

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 | F | 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 | \bigotimes | Use this note to specify something that MUST NOT 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 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

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| Worklist | | Alerts | |
| Business Partner | Please Review DOD for BP TEST CCN Please Review DOD for BP GARY S MINGES | No result found | d |
| Farm Records | Please Review DOD for BP DEBBIE REYNOLDS LLC | Q Search | ⊟ × |
| Product Master | Please Review DOD for BP CHARLES W PATTERSON Please Review DOD for BP HOWARD HODGE JR Expand Web Links & I No result found | Search Cleansing Search Customer Search Employee Search Farms/Bir Search Products Search Requester Search Requester Search Restricter |) Cases (s/Contacts as hs dierarchies d Products d Fields |
| JOHN DO JOHN DO | Favorites | Create | E × |
| | My Favorites - Filter: All Items | Create Farm/Bin Create New Produ | uct Request |
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| | | Key Field Change Potential Duplicat | e Requests tes |
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- 2. Click the **Business Partner** 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.



Saved Searches 🔻 Go Advanced 🗂 Accounts 🖸 Back 🝷 🔯 👻 र 🖨 📀 Home Ξ× Search Reports **—** × Worklist Key Field Change Requests Potential Duplicates Search Cleansing Cases **Business Partner** Search Customers/Contacts Search Documents Search Employees Search Member Hierarchies Search Restricted Fields Farm Records Product Master **Recent Items** A A SMITH KADE KYLE KRIS KYLE KAIN KYLE JOHN DO JOHN DO

3. Click the **Search Customers/Contacts** <u>Search Customers/Contacts</u> link to go to the Search: Customers page.

Accounts



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| Home | Search Criteria | | | | | | Hide Search Fields |
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| Business Partner | Search for: All Accou | nts | | | • | | |
| | Business Name | - | is | - | | 00 | |
| Farm Records | First Name | - | is | - | | 00 | |
| Product Master | Last Name | - | is | • | | 00 | |
| Descent literes | Middle Name | - | is | • | | 00 | |
| Recent Items | Common Customer Name | - | is | - | | 00 | |
| A A SMITH | BP Number/ID | - | is | - | | 00 | |
| KADE KYLE KRIS KYLE | Role | - | is | - | | - 0 0 | |
| KAIN KYLE | Tax ID Number | - | is | - | | 00 | |
| JOHN DO JOHN DO | Tax ID Type | - | is | - | | • 0 0 | |
| | Archived Flag | - | is | - | Not Set | - 0 0 | |
| | Inactive Flag | - | is | • | Not Set | - 0 0 | |
| | IRS Response Code | - | is | • | | - 0 0 | |
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| | State Prog Participation | - | is | • | ALL STATES | - 0 0 | |
| | County Prog Participation | - | is | • | <all counties=""></all> | - 0 0 | |
| | Service Center | - | is | - | <all centers=""></all> | - 0 0 | |
| | Search Clear Reset | | Save Search | Max n As: | kimum Number of Resul | ts: 100 | 回 哥 3 |
| | New Customer | | | | 1 | | |

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.



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| Product Master | ► | Last Name | - | is | - | Smith | 0 | • | | | |
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| KADE KYLE KRIS KYLE | | Role | - | is | - | | • 0 | • | | | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 0 | • | | | |
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5. Click the **Search** button to display the search results.



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| Business Partner | Search for: All Accou | nts | | | • | | |
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| Farm Records | First Name | - | is | - | | 00 | |
| Product Master | Last Name | - | is | - | SMITH | 00 | |
| Descutitore | Middle Name | - | is | • | | 00 | |
| | Common Customer Name | - | is | - | | 00 | |
| A A SMITH | BP Number/ID | - | is | - | | 00 | |
| KADE KYLE KRIS KYLE | Role | - | is | - | | - o o | |
| KAIN KYLE | Tax ID Number | - | is | - | | 00 | |
| JOHN DO JOHN DO | Tax ID Type | - | is | • | | - 0 0 | |
| | Archived Flag | - | is | • | Not Set | - o o | |
| | Inactive Flag | - | is | • | Not Set | - 0 0 | |
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| | County Prog Participation | - | is | - | <all counties=""></all> | - 0 0 | |
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| | Search Clear Reset | Custo | Save Search mers Found | Max n As: | kimum Number of Result | ts: 100 | |
| | Rew Customer | | | | | | Ш Ш Ф |

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



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| Worklist | State Prog Participation | • | is | • | ALL STATE | S 🔹 | 00 | | | | | |
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| | Search Clear Reset | | Save Sea | rch As: | | C | Save | | | | | |
| Recent Items | | | | | | | | | | | | |
| A A SMITH | Result List: More Than 100 Cu | istor | mers Found | | | | | | | | | |
| KADE KYLE | Solution Provide America Structure Customer | | | | | | | | | u 🗊 | a, | |
| KAIN KYLE | Ina BP Num Commor | | Tax Pa | Tax ID. | House | State | Street | City | ZIP | II. IR | L. | |
| JOHN DO JOHN DO | 8000114 A A SMI | ΤΗ | NO | No Ta | | Alabama | 55545 US | ONE | 3512 | IR | 0 | |
| | 8000112 A L SMI | ΓH | NO | No Ta | | Alabama | 7609 CAR | DORA | 3506 | IR | 0 | |
| | 8000114 A REID \$ | S | NO | No Ta | | Alabama | 1906 HOL | PRA | 3606 | · IR | 0 | |
| | 8000110 ALFRED | | NO | No Ta | | Alabama | PO BOX 236 | PINS | 3512 | IR | 0 | |
| | 8000115 ANN C S | | NO | No Ta | | Alabama | PO BOX 33 | MILL | 3626 | IR | 0 | |
| | 8000114 ANTHON | I | NO | No Ta | | Alabama | 9735 WHI | WA | 3518 | · IR | 0 | |
| | 8000113 BENNY | S | NO | No Ta | | Alabama | 6522 AL H | LET | 36047 | IR | 0 | |
| | 8000117 BETTYE | J | NO | No Ta | | Alabama | PO BOX 253 | HOL | 3508 | · IR | 0 | |
| | 8000115 BOBBY | S | NO | No Ta | | Alabama | 402 PAYN | LET | 3604 | IR | 0 | |
| | 8000113 BOBBY | E | NO | No Ta | | Alabama | 2846 HAP | MOR | 3511 | IR | 0 | |
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| | 8000115 CAFFEY | | NO | No Ta | | Alabama | 230 COU | LINE | 3626 | • (IR | 0 | |
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7. Scroll up to the Search Criteria to select a new search parameter.

