

#### 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 <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 cautionary 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 critical note	$\bigotimes$	Use this note to specify something that <b>MUST NOT</b> 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 <b>reference</b> is available	$\mathbf{P}$	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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Home	Workflow Tasks		Alerts	<b>×</b>
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Recent Items	🔭 Favorites	A 🗆 🗙	Search Member Hierarchies	
KENNETH D KE JOHN O HOWA	My Favorites -	Filter: All Items	Search Products Search Requested Products	
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DAVID M COBB			Create Farm/Bin Create New Product Request	
			Reports	■ ×

2.

**Business Partner** 

button to go to the

Accounts Page.

Click the **Business Partner** 



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

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Home	Search	Reports	□ ×
Worklist	Search Customers/Contacts		
Business Partner	Search Member Hierarchies		
Farm Records			
Product Master			
Recent Items			
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DAVID COBB DAVID M COBB			
DAVID M COBB			

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

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BP Number/ID	-	is	-			0 0
Role	-	is	-		-	0 0
Tax ID Number	-	is	-			0 0
Tax ID Type	-	is	-		•	0 0
Archived Flag	-	is	-	Not Set	-	0 0
Inactive Flag	-	is	-	Not Set	-	0 0
IRS Response Coo	de 💌	is	-		-	0 0
IRS Attempts	-	equals	-			0 0
State Prog Particip	ation -	is	-	ALL STATES	-	0 0
County Prog Partic	ipation -	is	-	<all counties=""></all>	-	0 0
Service Center	-	is	-	<all centers=""></all>	-	0 0

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

Field	R/O/C	Description
Last Name	0	Business Partner's Last Name
		<b>Example:</b> 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

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earch: Customers								🖸 Bad	:k - 🖸
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Last Name	-	is	-	Brady		0	•		
Middle Name	-	is	•			0	•		
Common Customer Name	-	is	•			0	•		
BP Number/ID	-	is	•			0	•		
Role	-	is	•		•	0	•		
Tax ID Number	-	is	•			0	•		
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	•		
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Search Clear Reset		Max Save Search As:		m Number of Resu		10 Sa			
Result List									
Solution Customer								II 🛱	R.

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

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earch: Customers								🖸 Back 🝷
Common Customer Name	-	is	-			0 0		
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Role	-	is	•		•	0 0		
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Tax ID Type	-	is	•		•	00		
Archived Flag	•	is	•	Not Set	•	00		
Inactive Flag	-	is	•	Not Set	•	00		
IRS Response Code	-	is	•		•	0 0		
IRS Attempts	-	equals	•			00		
State Prog Participation	-	is	•	ALL STATES	•	00		
County Prog Participation	-	is	•	<all counties=""></all>	•	00		
Service Center	-	is	-	<all centers=""></all>	-	00		
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	nmoi	n Custo T	P	. T H S	C.	S ZIF	<sup>o</sup> Code	T E I. I

- Click the **New Customer** Solution to create a new customer record.
  - Ð

6.

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.



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Customer: New		🖸 Back 👻 🗔 👻
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Customer Details		
General Data		
Current Role:*	•	
Tax ID Type:*	<b>~</b>	
Tax ID Number:*		

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.



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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			

Select Individual 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

8.



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

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Customer: New		🖸 Back 👻 🖸 👻
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		)
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.



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Customer Details		
General Data		
Current Role:* Individual	•	
Tax ID Type:*	-	
Tax ID 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.



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

Field		Description
Tax ID Number:	R	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).
		Example: 571962331



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General Data			
Current Role:*	Individual	-	
Tax ID Type:*		•	
Tax ID Number:*	571962331		
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**12.** Click the **Continue Continue** button to continue building the BP record.



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Current Role:	Individual	-	Informat						
BP Number / ID:	8000028505		Address						
Prefix:	•			Street ac	ldress, P	D BOX XX	(X, RR X B	SOX XX	
First Name:*			Address						
Middle Name:				Apartme	nt, Suite,	Unit, Build	ing, Floor		
Last Name:*			City:*						
Suffix:	-		State:*		đ				
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Tax ID Type:	Social Security Number	-	Delivery						
Tax ID Number:	571962331		Congres			•			
Notes									

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.



