

Purpose

The purpose of this work instruction is to show how to create a Business Partner (BP) Customer Record in CRM.

Trigger


Perform this procedure when you need to create a BP Record for an Individual or Organization.





Prerequisites

- The BP Record must be new and does not exist in CRM.
- The BP Record is for a Customer, Individual or Organization. This instruction should not be used to create an Employee record or a Contact.

Helpful Hints

- This Work Instruction details the basic steps to create and successfully save a BP record. Read the Information Note below the numbered step instruction to see: additional information about the screenshot; offer optional process steps; and assist with process rules and potential errors.
- Refer to work instructions on Search, Representative Capacity, Manage BP Validations etc. to complement the create process.
- "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:

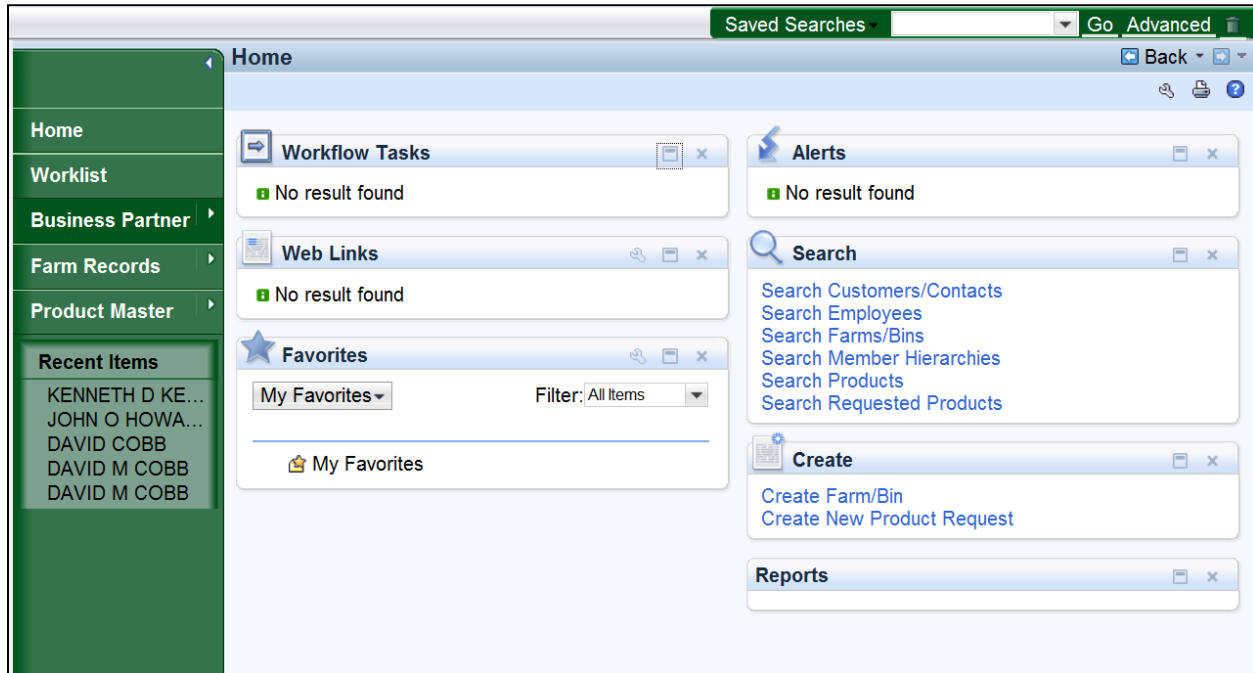
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.

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



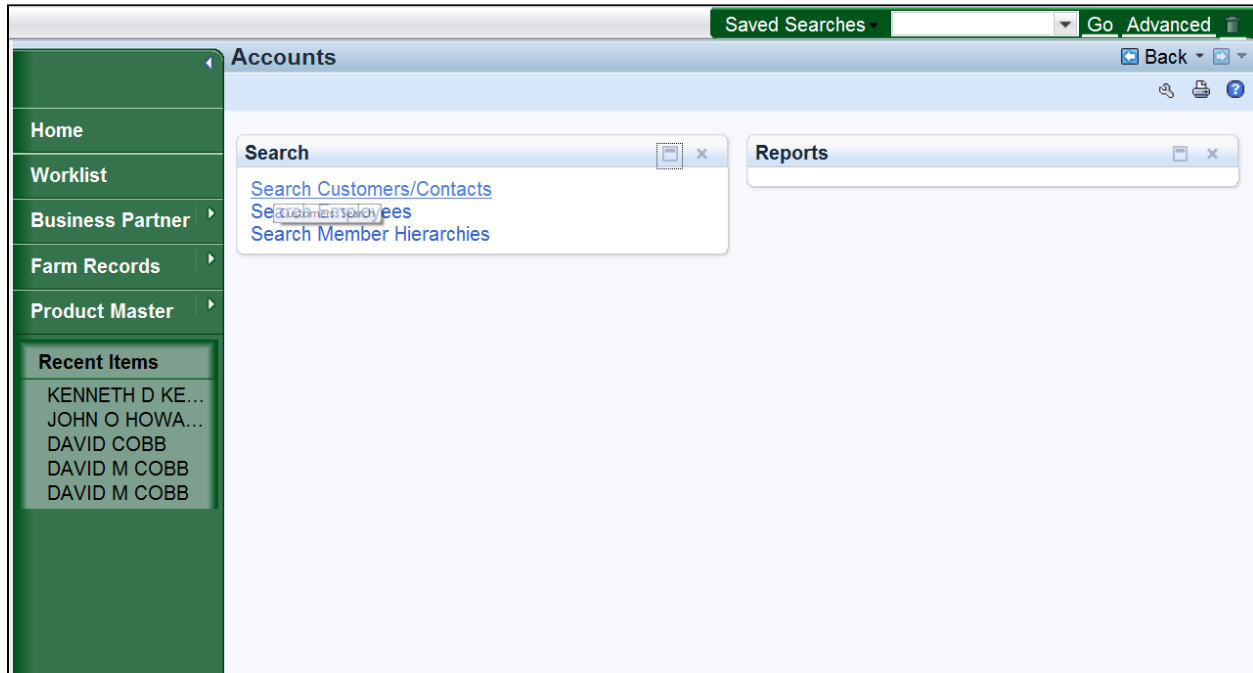
- 2.

Click the **Business Partner** button to go to the Accounts Page.

 Business Partner (BP) Customer Records are initiated from the BP Search screen which is accessible from the home page by selecting;

- 2nd level Navigation from the BP Navigation Bar
- Search Customer/Contacts from the Search assignment block
- Business Partner button on the navigation bar and selecting Search Customer/Contacts from the BP flyout.

Accounts

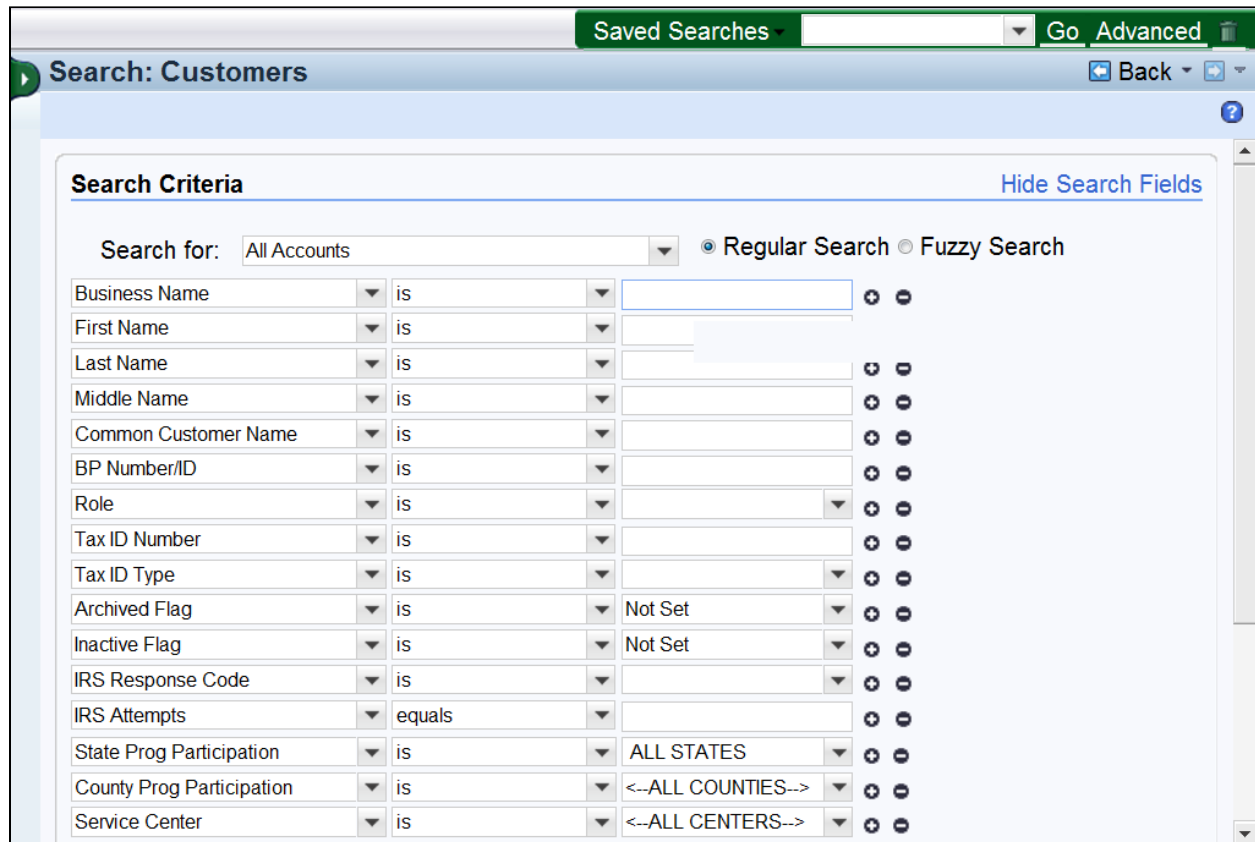


3. Click the **Search Customers/Contacts** [Search Customers/Contacts](#) link to go to the Search: Customers page.



Click the Collapse Navigation icon to hide the Navigation bar and expand the home screen.

Search: Customers



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

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



Prior to creating a new Business Partner record, the user must perform a thorough search for the customer record. This search must include a nationwide search, a search that includes active and inactive records, a search of common customer name name, a search for first and last name or business name and TIN (if available). Refer to the *BP Search Customer Business Partner Record Work Instruction* and 1-CM paragraph 175 for additional information on Search.

Search: Customers

Saved Searches ▾
Go Advanced

Search: Customers
Back ▾

Last Name	is	Brady	⊕ ⊖
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:

Search Clear Reset
Save Search As:

Result List

New Customer

5. Click the **Search** button to view search results based on the search criteria entered.

The Associated State and Associated County values will default to the user's applicable State and County.