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



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| Home | | Search Criteria | | | | | | Hide Search Fields |
| Worklist | | | | | | | | |
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| | | Business Name | • | is | - | | 00 | |
| Farm Records | | First Name | - | is | - | | 00 | |
| Product Master | | Last Name | - | is | - | SMITH | 00 | |
| Descent literate | | Middle Name | - | is | - | | 00 | |
| Recent Items | | Common Customer Name | - | is | - | | 00 | |
| A A SMITH | | BP Number/ID | - | is | - | | 00 | |
| KADE KYLE KRIS KYLE | | Role | - | is | - | | . 0 0 | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 00 | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | - | | . 0 0 | |
| | | Archived Flag | - | is | - | Not Set | . 0 0 | |
| | | Inactive Flag | - | is | - | Not Set | . 0 0 | |
| | | IRS Response Code | - | is | - | | . 0 0 | |
| | | IRS Attempts | - | equals | - | | 00 | |
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8. Click the First Name dropdown list button to display a list of Search Definitions and select "starts with".



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| Business Partner | • | Search for: All Accou | nts | | | - | | |
| | | Business Name | - | is | - | | 00 | |
| Farm Records | | First Name | - | is | • | | 00 | |
| Product Master | ► | Last Name | - | contains | | SMITH | 00 | |
| | | Middle Name | - | is starte with | | | 00 | |
| Recent Items | | Common Customer Name | - | IS | • | | 00 | |
| A A SMITH | | BP Number/ID | - | is | • | | 00 | |
| | | Role | - | is | - | | - 0 0 | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 00 | |
| JOHN DO JOHN DO | b 📗 | Tax ID Type | - | is | - | | | |
| | | Archived Flag | - | is | - | Not Set | | |
| | | Inactive Flag | - | is | - | Not Set | | |
| | | IRS Response Code | - | is | - | | | |
| | | IRS Attempts | - | equals | - | | 00 | |
| | | State Prog Participation | - | is | - | ALL STATES | | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | | |
| | | Service Center | - | is | - | <all centers=""></all> | | |
| | | Search Clear Reset Result List: More Than 100 | Custo | Save Search mers Found | Max n As: | kimum Number of Result | s: 100 | |
| | | Rew Customer | | 1 1 1 | | | | |

9. Select starts with 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."



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| 5 0 1 | <u> </u> | Business Name | - | is | - | | (| 0 | |
| Farm Records | | First Name | - | starts with | - | | (|) o | |
| Product Master | | Last Name | - | is | • | SMITH | (| • • | |
| Desent Items | | Middle Name | - | is | • | | (| 0 | |
| Recent items | | Common Customer Name | - | is | - | | (| 0 | |
| A A SMITH | | BP Number/ID | - | is | - | | • |) o | |
| KADE KYLE KRIS KYLE | | Role | - | is | - | | • (|) o | |
| KAIN KYLE | | Tax ID Number | - | is | - | | • |) o | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | - | | • (| 0 | |
| | | Archived Flag | - | is | - | Not Set | • (| 0 | |
| | | Inactive Flag | - | is | - | Not Set | • (|) o | |
| | | IRS Response Code | - | is | • | | T (|) o | |
| | | IRS Attempts | - | equals | - | | (|) o | |
| | | State Prog Participation | - | is | • | ALL STATES | • (|) o | |
| | | County Prog Participation | - | is | • | <all counties=""></all> | • (|) o | |
| | | Service Center | - | is | • | <all centers=""></all> | • (|) o | |
| | | Search Clear Reset Result List: More Than 100 | Custo | Save Search mers Found | Max n As: | kimum Number of Resul | lts: 1 | 00 Save | |
| | | PNew Customer | | 1 1 1 | | | | | II II Q |

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

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



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| Business Partner | Þ | Search for: All Account | nts | | | • | | | | | |
| Carry Decords | • | Business Name | - | is | - | | 0 | • | | | |
| Famil Records | | First Name | - | starts with | - | A | 0 | • | | | |
| Product Master | Þ | Last Name | - | is | - | SMITH | 0 | • | | | |
| Desent Items | | Middle Name | - | is | - | | 0 | • | | | |
| Recent items | | Common Customer Name | - | is | - | | 0 | • | | | |
| A A SMITH | | BP Number/ID | - | is | - | | 0 | • | | | |
| KADE KYLE KRIS KYLE | | Role | - | is | - | | • 0 | • | | | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 0 | • | | | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | - | | • 0 | • | | | |
| | | Archived Flag | - | is | - | Not Set | • 0 | • | | | |
| | | Inactive Flag | - | is | - | Not Set | • 0 | • | | | |
| | | IRS Response Code | - | is | - | | • 0 | • | | | |
| | | IRS Attempts | - | equals | - | | 0 | • | | | |
| | | State Prog Participation | - | is | - | ALL STATES | • 0 | • | | | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | • 0 | • | | | |
| | | Service Center | - | is | - | <all centers=""></all> | • 0 | • | | | |
| | | Search Clear Reset | Custo | Save Search A mers Found | Ma: As: | ximum Number of Resul | ts: 10 | 0 ave | | M | <u>a</u> |
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11. Click the **Search** button to display the search results.