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B Tax ID H	istory							
General Data			Main Addre	ess and Co	mmunica	tion Data		
Current Role:	Individual	-	Informat					
BP Number / ID:	8000028505		Address					
Prefix:	-			Street addres	ss, PO BOX	XXX, RR X	BOX XX	
First Name:*	Mike		Address					
Middle Name:				Apartment, S	uite, Unit, B	uilding, Floor		
Last Name:*			City:*					
Suffix:	-		State:*	đ				
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Tax ID Number:	571962331		Congres		-			
Notes								

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.



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Prefix:	•			Street a	ddress,	PO B	OX XXX,	RR X B	OX XX	
First Name:*	Mike		Address							
Middle Name:	G			Apartme	ent, Suit	e, Unit	, Building,	Floor		
Last Name:*			City:*							
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Data Origin:	CRM	-	Carrier.							
Tax ID Type:	Social Security Number	-	Delivery							
Tax ID Number:	571962331		Congres			-				
Notes										

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

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



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General Data			Main Addre	ss and Con	municati	on Data		
Current Role:	Individual		Informat					
BP Number / ID:	8000028505		Address					
Prefix:	•			Street address	s, PO BOX X	KX, RR X B	ох хх	
First Name:*	Mike		Address					
Middle Name:	G			Apartment, Su	ite, Unit, Build	ling, Floor		
Last Name:*	Brady		City:*					
Suffix:	•		State:*	đ				
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Legal Name:*	Esquire I		Country:*	US 🗇	USA			
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Data Origin:		-	Carrier.					
Tax ID Type:	IV JR ▼ ity Number		Delivery					
Tax ID Number:	571962331		Congres		-			
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**16.** Select JR **JR** from the **Suffix** list.



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B Edit S Tax ID H	story										
General Data			Main Addre	ess and	Con	nmun	icatior	n Data			
Current Role:	Individual	-	Informat								
BP Number / ID:	8000028505		Address								
Prefix:	•			Street a	ddress	s, PO B	OX XXX	K, RR X	BOX XX		
First Name:*	Mike		Address								
Middle Name:	G			Apartme	ent, Su	ite, Uni	t, Buildir	ng, Floor			
Last Name:*	Brady		City:*								
Suffix:	JR ▼		State:*		đ						
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Legal Name:*	N 🕶		Country:*	US	đ	USA					
Language Pref	English 💌		Commu.	Post (let	te 🕶						
Data Origin:	CRM	-	Carrier.								
Tax ID Type:	Social Security Number	-	Delivery								
Tax ID Number:	571962331		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.
		<b>Example:</b> 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

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B Edit S Tax ID Hi	istory				
General Data	Communication Data				
Current Role:	Individual	-	Informat		
BP Number / ID:	8000028505		Address	4815 Norris	isville Rd
Prefix:	•			Street add	Iress, 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:*	C	đ
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Tax ID Type:	Social Security Number	-	Delivery		
Tax ID Number:	571962331		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
		<b>Example:</b> 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

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General Data			Main Addre	ss and Con	nmunio	ation Data	a	
Current Role:	Individual	-	Informat					
BP Number / ID:	8000028505		Address	4815 Norrisvil	e Rd			
Prefix:	-			Street address	s, PO BO	X XXX, RR X	BOX XX	
First Name:*	Mike		Address					
Middle Name:	G			Apartment, Su	ite, Unit,	Building, Floo	r	
Last Name:*	Brady		City:*	White Hall				
Suffix:	JR 🔻		State:*	MD 🗇				
Common Cust			ZIP Cod	21161				
Legal Name:*	N 🕶		Country:*	US 🗇	USA			
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Data Origin:	CRM	-	Carrier.					
Tax ID Type:	Social Security Number	-	Delivery					
Tax ID Number:	571962331		Congres		-			
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**19.** Scroll to the **Program Participation** tab.

