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:

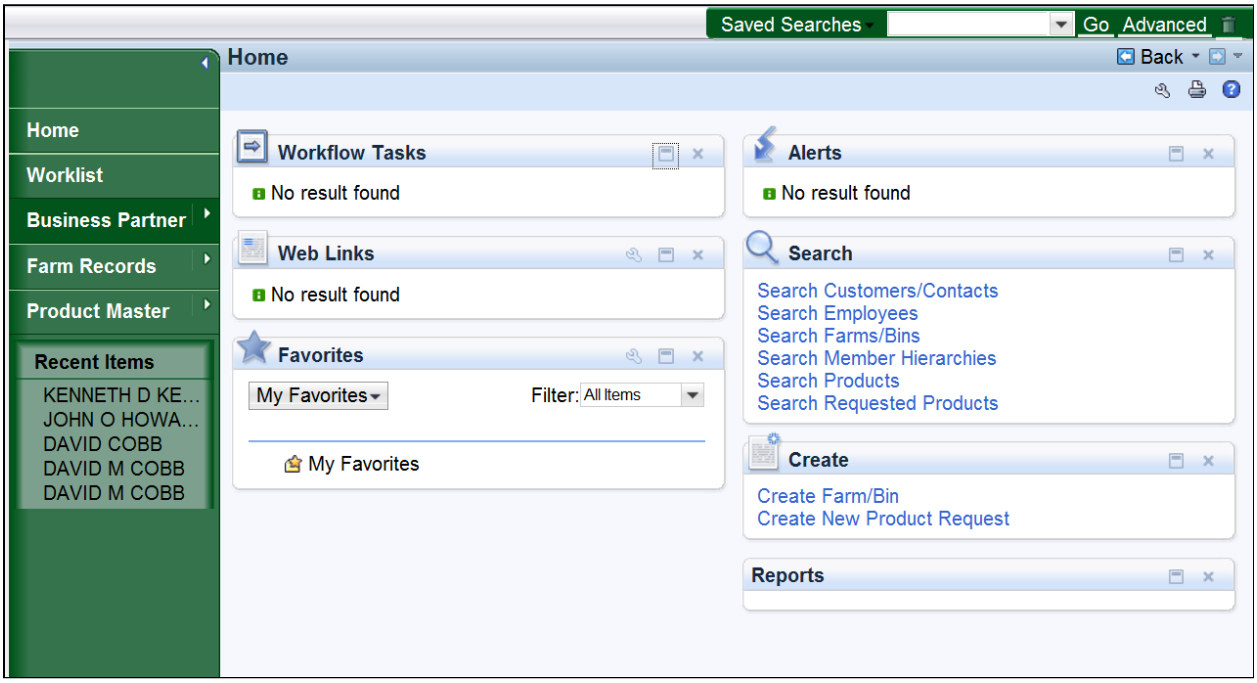
Note type	Icon	Description
A **general** note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.