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| Business Partner | • | Search for: All Account | nts | | | • | | | |
| | ~ | Business Name | - | is | • | | 0 | • | |
| Farm Records | | First Name | - | starts with | • | A | 0 | • | |
| Product Master | | Last Name | - | is | - | SMITH | 0 | • | |
| Descriptions | | Middle Name | - | is | - | | 0 | • | |
| Recent Items | | Common Customer Name | - | is | - | | 0 | • | |
| A A SMITH | | BP Number/ID | - | is | - | | 0 | • | |
| KADE KYLE KRIS KYLE | | Role | - | is | - | | • 0 | • | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 0 | • | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | - | | • 0 | • | |
| | | Archived Flag | - | is | - | Not Set | • 0 | • | |
| | | Inactive Flag | - | is | - | Not Set | • 0 | • | |
| | | IRS Response Code | - | is | - | | v 0 | • | |
| | | IRS Attempts | - | equals | - | | 0 | • | |
| | | State Prog Participation | - | is | - | ALL STATES | • 0 | • | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | • 0 | • | |
| | | Service Center | - | is | - | <all centers=""></all> | • 0 | • | |
| | | Search Clear Reset | ound | Save Searc | Max h As: | kimum Number of Resul | ts: 100 | ve | |
| | | PNew Customer | | | | | | I | |

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



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| | Search: Customers | | | | | | | | | | 🖸 Bac | k 🔻 🕻 | - 3 |
| | | | | | | | | | | | | | 0 |
| | ING Response Gode | - | 15 | | • | | • | 00 | | | | | |
| Home | IRS Attempts | • | equals | | - | | | 00 | | | | | |
| Worklist | State Prog Participation | • | is | | - | ALL STAT | TES 🔻 | 00 | | | | | |
| Business Partner | County Prog Participation | • | is | | • | <all co<="" th=""><th>UNTIES> 🔻</th><th>00</th><th></th><th></th><th></th><th></th><th></th></all> | UNTIES> 🔻 | 00 | | | | | |
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| Farm Records | | | | | | | | 100 | | | | | |
| Product Master | | | | | Maxi | mum Num | iber of Results: | 100 | | | | | |
| | Search Clear Reset | | Save | Searc | h As: | | C. | Save | | | | | |
| Recent Items | | | | | | | | | | | | | |
| A A SMITH | Result List: 33 Customers Fou | nd | | | | | | | | | | | |
| | PNew Customer | | | | | | | | | | II | es. | |
| KAIN KYLE | Ina BP Num Common | | Tax | Pa | Tax ID | House | . State | Street | City | ZIP | IR | 1 | |
| JOHN DO JOHN DO | 8000114 A A SMI | ΓН | NO | | No Ta | | Alabama | 55545 US | ONE | 3512 | IR | 0 | |
| | 8000112 A L SMIT | ΓH | NO | | No Ta | | Alabama | 7609 CAR | DORA | 3506 | IR | 0 | |
| | 8000114 A REID S | S | NO | | No Ta | | Alabama | 1906 HOL | PRA | 3606 | · IR | 0 | |
| | 8000091 AARON | S | NO | | No Ta | | Alabama | 3609 GAY | HUN | 3581 | IR | 0 | |
| | 8000018 ADAM S | | NO | | No Ta | | Alabama | 715 COU | FLO | 3563 | · IR | 0 | |
| | 8000037 AGNES | S | NO | | No Ta | | Hawaii | 354 ILIMA | KAIL | 9673 | IR | 0 | |
| | 8000123 ALBERT | L | NO | | No Ta | | Connecti | 493 NON | BET | 0675 | · IR | 0 | |
| | 8000017 ALETA C | | NO | | No Ta | | Alabama | 7626 COU | KILL | 3564 | • I IR | 0 | |
| | 8000048 ALFRED | | NO | | No Ta | | Pennsylv | 630 POPL | NE | 1735 | IR | 0 | |
| | 8000110 ALFRED | | NO | | No Ta | | Alabama | PO BOX 236 | PINS | 3512 | IR | 0 | |
| | 8000079 ALFRED | A | NO | | No Ta | | Kansas | 707 FRAZI | VAL | 6608 | IR | 0 | |
| | 8000010 ALLEN S | S | NO | | No Ta | | California | PO BOX 5 | ST0 | 9520 | IR | 0 | |
| | 8000120 ALMA SI | M | NO | | No Ta | | Alabama | 2811 CLAI | TALL | 3516 | IR | 0 | |
| | 8000090 ALVA RU | J | NO | | No Ia | | lexas | 1101 COU | 1HO | /65/ | • IR | 0 | |
| | | | | | | <u>2</u> 3 | Forward • | | | | | | |

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.