#### **Customer: New**

Customer: New Save X Cancel Show Duplicates Addresses* Address Types Communication Numbers E-Mails New Save State Sta	• 🖸 •
Addresses* Address Types Communication Numbers E-Mails	
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No result found	
Representative Capacity Relationships SSN Family	
PNew 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	
Second S	
	-

**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.



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B No result found							
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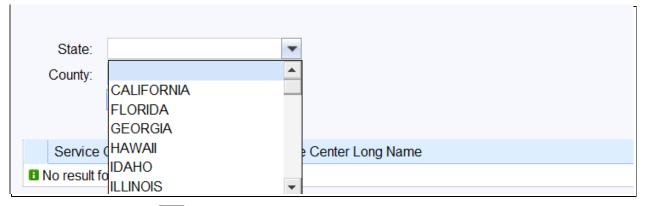
21. Select FSA CUSTOMER FSA CUSTOMER from the list.



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Restricted:							
Addresses* Address Types	Communication Numbers	E-Mails					
<b>New</b>							
Save X Cancel Show Duplicates Restricted: Addresses* Address Types Communication Numbers E-Mails Addresses* Address Types Communication Numbers E-Mails New 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 Cedit Insert A Customer Type Servicing Organizat General Program Current Participant FSA CUSTOMER							
Representative Capacity Rela	tionships SSN Family						
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A Type Bus	iness Part Status	Effective Dat	e Revoked/Can				
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A Customer Type	Servicing Organizat	General Program	Current Participant				
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Attachments	Open	Input Help					
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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**

State:		-	
County:	MAINE		
	MARYLAND		
	MASSACHUSETTS		
	MICHIGAN		
Service	MINNESOTA	Center Long Name	
B No result fo	MISSISSIPPI		
	MISSOURI	•	

24. Select MARYLAND MARYLAND from the State list.

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

# **Service Center Search**

State: County:	MARYLAND	<b>•</b>	
County.	Count		
	Search		
Service	Center Short Name	Service Center Long Name	
No result	found		

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

#### **Service Center Search**

	State:	MARYLAND	-	]
	County:		-	
				]
	l	ALLEGANY		
		ANNE ARUNDEL		
	Service (	BALTIMORE		e Center Long Name
81	No result fo	BALTIMORE CITY		
			-	



# 26. Select BALTIMORE BALTIMORE

from the **County** list.

# **Service Center Search**

State:	MARYLAND	•	
County:	BALTIMORE	•	
	Search		
Service	Center Short Name	Service Center Long Name	
No result f	ound		

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

## **Service Center Search**

State:	MARYLAND	•
County:	BALTIMORE	▼
	Search	
Service	Center Short Name	Service Center Long Name
BALTIM	ORE CO, MD	BALTIMORE CO, MD
[		

**28.** Double-click Service Center Short Name BALTIMORE CO, MD select it.

to



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Customer: Ne	w						🖸 Back	- 🖸
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Addresses*	Address Types	Communicatio	n Numbers	E-Mails				
[] New							5	8
Save X 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 Effective Date Revoked/Can								
New       Image: Second state st								
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🗊 FS	A CUSTOMER	✓ 62623	þ		•			-
Attachments								
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**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.



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



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T T FS/	A CUSTOMER	▼ 62623	đ	Has inte	erest in the p▼		•	
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**31.** Click the **Current Participation** dropdown list icon button to view available options.



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A Cu	stomer Type	Servicing O	rganizat	General	Program	Current Partic	ipant	
🗍 🗊 FS	A CUSTOMER	▼ 62623	þ	Has inter	rest in the p▼		-	
Attachments	A				Application n Currently enr Not currently	olled and partic	cipating	

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



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Save Show D	uplicates				<mark>、 4</mark> (1	) & 🗄	
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Program Participation*	Associated Count	ties					
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A Customer Type	Servicing	Organizat	General	Program	Current Parti	cipant	
FSA CUSTOME	R 🔻 <mark>62623</mark>	đ	Has inte	rest in the p•	Currently enr	olled a▼	
Attachments							
						6	
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33.

Click the Associated Counties Associated Counties tab.

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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.



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ustomer: New					🖸 Back 🝷	
Save 🛛 🗙 Cancel 🕸 Show [	Duplicates				🔥 🔔	?
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А Туре	Business Part	Status		Effective Date	Revoked/Can	
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Program Participation*	Associated Counties					
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Insert						
A Address	State	9		County		
No result found						
Attachments						
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**34.** Click the **Insert 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.