Search: Customers

Saved Searches ▾
Go Advanced

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	ALL STATES		
County Prog Participation	is	<--ALL COUNTIES-->		
Service Center	is	<--ALL CENTERS-->		

Maximum Number of Results:

Save Search As:

Result List: 2 Customers Found

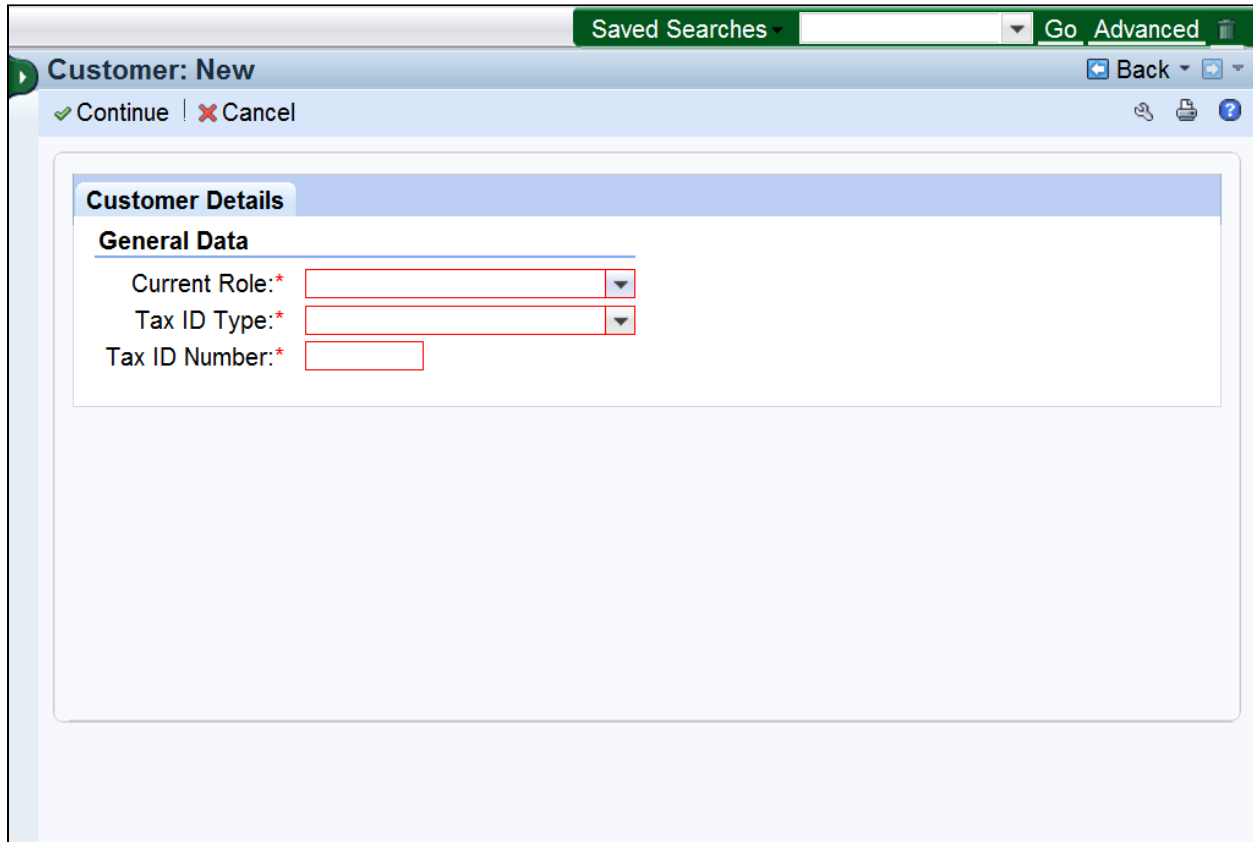
New Customer


	In...	BP N...	Common Cust...	T...	P...	T...	H...	S...	C...	S...	ZIP Code	T E I. I..
--	-------	---------	----------------	------	------	------	------	------	------	------	----------	------------


6. Click the **New Customer** **New Customer** button to create a new customer record.

The **New Customer** button is available at the top of the Results List on the Search screen. A New button also appears at the top of the Customer records Details page if a record requires viewing prior to determining if a new record must be created for the customer.

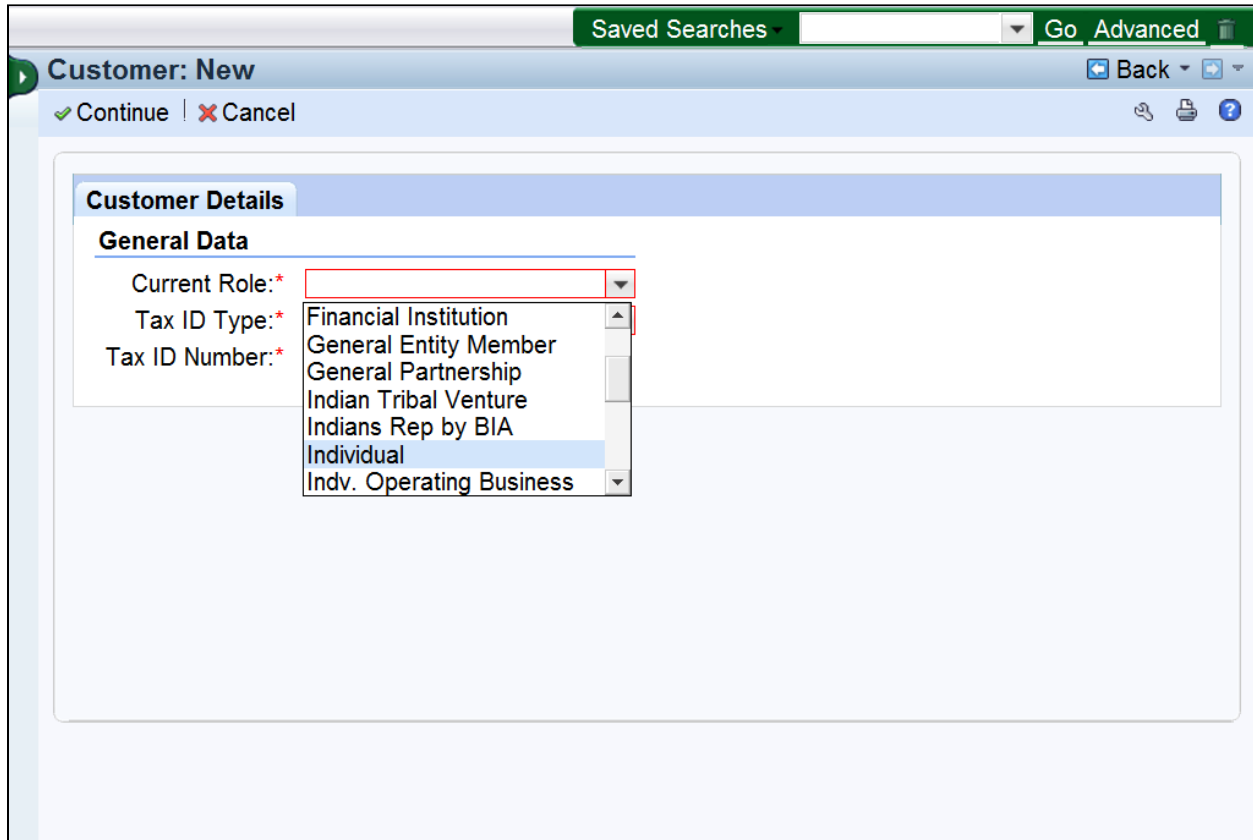
Customer: New



7. Click the **Current Role**  dropdown list icon button to select the Business Partner Role.

 Dropdown fields marked with an asterisk and text fields highlighted in red are required to complete the BP record.

Customer: New



Customer: New

Continue | Cancel

Customer Details

General Data


Current Role:*

Tax ID Type:*

Tax ID Number:*

Financial Institution
General Entity Member
General Partnership
Indian Tribal Venture
Indians Rep by BIA
Individual
Indv. Operating Business

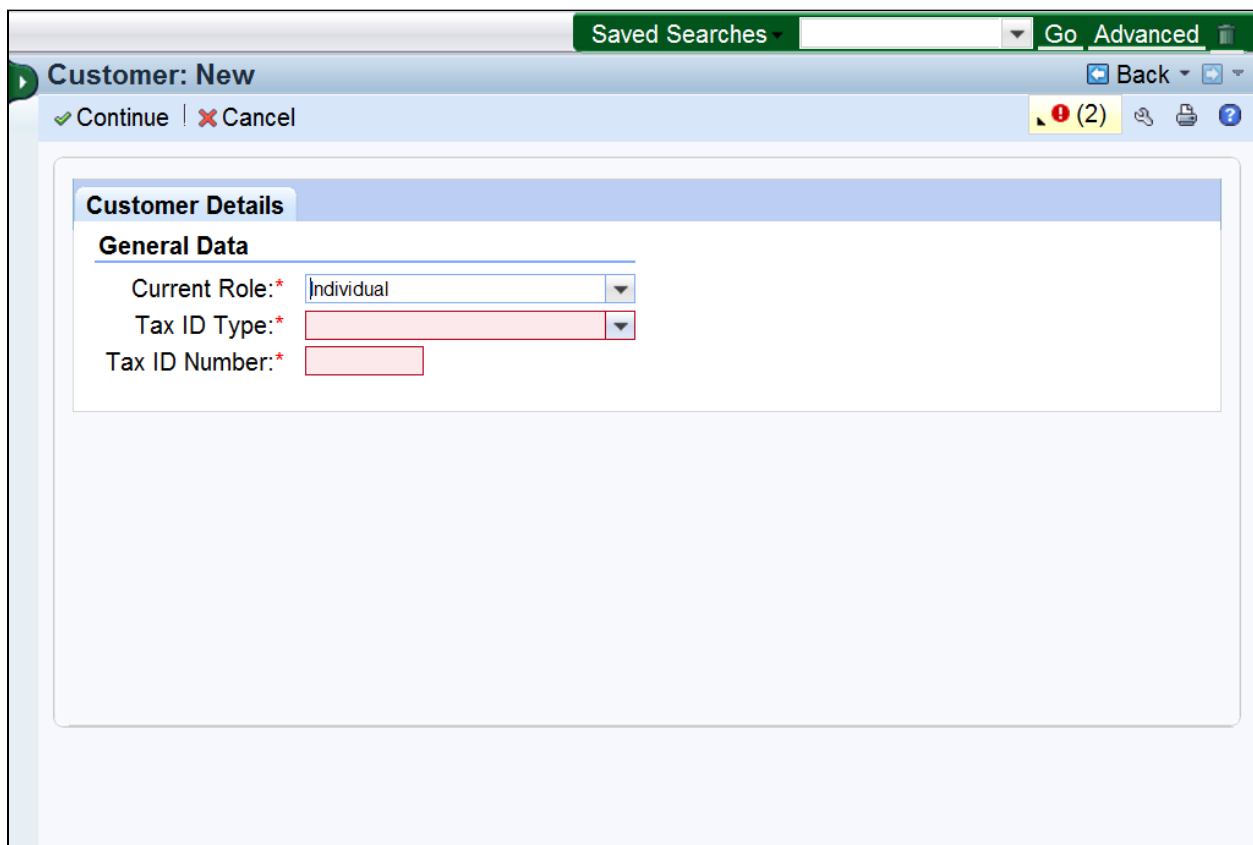
8. Select **Individual** from the **Current Role** list.

 Available and required fields are displayed based on the Business Partner role selected. Roles available are:

- Corporation
- Estate
- Federal Entity
- Financial Institution
- General Partnership
- Indian Tribal Venture
- Indians REpresented by BIA*
- Individual
- Individual Operating as a Business
- Joint Venture
- Limited Liability Company

- Limited Partnership
- News Media
- Non-profit or Tax-Exempt
- Public School
- State/Local Gove
- Trust - Irrevocable
- Trust - Revocable

Customer: New



Customer: New

Continue | Cancel

Customer Details

General Data

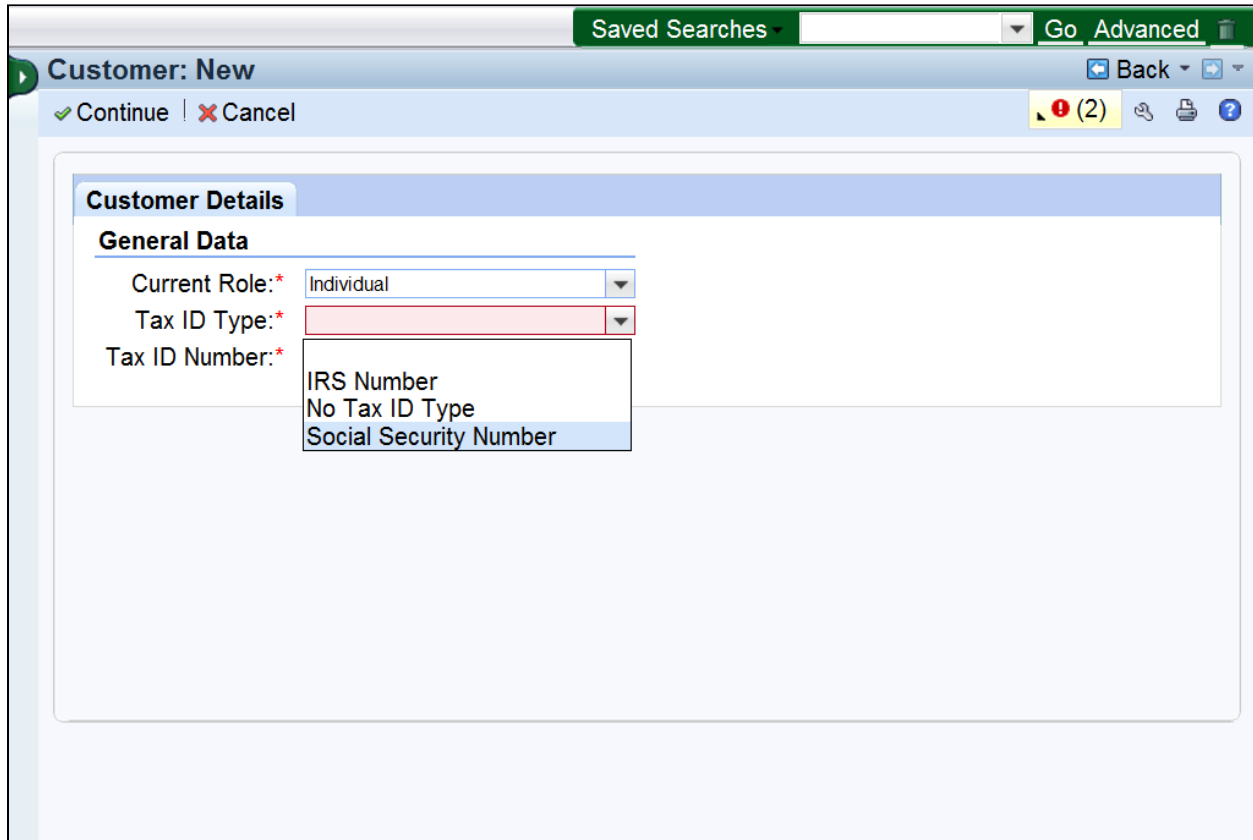
Current Role:* Individual

Tax ID Type:*

Tax ID Number:*

9. Click the **Tax ID Type** dropdown list icon button to select the Tax ID type.

Customer: New



Customer: New

Continue | Cancel

Customer Details

General Data


Current Role:* Individual

Tax ID Type:*

Tax ID Number:*

- IRS Number
- No Tax ID Type
- Social Security Number

10. Select **Social Security Number** **Social Security Number** from the dropdown list.

 There are five Tax ID Types that are displayed based on Current Role selected:

- Employer ID Number
- Federal Government Agency
- IRS Number
- No Tax ID
- Social Security Number

If No Tax ID Type is selected from the dropdown, Tax ID Number is not required.