| | | | | | | Saved Sear | rches - | ✓ Go Advanced m |
|------------------|---|--|------|---------------|-----------|-------------------------|---------|--------------------|
| | | Search: Customers | | | | | | 🖸 Back 👻 💟 👻 |
| | | | | | | | | 0 |
| Home | | | | | | | | |
| Worklist | | Search Criteria | | | | | | Hide Search Fields |
| Business Partner | • | Search for: All Account | nts | | | • | | |
| | | Business Name | - | is | • | | 00 | |
| Farm Records | | First Name | - | starts with | - | A | 00 | |
| Product Master | Þ | Last Name | - | is | - | SMITH | 00 | |
| Desent Items | | Middle Name | - | is | • | | 00 | |
| Recent items | _ | Common Customer Name | - | is | • | | 00 | |
| A A SMITH | | BP Number/ID | - | is | • | | 00 | |
| KRIS KYLE | | Role | - | is | - | | - 0 0 | |
| KAIN KYLE | | Tax ID Number | - | is | • | | 00 | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | • | | • 0 0 | |
| | | Archived Flag | - | is | • | Not Set | • 0 0 | |
| | | Inactive Flag | - | is | • | Not Set | • 0 0 | |
| | | IRS Response Code | - | is | • | | • 0 0 | |
| | | IRS Attempts | - | equals | - | | 00 | |
| | | State Prog Participation | - | is | - | ALL STATES | • 0 0 | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | • 0 0 | |
| | | Service Center | - | is | - | <all centers=""></all> | • 0 0 | |
| | | Search Clear Reset Result List: 33 Customers Fo | ound | Save Search A | Ma As: | kimum Number of Result | s: 100 |] |
| | | PNew Customer | | | | | | LI ● 《 |

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.



| | | | | | | Saved Sea | arches | - | | Go Advance | d 🗎 |
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| | | Search: Customers | | | | | | | | 🖸 Back 🝷 | - |
| | | | | | | | | | | | () |
| Home | | | | | | | | | | | |
| Worklist | | Search Criteria | | | | | | | | Hide Search Fields | |
| Business Partner | • | Search for: All Accou | nts | | | • | | | | | |
| | | Business Name | - | is | - | | 0 | • | | | |
| Farm Records | | First Name | - | starts with | - | A | 0 | • | | | |
| Product Master | Þ | Last Name | - | is | - | SMITH | 0 | • | | | |
| D ck | | Middle Name | - | is | - | | 0 | • | | | |
| Recent Items | | Common Customer Name | - | is | - | | 0 | • | | | |
| A A SMITH | | BP Number/ID | - | is | - | | 0 | • | | | |
| | | Role | - | is | - | | v 0 | • | | | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 0 | • | | | |
| JOHN DO JOHN DO | D I | Tax ID Type | - | is | - | | v 0 | • | | | |
| | | Archived Flag | - | is | - | Not Set | v 0 | • | | | |
| | | Inactive Flag | - | is | - | Not Set | v 0 | • | | | |
| | | IRS Response Code | - | is | - | | v 0 | • | | | |
| | | IRS Attempts | - | equals | - | | 0 | • | | | |
| | | State Prog Participation | - | is | - | ALL STATES | v 0 | • | | | |
| | | County Prog Participation | - | is | - | ALL STATES | | | | | |
| | | Service Center | - | is | - | ALABAMA | | | | | |
| | | Search Clear Reset Result List: 33 Customers Fo | ound | Save Search . | Ma: As: | ALASKA AMERICAN SAMOA ARIZONA ARKANSAS CALIFORNIA | | | ¥ | | |
| | | PNew Customer | | | | | | | | u 🗐 I | |

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



| | | | | | | Saved Sear | ches 👻 | ✓ Go Advanced m |
|------------------------|---|--|------|---------------|-----------|-------------------------|--------|--------------------|
| | | Search: Customers | | | | | | 🖸 Back 👻 💟 👻 |
| | | | | | | | | 0 |
| Home | | Search Criteria | | | | | | Hide Cearch Eielde |
| Worklist | | Search Chiena | | | | | | Hide Search Fields |
| Business Partner | • | Search for: All Account | nts | | | • | | |
| | | Business Name | - | is | • | | 00 | |
| Farm Records | | First Name | - | starts with | • | A | 00 | |
| Product Master | Þ | Last Name | - | is | • | SMITH | 00 | |
| Descriptions | | Middle Name | - | is | • | | 00 | |
| Recent Items | | Common Customer Name | - | is | • | | 00 | |
| A A SMITH | | BP Number/ID | - | is | • | | 00 | |
| KADE KYLE KRIS KYLE | | Role | - | is | • | | • • • | |
| KAIN KYLE | | Tax ID Number | - | is | • | | 00 | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | • | | | |
| | | Archived Flag | - | is | • | Not Set | • • • | |
| | | Inactive Flag | - | is | • | Not Set | | |
| | | IRS Response Code | - | is | Ŧ | | | |
| | | IRS Attempts | - | equals | • | | 00 | |
| | | State Prog Participation | - | is | • | ALABAMA | | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | | |
| | | Service Center | - | is | - | <all centers=""></all> | | |
| | | Search Clear Reset Result List: 33 Customers Fo | ound | Save Search A | Ma .s: | ximum Number of Results | s: 100 | |
| | | Prew Customer | | 1 1 1 | | - I | | <u>م</u> ال |

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



| | | | | | | Saved Sear | ches 👻 | ✓ Go Advanced m |
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| | | | | | | | | 0 |
| Home | | | | | | | | ^ |
| | | Search Criteria | | | | | | Hide Search Fields |
| Worklist | | | | | | | | |
| Business Partner | ► | Search for: All Accou | nts | | | • | | |
| Farm Records | • | Business Name | - | is | • | | 00 | |
| | | First Name | - | starts with | - | A | 00 | |
| Product Master | | Last Name | - | is | - | SMITH | 00 | |
| Pocont Itoms | | Middle Name | - | is | - | | 00 | |
| | | Common Customer Name | - | is | • | | 00 | |
| | | BP Number/ID | - | is | • | | 00 | |
| KRIS KYLE | | Role | - | is | - | | • • • | |
| KAIN KYLE | | Tax ID Number | - | is | • | | 00 | |
| JOHN DO JOHN DO | D I | Tax ID Type | - | is | - | | • • • | |
| | | Archived Flag | - | is | • | Not Set | • • • | |
| | | Inactive Flag | - | is | - | Not Set | • • • | |
| | | IRS Response Code | - | is | - | | | |
| | | IRS Attempts | - | equals | - | | 00 | |
| | | State Prog Participation | - | is | - | ALABAMA | | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | | |
| | | Service Center | - | is | - | <all centers=""></all> | | |
| | | Search Clear Reset | und | Save Searc | Max h As: | kimum Number of Result | s: 100 | |
| | | Sew Customer | | | | | | |

