

## Purpose

The purpose of this work instruction is to describe how to display the details of a Business Partner (BP) customer record.

## Trigger



Perform this procedure when a review of customer Business Partner components is required.




## Prerequisites

- The customer record must be saved in CRM.

## 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 information in some of the assignment blocks (tabs) are different if the customer is an organization instead of an individual.
- "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** indicate the action is conditional.
- The following notes may be used throughout this work instruction:

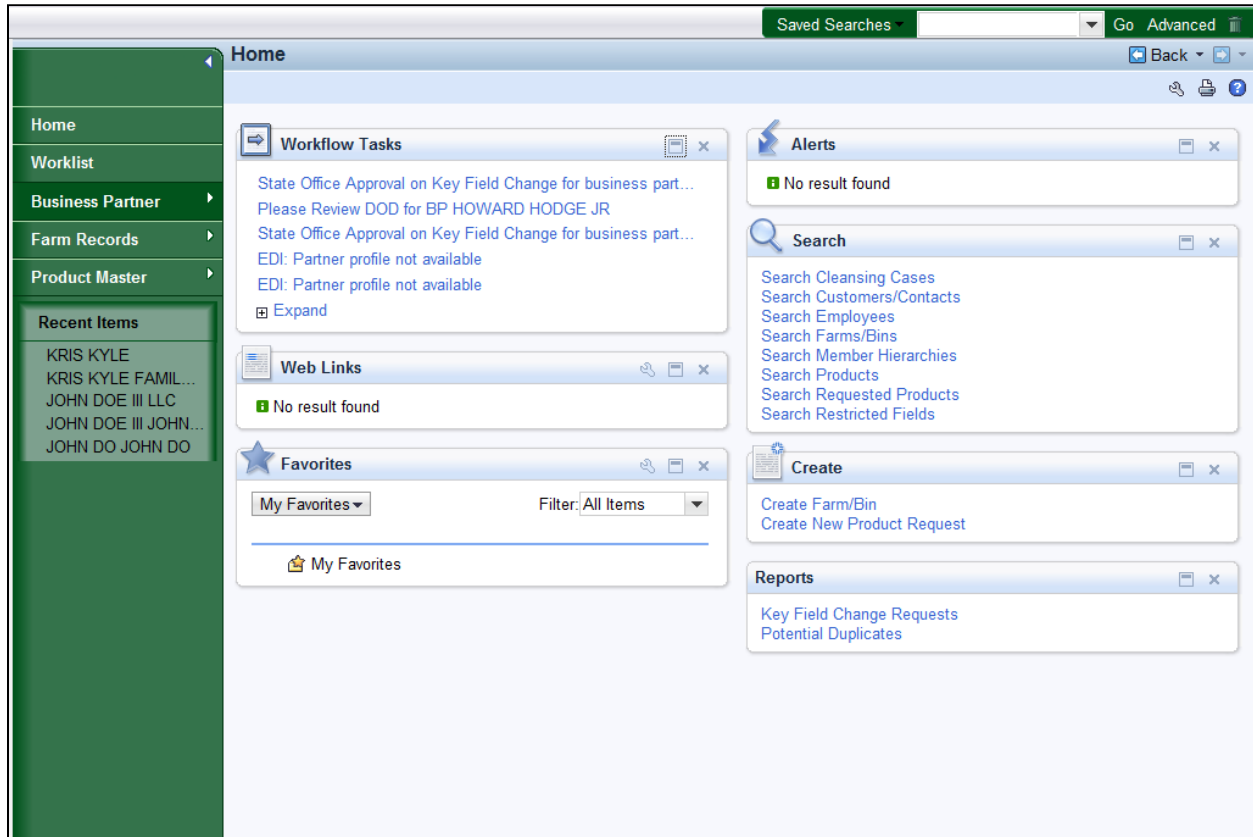
Note type	Icon	Description
A <b>general</b> note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A <b>cautionary</b> note		Use this note to communicate to the end-user of something that <b>MUST</b> be

		completed or another trigger that should be started and is related to the procedure.
A <b>critical</b> note		Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
<b>Contact</b> 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 <b>reference</b> is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

## Procedure

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

### Home



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



## 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 Recent Items. The "Recent Items" section lists: KRIS KYLE, KRIS KYLE FAMIL..., JOHN DOE III LLC, JOHN DOE III JOHN..., and JOHN DO JOHN DO. The main content area is light blue and contains a "Search" panel with links: Search Cleansing Cases, Search Customers/Contacts, Search Documents, Search Employees, Search Member Hierarchies, and Search Restricted Fields. A "Reports" panel is also visible with links: Key Field Change Requests and Potential Duplicates. At the top right of the main area, there are "Saved Searches", "Go", and "Advanced" options, along with "Back" and "Print" icons.