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Representative C	Capacity Relationships	SSN Family					
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Program Participa	tion* Associated Cou	nties					
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Attachments							
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35.

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



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Program Participation*	ssociated Countie	s				
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Insert						
A Address	Sta	te		County		
1 4815 Norrisville	Rd / White H <del>▼</del>			•	+	
Attachments	MAG	RYLAND				
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**36.** Select MARYLAND MARYLAND from the State list.



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Customer: New					🖸 Back 🝷	
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Addresses* Address	Types Communica	tion Numbers	E-Mails			
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No result found						
Representative Capac	ity Relationships	SSN Family				
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А Туре	Business Part.	Status	Ef	fective Date	Revoked/Can	
No result found						
Program Participation*	Associated Count	ies				
[≱ Edit						
Insert						
A Address	S	tate		County		
1 4815 Norrisv	ille Rd / White H▼ M	ARYLAND		•	•	_
Attachments						
					<b>I</b>	
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37.

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



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Customer: New						Back -	٦
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Restricted:	]						
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PNew						€ @	
No result found							
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PNew History Data						6	
А Туре	Business Pa	rt Status	Effec	tive Date	Revoked/0	Can	
No result found							
Program Participation	* Associated Cou	nties					
Edit						9	
Insert							
A Address		State		County			
1 4815 Norris	sville Rd / White H <mark>▼</mark>	MARYLAND	•			-	
Attachments				BALTIMOR BALTIMOR	—		
		Tamalata 🖴		N 4			

38. Select BALTIMORE BALTIMORE

from the **County** list.

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



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Program Part	icipation* As	sociated Cou	nties								
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A Add	dress		State	÷			County				
1 481	15 Norrisville F	Rd / White H▼	MAR	YLAND		-	BALTIMOR	E		•	
Attachments											
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**39.** Scroll to the top of the customer record to proceed to the **Customer Profile** tab.



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ustomer: New						🖸 Back	• [
Save   × Cancel   S	Show Duplicates					🔪 🚺 🔍	4
<b>Customer Details</b>	Customer Profile Roles	Ide	entification Nur	nbers		<b>C</b> .	2
B Edit S Tax ID H	istory						
General Data			Main Addre	ss an	d Cor	nmunication Data	
Current Role:	Individual	-	Informat				
BP Number / ID:	8000028505		Address	4815 N	ORRIS	VILLE RD	
Prefix:	•			Street	addres	s, PO BOX XXX, RR X BOX XX	
First Name:*	Mike		Address				
Middle Name:	G			Apartn	nent, Su	ite, Unit, Building, Floor	
Last Name:*	Brady		City:*	WHITE	HALL		
Suffix:	JR 🔻		State:*	MD	ð	MARYLAND	
Common Cust	Mike G Brady JR		ZIP Cod	21161			
Legal Name:*	N 🕶		Country:*	US	þ	USA	
Language Pref	English 💌		Commu.	Post (	ette 🔻		
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.



		Saved	Searches		🕶 <u>Go</u> Ac	dvance	i îi
Customer: New						Back -	
🖫 Save 🛛 🗙 Cancel 📋	Show Duplicates				<b>1</b> (1)	4	6
							-
Customer Details	Customer Profile Roles	Identifi	ication Numbers				
Edit							
Gender:*		-	Marital Status:	Unknown or N/A		•	
Gender Deter.		-	Citizen Country:	USA		•	
Birth Date:		5	Resident Alien:	Unknown		-	
Birth Date Det		-	Veteran:	Unknown or N/A		•	
Ethnicity:*		-					
Ethnicity Deter		-					
Mail Indicators							
RMA:			NRCS:	V			
RD:			FSA:	$\checkmark$			
Race*							
Insert							
A Race			Race Determina	ation			

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



		Saved Searches -	🔽 Go Adv	/anced
Customer: New			🖸 B	ack - 🛛
∃Save │ × Cancel │ S	Image: Second Seco			
Customer Details	Customer Profile Rol	les Identification Numbers	3	
Edit				
Gender:*		<ul> <li>Marital Status:</li> </ul>	Unknown or N/A	-
Gender Deter.		Citizen Country:	USA	•
Birth Date:		Resident Alien:	Unknown	•
Birth Date Det	Maic	▼ Veteran:	Unknown or N/A	•
Ethnicity:*		-		
Ethnicity Deter		•		
Mail Indicators				
RMA:		NRCS:	$\checkmark$	
RD:		FSA:	$\checkmark$	
Race*				
Insert				
A Race		Race Determin	nation	