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



Saved Searches -▼ Go Advanced 🗑 Search: Customers 🖸 Back 🝷 💽 👻 0 . Home Common Customer Name 🔻 is • 00 BP Number/ID 🔻 is -00 Worklist Role 🔻 is • - 0 0 **Business Partner** Tax ID Number 🔻 is -0 0 Tax ID Type Farm Records 🔻 is • - 0 0 Archived Flag 🔻 is Not Set - O O Product Master Inactive Flag Not Set 🔻 is - O O IRS Response Code ▼ is **Recent Items** • - O O IRS Attempts • A A SMITH equals 00 State Prog Participation ▼ ALABAMA ▼ is KADE KYLE - O O KRIS KYLE County Prog Participation ▼ <--ALL COUNTIES--> ▼ O ● 🔻 is KAIN KYLE --ALL CENTERS--> • 0 • Service Center 🔻 is JOHN DO JOHN DO Maximum Number of Results: 100 Search Clear Reset Save Search As: Save Result List: 7 Customers Found 🔲 🗐 🔍 New Customer City ZIP... IR... I.. Ina... BP Num... Common... Tax... Pa... Tax ID... House... State Street NO... NO... Alabama 55545 US... ONE... 3512... Alabama 7609 CAR... DORA 3506... No Ta... 8000114... A A SMITH IR.... 0 8000112... A L SMITH 8000112... A L SMITH NO... No Ta... Alabama 1906 HOL... PRA... 3606... IR... 8000114... A REID S... NO... No Ta... Alabama 1906 HOL... PRA... 3606... IR... No Ta... IR 0 0 8000110... ALFRED... NO... 🔲 No Ta... Alabama PO BOX 236 PINS... 3512... IR.... 0 8000120... ALMA SM... NO... No Ta... Alabama 2811 CLAI... TALL... 3516... IR... 0 IR... No Ta... 8000115... ANN C S... NO... Alabama PO BOX 33 MILL... 3626... 0 8000114... ANTHON NO... No Ta... Alabama 9735 WHI... WA... 3518.... · IR... 0

Search: Customers

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.



| | | | | | | Saved Sear | ches 👻 | ✓ Go Advanced m |
|------------------------|-----|---------------------------|-----|-------------|------------|-------------------------|--------|----------------------|
| | | Search: Customers | | | | | | 🖸 Back 👻 🖾 👻 |
| | | | | | | | | 8 |
| Home | | Count Collegia | | | | | | Liide Cassala Eistea |
| Worklist | | Search Criteria | | | | | | Hide Search Fleids |
| Business Partner | • | Search for: All Accou | nts | | | • | | |
| | | Business Name | - | is | • | | 00 | |
| Farm Records | | First Name | - | starts with | - | A | 00 | |
| Product Master | Þ | Last Name | - | is | - | SMITH | 00 | |
| Descutifums | | Middle Name | - | is | - | | 00 | |
| Recent Items | | Common Customer Name | - | is | - | | 00 | |
| A A SMITH | | BP Number/ID | - | is | - | | 00 | |
| KADE KYLE KRIS KYLE | | Role | - | is | - | | • • • | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 00 | |
| JOHN DO JOHN DO | o 📗 | Tax ID Type | - | is | - | | | |
| | | Archived Flag | - | is | - | Not Set | | |
| | | Inactive Flag | - | is | - | Not Set | | |
| | | IRS Response Code | - | is | - | | | |
| | | IRS Attempts | - | equals | - | | 00 | |
| | | State Prog Participation | - | is | - | ALABAMA | | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | | |
| | | Service Center | - | is | - | <all centers=""></all> | | |
| | | Search Clear Reset | und | Save Search | Ma: As: | kimum Number of Result | s: 100 | |
| | | Rew Customer | | | | | | 回 圉 & |
| | | | | | | | | |

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.



| | | | | | | Saved Sear | rches - | 🔻 Go Advanced 湔 |
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| | | Search: Customers | | | | | | 🖸 Back 👻 🖾 👻 |
| | | | | | | | | 8 |
| Home | | Search Criteria | | | | | | Hide Search Fields |
| Worklist | | Search Chiena | | | | | | The Search Heids |
| Business Partner | • | Search for: All Accou | nts | | | • | | |
| | | Business Name | • | is | • | | 00 | |
| Farm Records | | First Name | - | starts with | • | A | 00 | |
| Product Master | Þ | Last Name | - | is | • | SMITH | 00 | |
| Pocont Itoms | | Middle Name | - | is | - | | 00 | |
| Recent items | - | Common Customer Name | - | is | • | | 00 | |
| | | BP Number/ID | - | is | - | | 00 | |
| KRIS KYLE | | Role | - | is | - | | • 0 0 | |
| KAIN KYLE | | Tax ID Number | - | is | • | | 00 | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | - | | • • • | |
| | | SCIMS ID Number | - | is | - | Not Set | • • • | |
| | | Service Center | | is | • | Not Set | • • • | |
| | | State by Country | | is | - | | • • • | |
| | | State Prog Participation | | equals | - | | 00 | |
| | | Tax ID Number | _ | is | - | ALABAMA | - 0 0 | |
| | | Tax ID Type | - | is | - | <all counties=""></all> | - 0 0 | |
| | | Service Center | - | is | - | <all centers=""></all> | - 0 0 | |
| | | Search Clear Reset | und | Save Searc | Ma: h As: | kimum Number of Result | s: 100 | |
| | | Now Customor | | | | | | 回 冊 & |
| | | | | | | | | |