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



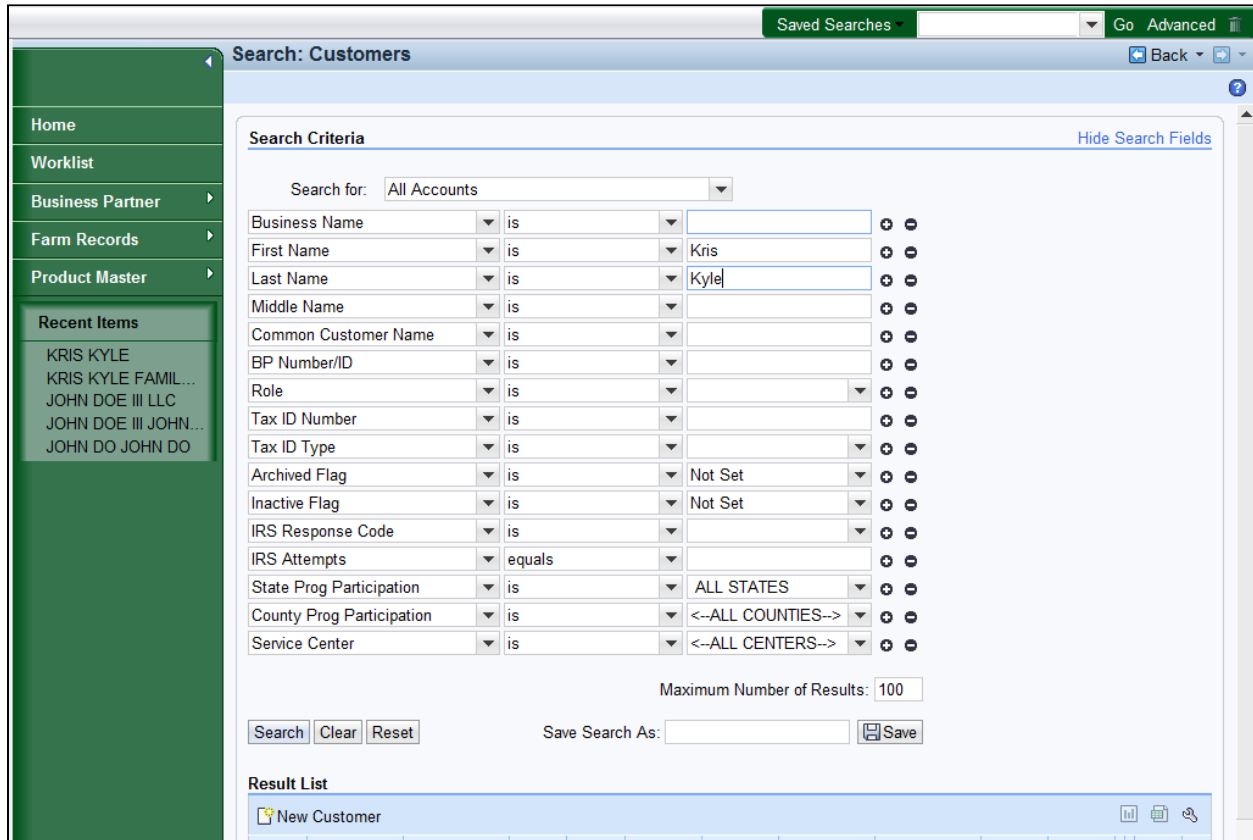
### Search: Customers

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

Field	R/O/C	Description
First Name	O	Business Partner's First Name <b>Example:</b> Kris
Last Name	O	Business Partner's Last Name <b>Example:</b> Kyle

 A Wildcard placed before and after the search term displays results that contain the search term anywhere. A Wildcard before the search term displays results where the term is NOT the first word. A Wildcard after the search term displays results where the term IS the part of the first word.

## Search: Customers



Search: Customers

Search Criteria

Search for: All Accounts

Business Name	is	
First Name	is	Kris
Last Name	is	Kyle
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

- Click the **Search**  button to list the Customers meeting the search criteria.



For more information on the Business Partner search see the *BP Search Business Partner Record* Work Instruction.

## 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	is	KRIS	<input type="button" value="X"/>	<input type="button" value="O"/>
Last Name	is	KYLE	<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: 1 Customer Found**

6. Scroll down to display the **ResultsList** to view the search results based on the entered search criteria.

## Search: Customers

Saved Searches
Go Advanced

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
- KRIS KYLE
- KRIS KYLE FAMIL...
- JOHN DOE III LLC
- JOHN DOE III JOHN...
- JOHN DO JOHN DO

Back

Search for: All Accounts

Business Name	is		
First Name	is	KRIS	
Last Name	is	KYLE	
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: 1 Customer Found**

New Customer
Print
Export

Ina...	BP Num...	Common...	Tax...	Pa...	Tax ID...	House...	State	Street	City	ZIP...	IR...	I...
<input type="checkbox"/>	8000127...	<a href="#">KRIS KYLE</a>	667...	<input checked="" type="checkbox"/>	Social...		Maryland	12310 DO...	REIS...	2113...	Er...	1

- Click the Common Customer Name from the **ResultList** (Kris Kyle) [KRIS KYLE](#) to go to the Customer: page.