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



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Customer: New					🖸 E	Back -	•
🖉 🛛 Save 🛛 🗙 Cancel 📗	Show Duplicates				<b>1</b> (1)	2 🖨	()
Customer Details	Customer Profile	Roles Ide	entification Numbers				
Edit							
Gender:*	Male	-	Marital Status:	Unknown or N/A		-	
Gender Deter.		-	Citizen Country:	USA		-	
Birth Date:		<b>[</b> 7	Resident Alien:	Unknown		-	
Birth Date Det		-	Veteran:	Unknown or N/A		•	
Ethnicity:*		-					
Ethnicity Deter		-					
Mail Indicators							
RMA:			NRCS:	$\checkmark$			
RD:			FSA:	$\checkmark$			
Race*							
Insert							
A Race			Race Determina	ation			-

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



		Saved Searches -	Go Advanced	<u>1</u>
Customer: New			🖸 Back 🝷	•
🗧 🗟 Save 🛛 🗙 Cancel 🕸	Show Duplicates		🚺 (1) 🔍 🔮	6
Gender:* Gender Deter Birth Date Birth Date Det Ethnicity:*	Customer Declared Not Verified	<ul> <li>Marital Status:</li> <li>Citizen Country: Resident Alien: Veteran:</li> </ul>	Unknown or N/A UJSA Unknown	
Ethnicity Deter <u>Mail Indicators</u> RMA: RD: Race*	-	▼ NRCS: FSA:		
Insert				
A Race		Race Determin	ation	-

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



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



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Customer: New					C I	Back -	•
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Customer Details	Customer Profile Rol	es Ider	tification Numbers				
Edit							
Gender:*	Male	•	Marital Status:	Unknown or N/A		•	
Gender Deter.	Customer Declared	-	Citizen Country:	USA			
Birth Date:		17	Resident Alien:	Unknown		•	
Birth Date Det		-	Veteran:	Unknown or N/A		•	
Ethnicity:*		-					
Ethnicity Deter		•					
Mail Indicators							
RMA:			NRCS:	7			
RD:			FSA:				
Race*							
Insert							
A Race			Race Determina	ation			

**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.



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Customer: New						Back -	-
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[≱ Edit							
Gender:*	Male	•	Marital Status:	Unknown or N/A		•	
Gender Deter.	Customer Declared	•	Citizen Country:	USA		•	
Birth Date:	01/01/1969	<b>1</b> 7	Resident Alien:	Unknown		•	
Birth Date Det		-	Veteran:	Unknown or N/A		•	
Ethnicity:*		-					
Ethnicity Deter		-					
Mail Indicators							
RMA:			NRCS:	$\checkmark$			
RD:			FSA:	$\checkmark$			
Race*							
Insert							
A Race			Race Determin	ation			•

**46**.

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



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Customer: New						Back -	-
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Customer Details	Customer Profile Roles	s Ide	ntification Numbers			C,	
Edit							
Gender:*	Male	-	Marital Status:	Unknown or N/A		•	
Gender Deter.	Customer Declared	-	Citizen Country:	USA		•	
Birth Date:	01/01/1969	<b>E</b> 7	Resident Alien:	Unknown		-	
Birth Date Det		-	Veteran:	Unknown or N/A		-	
Ethnicity:*	Customer Declared	_					
Ethnicity Deter	Not Verified						
Mail Indicators							
RMA:			NRCS:	$\checkmark$			
RD:			FSA:	$\checkmark$			
Race*							
Insert							
A Race			Race Determina	ation			-

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



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ustomer: New						Back -
Save 🛛 🗙 Cancel 🗍	Show Duplicates				<b>1</b> (1)	I -
Customer Details	Customer Profile	Roles Ide	entification Numbers			
₽Edit						
Gender:*	Male	-	Marital Status:	Unknown or N/A		-
Gender Deter.	Customer Declared	-	Citizen Country:	USA		•
Birth Date:	01/01/1969	67	Resident Alien:	Unknown		-
Birth Date Det	Customer Declared	-	Veteran:	Unknown or N/A		-
Ethnicity:*		•				
Ethnicity Deter		•				
Mail Indicators						
RMA:			NRCS:	$\checkmark$		
RD:			FSA:	$\checkmark$		
Race*						
Insert						
A Race			Race Determina	ation		

