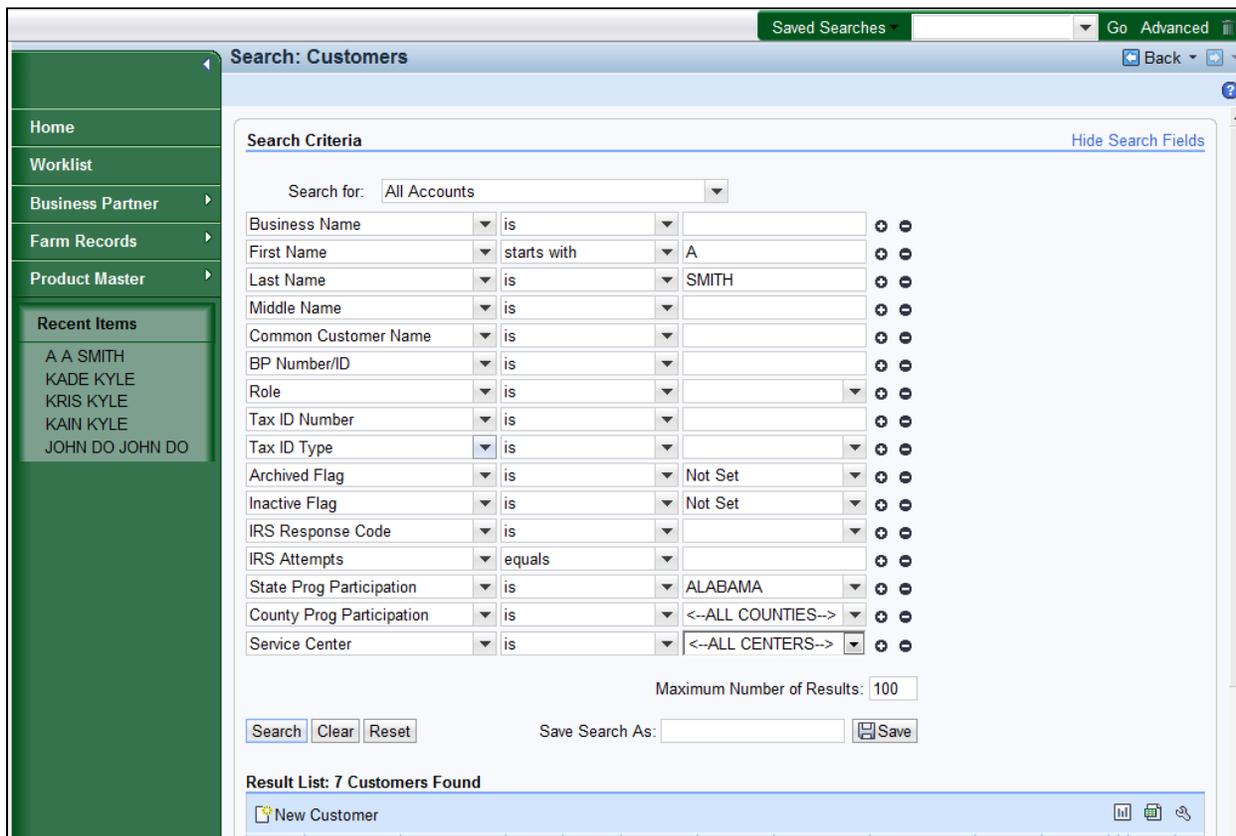
New Customer

Ina...	BP Num...	Common...	Tax...	Pa...	Tax ID...	House...	State	Street	City	ZIP...	IR...	L...
<input type="checkbox"/>	8000114...	A A SMITH	NO...	<input type="checkbox"/>	No Ta...		Alabama	55545 US...	ONE...	3512...	IR...	0
<input type="checkbox"/>	8000112...	A L SMITH	NO...	<input type="checkbox"/>	No Ta...		Alabama	7609 CAR...	DORA	3506...	IR...	0
<input type="checkbox"/>	8000114...	A REID S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	1906 HOL...	PRA...	3606...	IR...	0
<input type="checkbox"/>	8000110...	ALFRED...	NO...	<input type="checkbox"/>	No Ta...		Alabama	PO BOX 236	PINS...	3512...	IR...	0
<input type="checkbox"/>	8000120...	ALMA SM...	NO...	<input type="checkbox"/>	No Ta...		Alabama	2811 CLAI...	TALL...	3516...	IR...	0
<input type="checkbox"/>	8000115...	ANN C S...	NO...	<input type="checkbox"/>	No Ta...		Alabama	PO BOX 33	MILL...	3626...	IR...	0
<input type="checkbox"/>	8000114...	ANTHON...	NO...	<input type="checkbox"/>	No Ta...		Alabama	9735 WHL...	WA...	3518...	IR...	0

18. Scroll up to the Search Criteria to select a new search parameter.

The search has been narrowed down the results to seven (7) BP records.

Search: Customers



Search: Customers

Search for: All Accounts

Business Name	is	
First Name	starts with	A
Last Name	is	SMITH
Middle Name	is	
Common Customer Name	is	
BP Number/ID	is	
Role	is	
Tax ID Number	is	
Tax ID Type	is	
Archived Flag	is	Not Set
Inactive Flag	is	Not Set
IRS Response Code	is	
IRS Attempts	equals	
State Prog Participation	is	ALABAMA
County Prog Participation	is	<--ALL COUNTIES-->
Service Center	is	<--ALL CENTERS-->

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 7 Customers Found

New Customer

19. Click the **Tax ID Type:**  dropdown list icon button to display the list of alternate search criteria for this field.



We will further filter the search by adding a city to the existing search criteria.

Search: Customers

Search: Customers

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