Customer: New

Customer: New

Continue | Cancel

Customer Details

General Data

Current Role:* Individual

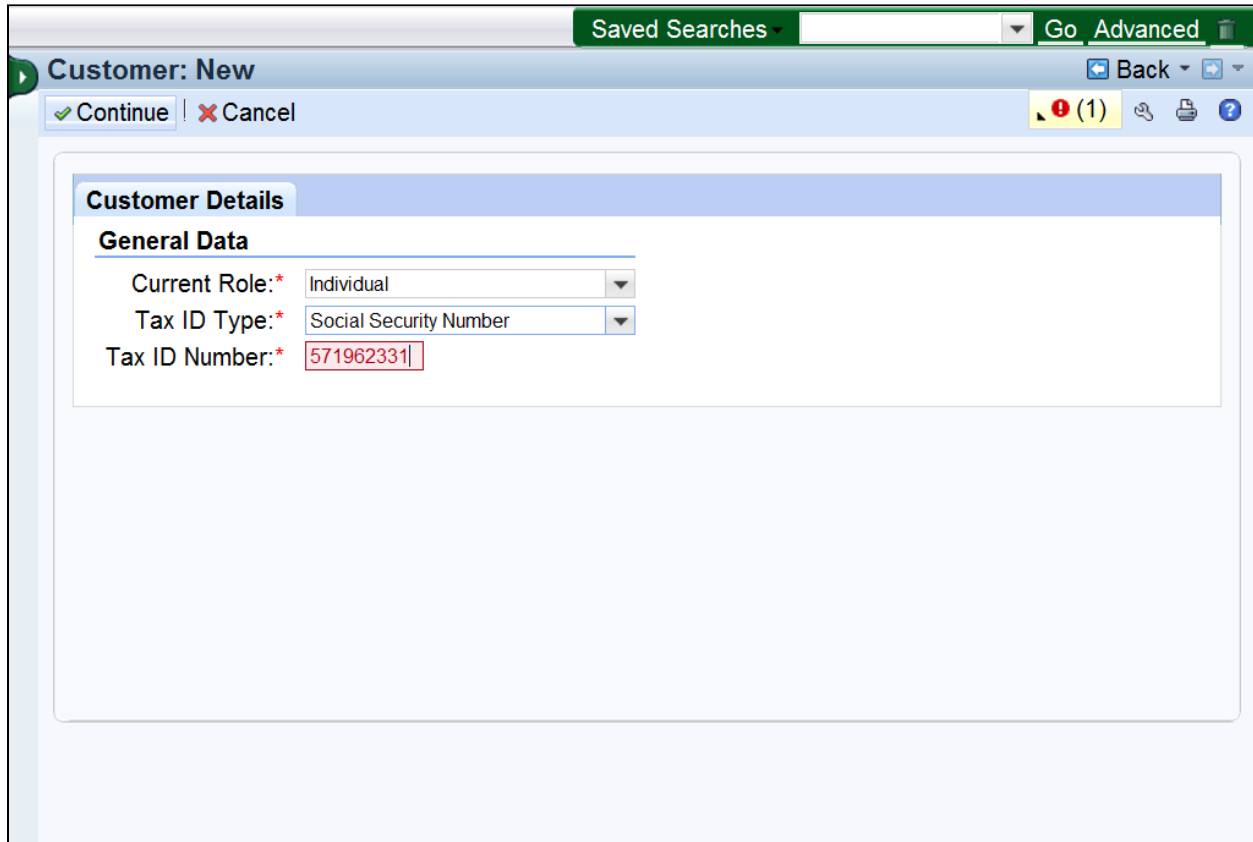
Tax ID Type:* Social Security Number

Tax ID Number:*

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

Field		Description
Tax ID Number:	R	<p>A Taxpayer Identification Number (TIN) is an identifying number used for tax purposes in the United States. It is also known as a Tax Identification Number or Federal Taxpayer Identification Number. A TIN may be assigned by the Social Security Administration or by the Internal Revenue Service (IRS).</p> <p>Example: 571962331</p>

Customer: New



Customer: New

Continue | Cancel

Customer Details

General Data

Current Role:* Individual

Tax ID Type:* Social Security Number

Tax ID Number:* 571962331

12. Click the **Continue**  button to continue building the BP record.



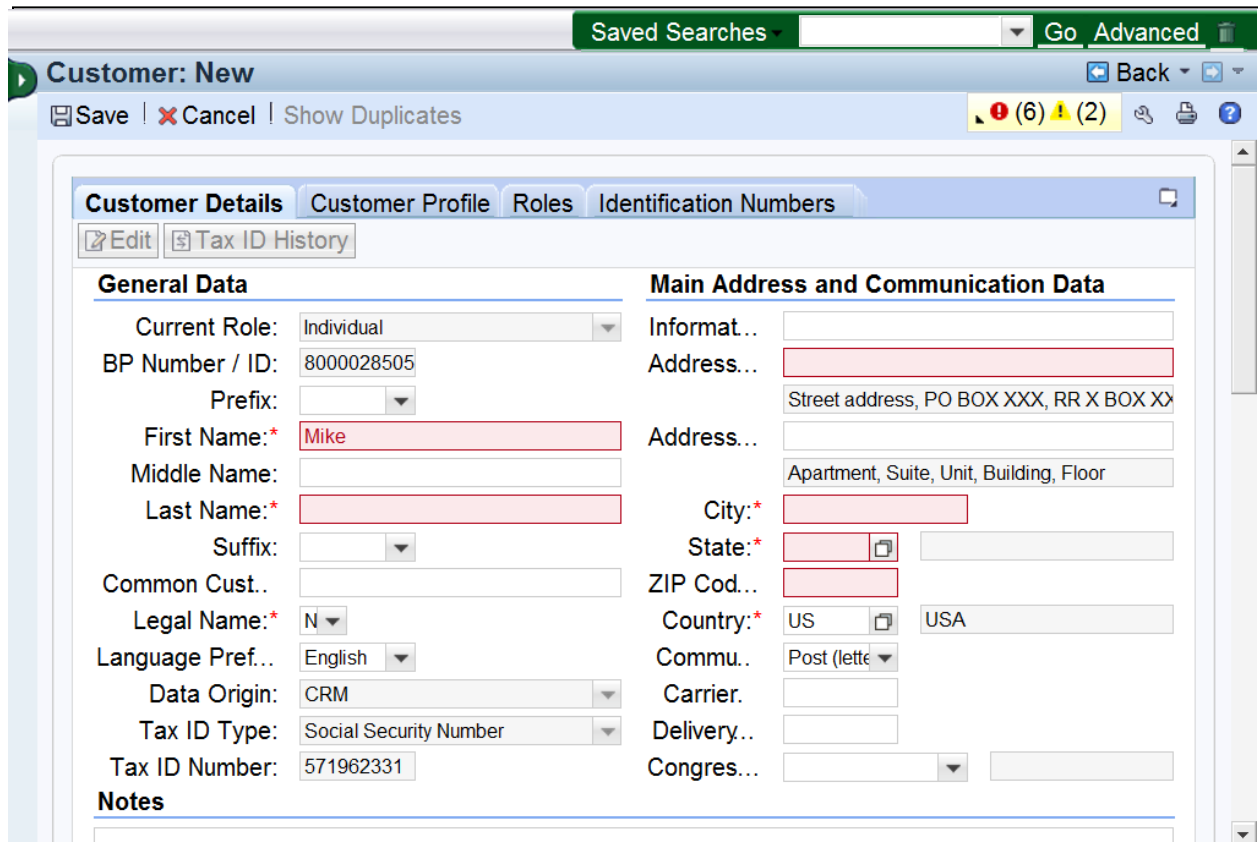
Customer: New

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

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


All fields highlighted in red are required and must be completed to save the record. Best practice is to enter all customer data available.

Customer: New



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

Field	R/O/C	Description
Middle Name:	R	Business Partner's Middle Name. Example: G

 The Communication Alerts in the top right will alert missed fields and information to assist with completion of the customer record.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | Customer Profile | Roles | Identification Numbers

General Data

Current Role: Individual
 BP Number / ID: 8000028505
 Prefix:
 First Name: * Mike
 Middle Name: G
 Last Name: *
 Suffix:
 Common Cust.:
 Legal Name: * N
 Language Pref.: English
 Data Origin: CRM
 Tax ID Type: Social Security Number
 Tax ID Number: 571962331

Main Address and Communication Data

Informat...
 Address...
 Street address, PO BOX XXX, RR X BOX XX
 Address...
 Apartment, Suite, Unit, Building, Floor
 City: *
 State: *
 ZIP Cod...
 Country: * US USA
 Commu... Post (lette
 Carrier:
 Delivery...
 Congres...

Notes

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

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



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | Customer Profile | Roles | Identification Numbers

General Data | Main Address and Communication Data

Current Role:	Individual	Informat...	
BP Number / ID:	8000028505	Address...	
Prefix:			Street address, PO BOX XXX, RR X BOX XX
First Name:*	Mike	Address...	
Middle Name:	G		Apartment, Suite, Unit, Building, Floor
Last Name:*	Brady	City:*	
Suffix:		State:*	
Common Cust..	DVM	ZIP Cod...	
Legal Name:*	Esquire	Country:*	US USA
Language Pref..	I	Commu..	Post (lette
Data Origin:	II	Carrier.	
Tax ID Type:	III	Delivery...	
Tax ID Number:	IV	Congres...	
	JR		
	571962331		

Notes

16. Select JR **JR** from the **Suffix** list.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | Customer Profile | Roles | Identification Numbers

General Data

Current Role: Individual
 BP Number / ID: 8000028505
 Prefix:
 First Name: * Mike
 Middle Name: G
 Last Name: * Brady
 Suffix: JR
 Common Cust..
 Legal Name: * N
 Language Pref...: English
 Data Origin: CRM
 Tax ID Type: Social Security Number
 Tax ID Number: 571962331

Main Address and Communication Data

Informat...
 Address...
 Street address, PO BOX XXX, RR X BOX XX
 Address...
 Apartment, Suite, Unit, Building, Floor
 City: *
 State: *
 ZIP Cod...
 Country: * US USA
 Commu...: Post (lette
 Carrier.
 Delivery...
 Congres...