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



		Save	d Searches -		🕶 <u>Go</u> Ac	dvanced	Î
Customer: New						Back -	-
Bave │ X Cancel │ S	Show Duplicates				<b>1</b> (1)	I 🗄	•
Customer Details	Customer Profile Roles	Iden	tification Numbers				
Edit							
Gender:*	Male	-	Marital Status:	Unknown or N/A		-	
Gender Deter.	Customer Declared	-	Citizen Country:	USA		•	
Birth Date:	01/01/1969	67	Resident Alien:	Unknown		-	
Birth Date Det	Customer Declared	-	Veteran:	Unknown or N/A		•	
Ethnicity:*		-					
Ethnicity Deter	Hispania er Latina						
Mail Indicators	Hispanic or Latino Not Hispanic or Latino						
RMA:			NRCS:				
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ND.			134.	Y			
Race*							
Insert							
A Race			Race Determina	ation			

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



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Customer: New							Back -	-
🗄 Save 🕴 🗙 Cancel 📋	Show Duplicates					<b>1</b> (1)	28	3
Customer Details	Customer Profile	Roles	Ide	ntification Numbers				
Edit								
Gender:*	Male		-	Marital Status:	Unknown or N/A		•	
Gender Deter.	Customer Declared		-	Citizen Country:	USA		-	
Birth Date:	01/01/1969		7	Resident Alien:	Unknown		-	
Birth Date Det	Customer Declared		•	Veteran:	Unknown or N/A		•	
Ethnicity:*	Not Hispanic or Latino		•					
Ethnicity Deter			•					
Mail Indicators								
RMA:				NRCS:	~			
RD:				FSA:	$\checkmark$			
Race*								
Insert								
A Race				Race Determina	ation			

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



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Customer: New						Back -	- 🖸 -
Save 🛛 🗙 Cancel 🗍	Show Duplicates				<b>1</b> (1)	& €	€ 3
Customer Details	Customer Profile Roles	Ide	ntification Numbers			C,	
Edit							
Gender:*	Male	-	Marital Status:	Unknown or N/A		-	
Gender Deter.	Customer Declared	-	Citizen Country:	USA		-	
Birth Date:	01/01/1969	2	Resident Alien:	Unknown		•	
Birth Date Det	Customer Declared	-	Veteran:	Unknown or N/A		•	
Ethnicity:*	Not Hispanic or Latino	-					
Ethnicity Deter		-					
Mail Indiantara	Customer Declared						
Mail Indicators	Not Verified						
RMA:	-		NRCS:				
RD:			FSA:	$\checkmark$			
Race*							
Insert							
A Race			Race Determina	ation			-

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



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Customer: New						Back -	•
🛛 🛛 Save 🛛 🗙 Cancel 🗍	Show Duplicates				<b>1</b> (1)	& 🗄	0
Customer Details	Customer Profile	Roles Id	entification Numbers				
l⊉Edit							
Gender:*	Male	-	Marital Status:	Unknown or N/A		-	
Gender Deter.	Customer Declared	-	Citizen Country:	USA		•	
Birth Date:	01/01/1969	67	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:				
KD.			TOA.				
Race*							
Insert							
A Race			Race Determina	ation			
A Race			Race Determina	ation			-

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

For 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.