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



| | | | | | | Saved S | Searche | es 👻 | - | Go Adv | anced | Ĩ |
|------------------|---|----------------------------|----------|---------------|-----------|--|---------|-------------|----------|--------|--------|-----|
| | | Search: Customers | | | | | | | | 🖸 Ba | ck 🝷 🖾 | - 1 |
| | | | | | | | | | | | | () |
| Home | | Search Critoria | | | | | | | Hida | Search | Fielde | - |
| Worklist | | Search Chiena | | | | | | | Hide | Search | rielas | |
| Business Partner | Þ | Search for: All Accourt | nts | | | • | | | | | | |
| Form Decords | • | Business Name | - | is | • | | | 0 0 | | | | |
| | | First Name | - | starts with | - | A | | 0 0 | | | | |
| Product Master | | Last Name | - | is | - | SMITH | | 0 0 | | | | |
| Decent Items | | Middle Name | - | is | - | | | • • | | | | |
| Recent items | | Common Customer Name | - | is | - | | | 0 0 | | | | |
| A A SMITH | | BP Number/ID | - | is | - | | | 0 0 | | | | |
| KRIS KYLE | | Role | - | is | - | | - | 0 0 | | | | |
| KAIN KYLE | | Tax ID Number | - | is | - | | | 0 0 | | | | |
| JOHN DO JOHN DO | | Tax ID Type | - | is | • | | - | 0 0 | | | | |
| | | Business Name | | is | • | Not Set | - | 0 0 | | | | |
| | | City | | is | - | Not Set | - | 0 0 | | | | |
| | | Common Customer Name | | is | - | | - | 0 0 | | | | |
| | | County Prog Participation | | equals | - | | | 0 0 | | | | |
| | | Customer Type | | is | - | ALABAMA | - | 0 0 | | | | |
| | | Date of Birth - annonpanon | * | is | - | <all counties<="" th=""><th>-> ▼</th><th>0 0</th><th></th><th></th><th></th><th></th></all> | -> ▼ | 0 0 | | | | |
| | | Service Center | - | is | • | <all centers<="" th=""><th>> 🔻</th><th>0 0</th><th></th><th></th><th></th><th></th></all> | > 🔻 | 0 0 | | | | |
| | | Search Clear Reset | und | Save Search A | Ma As: | kimum Number of Re | esults: | 100 Save | | | | |
| | | PNew Customer | | | | | | | | • | ez, | |
| | | | | | | | | | | | Ŭ | |

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



| | | | _ | | _ | Saved Sea | rches | ; - | - | Go Advance | d 🗎 |
|------------------|-----|---------------------------|-----|---------------|------------|-------------------------|--------|------------|-------|---------------|-----|
| | | Search: Customers | | | | | | | | 🖸 Back 🝷 | - |
| | | | | | | | | | | | () |
| Home | | Search Criteria | | | | | | | Hida | Search Field | |
| Worklist | | Search Chiena | | | | | | | Tilde | Search Fleida | 2 |
| Business Partner | • | Search for: All Accou | nts | | | • | | | | | |
| Farm Danada | | Business Name | - | is | - | | 0 | 0 | | | |
| Farm Records | | First Name | - | starts with | - | A | 0 |) o | | | |
| Product Master | Þ | Last Name | - | is | - | SMITH | 0 |) o | | | |
| Descutitors | | Middle Name | - | is | - | | 0 |) o | | | |
| Recent items | | Common Customer Name | - | is | - | | 0 | • • | | | |
| A A SMITH | | BP Number/ID | - | is | - | | 0 | • • | | | |
| KRIS KYLE | | Role | - | is | - | | • 0 | • • | | | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 0 | • • | | | |
| JOHN DO JOHN DO | o 📗 | City | - | is | - | | • 0 | • | | | |
| | | Archived Flag | - | is | - | Not Set | • 0 | 0 | | | |
| | | Inactive Flag | - | is | - | Not Set | - 0 | • | | | |
| | | IRS Response Code | - | is | - | | • 0 | 0 | | | |
| | | IRS Attempts | - | equals | - | | 0 | 0 | | | |
| | | State Prog Participation | - | is | - | ALABAMA | - o | 0 | | | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | • 0 | 0 | | | |
| | | Service Center | - | is | - | <all centers=""></all> | - 0 | | | | |
| | | Search Clear Reset | und | Save Search / | Ma: As: | kimum Number of Resul | ts: 10 | 00 Save | | | |
| | | Prew Customer | | | | | | | | H | |

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 |



| | | | _ | | | Saved Searc | ches 🔻 | 🔻 Go Advanced 🗑 |
|------------------|-----|---------------------------|-----|-------------|------------|-------------------------|-----------|--------------------|
| | | Search: Customers | | | | | | 🖸 Back 👻 💟 👻 |
| | | | | | | | | 0 |
| Home | | (| | | | | | ^ |
| M/ | | Search Criteria | | | | | | Hide Search Fields |
| VVORKIIST | | Caarab far | | | | _ | | |
| Business Partner | Þ | Search Ior. All Accou | nts | | | | | |
| Farm Records | Þ | Business Name | • | is | • | | 00 | |
| | | First Name | • | starts with | • | A | 00 | |
| Product Master | | Last Name | - | is | • | SMITH | 00 | |
| Recent Items | | Middle Name | - | is | - | | 00 | |
| | - | Common Customer Name | - | is | • | | 00 | |
| | | BP Number/ID | - | is | - | | 0 0 | |
| KRIS KYLE | | Role | - | is | - | | | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 0 0 | |
| JOHN DO JOHN DO | D I | City | - | is | - | Oneonta | 00 | |
| | | Archived Flag | - | is | - | Not Set | · • | |
| | | Inactive Flag | - | is | • | Not Set | Copy Line | |
| | | IRS Response Code | - | is | - | • | 00 | |
| | | IRS Attempts | - | equals | - | | 0 0 | |
| | | State Prog Participation | - | is | - | ALABAMA | 00 | |
| | | County Prog Participation | - | is | - | <all counties=""></all> | | |
| | | Service Center | - | is | - | <all centers=""></all> | 00 | |
| | | Search Clear Reset | und | Save Search | Max As: | kimum Number of Results | s: 100 | |
| | | New Customer | | | | | | N # & |
| | | | | | | | 1 | |