Notes

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

Field	R/O/C	Description
Address Line1:	R	An alpha/numeric field in which the number and street name of location is entered. Example: 4815 Norrisville Rd
City:	R	Incorporated municipality, usually governed by a mayor and a board of alderman or councilman. Example: White Hall



The Main Address and Communication Data fields will trigger Address Validation upon completion and selecting Save. The columns on the



Address Validation page can't be expanded, however hovering over the column names with the cursor will display the complete column name and data.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | Customer Profile | Roles | Identification Numbers

General Data

Current Role: Individual

BP Number / ID: 8000028505

Prefix:

First Name: * Mike

Middle Name: G

Last Name: * Brady

Suffix: JR

Common Cust.:

Legal Name: * N

Language Pref.: English

Data Origin: CRM

Tax ID Type: Social Security Number

Tax ID Number: 571962331

Main Address and Communication Data

Informat.:

Address...: 4815 Norrisville Rd

Street address, PO BOX XXX, RR X BOX XX

Address...:

Apartment, Suite, Unit, Building, Floor

City: * White Hall

State: *

ZIP Cod.:

Country: * US USA

Commu.: Post (lette

Carrier.:

Delivery.:


Congres.:

Notes

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

Field	R/O/C	Description
State:	R	Field for entry of the two character State abbreviation. Example: Maryland - MD. Example: MD
ZIP Code:	R	5 digit code indicating the state and post office or postal zone Example: 21161



 Complete or confirm the remaining fields in Main Address and Communication Data.

Country is required and is defaulted to *US*.

Communication Method defaults to *Post (letter)*. Communication Method selected must be maintained in the Corresponding Assignment Block.

Carrier Route, **Delivery Route** and **Congressional District** are systematically updated and can be changed if necessary.

Zip Code is required. If a zip code is more than 2 digits off, the correct zip code may not be suggested in the Address Validation.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | Customer Profile | Roles | Identification Numbers

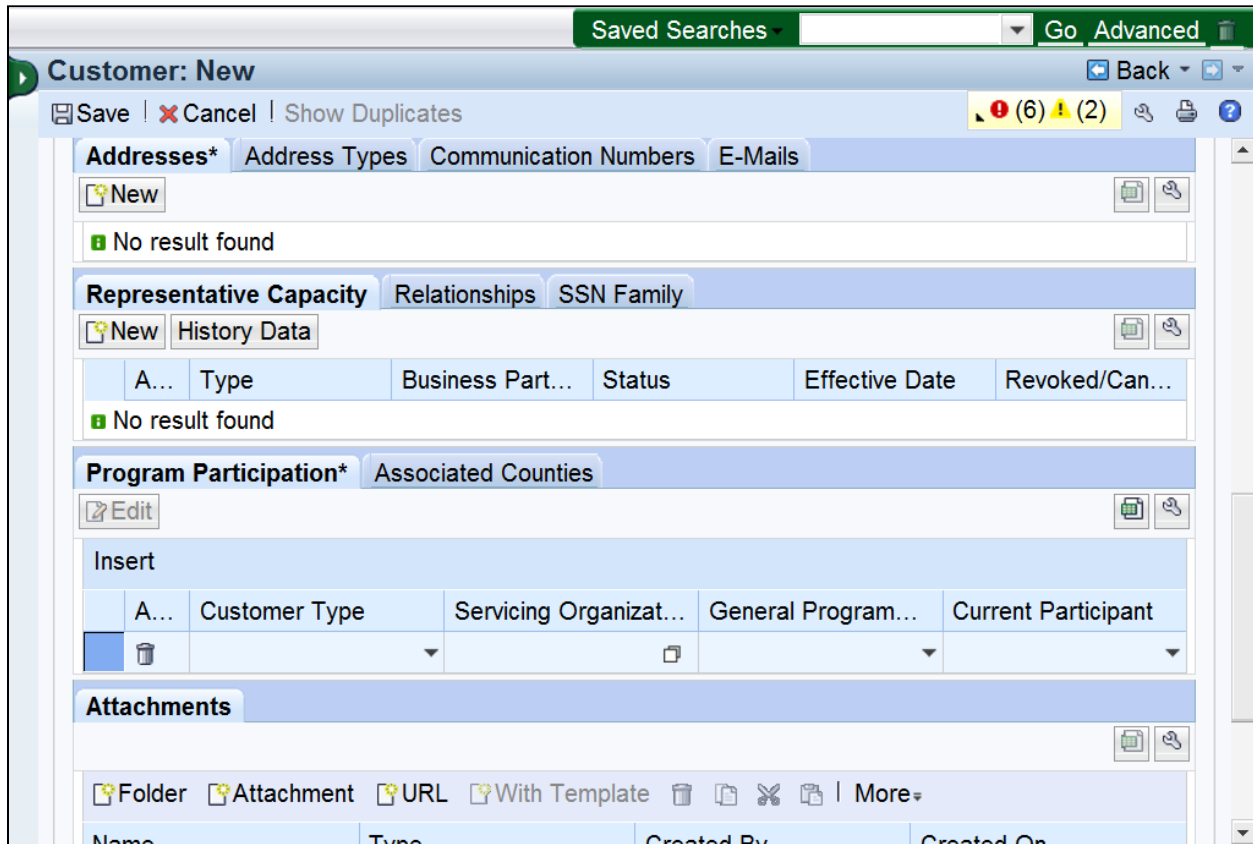
Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Informa...:
BP Number / ID: 8000028505	Address...: 4815 Norrisville Rd
Prefix:	Street address, PO BOX XXX, RR X BOX XX
First Name*: Mike	Address...:
Middle Name: G	Apartment, Suite, Unit, Building, Floor
Last Name*: Brady	City*: White Hall
Suffix: JR	State*: MD
Common Cust.:	ZIP Cod...: 21161
Legal Name*: N	Country*: US USA
Language Pref...: English	Commu...: Post (lette)
Data Origin: CRM	Carrier.:
Tax ID Type: Social Security Number	Delivery...:
Tax ID Number: 571962331	Congres...:

Notes

19. Scroll to the **Program Participation** tab.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert


A...	Customer Type	Servicing Organizat...	General Program...	Current Participant

Attachments

Folder | Attachment | URL | With Template | More

Name	Type	Created By	Created On
------	------	------------	------------

20. Click the **Customer Type** dropdown list icon button to view available options.

 Program Participation and Associated Counties data are required to complete the BP record if the customer is an FSA or FLP customer. For all other Customer Types an Assoc. County is not required.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program

Edit

Insert

A...	AG NRCS CUSTOMER				
	FARM LOAN PROGRAM CUSTOMER				
	FSA CUSTOMER				
	INACTIVE CUSTOMER				
	NON COUNTY FSA CUSTOMER				
	NON-AG NRCS CUSTOMER				

at... | General Program... | Current Participant

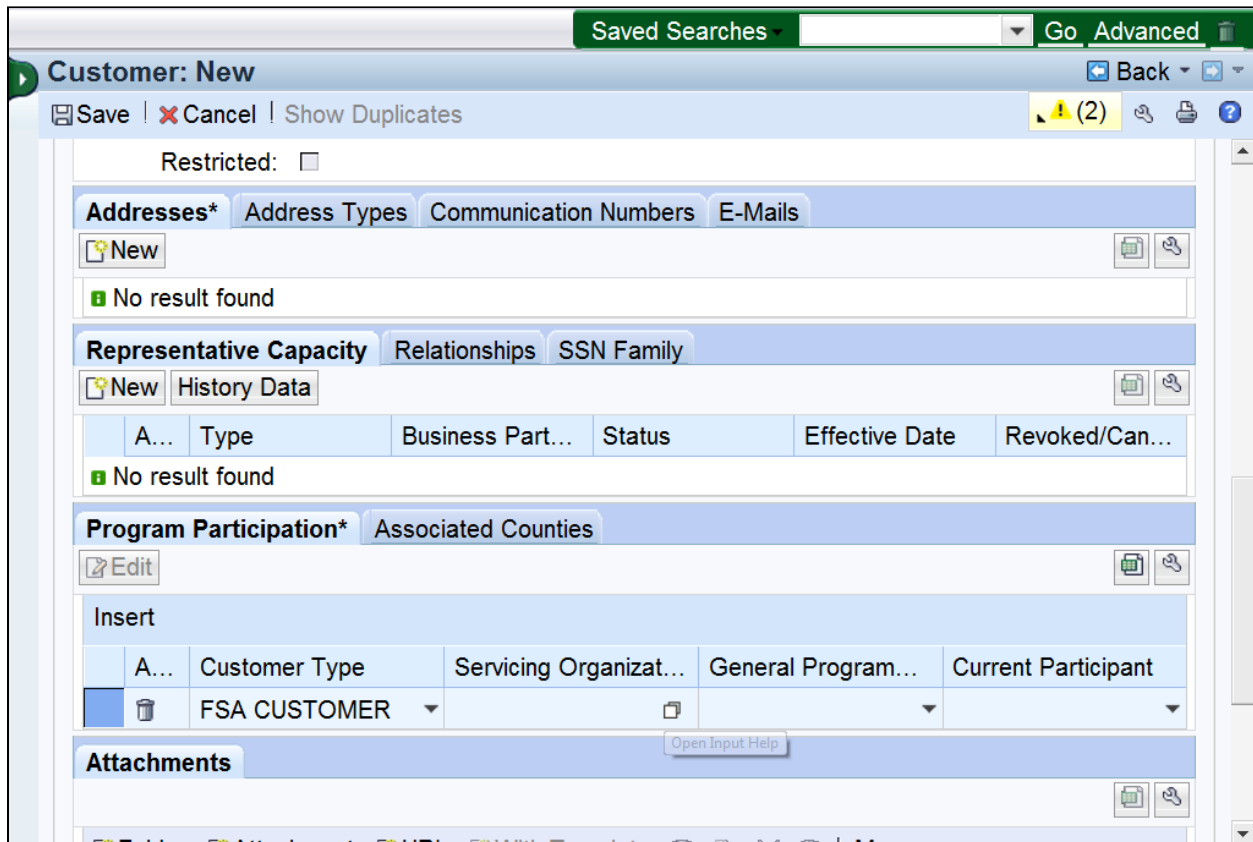
Attachments

Folder | Attachment | URL | With Template | More+

Name	Type	Created By	Created On
------	------	------------	------------

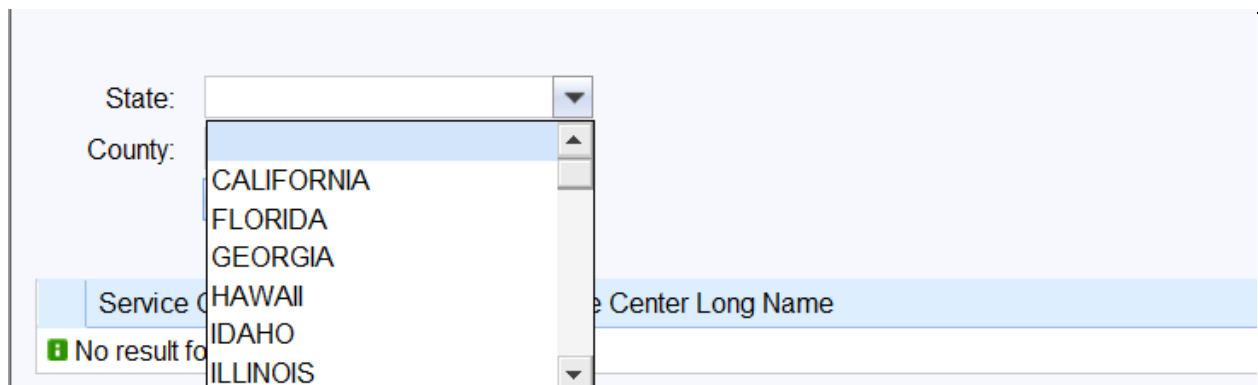
21. Select **FSA CUSTOMER** from the list.

Customer: New



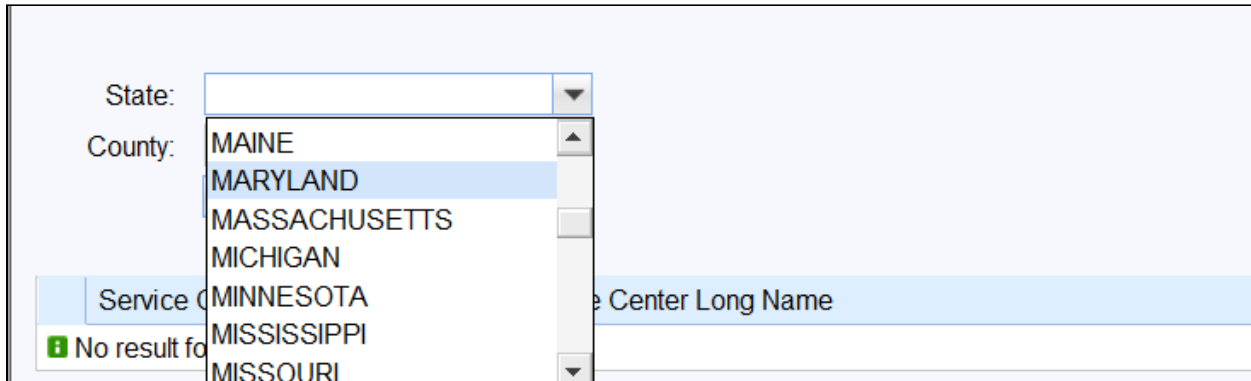
22. Click the **Servicing Organization** field Open Input Help  button to view the dropdown list.