		Saved	I Searches -	-	Go Adv	/anced	
ustomer: New					🖸 B	ack -	(
Save 🛛 🗙 Cancel 🗍	Show Duplicates				<b>1</b> (1)	ه 🖨	,
Customer Details	Customer Profile Rol	les Ident	ification Numbers				
Edit		-					
Gender:*	Male	-	Marital Status:	Unknown or N/A		-	
Gender Deter.	Customer Declared	-	Citizen Country:				
Birth Date:	01/01/1969	17	Resident Alien:	Divorced 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:	$\checkmark$			
RD:			FSA:	V			
Race*							
Insert							
A Race			Race Determina	ation			

53. Select Single Single from the Marital Status list.



		Save	d Searches -		🔻 Go Ac	dvance
stomer: New						Back
ave 🛛 🗙 Cancel 🗍	Show Duplicates				<b>1</b> (1)	Z,
5						
Gender:*	Male	•	Marital Status:	Single		-
Gender Deter.	Customer Declared	-	Citizen Country:	-		-
Birth Date:	01/01/1969	67	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:	$\checkmark$		
Race*						
Insert						
A Race			Race Determin	ation		
Î			-			-
Dischillé						
Disability						

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



ustomer: New		Saved Searches -		💌 Go Ac	dvance
					Back -
Save 🛛 🗙 Cancel 📗	Show Duplicates			<b>1</b> (1)	4 6
Gender:*	Male	<ul> <li>Marital Status:</li> </ul>	Single		-
Gender Deter.	Customer Declared	<ul> <li>Citizen Country:</li> </ul>			-
Birth Date:		Resident Alien:			-
Birth Date Det	Customer Declared	▼ Veteran:			-
Ethnicity:*	Not Hispanic or Latino	•			
Ethnicity Deter	Customer Declared	-			
Mail Indicators RMA:		NRCS:	$\checkmark$		
i (ivi/-(,					
RD: Race American In Asian - Far Inser Black or Afr Native Hawa	dian or Alaska Native (in East,SE Asia,or Indian S ican American. African A aiian or Other Pacific Isla	FSA: Includes origins of Central & Subcontinent(includes Japan Amer indicates origins in bla ander. Origins of Hawaii, Gu	South America) & Philippines) ck racial grps Jam, & Samoa		
RD: Race American In Asian - Far Inser Black or Afr Native Hawa	dian or Alaska Native (in East,SE Asia,or Indian S ican American. African A aiian or Other Pacific Isla	icludes origins of Central & Subcontinent(includes Japan Amer indicates origins in bla	South America) & Philippines) ck racial grps Jam, & Samoa		

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



			Save	d Searches -		✓ Go Ac	vance	Î
ustom	er: New						Back -	•
Save	×Cancel 1	Show Duplicates				<b>1</b> (1)	2 🗄	0
	Gender:*	Male	•	Marital Status:	Single		•	
Gen	der Deter.	Customer Declared	-	Citizen Country:	USA		•	
Diath	Birth Date:	01/01/1969	67	Resident Alien:			•	
Birth	Date Det Ethnicity:*	Customer Declared Not Hispanic or Latino	• •	Veteran:	Unknown or N/A		•	
Ethnic	city Deter	Customer Declared	• •					
Mail	Indicators RMA:			NRCS:				
	RD:			FSA:				
Race Insert								
A	Race			Race Determin	ation			
î	White - Origi	ins in original peoples of E	urope,	-			-	
Disat	pility							

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



		Saved Se	earches -		▼ Go	Adva	incec	L
stomer: New					(	🖸 Ba	ck -	C
Save 🛛 🗙 Cancel 🕸	Show Duplicates				<mark>、</mark> 4 (1	<mark>1)</mark>	6	,
Gender:*	Male	- N	/arital Status:	Single			•	
Gender Deter.	Customer Declared		tizen Country:	USA			-	
Birth Date:	01/01/1969		esident Alien:	Unknown			-	
Birth Date Det	Customer Declared	•	Veteran:	Unknown or N/A			•	
	Not Hispanic or Latino	-						
Ethnicity:*	NOT HISPAHIC OF LATHO							
Ethnicity Deter	Customer Declared	•						
	Customer Declared		NRCS:					
Ethnicity Deter Mail Indicators	Customer Declared		NRCS: FSA:					
Ethnicity Deter Mail Indicators RMA: RD: Race*	Customer Declared							
Ethnicity Deter Mail Indicators RMA: RD: Race* Insert	Customer Declared							
Ethnicity Deter Mail Indicators RMA: RD: Race* Insert A Race	Customer Declared	▼ C N	FSA:					

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.