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

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



| | | | | | Saved Searc | ches | - | ✓ Go Advanced 	mi |
|------------------------|------------------------------|----|----------------|-----|-------------------------|-------|-------------------------|--------------------|
| | Search: Customers | | | | | | | 🖸 Back 👻 💟 👻 |
| | | | | | | | | 0 |
| Home | Search Criteria | | | | | | | Hide Search Fields |
| Worklist | | | | | | | | |
| Business Partner | Search for: All Accour | ts | | | • | | | |
| Earm Records | Business Name | • | is | • | | 0 | • | |
| | First Name | • | starts with | • | A | 0 | • | |
| Product Master | Last Name | • | is | • | SMITH | 0 | • | |
| Desent Itoms | Middle Name | - | is | • | | 0 | • | |
| Recent items | Common Customer Name | • | is | • | | 0 | • | |
| | BP Number/ID | • | is | • | | 0 | • | |
| KADE KTLE KRIS KYLE | Role | • | is | • | • | 0 | • | |
| KAIN KYLE | Tax ID Number | • | is | • | | 0 | • | |
| JOHN DO JOHN DO | City | • | is | • | Oneonta | C | • | |
| | City | - | is | • | | o | • | |
| | Archived Flag | - | is | • | Not Set Choose | e the | value of this criterion | |
| | Inactive Flag | • | is | • | Not Set | 0 | • | |
| | IRS Response Code | - | is | • | | 0 | • | |
| | IRS Attempts | • | equals | • | | 0 | • | |
| | State Prog Participation | • | is | • | ALABAMA | 0 | • | |
| | County Prog Participation | • | is | • | <all counties=""></all> | 0 | • | |
| | Service Center | • | is | • | <all centers=""></all> | 0 | • | |
| | Search Clear Reset | | Save Search As | Ma: | ximum Number of Results | s: 10 | 0 ave | |
| | Result List: 7 Customers Fou | nd | | | | | | |
| | FO New Contents | | | | | | | . கு. |

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

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



| | | | | | | Saved Sear | ches - | ✓ Go Advanced m |
|---|-----|------------------------------|-----|-------------|----|-------------------------|--------|--------------------|
| | | Search: Customers | | | | | | 🖸 🖸 Back 👻 🖾 👻 |
| | | | | | | | | 0 |
| Home | | | | | | | | ▲ |
| | | Search Criteria | | | | | | Hide Search Fields |
| Worklist | | | | | | | | |
| Business Partner | Þ | Search for: All Account | nts | | | • | | |
| Farm Records | Þ | Business Name | - | is | • | | 00 | |
| | | First Name | - | starts with | - | A | 00 | |
| Product Master | | Last Name | - | is | - | SMITH | 00 | |
| Pocont Itoms | | Middle Name | - | is | - | | 0 0 | |
| Recent items | _ | Common Customer Name | - | is | - | | 00 | |
| | | BP Number/ID | - | is | - | | 00 | |
| KRIS KYLE | | Role | - | is | - | | • • • | |
| KAIN KYLE | | Tax ID Number | - | is | - | | 00 | |
| JOHN DO JOHN DO | D I | City | - | is | - | Oneonta | 0 0 | |
| | | City | - | is | - | Dora | 00 | |
| | | Archived Flag | - | is | - | Not Set | - 0 0 | |
| | | Inactive Flag | - | is | - | Not Set | . 0 0 | |
| | | IRS Response Code | - | is | - | | . 0 0 | |
| | | IRS Attempts | - | equals | - | | 0 0 | |
| | | State Prog Participation | - | is | - | ALABAMA | . 0 0 | , |
| | | County Prog Participation | - | is | - | <all counties=""></all> | . 0 0 | |
| | | Service Center | - | is | - | <all centers=""></all> | - 0 0 | , |
| | | | | | Ma | ximum Number of Result | s: 100 | |
| KNIS KYLE KAIN KYLE JOHN DO JOHN DO City is City is Archived Flag is Inactive Flag is Not Set 0 IRS Response Code is IRS Attempts equals State Prog Participation is County Prog Participation is Service Center is Maximum Number of Results: 100 Search Clear Reset Save Search As: | | | | | | | | |
| | | Result List: 7 Customers For | und | | | | | |
| | | | | | | | | <u>国</u> |