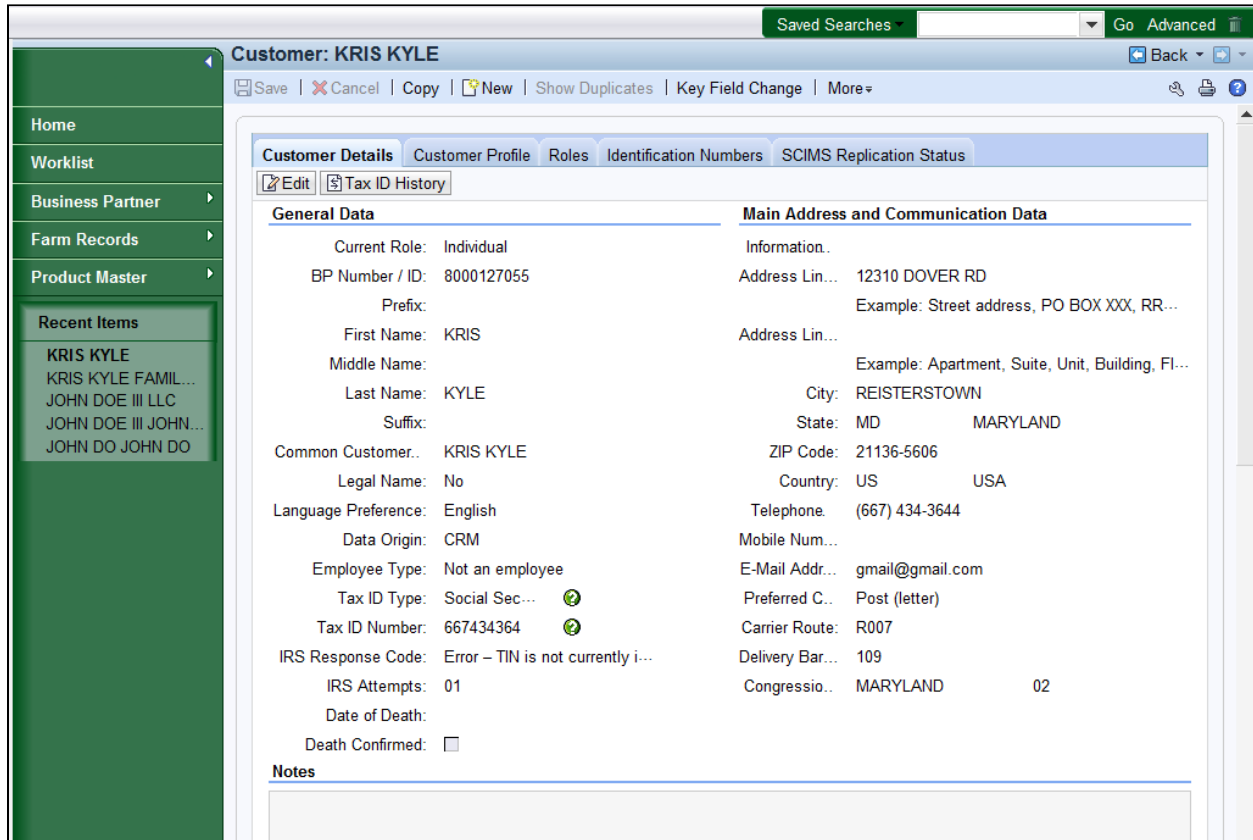
Wednesday, March 04, 2015

BP\_Display\_BP\_Record\_v2.udc

8/27



## Customer: KRIS KYLE





Customer: KRIS KYLE

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: 8000127055	Address Lin... 12310 DOVER RD
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: KRIS	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: KYLE	City: REISTERSTOWN
Suffix:	State: MD MARYLAND
Common Customer.. KRIS KYLE	ZIP Code: 21136-5606
Legal Name: No	Country: US USA
Language Preference: English	Telephone. (667) 434-3644
Data Origin: CRM	Mobile Num...
Employee Type: Not an employee	E-Mail Addr... gmail@gmail.com
Tax ID Type: Social Sec... 	Preferred C.. Post (letter)
Tax ID Number: 667434364 	Carrier Route: R007
IRS Response Code: Error – TIN is not currently i...	Delivery Bar... 109
IRS Attempts: 01	Congressio.. MARYLAND 02
Date of Death:	
Death Confirmed: <input type="checkbox"/>	

Notes

8. Scroll down to the **Addresses\*** assignment block on the Customer Details tab.




The Customer Details tab is divided into two parts: (1) General Data which includes the Customer's Name, Tax ID and IRS Response Code, and Date of Death; (2) Main Address and Communication Data includes the Customer's Address, Phone, E-mail, and Congressional Voting District.

## Customer: KRIS KYLE

Customer: KRIS KYLE


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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:


Addresses\* | Address Types | Communication Numbers | E-Mails

New

Actions	Address	Current	Valid From	Valid To
	12310 DOVER RD / REISTERSTOWN MD 2113...	<input checked="" type="checkbox"/>	01/19/2015	12/31/9999


Representative Capacity | Relationships | SSN Family

New | History Data

Act...	Type	Business Partner	Status	Effective Date	Revoked/Canc...	Diff.type char.
	Is Married To	BRENDA MOSE...	Active	01/29/2015	12/31/9999	


Program Participation\* | Associated Counties

Edit


Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

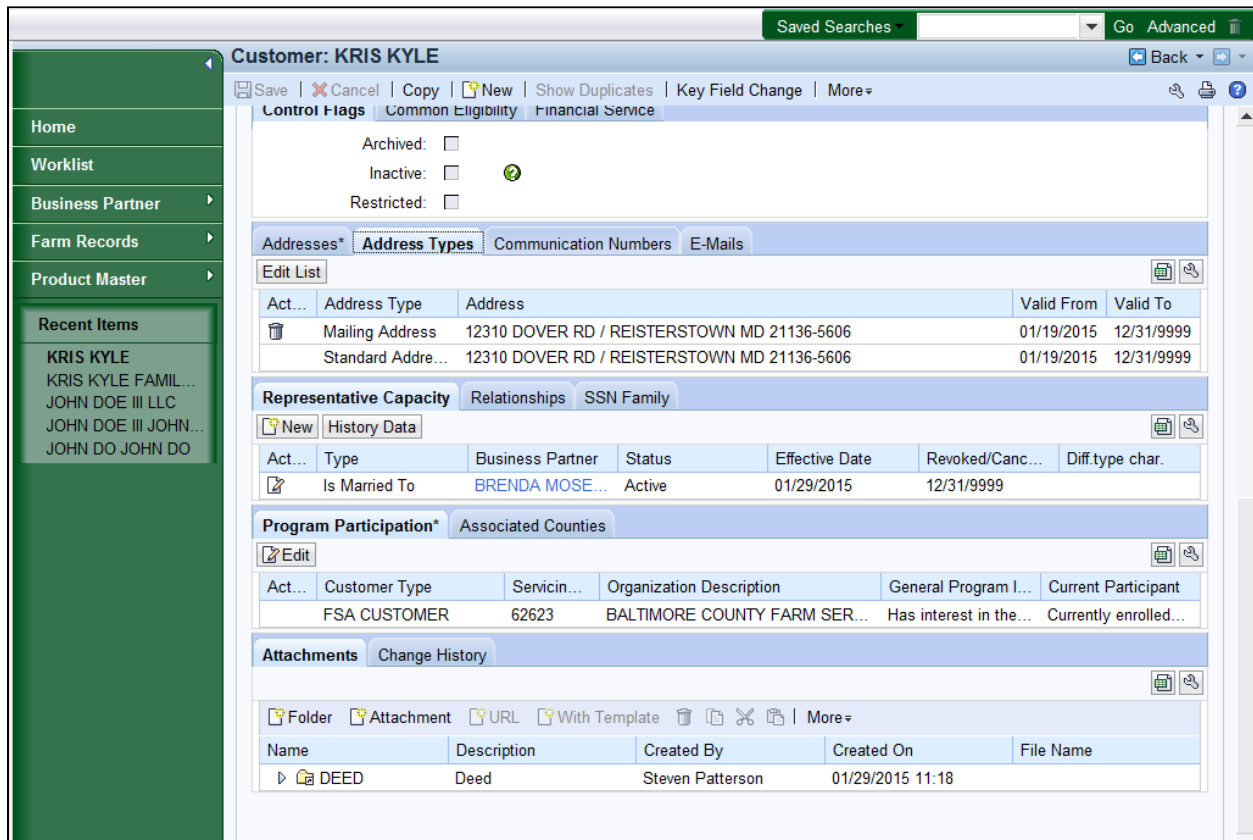
Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
 DEED	Deed	Steven Patterson	01/29/2015 11:18	

9. Click the **Address Types** **Address Types** tab.

 The **Addresses\*** tab lists all the addresses associated with the customer.