Service Center Search




23. Click the **State**  dropdown list icon button to view the available options.

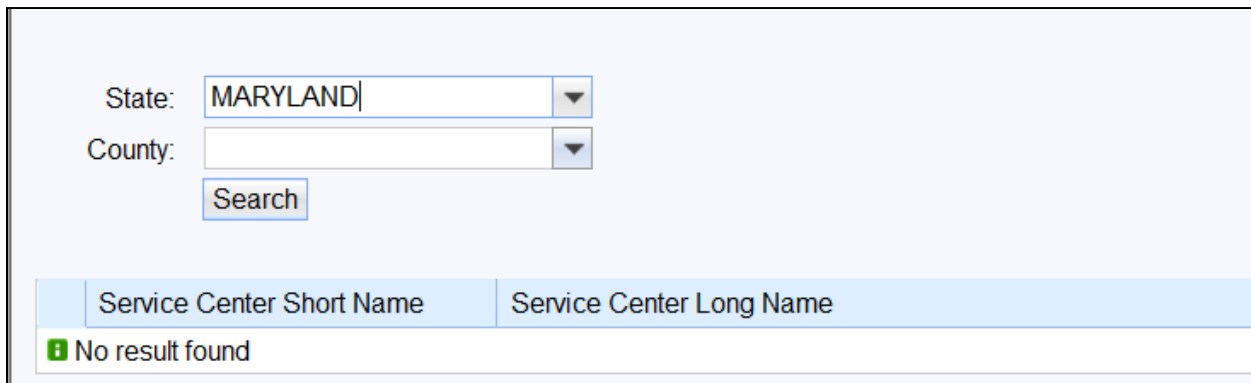
Service Center Search



24. Select **MARYLAND** from the **State** list.

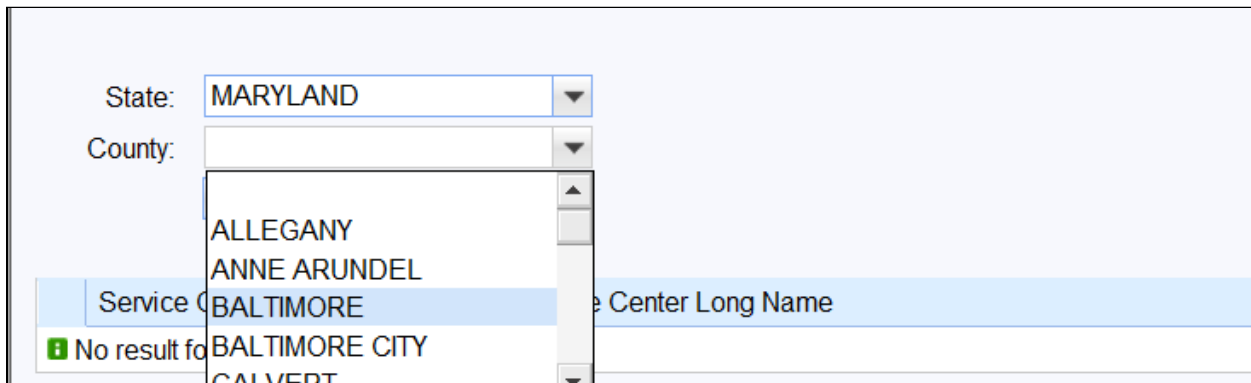
 Scroll or Type State name to filter through the dropdown list.

Service Center Search



25. Click the **County** dropdown list icon button to view available options.

Service Center Search





26. Select **BALTIMORE** from the **County** list.

Service Center Search

State:

County:

Service Center Short Name	Service Center Long Name
No result found	

27. Click the **Search** button to search for the Service Center based on entered search criteria.

Service Center Search

State:

County:

Service Center Short Name	Service Center Long Name
BALTIMORE CO, MD	BALTIMORE CO, MD

28. Double-click **Service Center Short Name** to select it.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties


Edit

Insert

A...	Customer Type	Servicing Organizat...	General Program...	Current Participant
	FSA CUSTOMER	62623		

Attachments

29. Click the **General Program Interest** dropdown list icon button to select the Program Interest from the available options.

 The Service Center ID will appear in the Servicing Organization field.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert				
A...	Customer Type	Servicing Organizat...	General Program...	Current Participant
	FSA CUSTOMER	62623		

Attachments

Does not have interest in the program
Has interest in the program
Unknown

30. Select **Has interest in the program** from the **General Program Interest** list.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert

A...	Customer Type	Servicing Organizat...	General Program...	Current Participant
	FSA CUSTOMER	62623	Has interest in the p	

Attachments

- Click the **Current Participation** dropdown list icon button to view available options.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert

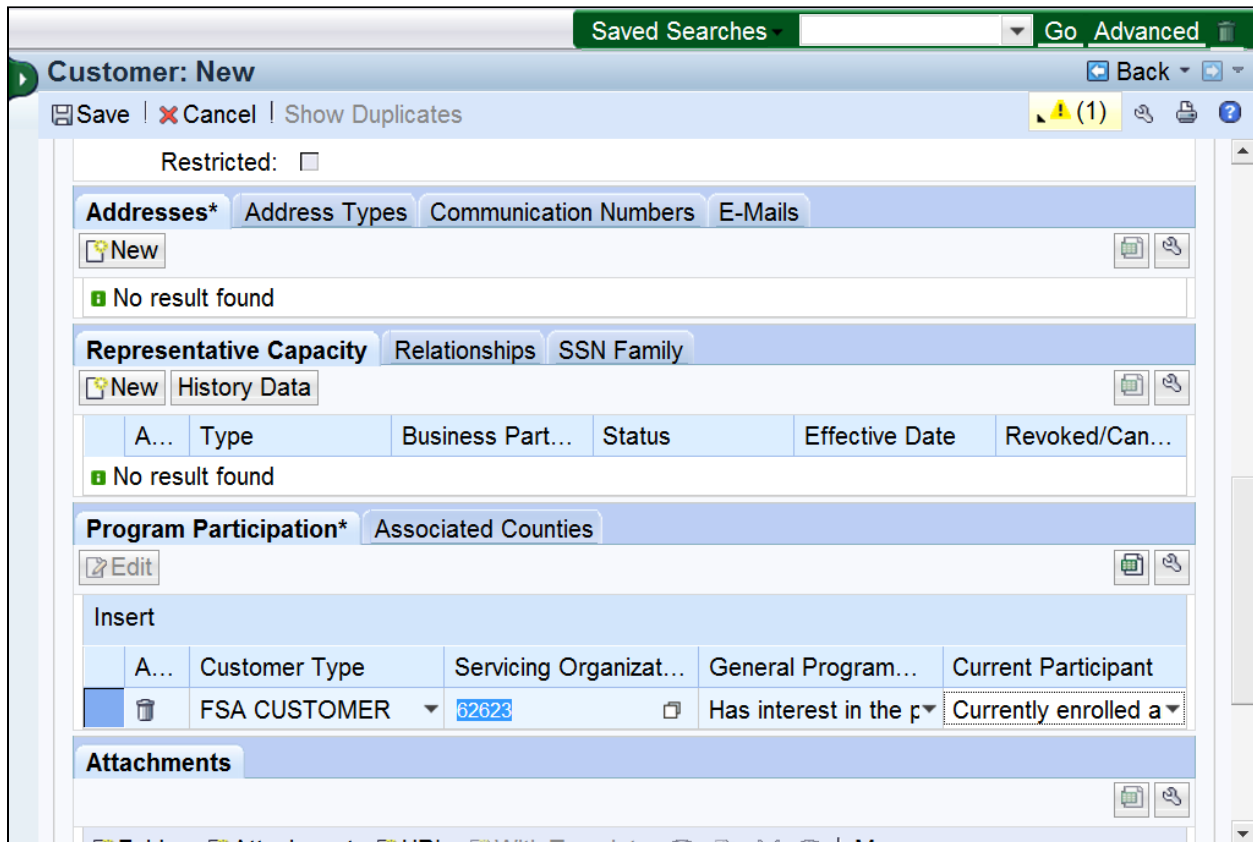
A...	Customer Type	Servicing Organizat...	General Program...	Current Participant
	FSA CUSTOMER	62623	Has interest in the p	

Attachments

Application made
Currently enrolled and participating
Not currently participating

32. Select **Currently enrolled and participating** from the **Current Participant** list.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties


Edit

Insert

A...	Customer Type	Servicing Organizat...	General Program...	Current Participant
	FSA CUSTOMER	62623	Has interest in the p	Currently enrolled a

Attachments

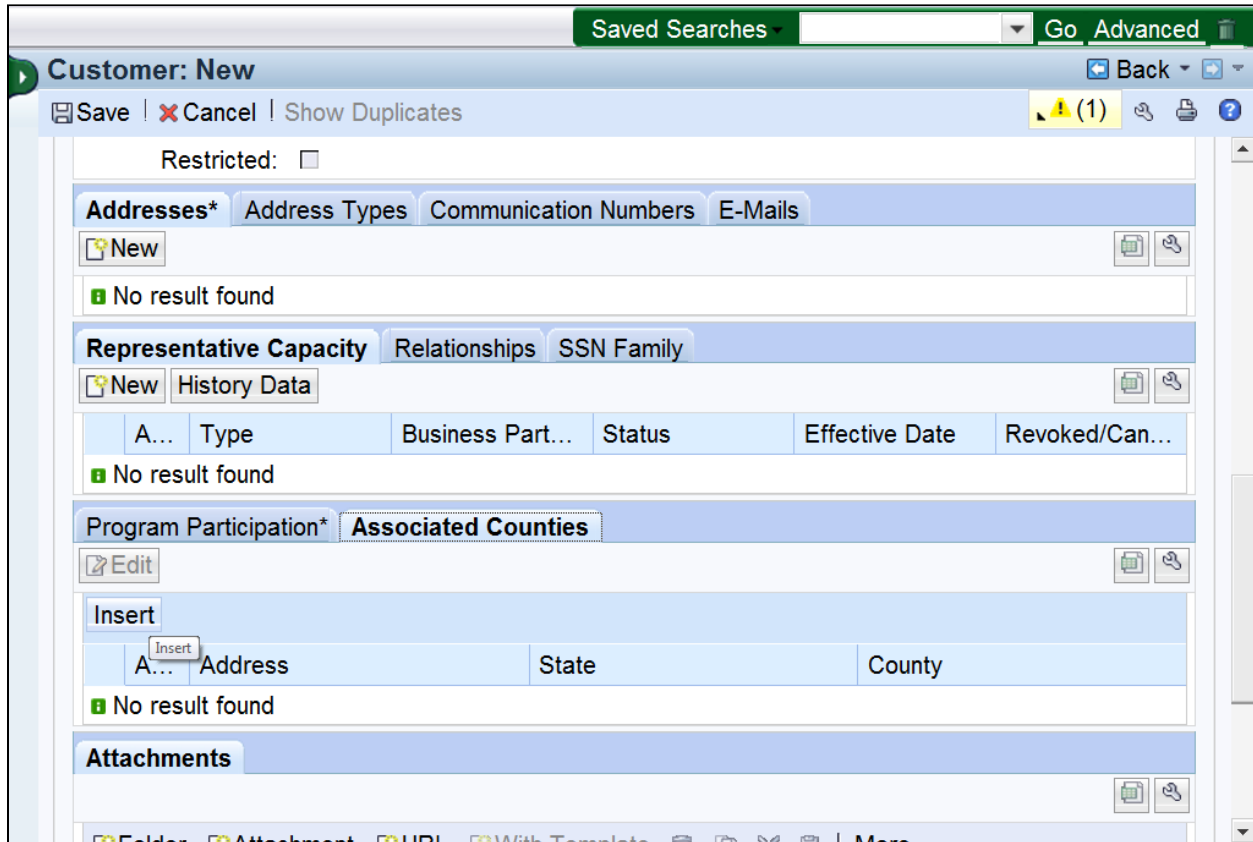
33. Click the Associated Counties **Associated Counties** tab.

 Program Participation has been successfully completed.

Click the **Insert** button and repeat to add additional Program Participation.