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



| | | | | | | Saved Sea | arch | es - | ✓ Go Advanced |
|------------------------|-----|------------------------------|-----|----------------|----|-------------------------|------|------|--------------------|
| | | Search: Customers | | | | | | | 🔄 Back 👻 🗔 👻 |
| | | | | | | | | | 0 |
| Home | | | | | | | | | |
| | | Search Criteria | | | | | | | Hide Search Fields |
| Worklist | | | | | | | | | |
| Business Partner | Þ | Search for: All Accou | nts | | | • | | | |
| Form Decords | • | Business Name | - | is | • | | | • • | |
| Famil Records | | First Name | - | starts with | • | A | | • • | |
| Product Master | | Last Name | - | is | • | SMITH | | • • | |
| Desent Items | | Middle Name | - | is | • | | | • • | |
| Recent items | | Common Customer Name | - | is | • | | | • • | |
| A A SMITH | | BP Number/ID | - | is | • | | | • • | |
| KADE KYLE KRIS KYLE | | Role | - | is | ▼ | | • | • • | |
| KAIN KYLE | | Tax ID Number | - | is | ▼ | | | • • | |
| JOHN DO JOHN DO | o 📗 | City | - | is | • | Oneonta | | 0 0 | |
| | | City | - | is | • | Dora | | 0 0 | |
| | | Archived Flag | - | is | Ŧ | Not Set | • | 0 0 | |
| | | Inactive Flag | - | is | • | Not Set | • | • • | |
| | | IRS Response Code | - | is | • | | • | 00 | |
| | | IRS Attempts | - | equals | • | | | 0 0 | |
| | | State Prog Participation | - | is | • | ALABAMA | • | 00 | |
| | | County Prog Participation | - | is | • | <all counties=""></all> | • | 0 0 | |
| | | Service Center | - | is | Ŧ | <all centers=""></all> | • | 00 | |
| | | | | | | , . | | | |
| | | | | | Ma | ximum Number of Resul | ts: | 100 | |
| | | Search Clear Reset | | Save Search As | | | | Save | 1 |
| | | Coulding Ordan (1000t | | oure oouren Aa | | | | 0000 | |
| | | Result List: 2 Customers For | und | | | | | | |
| | | Contempo | | | | | | | |

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



| Saved Searches Go Advanced | | | | | | | | | |
|----------------------------|---------------------------|---------------------------------|--------------|-------------------------|----------|------|------|--------|---------|
| | Search: Customers | | | | | | | 🖸 Bacl | k 🕶 💽 👻 |
| | | | | | | | | | 3 |
| Home | Business Name | is | - | | 00 | | | | |
| Morklint | First Name | starts with | • | A | 00 | | | | |
| VVOTKIISL | Last Name | r is | - | SMITH | 00 | | | | |
| Business Partner | Middle Name | r is | - | | 00 | | | | |
| Farm Records | Common Customer Name | r is | - | | 00 | | | | |
| | BP Number/ID | r is | - | | 00 | | | | |
| Product Master | Role | r is | - | | 00 | | | | |
| Recent Items | Tax ID Number | r is | - | | 00 | | | | |
| | City | r is | - | Oneonta | 00 | | | | |
| KADE KYLE | City | r is | - | Dora | 00 | | | | |
| KRIS KYLE | Archived Flag | r is | - | Not Set | | | | | |
| KAIN KYLE | Inactive Flag | r is | - | Not Set | | | | | |
| JOHN DO JOHN DO | IRS Response Code | r is | - | | | | | | |
| | IRS Attempts | equals | - | | 00 | | | | |
| | State Prog Participation | r is | • | ALABAMA | 00 | | | | |
| | County Prog Participation | r is | - | <all counties=""></all> | 00 | | | | |
| | Service Center | r is | • | <all centers=""></all> | 00 | | | | |
| | Search Clear Reset | Save Searc | Max h As: | imum Number of Result | s: 100 | | | | |
| | Rew Customer | | | | | | | i i | 2 |
| | Be BD Num Commen | Ten | TevilD | Hausa Chat- | Chronit | City | סוק | | |
| | PRODUCT | NO | No To | House State | Street | ONE | 2610 | ID | 1 |
| | 8000114 A L S ATA | SMITHO | No Ta | Alabama | 7609 CAR | DORA | 3506 | IR | 0 |

27. Click the Common Customer name from the Common Customer Name (A A SMITH) link AASMITH 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

| | | | | Saved Se | arches - | - | Go Advand | ced 🗎 |
|------------------|-----------------------------------|-----------|-------------------------|-----------|------------------|----------------------|--------------|-------|
| | Customer: A A SMITH | | | | | | C Back | • 🚺 • |
| | 🖫 Save 🗙 Cancel Copy 🍄 New | Show Dupl | licates Key Field Cha | nge Mo |)re = | | Ą | ₿ 🕐 |
| Home | | | | | | | | |
| W Home | Customer Details Customer Profile | Roles I | dentification Numbers | SCIMS R | eplication Statu | s | | |
| Business Partner | Edit STax ID History | | | | | | | |
| | General Data | | Main | Address | and Communi | ication Data | | |
| Farm Records | Current Role: Individual | | Infor | mation | | | | |
| Product Master | BP Number / ID: 8000114809 | | Addre | ess Lin | 55545 US HIG | HWAY 231 | | |
| Descriptions | Prefix: | | | | Example: Stre | et address, PO BO | X XXX, RR… | |
| Recent Items | First Name: A | | Addre | ess Lin | | | | |
| | Middle Name: A | | | | Example: Apa | rtment, Suite, Unit, | Building, Fl | |
| KRIS KYLE | Last Name: SMITH | | | City: | ONEONTA | | | |
| KAIN KYLE | Suffix: | | | State: | AL | ALABAMA | | |
| JOHN DO JOHN DO | Common Customer. A A SMITH | | Z | IP Code: | 35121-4005 | | | |
| | Legal Name: No | | | Country: | US | USA | | |
| | Language Preference: English | | Tele | ephone. | | | | |
| | Data Origin: SCIMS | | Mobil | e Num | | | | |
| | Employee Type: Not an empl | oyee | E-Ma | il Addr | | | | |
| | Tax ID Type: No Tax Iden | 🕜 | Prefe | erred C | Post (letter) | | | |
| | Tax ID Number: No Tax ID | 0 | Carrie | er Route: | R001 | | | |
| | Date of Death: | | Delive | ery Bar | 450 | | | |
| | Death Confirmed: | | Cong | gressio | ALABAMA | 06 | | |
| | Notes | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

28.

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

have completed the transaction.

Ð

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.