## Customer: KRIS KYLE



Customer: KRIS KYLE

Archived:   
 Inactive:   
 Restricted:

Addresses\* **Address Types** Communication Numbers E-Mails

Edit List

Act...	Address Type	Address	Valid From	Valid To
	Mailing Address	12310 DOVER RD / REISTERSTOWN MD 21136-5606	01/19/2015	12/31/9999
	Standard Address	12310 DOVER RD / REISTERSTOWN MD 21136-5606	01/19/2015	12/31/9999

Representative Capacity Relationships SSN Family

New History Data

Act...	Type	Business Partner	Status	Effective Date	Revoked/Canc...	Diff.type char.
	Is Married To	BRENDA MOSE...	Active	01/29/2015	12/31/9999	

Program Participation\* Associated Counties

Edit


Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments Change History

Folder Attachment URL With Template More

Name	Description	Created By	Created On	File Name
DEED	Deed	Steven Patterson	01/29/2015 11:18	

10. Click the **Communication Numbers** tab. The Standard address includes the Congressional Voting District and is reflected in the Customer Details tab.

 Address Types are defined below:

**Billing Address** indicates that this address is a location where shipments can be received.

**Mailing Address** indicates that is address is the mailing address. This address may be a post office box or other location where the customer receives mail.

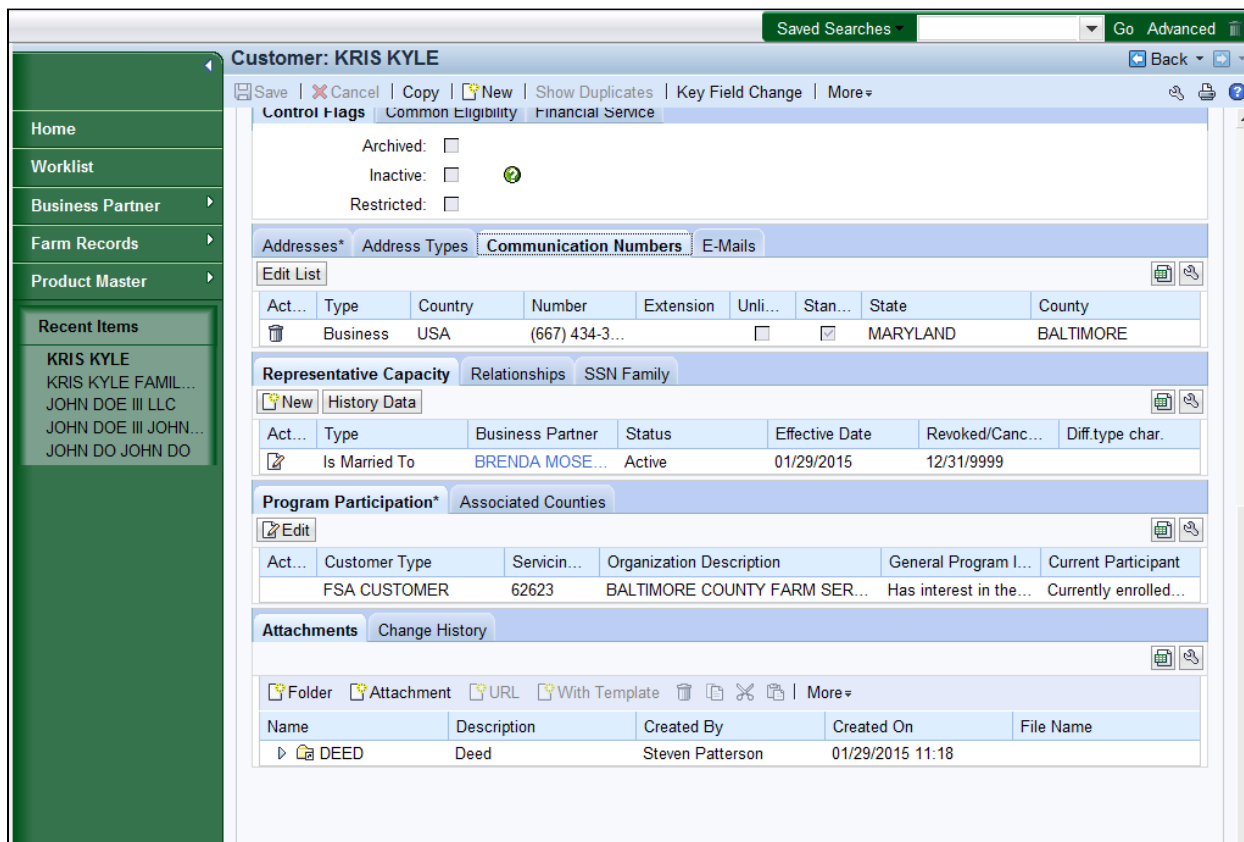
**Primary Address** indicates the BPs primary address.

**Shipping Address** indicates that this address is a location where shipments can be received (Non-PO Box addresses).


**Standard Address** indicates that this address is the main address used to determine Congressional Voting District.

**Street Address** indicates alternate BPs address.

## Customer: KRIS KYLE




Customer: KRIS KYLE

Archived:   
 Inactive:    
 Restricted:


Addresses\* | Address Types | **Communication Numbers** | E-Mails

Edit List

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	USA	(667) 434-3...		<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARYLAND	BALTIMORE

Representative Capacity | Relationships | SSN Family

New | History Data





Act...	Type	Business Partner	Status	Effective Date	Revoked/Canc...	Diff type char.
	Is Married To	BRENDA MOSE...	Active	01/29/2015	12/31/9999	


Program Participation\* | Associated Counties

Edit

Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template |  |  |  |  | More ▾

Name	Description	Created By	Created On	File Name
 DEED	Deed	Steven Patterson	01/29/2015 11:18	

11. Click the **E-Mails** **E-Mails** tab.




The **CommunicationNumbers** tab includes phone numbers associated with the customer. The Standard Communication Number for both a mobile and a business or home number will be reflected in the Customer Details tab.

## Customer: KRIS KYLE

Customer: KRIS KYLE


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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:


Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | SSN Family

New | History Data




Act...	Type	Business Partner	Status	Effective Date	Revoked/Canc...	Diff.type char.
	Is Married To	BRENDA MOSE...	Active	01/29/2015	12/31/9999	