Associated Counties must be entered for Program Participation when required the customer is an FSA or FLP customer.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

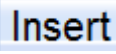
Edit


Insert

A...	Address	State	County
No result found			

Attachments

Folder | Attachment | UPL | With Template | More

34. Click the **Insert**  button to add a new line to the Associated Counties tab.

 Each FSA and Farm Loan Program Participation must have an Associated County. Clicking the insert button will automatically fill the address field. You must click the Insert button for each Associated County entered.

If a customer has multiple addresses, the user will select the corresponding address for the Associated County.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert

A...	Address	State	County
	4815 Norrisville Rd / White H		

Attachments

35. Click the **State** dropdown list icon button.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert			
A...	Address	State	County
	4815 Norrisville Rd / White H	MARYLAND	

Attachments

36. Select **MARYLAND** from the **State** list.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert

A...	Address	State	County
	4815 Norrisville Rd / White H	MARYLAND	

Attachments

37. Click the **County** dropdown list icon button to view available options.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					


Program Participation* | Associated Counties

Edit

Insert			
A...	Address	State	County
	4815 Norrisville Rd / White H	MARYLAND	BALTIMORE BALTIMORE CITY

Attachments

38. Select **BALTIMORE** **BALTIMORE** from the **County** list.

 If multiple counties are associated to a Service Center, multiple options will appear.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Restricted:

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

New

No result found

Representative Capacity | Relationships | SSN Family

New | History Data

A...	Type	Business Part...	Status	Effective Date	Revoked/Can...
No result found					

Program Participation* | Associated Counties

Edit

Insert

A...	Address	State	County
	4815 Norrisville Rd / White H	MARYLAND	BALTIMORE

Attachments

39. Scroll to the top of the customer record to proceed to the **Customer Profile** tab.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | Customer Profile | Roles | Identification Numbers

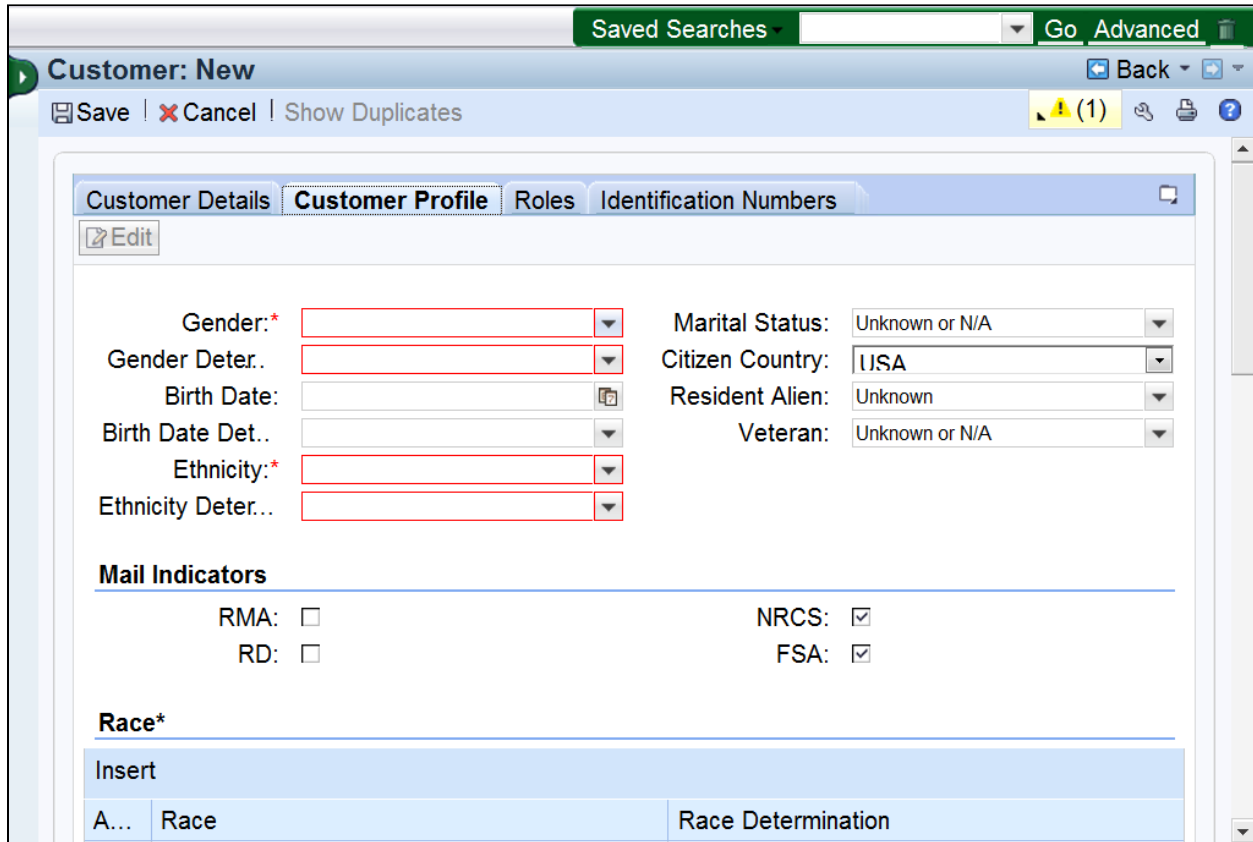
Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Informat...
BP Number / ID: 8000028505	Address... 4815 NORRISVILLE RD
Prefix:	Street address, PO BOX XXX, RR X BOX XX
First Name:* Mike	Address...
Middle Name: G	Apartment, Suite, Unit, Building, Floor
Last Name:* Brady	City:* WHITE HALL
Suffix: JR	State:* MD MARYLAND
Common Cust.: Mike G Brady JR	ZIP Cod... 21161
Legal Name:* N	Country:* US USA
Language Pref... English	Commu.. Post (lette
Data Origin: CRM	Carrier.
Tax ID Type: Social Security Number	Delivery...
Tax ID Number: 571962331	Congres...

Notes

40. Click the **Customer Profile** **Customer Profile** tab.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Customer Details **Customer Profile** Roles Identification Numbers

Edit

Gender:* Marital Status: Unknown or N/A

Gender Deter.. Citizen Country: USA

Birth Date: Resident Alien: Unknown

Birth Date Det.. Veteran: Unknown or N/A

Ethnicity:*

Ethnicity Deter...

Mail Indicators

RMA: NRCS:

RD: FSA:

Race*

Insert

A...	Race	Race Determination
------	------	--------------------

41. Click the **Gender** dropdown list icon button to view available options.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Marital Status: Unknown or N/A

Gender Deter.. Citizen Country: USA

Birth Date: Resident Alien: Unknown

Birth Date Det.. Veteran: Unknown or N/A

Ethnicity:*

Ethnicity Deter...

Mail Indicators

RMA: NRCS:

RD: FSA:

Race*

Insert

A...	Race	Race Determination
------	------	--------------------

42. Select Male **Male** from the **Gender** list.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A
 Gender Deter.. | Citizen Country: USA
 Birth Date: | Resident Alien: Unknown
 Birth Date Det.. | Veteran: Unknown or N/A
 Ethnicity:* |
 Ethnicity Deter..

Mail Indicators

RMA: NRCS:
 RD: FSA:

Race*

Insert

A...	Race	Race Determination
------	------	--------------------

43. Click the **Gender Determination:** dropdown list icon button to view available options.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A

Gender Deter.. | Citizen Country: USA

Birth Date: | Resident Alien: Unknown

Birth Date Det.. Customer Declared | Veteran: Unknown or N/A

Ethnicity:* Not Verified

Ethnicity Deter..

Mail Indicators

RMA: | NRCS:


RD: | FSA:

Race*

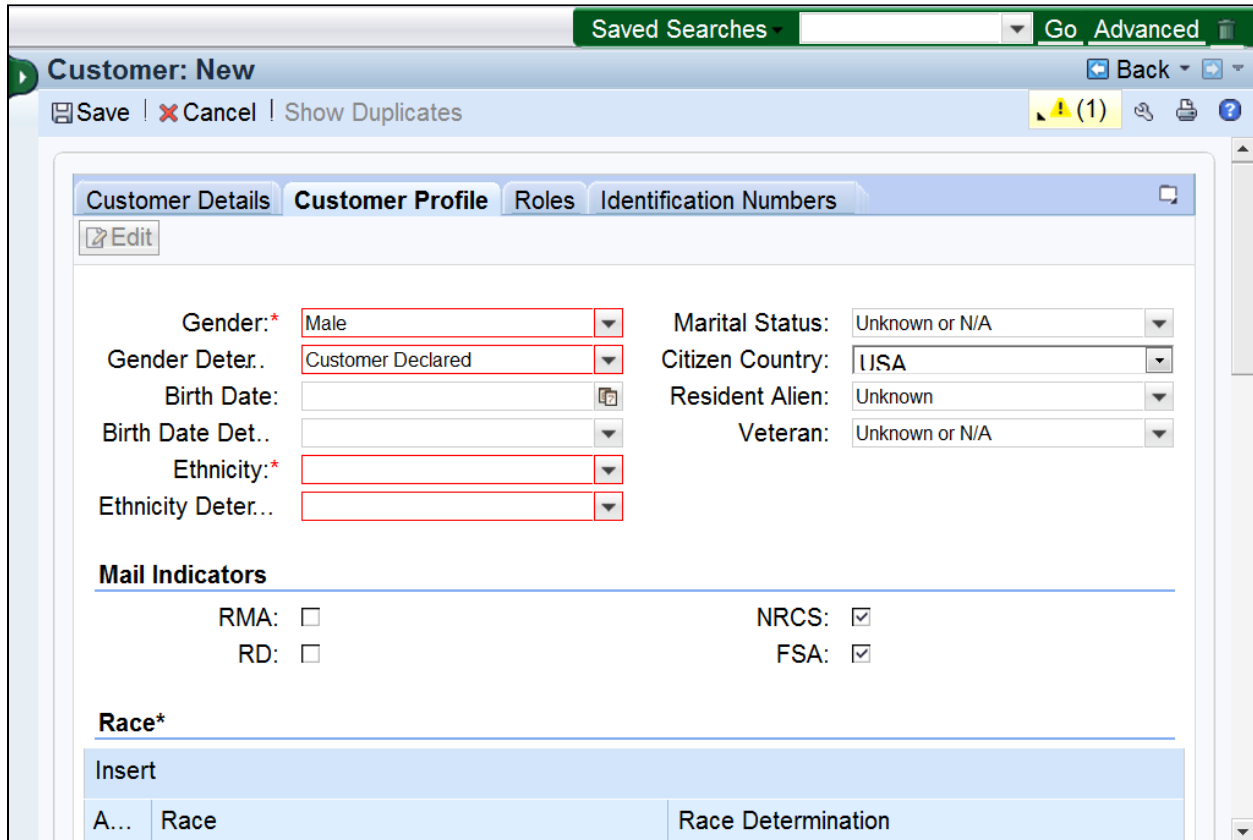
Insert

A...	Race	Race Determination
------	------	--------------------

44. Select **Customer Declared** from the **Gender Determination** list.

 The determination field must be completed for Gender, Birth Date, Ethnicity, and Race.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A

Gender Deter.: Customer Declared | Citizen Country: USA

Birth Date: | Resident Alien: Unknown

Birth Date Det.: | Veteran: Unknown or N/A

Ethnicity:* |

Ethnicity Deter.. |

Mail Indicators

RMA: | NRCS:

RD: | FSA:

Race*

Insert

A... Race | Race Determination

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

Field	R/O/C	Description
Birth Date:	R	The date of birth for an individual. Example: 01/01/1969



Enter the birth date in MM/DD/YYYY format or use the Open Input search icon to select from the calendar.

Only required if Customer is a minor or FLP customer.

Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A
 Gender Deter.: Customer Declared | Citizen Country: USA
 Birth Date: 01/01/1969 | Resident Alien: Unknown
 Birth Date Det.: | Veteran: Unknown or N/A
 Ethnicity:* |
 Ethnicity Deter.. |

Mail Indicators

RMA: | NRCS:
 RD: | FSA:

Race*

Insert

A...	Race	Race Determination
------	------	--------------------

46. Click the **Birth Date Determination** dropdown list icon button to view available options.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A
 Gender Deter.: Customer Declared | Citizen Country: USA
 Birth Date: 01/01/1969 | Resident Alien: Unknown
 Birth Date Det.: | Veteran: Unknown or N/A
 Ethnicity:* |
 Ethnicity Deter...: Customer Declared
 Not Verified

Mail Indicators

RMA: | NRCS:
 RD: | FSA:

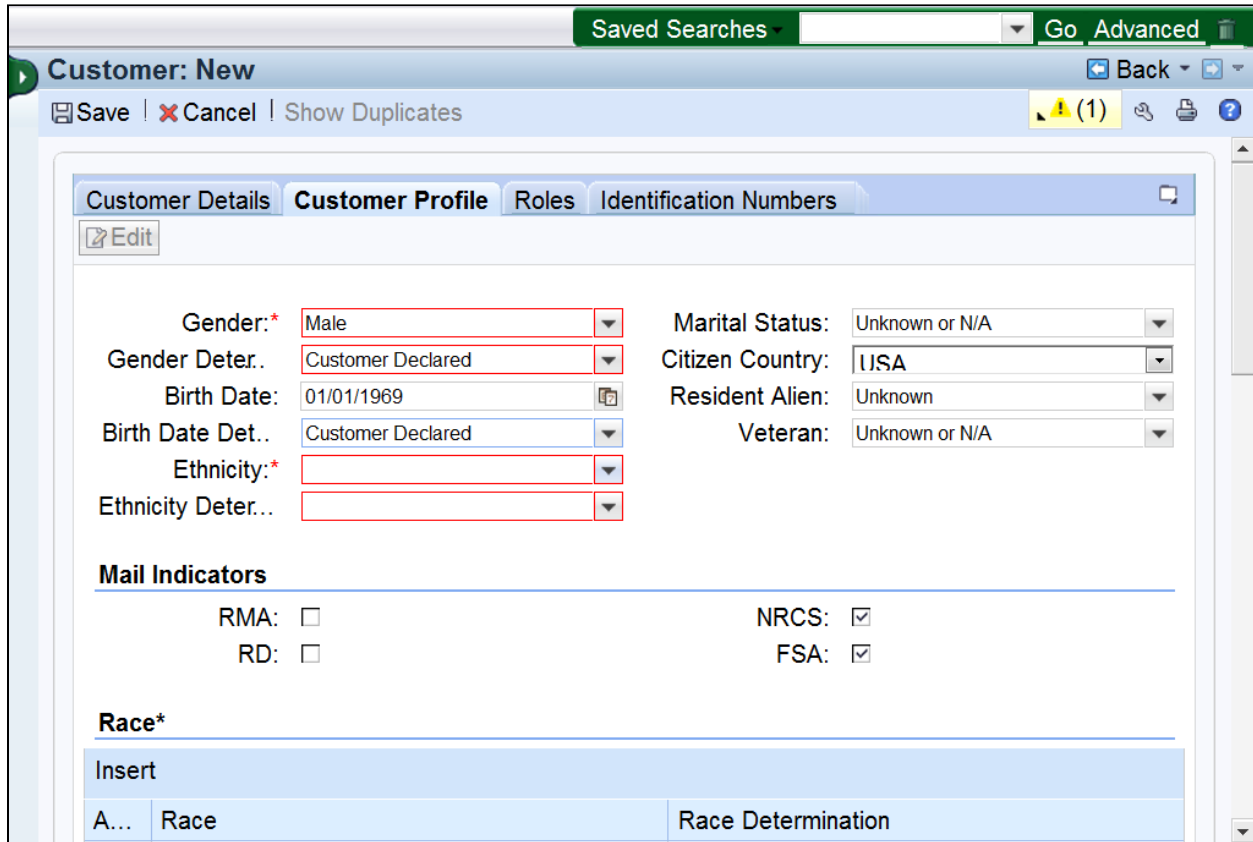
Race*

Insert

A...	Race	Race Determination

47. Select **Customer Declared** from the **Birth Date Determination** list.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Edit

Gender:* Male | Marital Status: Unknown or N/A
Gender Deter.. Customer Declared | Citizen Country: USA
Birth Date: 01/01/1969 | Resident Alien: Unknown
Birth Date Det.. Customer Declared | Veteran: Unknown or N/A
Ethnicity:* |
Ethnicity Deter..

Mail Indicators

RMA: | NRCS:
RD: | FSA:

Race*

Insert		
A...	Race	Race Determination

48. Click the **Ethnicity** dropdown list icon button.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A

Gender Deter.: Customer Declared | Citizen Country: USA

Birth Date: 01/01/1969 | Resident Alien: Unknown

Birth Date Det.: Customer Declared | Veteran: Unknown or N/A

Ethnicity:* | Ethnicity Deter...: **Not Hispanic or Latino**

Mail Indicators

RMA: | NRCS:

RD: | FSA:

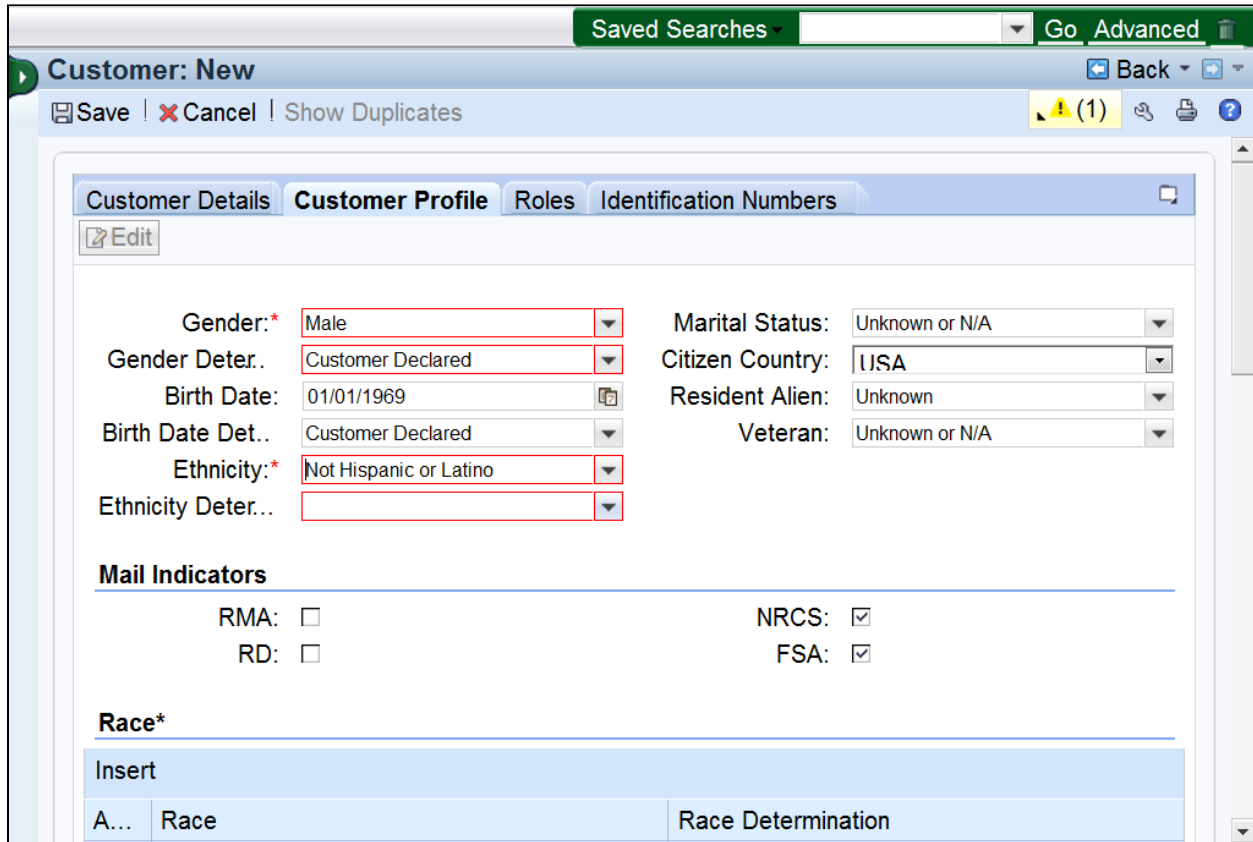
Race*

Insert

A...	Race	Race Determination

49. Select **Not Hispanic or Latino** from the **Ethnicity Determination** list.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Edit

Gender:* Male
Gender Deter.. Customer Declared
Birth Date: 01/01/1969
Birth Date Det.. Customer Declared
Ethnicity:* Not Hispanic or Latino
Ethnicity Deter..

Marital Status: Unknown or N/A
Citizen Country: USA
Resident Alien: Unknown
Veteran: Unknown or N/A

Mail Indicators

RMA: NRCS:
RD: FSA:

Race*

Insert		
A...	Race	Race Determination

50. Click the **Ethnicity Determination** dropdown list icon button.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A
 Gender Deter.: Customer Declared | Citizen Country: USA
 Birth Date: 01/01/1969 | Resident Alien: Unknown
 Birth Date Det.: Customer Declared | Veteran: Unknown or N/A
 Ethnicity:* Not Hispanic or Latino
 Ethnicity Deter...: [Dropdown]

Mail Indicators

Customer Declared
 Not Verified

RMA: | NRCS:
 RD: | FSA:

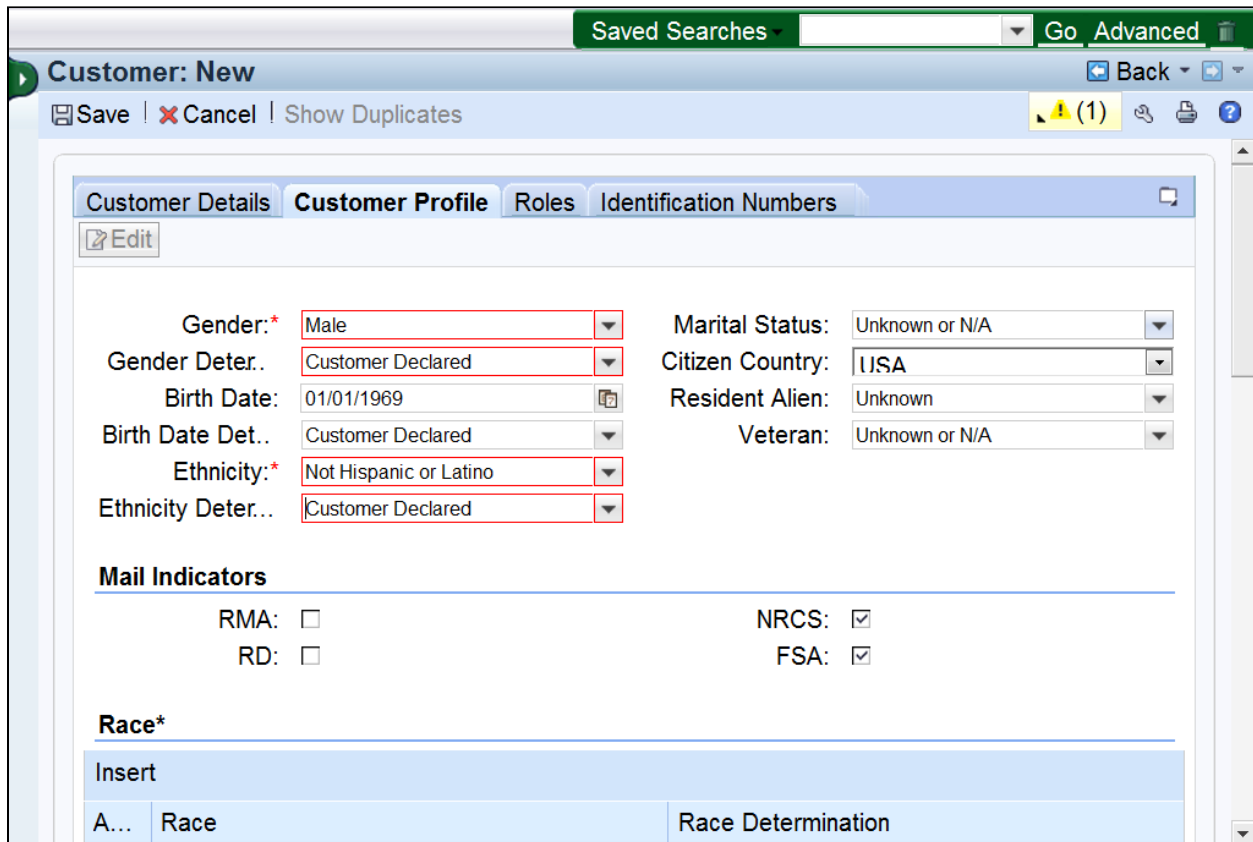
Race*

Insert

A...	Race	Race Determination

51. Select **Customer Declared** from the **Ethnicity Determination** list.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A