SCIMS ID Number	is	Not Set	
Service Center	is	Not Set	
Standard Address	is		
State by Country	is		
State Prog Participation	equals		
Tax ID Number	is	ALABAMA	
Tax ID Type	is	<-ALL COUNTIES-->	
County Prog Participation	is	<-ALL COUNTIES-->	
Service Center	is	<-ALL CENTERS-->	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 7 Customers Found

New Customer

20. Click the **Up**  arrow to locate the Search parameter "City" from the available list.



Search: Customers

Saved Searches
Go Advanced

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

- A A SMITH
- KADE KYLE
- KRIS KYLE
- KAIN KYLE
- JOHN DO JOHN DO

Search: Customers Back

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is	<input type="text"/>	⊕ ⊖
First Name	starts with	A	⊕ ⊖
Last Name	is	SMITH	⊕ ⊖
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"/>	⊕ ⊖
Tax ID Number	is	<input type="text"/>	⊕ ⊖
Tax ID Type	is	<input type="text"/>	⊕ ⊖
Business Name	is	Not Set	⊕ ⊖
City	is	Not Set	⊕ ⊖
Common Customer Name	is	<input type="text"/>	⊕ ⊖
Country	is	<input type="text"/>	⊕ ⊖
County Prog Participation	equals	<input type="text"/>	⊕ ⊖
Customer Type	is	ALABAMA	⊕ ⊖
Date of Birth	is	<input type="text"/>	⊕ ⊖
County Prog Participation	is	<-ALL COUNTIES-->	⊕ ⊖
Service Center	is	<-ALL CENTERS-->	⊕ ⊖

Maximum Number of Results:

Save Search As:

Result List: 7 Customers Found

Print | Refresh | Help

21. Select **City** from the list.

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BP_Search_Customer_Business_Partner_Record_v4.udc

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Search: Customers

Search: Customers

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is	
First Name	starts with	A
Last Name	is	SMITH
Middle Name	is	
Common Customer Name	is	
BP Number/ID	is	
Role	is	
Tax ID Number	is	
City	is	
Archived Flag	is	Not Set
Inactive Flag	is	Not Set
IRS Response Code	is	
IRS Attempts	equals	
State Prog Participation	is	ALABAMA
County Prog Participation	is	<-ALL COUNTIES-->
Service Center	is	<-ALL CENTERS-->