Program Participation\* | Associated Counties

Edit


Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

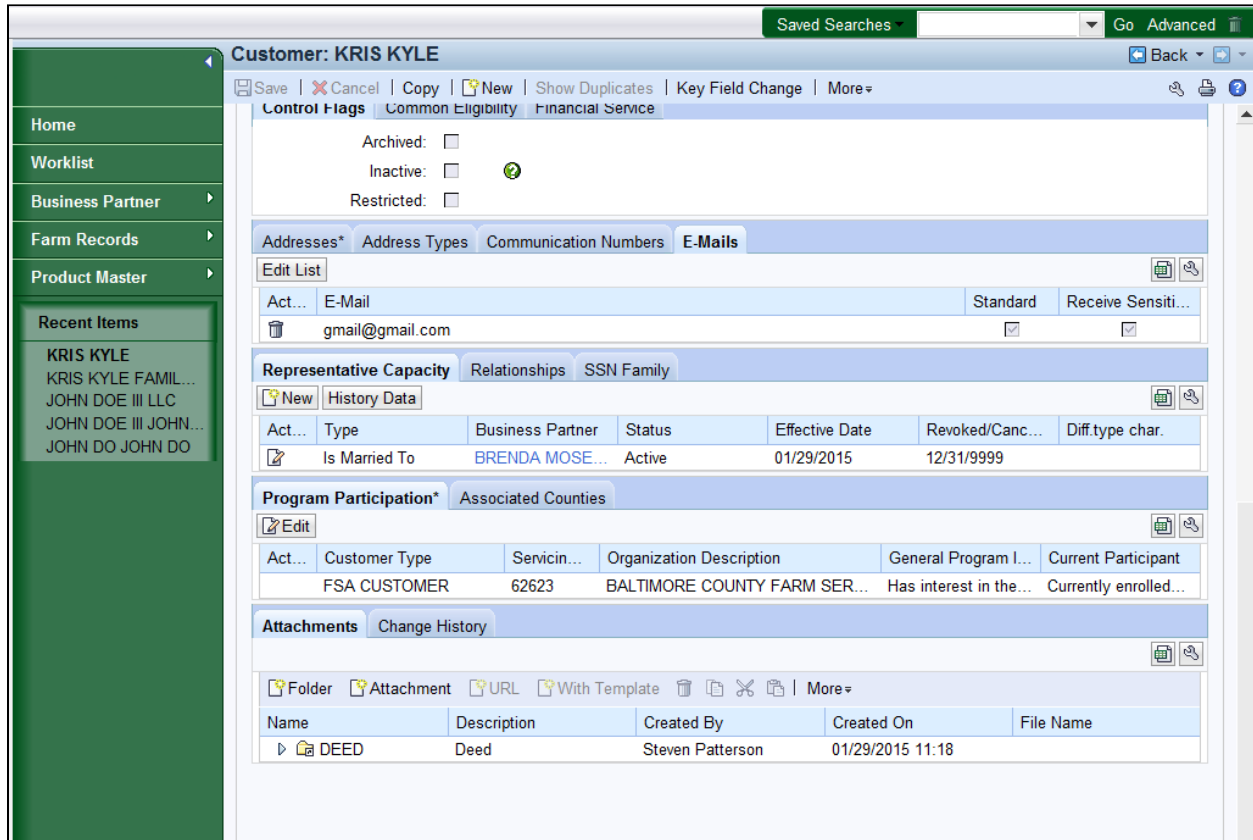
Folder | Attachment | URL | With Template |  |  |  | More

Name	Description	Created By	Created On	File Name
 DEED	Deed	Steven Patterson	01/29/2015 11:18	

12. Click the **Representative Capacity** **Representative Capacity** tab.

 The **E-Mail** tab includes the standard e-mail addresses associated with the customer. Also, indicates if the e-mail address should be used to communicate sensitive communications.

## Customer: KRIS KYLE



Customer: KRIS KYLE

Archived:   
 Inactive:   
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | SSN Family

Act...	Type	Business Partner	Status	Effective Date	Revoked/Canc...	Diff.type char.
	Is Married To	BRENDA MOSELY	Active	01/29/2015	12/31/9999	


Program Participation\* | Associated Counties

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Name	Description	Created By	Created On	File Name
DEED	Deed	Steven Patterson	01/29/2015 11:18	

### 13. Click the **Relationships** Relationships tab.

 The **Representative Capacity** assignment block lists the Signature authority for a customer. In this example, Kris Kyle "Has" indicated he is "Married To" to Brenda Mosely. This indicates the customer's wife "Has" Spousal Signature authority and can sign for her husband.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:  Inactive:  Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | **Relationships** | SSN Family

New

Act...	Relationship	Full Name	Valid From	Valid To
	Has Family Member/Busin...	R CULCLASURE	01/28/2015	12/31/9999

Program Participation\* | Associated Counties

Edit

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | | | | More

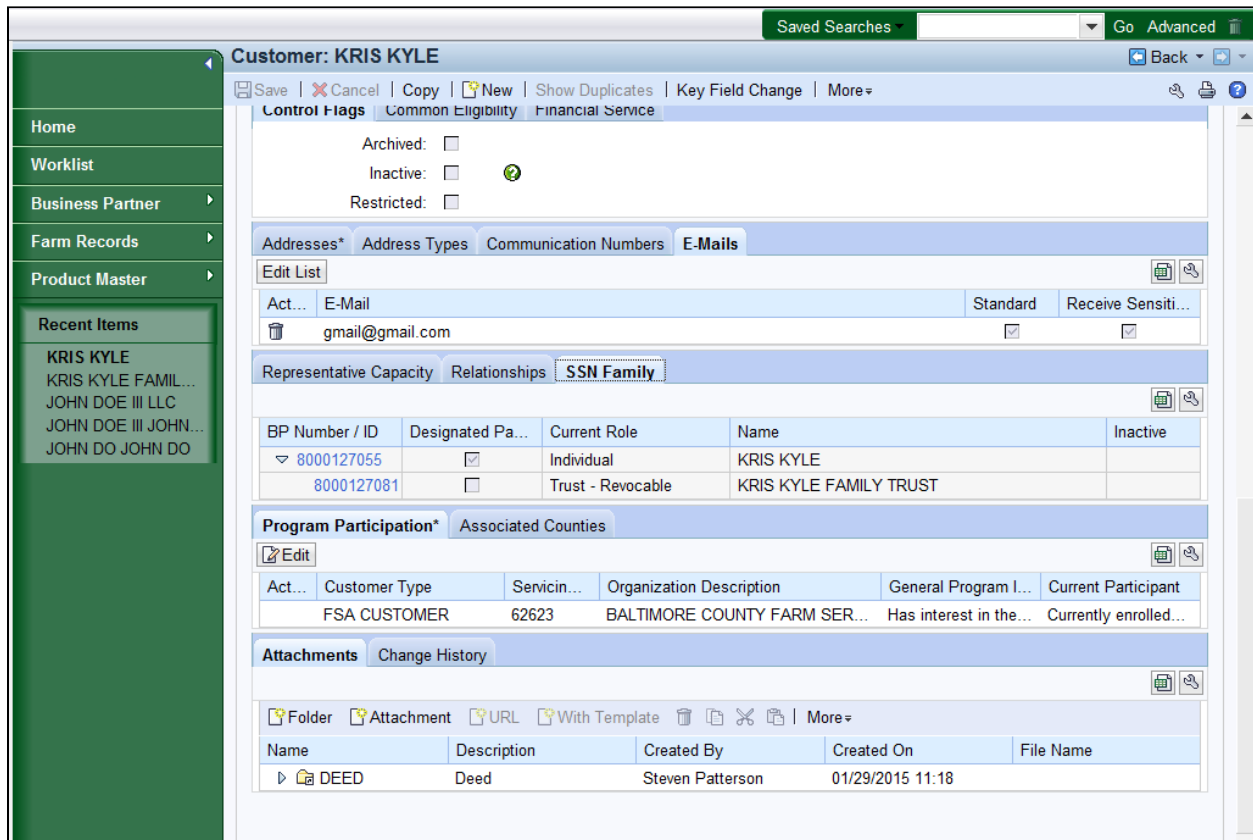
Name	Description	Created By	Created On	File Name
DEED	Deed	Steven Patterson	01/29/2015 11:18	