Gender Deter.: Customer Declared | Marital Status: Unknown or N/A

Birth Date: 01/01/1969 | Citizen Country: USA

Birth Date Deter.: Customer Declared | Resident Alien: Unknown

Ethnicity:* Not Hispanic or Latino | Veteran: Unknown or N/A

Ethnicity Deter...: Customer Declared

Mail Indicators

RMA: | NRCS:


RD: | FSA:

Race*

Insert

A... Race | Race Determination

52. Click the **Marital Status** dropdown list icon button.

 If the Customer has the Program Participation defined as a **Farm Loan Program (FLP)**, then the **Marital Status** and **Veteran** fields are required. The status can not be set to Unknown or N/A.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Customer Details | **Customer Profile** | Roles | Identification Numbers

Gender:* Male | Marital Status: Unknown or N/A

Gender Deter.: Customer Declared | Citizen Country: Divorced

Birth Date: 01/01/1969 | Resident Alien: Married

Birth Date Det.: Customer Declared | Veteran: Separated

Ethnicity:* Not Hispanic or Latino | Single

Ethnicity Deter...: Customer Declared | Unknown or N/A

Widow(er)

Mail Indicators

RMA: | NRCS:

RD: | FSA:

Race*

Insert

A...	Race	Race Determination

53. Select **Single** from the **Marital Status** list.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Gender:* Male Marital Status: Single

Gender Deter.: Customer Declared Citizen Country: USA

Birth Date: 01/01/1969 Resident Alien: Unknown

Birth Date Det.: Customer Declared Veteran: Unknown or N/A

Ethnicity:* Not Hispanic or Latino

Ethnicity Deter...: Customer Declared

Mail Indicators

RMA: NRCS:

RD: FSA:

Race*

Insert	
A...	Race

Disability

54. Click the **Race** dropdown list icon button.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Gender:* Male Marital Status: Single

Gender Deter.: Customer Declared Citizen Country: USA

Birth Date: 01/01/1969 Resident Alien: Unknown

Birth Date Det.: Customer Declared Veteran: Unknown or N/A

Ethnicity:* Not Hispanic or Latino

Ethnicity Deter...: Customer Declared

Mail Indicators

RMA: NRCS:

RD: FSA:

Race

American Indian or Alaska Native (includes origins of Central & South America)

Asian - Far East, SE Asia, or Indian Subcontinent (includes Japan & Philippines)

Black or African American. African Amer indicates origins in black racial grps

Native Hawaiian or Other Pacific Islander. Origins of Hawaii, Guam, & Samoa

White - Origins in original peoples of Europe, the Middle East, N Africa

Disability

55. Select **White - Origins in original peoples of Europe, the Middle East, N Africa** from the **Race** list.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Gender:* Male Marital Status: Single

Gender Deter.: Customer Declared Citizen Country: USA

Birth Date: 01/01/1969 Resident Alien: Unknown

Birth Date Det.: Customer Declared Veteran: Unknown or N/A

Ethnicity:* Not Hispanic or Latino

Ethnicity Deter...: Customer Declared

Mail Indicators

RMA: NRCS:

RD: FSA:

Race*

Insert	
A...	Race
	White - Origins in original peoples of Europe,

Disability

56. Click the **Race Determination** dropdown list icon button.



Customer: New

Customer: New

Save | Cancel | Show Duplicates

Gender:* Male Marital Status: Single

Gender Deter.. Customer Declared Citizen Country: USA

Birth Date: 01/01/1969 Resident Alien: Unknown

Birth Date Det.. Customer Declared Veteran: Unknown or N/A

Ethnicity:* Not Hispanic or Latino

Ethnicity Deter... Customer Declared

Mail Indicators

RMA: NRCS:


RD: FSA:

Race*

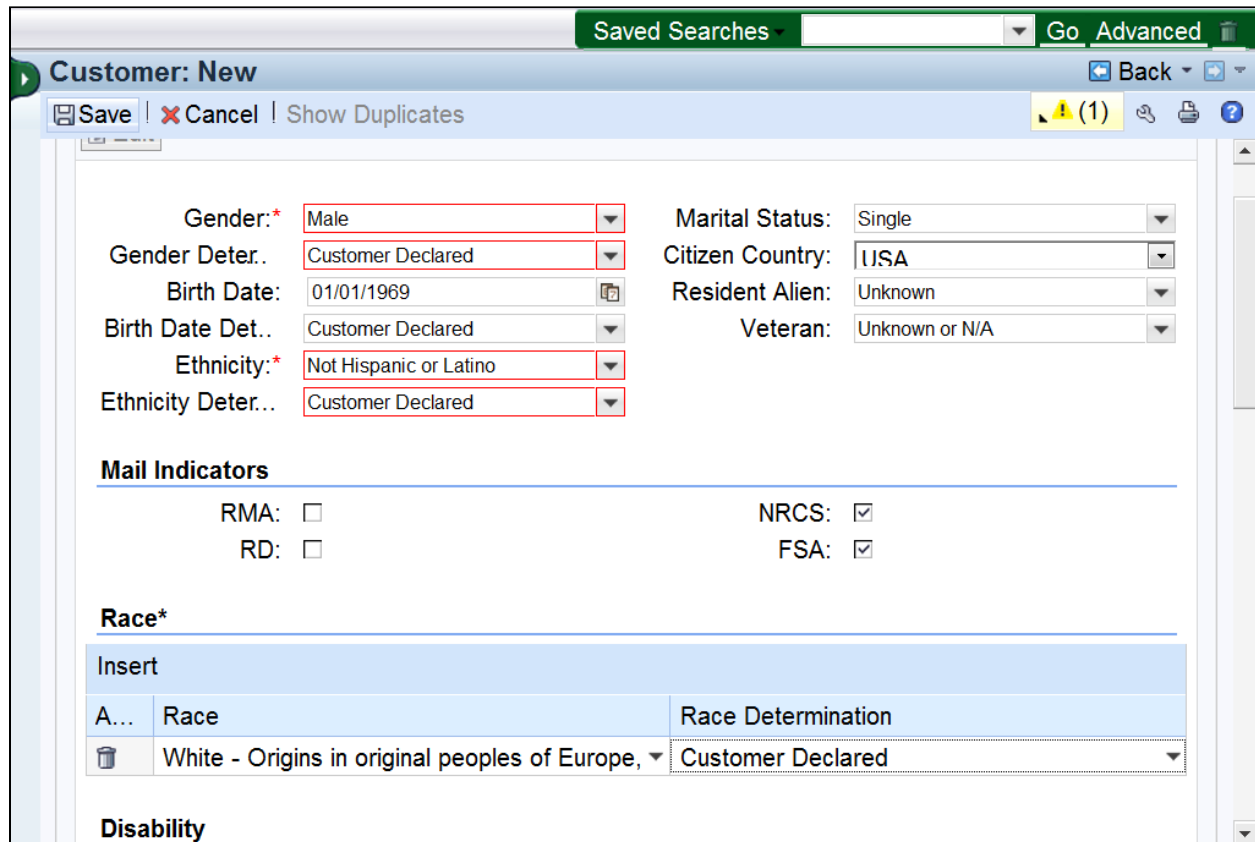
Insert	
A...	Race
	Customer Declared
	Not Verified
	White - Origins in original peoples of Europe, ▾

Disability

57. Select Customer Declared **Customer Declared** from the **Race Determination** list.

 Race Determination must match Ethnicity Determination. If not, an error will be received, and will prevent the record from saving.

Customer: New



Customer: New

Save | Cancel | Show Duplicates

Gender:* Male
 Gender Deter.. Customer Declared
 Birth Date: 01/01/1969
 Birth Date Det.. Customer Declared
 Ethnicity:* Not Hispanic or Latino
 Ethnicity Deter... Customer Declared

Marital Status: Single
 Citizen Country: USA
 Resident Alien: Unknown
 Veteran: Unknown or N/A

Mail Indicators


RMA: NRCS:
 RD: FSA:

Race*

A...	Race	Race Determination
	White - Origins in original peoples of Europe, ...	Customer Declared

Disability

58. Click the **Save** button.

 After all required fields are entered, the BP record can be saved. Validations will be initiated upon save.

Be sure to complete all BP creation tasks prior to selecting Save, such as: Creating Representative Capacity, Adding a Contact BP etc.

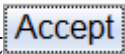
The BP record will be available to edit after save. Refer to the *Maintain BP Customer Record* and *Submit KFC Request Work Instructions* for information on how to update the BP record.




Error at address check

Please review Address validation results.

Address Component	Original Address	Validated Address
Address Line 1	4815 NORRISVILLE RD	4815 NORRISVILLE RD
Secondary Number		
Street 2		
Address Line 2		
DPV/Carr./Cong.dist		153 R001 2401
Building Code		
Room Number		
Floor		
City	WHITE HALL	WHITE HALL
ZIP Code	21161	21161-9678
State	MD	MD
Country	US	US


59. Click the **Accept**  button to update the address in the BP record.


 Address Validation will add the 4 digit postal code, if available, to the zip code and update the following fields:

- Carrier Route
- Delivery Bar Code
- Congressional Voting District

If the 4 digit postal code is unavailable, the Congressional Voting District must be entered manually.

 Click **Accept** to update the BP record with the Validated Address.

 Click **Use Original Address** to ignore the Validated Address. Be sure to follow system standards and abbreviations. This may be used for new addresses. This should not be commonly used. If selected, the address will not be validated going forward unless there is a change to the address.

 Click **Cancel** to return to the address field in the BP record.



Customer: MIKE G BRADY JR

Customer: MIKE G BRADY JR Back

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

(1) (1)

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: 8000028505	Address Lin.. 4815 NORRISVILLE RD
Prefix:	Street address, PO BOX XXX, RR X BOX X...
First Name: MIKE	Address Lin..
Middle Name: G	Apartment, Suite, Unit, Building, Floor
Last Name: BRADY	City: WHITE HALL
Suffix: JR	State: MD MARYLAND
Common Customer.. MIKE G BRADY JR	ZIP Code: 21161-9678
Legal Name: No	Country: US USA
Language Preference: English	Communica.. Post (letter)
Data Origin: CRM	Carrier Route: R001
Employee Type: Not an employee	Delivery Ba.. 153
Tax ID Type: Social Secu...	Congressio.. MARYLAND 01
Tax ID Number: 571962331	
IRS Response Code: Waiting for IRS response	

60. Click the **Expand message area** button to view messages.



Error messages are displayed as an exclamation mark inside a red circle

in the upper right corner and must be expanded to display their message. If CRM displays any error messages, then they must be solved

before the save action can be completed. Yellow and Green



messages are informational only.



Customer: MIKE G BRADY JR

Customer: MIKE G BRADY JR

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

Customer Details | Customer Profile | Roles | Identification Numbers | SCIMS R

Edit | Tax ID History

Data has been saved

General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number / ID: 8000028505	Address Lin.. 4815 NORRISVILLE RD
Prefix:	Street address, PO BOX XXX, RR X BOX X...
First Name: MIKE	Address Lin..
Middle Name: G	Apartment, Suite, Unit, Building, Floor
Last Name: BRADY	City: WHITE HALL
Suffix: JR	State: MD MARYLAND
Common Customer.. MIKE G BRADY JR	ZIP Code: 21161-9678
Legal Name: No	Country: US USA
Language Preference: English	Communica.. Post (letter)
Data Origin: CRM	Carrier Route: R001
Employee Type: Not an employee	Delivery Ba.. 153
Tax ID Type: Social Secu... ✓	Congressio.. MARYLAND 01
Tax ID Number: 571962331 ✓	
IRS Response Code: Waiting for IRS response	

61. Click the **Collapse message area** button to close the messages.

Customer: MIKE G BRADY JR

Customer: MIKE G BRADY JR

Save | Cancel | New | Show Duplicates | Key Field Change | Copy | 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: 8000028505	Address Lin.. 4815 NORRISVILLE RD
Prefix:	Street address, PO BOX XXX, RR X BOX X...
First Name: MIKE	Address Lin..
Middle Name: G	Apartment, Suite, Unit, Building, Floor
Last Name: BRADY	City: WHITE HALL
Suffix: JR	State: MD MARYLAND
Common Customer.. MIKE G BRADY JR	ZIP Code: 21161-9678
Legal Name: No	Country: US USA
Language Preference: English	Communica.. Post (letter)
Data Origin: CRM	Carrier Route: R001
Employee Type: Not an employee	Delivery Ba.. 153
Tax ID Type: Social Secu... ✓	Congressio.. MARYLAND 01
Tax ID Number: 571962331 ✓	
IRS Response Code: Waiting for IRS response	

62. Click the **Back** button to return to the Search page. You have



completed the transaction.



Result

You have created a Business Partner customer record in CRM.