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

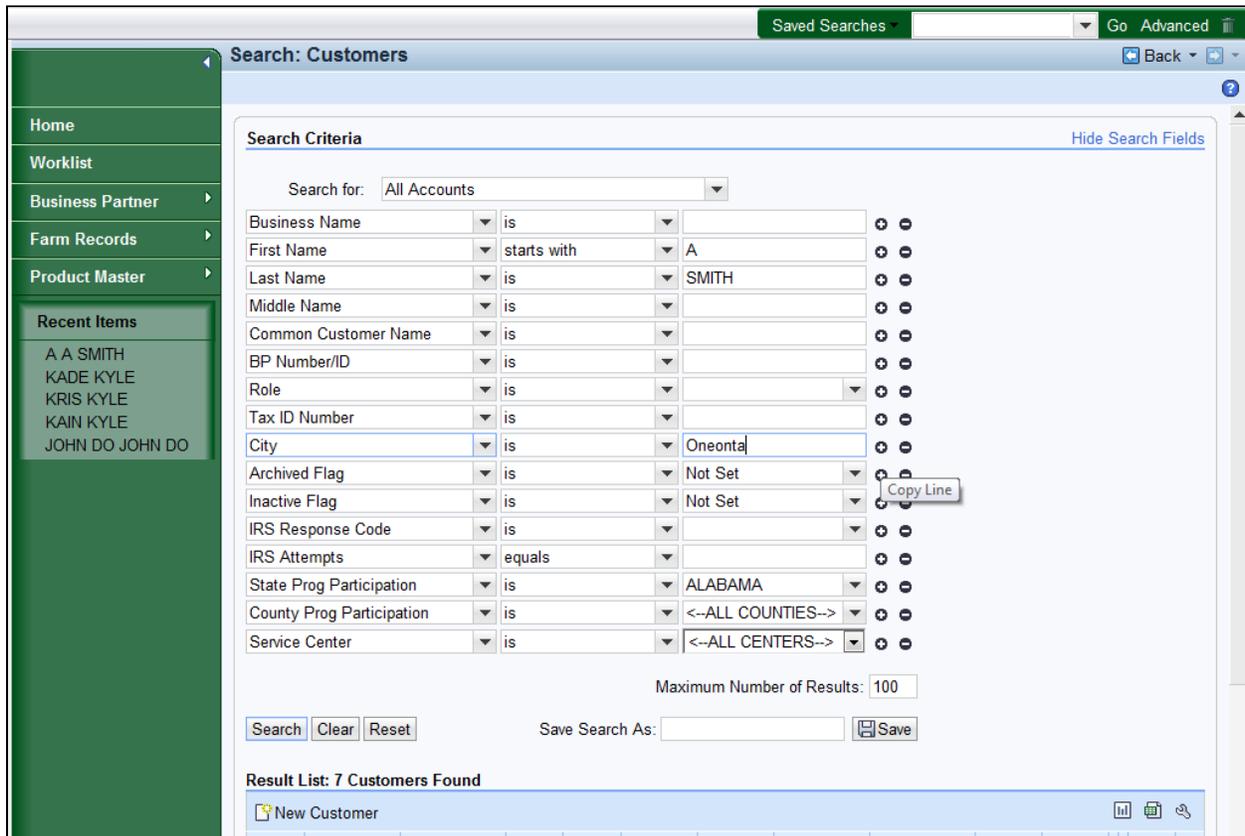
Result List: 7 Customers Found

New Customer

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

Field	R/O/C	Description
City	R	Incorporated municipality, usually governed by a mayor and a board of alderman or councilman Example: Oneonta

Search: Customers



Search: Customers

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
City	is	Oneonta	
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALABAMA	
County Prog Participation	is	<-ALL COUNTIES-->	
Service Center	is	<-ALL CENTERS-->	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 7 Customers Found

New Customer

23. Click the **Copy Line** button to add a second search by City line.

 The **Remove Line** button is used to remove the selected search criteria line from being included in the search.