### 14. Click the **SSN Family** **SSN Family** tab.



The **Relationships** tab provides information on relationship between a customer and an employee. The relationships restrict the ability of an employee to approve applications for family members and business associates.

## Customer: KRIS KYLE



Customer: KRIS KYLE

Archived:   
 Inactive:   
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | **SSN Family**

BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	


Program Participation\* | Associated Counties

Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Name	Description	Created By	Created On	File Name
DEED	Deed	Steven Patterson	01/29/2015 11:18	

### 15. Click the **Program Participation\*Program Participation\*** tab.

 The **SSN Family** tab provides a link to display all BP records that share the same Social Security Number (SSN). The SSN Family tab only appears if the Business Partner has been assigned Individual, LLC, or Revocable Trust and the Tax ID Type is set to SSN.

All Individual records with an SSN will have the SSN Family tab on their record even if they are not linked to a Revocable Trust or LLC.




## Customer: KRIS KYLE

Customer: KRIS KYLE


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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | **SSN Family**


BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | **Associated Counties**

Edit

Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Name	Description	Created By	Created On	File Name
 DEED	Deed	Steven Patterson	01/29/2015 11:18	

16. Click the **Associated Counties** **Associated Counties** tab.




The **Program Participation\*** tab contains the Customer Type, General Program Interest and Current Participation.

## Customer: KRIS KYLE

Customer: KRIS KYLE


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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | **SSN Family**


BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | **Associated Counties**


Edit

Act...	Address	State	County
	12310 DOVER RD / REISTERSTOW...	MARYLAND	BALTIMORE

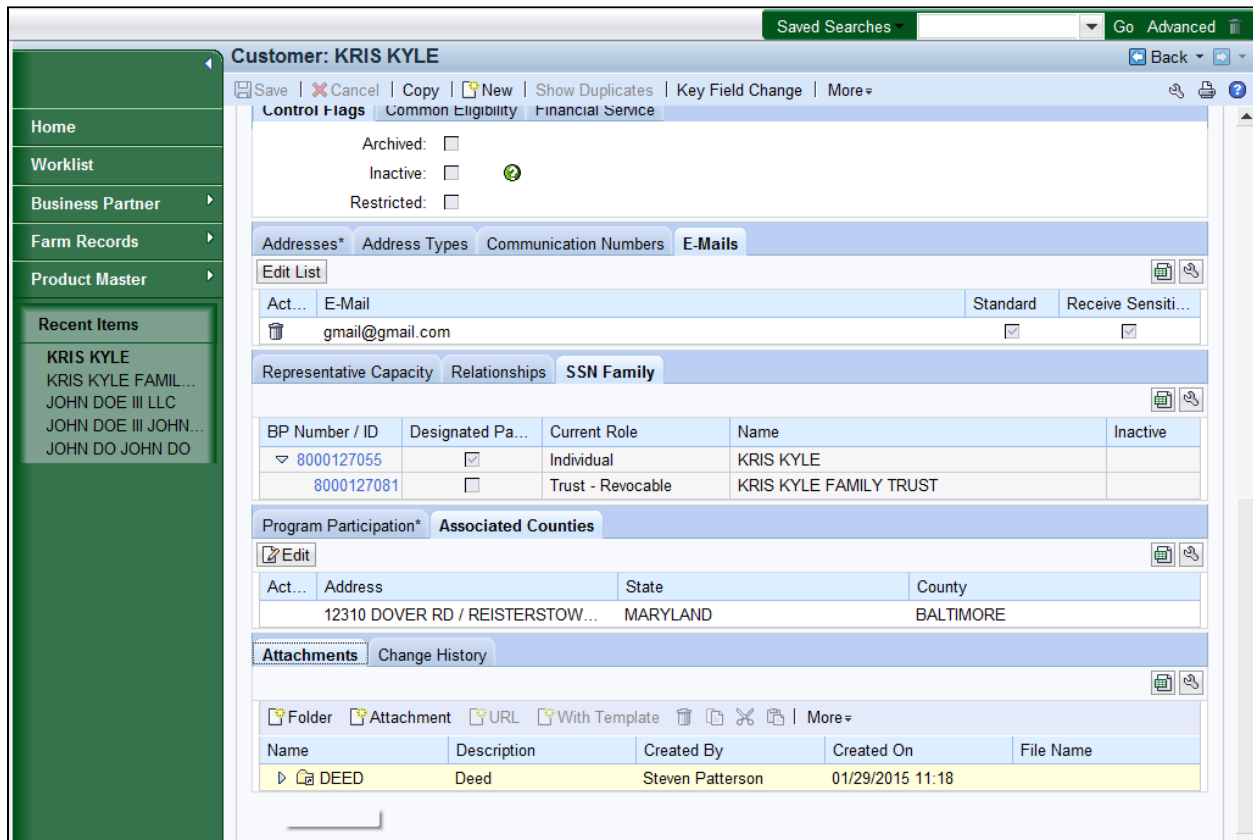
Attachments | Change History

Name	Description	Created By	Created On	File Name
 DEED	Deed	Steven Patterson	01/29/2015 11:18	

17. Click the **Attachments** **Attachments** tab.

 The **Associated Counties** tab list the addresses and counties associated with the customer. Associated Counties was previously called Legacy Link (in SCIMS).