		Save	d Searches -		Go Go	Advand	JCu
stomer: New					C	🖸 Back	(*
ave 🛛 🗙 Cancel 🗍	Show Duplicates				<mark>、 4</mark> (1	) ર <u>્</u> ચ	٥
Gender:*	Male	•	Marital Status:	Single		•	
Gender Deter.	Customer Declared	-	Citizen Country:	USA			
Birth Date:	01/01/1969	<b>1</b> 7	Resident Alien:	•		-	
Birth Date Det	Customer Declared	-	Veteran:	Unknown or N/A		-	
Ethnicity:*	Not Hispanic or Latino	-					-
Ethnicity:*	not mopanio or Launo						
Ethnicity Deter	Customer Declared	•					
-	Customer Declared		NRCS:				_
Ethnicity Deter Mail Indicators	Customer Declared		NRCS: FSA:				-
Ethnicity Deter Mail Indicators RMA:	Customer Declared						_
Ethnicity Deter Mail Indicators RMA: RD: Race*	Customer Declared						-

#### 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

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 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 BR	ADY JR			🖸 Back 🝷
Save   🗙 Cancel   🛯 Nev	v I Show Duplicates I Key Field Chang	e   Copy   More∓		<mark>、 4</mark> (1) 🖪 (1) 🔍 🔮
Customer Details Cus	tomer Profile Roles Identification Nu	mbers SCIMS Re	eplication Status	3
☑ Edit S Tax ID History				
General Data		Main Address	and Communi	cation Data
Current Role:	Individual	Information.		
BP Number / ID:	8000028505	Address Lin	4815 NORRIS	VILLE RD
Prefix:			Street address	s, PO BOX XXX, RR X BOX X
First Name:	MIKE	Address Lin		
Middle Name:	G		Apartment, Su	ite, 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	
	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 **1** 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 <sup>th</sup> and Green

messages are informational only.



## **Customer: MIKE G BRADY JR**

Customer: MIKE G BR	ADY JR					🖸 Back 🝷
🖫 Save   🕱 Cancel   🗳 Nev	v Show Duplicates	Key Field Change   Co	py   More	-		<mark>8 (1)</mark> 💐 🔒
Customer Details Cus		Identification Numbers	SCIMS R	Data has be	een saved	
General Data	_	Ма	in Address	and Communic	cation Data	
Current Role:	Individual	In	formation.			
BP Number / ID:	8000028505	Ad	dress Lin	4815 NORRIS	VILLE RD	
Prefix:				Street address	, PO BOX XXX	(, RR X BOX X
First Name:	MIKE	Ad	dress Lin			
Middle Name:	G			Apartment, Sui	te, Unit, Buildin	g, 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	Co	mmunica	Post (letter)		
Data Origin:	CRM	Ca	rrier Route:	R001		
Employee Type:	Not an employee	De	elivery Ba	153		
Tax ID Type:	Social Secu 🔞	Co	ongressio	MARYLAND	01	
Tax ID Number:	571962331 🕜					
IRS Response Code	Waiting for IRS respo	onse				

61. Click the Collapse message area  $\times$  button to close the messages.

# Customer: MIKE G BRADY JR

ustomer: MIKE G BR/	ADY JR					🖸 Back
Save   🗙 Cancel   🕒 Nev	v Show Duplicates	Key Field Change   Co	py I More∍			🖪 (1) 🔍 🛛
Customer Details Cus	stomer Profile Roles	Identification Numbers	SCIMS R	eplication Status		
Edit S Tax ID History	7		-	•		
General Data		Ма	in Address	and Communi	ication Data	
Current Role:	Individual	Inf	formation.			
BP Number / ID:	8000028505	Ade	dress Lin	4815 NORRIS	VILLE RD	
Prefix:				Street address	s, PO BOX XXX,	RR X BOX X
First Name:	MIKE	Ade	dress Lin			
Middle Name:	G			Apartment, Su	iite, 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	Co	mmunica	Post (letter)		
Data Origin:	CRM	Ca	rrier Route:	R001		
Employee Type:	Not an employee	De	livery Ba	153		
Tax ID Type:	Social Secu 🔞	Co	ongressio	MARYLAND	01	
Tax ID Number:	571962331 🚱					
IRS Response Code:	Waiting for IRS respo	nco				

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



completed the transaction.



# Result

You have created a Business Partner customer record in CRM.