Search: Customers

Search: Customers
Go Advanced

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
 - A A SMITH
 - KADE KYLE
 - KRIS KYLE
 - KAIN KYLE
 - JOHN DO JOHN DO

Search Criteria
Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
City	is	Oneonta	
City	is		
Archived Flag	is	Not Set	Choose the value of this criterion
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALABAMA	
County Prog Participation	is	<-ALL COUNTIES-->	
Service Center	is	<-ALL CENTERS-->	

Maximum Number of Results: 100

Save Search As:

Result List: 7 Customers Found

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

Field	R/O/C	Description
City	O	Incorporated municipality, usually governed by a mayor and a board of alderman or councilman. Example: Dora

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Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
City	is	Oneonta	
City	is	Dora	
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALABAMA	
County Prog Participation	is	<-ALL COUNTIES-->	
Service Center	is	<-ALL CENTERS-->	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 7 Customers Found

25. Click the **Search** button to display the search results.



Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
City	is	Oneonta	
City	is	Dora	
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALABAMA	
County Prog Participation	is	<--ALL COUNTIES-->	
Service Center	is	<--ALL CENTERS-->	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 2 Customers Found

26. Scroll down to the **Results List** table to display the search results.

Search: Customers

Saved Searches
Go Advanced

Home

Worklist

Business Partner

Farm Records

Product Master

Recent Items

A A SMITH

KADE KYLE

KRIS KYLE

KAIN KYLE

JOHN DO JOHN DO

Search: Customers

Back
?

Business Name	is		
First Name	starts with	A	
Last Name	is	SMITH	
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
City	is	Oneonta	
City	is	Dora	
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
State Prog Participation	is	ALABAMA	
County Prog Participation	is	<-ALL COUNTIES-->	
Service Center	is	<-ALL CENTERS-->	

Maximum Number of Results:

Search Clear Reset
Save Search As: Save

Result List: 2 Customers Found

[New Customer](#)

Ina...	BP Num...	Common...	Tax...	Pa...	Tax ID...	House...	State	Street	City	ZIP...	IR...	I...
<input type="checkbox"/>	8000114...	A A SMITH	NO...	<input type="checkbox"/>	No Ta...		Alabama	55545 US...	ONE...	3512...	IR...	0
<input type="checkbox"/>	8000112...	A L S(AA:SMITH)...		<input type="checkbox"/>	No Ta...		Alabama	7609 CAR...	DORA	3506...	IR...	0

27. Click the Common Customer name from the Common Customer Name (A A SMITH) link [A A SMITH](#) to go to the Customer: A A SMITH page.

 The search has been narrowed down the results to two (2) BP records.

Our final search based on the criteria Last Name (SMITH), first letter of First Name (A), State (Alabama), and two cities (Oneonta and Dora) produces the Result List of two customers.



Customer: A A SMITH

Customer: A A SMITH

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | More

Customer Details | Customer Profile | Roles | Identification Numbers | SCIMS Replication Status

Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number / ID: 8000114809	Address Lin... 55545 US HIGHWAY 231
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: A	Address Lin...
Middle Name: A	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: SMITH	City: ONEONTA
Suffix:	State: AL ALABAMA
Common Customer.. A A SMITH	ZIP Code: 35121-4005
Legal Name: No	Country: US USA
Language Preference: English	Telephone.
Data Origin: SCIMS	Mobile Num...
Employee Type: Not an employee	E-Mail Addr...
Tax ID Type: No Tax Iden...	Preferred C.. Post (letter)
Tax ID Number: No Tax ID...	Carrier Route: R001
Date of Death:	Delivery Bar... 450
Death Confirmed: <input type="checkbox"/>	Congressio.. ALABAMA 06

Notes

28. Click the **Home**  button to go to the Home page. You have completed the transaction.

 The procedure has shown how to use multiple search criteria to refine a search. You can put together the group of search criteria that best suits your needs to search for customers.



Result

You have searched for a BP Customer Record using multiple search criteria.