## Customer: KRIS KYLE



Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:  Inactive:  Restricted:

Addresses\* | Address Types | Communication Numbers | E-Mails

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | SSN Family

BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | Associated Counties

Edit


Act...	Address	State	County
	12310 DOVER RD / REISTERSTOW...	MARYLAND	BALTIMORE

Attachments | Change History

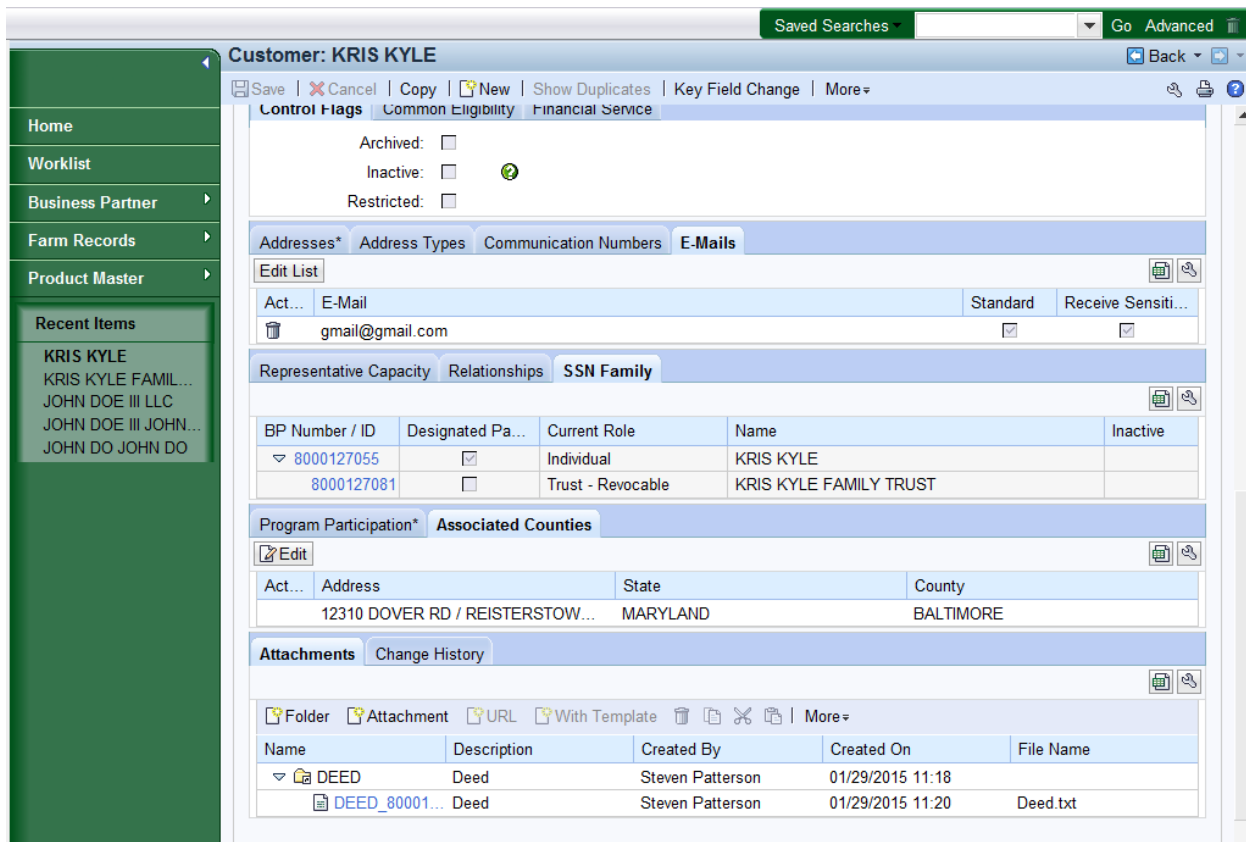
Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
DEED	Deed	Steven Patterson	01/29/2015 11:18	

18. Click the **DEED**  **DEED** tree item to expand the folder.

 The **Attachments** tab contains specific documents that are scanned and attached to Multi-County Customer records for use by other County Offices.

## Customer: KRIS KYLE



Customer: KRIS KYLE

Control Flags: Archived:  Inactive:  Restricted:

Addresses\* | Address Types | Communication Numbers | E-Mails

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | SSN Family

BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | Associated Counties

Act...	Address	State	County
	12310 DOVER RD / REISTERSTOW...	MARYLAND	BALTIMORE

Attachments | Change History

Name	Description	Created By	Created On	File Name
DEED	Deed	Steven Patterson	01/29/2015 11:18	
DEED_80001...	Deed	Steven Patterson	01/29/2015 11:20	Deed.txt

### 19. Click the **Change History** **Change History** tab.




Within each folder, there is a link to the document file, a brief description, who created and at what time the document was posted to the record, and the name of the file.

## Customer: KRIS KYLE

Customer: KRIS KYLE


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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensi...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | **SSN Family**

BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | **Associated Counties**

Edit

Act...	Address	State	County
	12310 DOVER RD / REISTERSTOW...	MARYLAND	BALTIMORE

Attachments | **Change History**

User	Date	Time	Short Description	Field	Old Value	New Value
MIPATT...	01/29/...	11:1...	Fiduciary Relationships		Is Married To 8000110...	*** Created ***
MIPATT...	01/28/...	13:4...	Customer Details/Cus...	Paying Entity		X
MIPATT...	01/28/...	13:4...	Associated Counties	Legacy Inactive...	09:11:18	00:00:00
MIPATT...	01/28/...	13:4...	Associated Counties	Legacy Inactive...	01/27/2015	00/00/0000

20. Scroll up to the top of the Customer record.



The **Change History** tab shows what changes were made to the customer record, when they were made, and most importantly, who made them.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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: 8000127055	Address Lin... 12310 DOVER RD
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: KRIS	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: KYLE	City: REISTERSTOWN
Suffix:	State: MD MARYLAND
Common Customer.. KRIS KYLE	ZIP Code: 21136-5606
Legal Name: No	Country: US USA
Language Preference: English	Telephone. (667) 434-3644
Data Origin: CRM	Mobile Num...
Employee Type: Not an employee	E-Mail Addr... gmail@gmail.com
Tax ID Type: Social Sec...	Preferred C.. Post (letter)
Tax ID Number: 667434364	Carrier Route: R007
IRS Response Code: Error – TIN is not currently i...	Delivery Bar... 109
IRS Attempts: 01	Congressio.. MARYLAND 02
Date of Death:	
Death Confirmed: <input type="checkbox"/>	

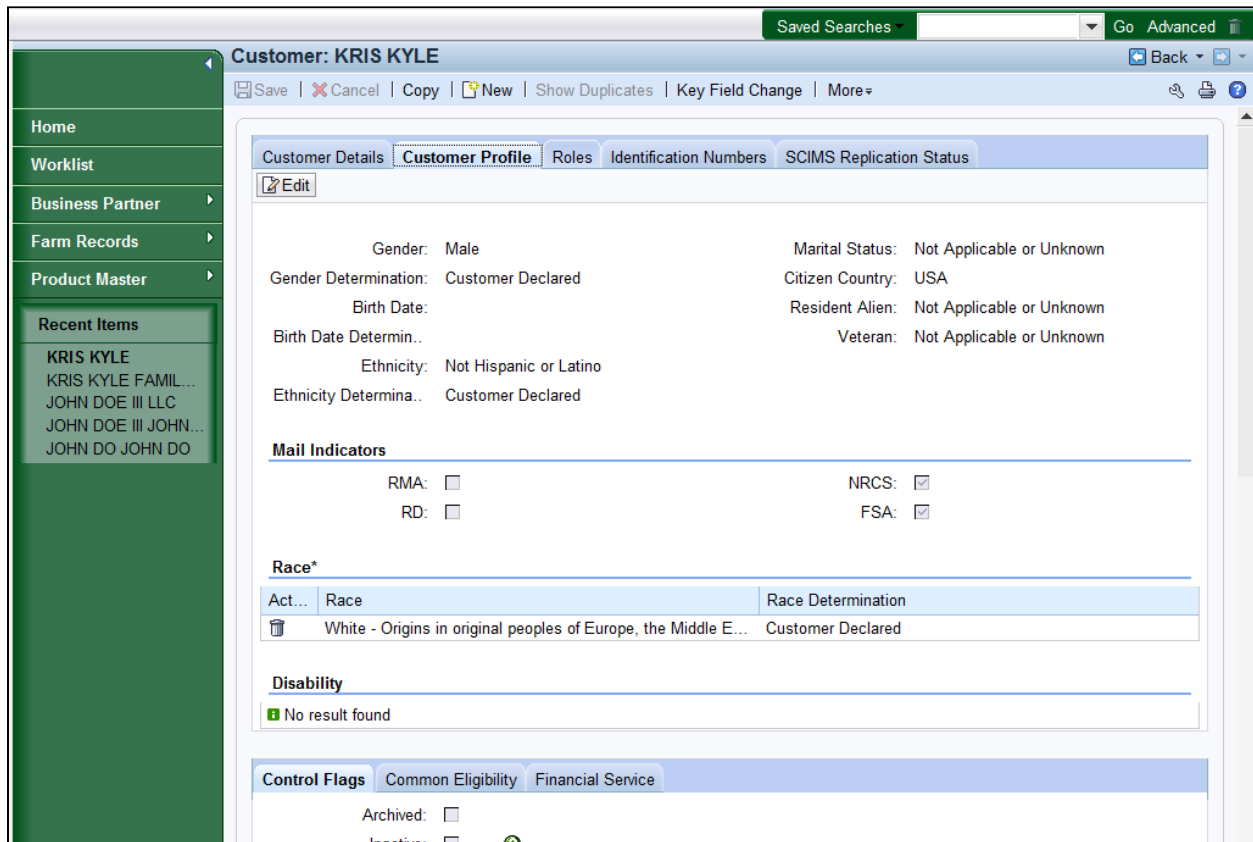
Notes

21. Click the **Customer Profile** [Customer Profile](#) assignment block.



The **Customer Details** tab includes contact information, tax ID number, IRS response code, and date of death.

## Customer: KRIS KYLE



Customer: KRIS KYLE

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

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

Edit

Gender: Male      Marital Status: Not Applicable or Unknown  
 Gender Determination: Customer Declared      Citizen Country: USA  
 Birth Date:      Resident Alien: Not Applicable or Unknown  
 Birth Date Determination:      Veteran: Not Applicable or Unknown  
 Ethnicity: Not Hispanic or Latino  
 Ethnicity Determination: Customer Declared

**Mail Indicators**

RMA:       NRCS:   
 RD:       FSA:

**Race\***

Act...	Race	Race Determination
	White - Origins in original peoples of Europe, the Middle E...	Customer Declared

**Disability**

No result found

**Control Flags** | Common Eligibility | Financial Service

Archived:   
 Inactive:

22. Click the **Roles** **Roles** tab.



The **Customer Profile** tab contains gender, birth date, marital status, ethnicity information, mail indicators and race determination.

## Customer: KRIS KYLE

Customer: KRIS KYLE


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

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

Edit List | Role History

Year	BP Role
2015	Individual
2014	Individual
2013	Individual
2012	Individual

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | **SSN Family**

BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | **Associated Counties**

Edit

23. Click the **Identification Numbers** tab.



The **Roles** tab provides information on the customer's current role and any prior year roles.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

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

ID Type Description	ID Number	Valid From	Valid To
SCIMS Core Customer ID	11660484	01/19/2015	12/31/9999

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:   
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity | Relationships | **SSN Family**

BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | **Associated Counties**

Edit

Act...	Address	State	County
	12310 DOVER RD / REISTERSTOW...	MARYLAND	BALTIMORE

24. Click SCIMS Replication Status **SCIMS Replication Status** tab.



The **Identification Numbers** tab lists alternate Identification Numbers from other systems or sources like SCIMS (CCID), or Winning or Losing BP IDs.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

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

Refresh

Replicati...	Status	Busines...	Message	Replicated On	Replicated By
125067	SUCCESS		Replication has been successfully completed	01/28/2015 13...	MIPATTERSONS

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

Addresses\* | Address Types | Communication Numbers | **E-Mails**

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>


Representative Capacity | Relationships | **SSN Family**

BP Number / ID	Designated Pa...	Current Role	Name	Inactive
8000127055	<input checked="" type="checkbox"/>	Individual	KRIS KYLE	
8000127081	<input type="checkbox"/>	Trust - Revocable	KRIS KYLE FAMILY TRUST	

Program Participation\* | **Associated Counties**

Edit

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

 The **SCIMS Replication Status** tab provides a status update of the customer data replicating from CRM to SCIMS. Any replication errors will be listed here with the status of Failed.



## Result

You have successfully displayed a customer Business Partner record.