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



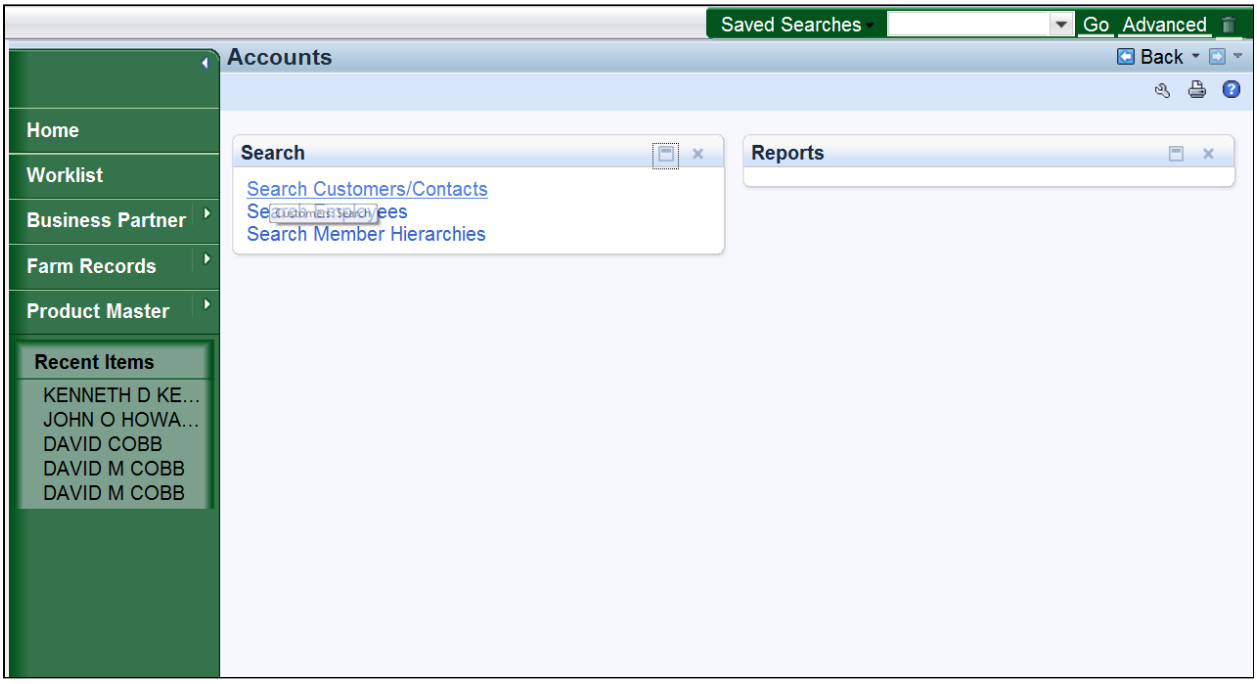
2. Click the **Business Partner**

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.

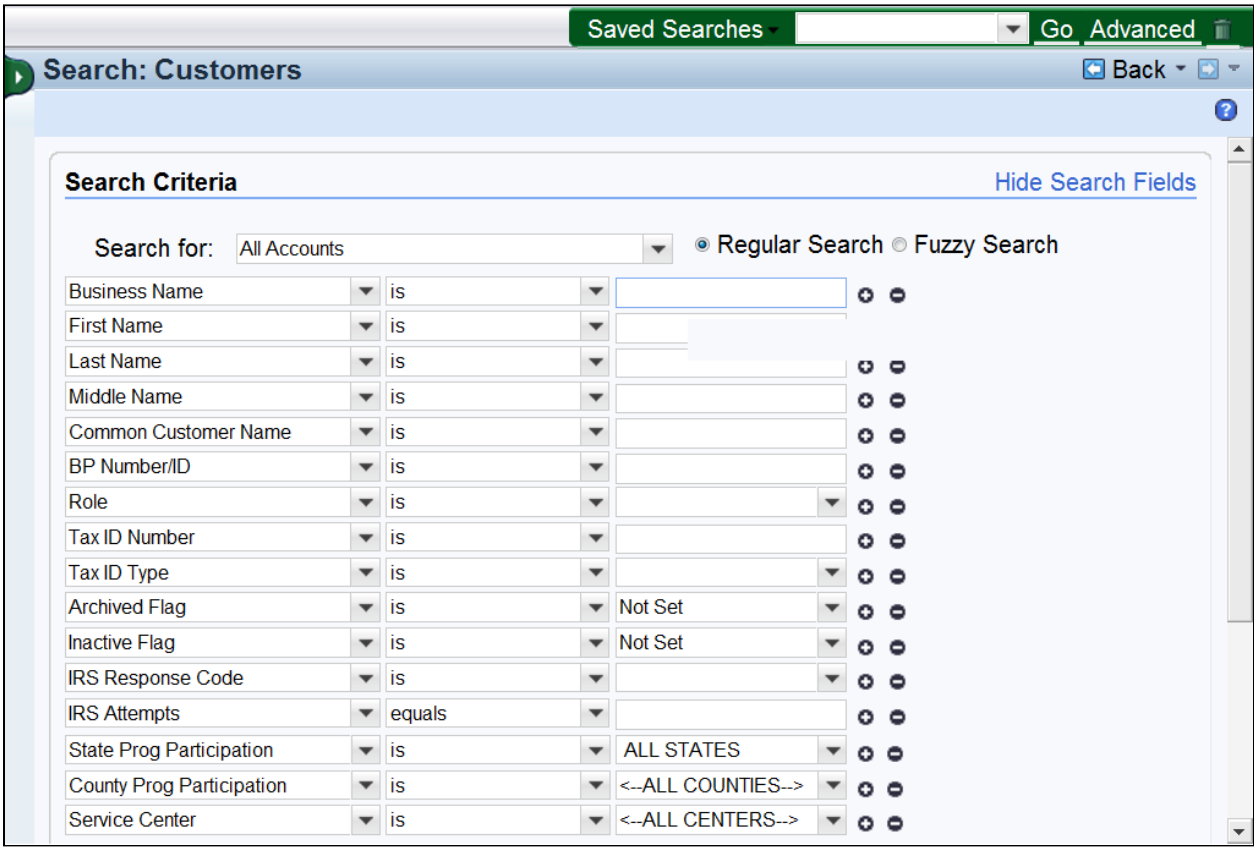
Accounts



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

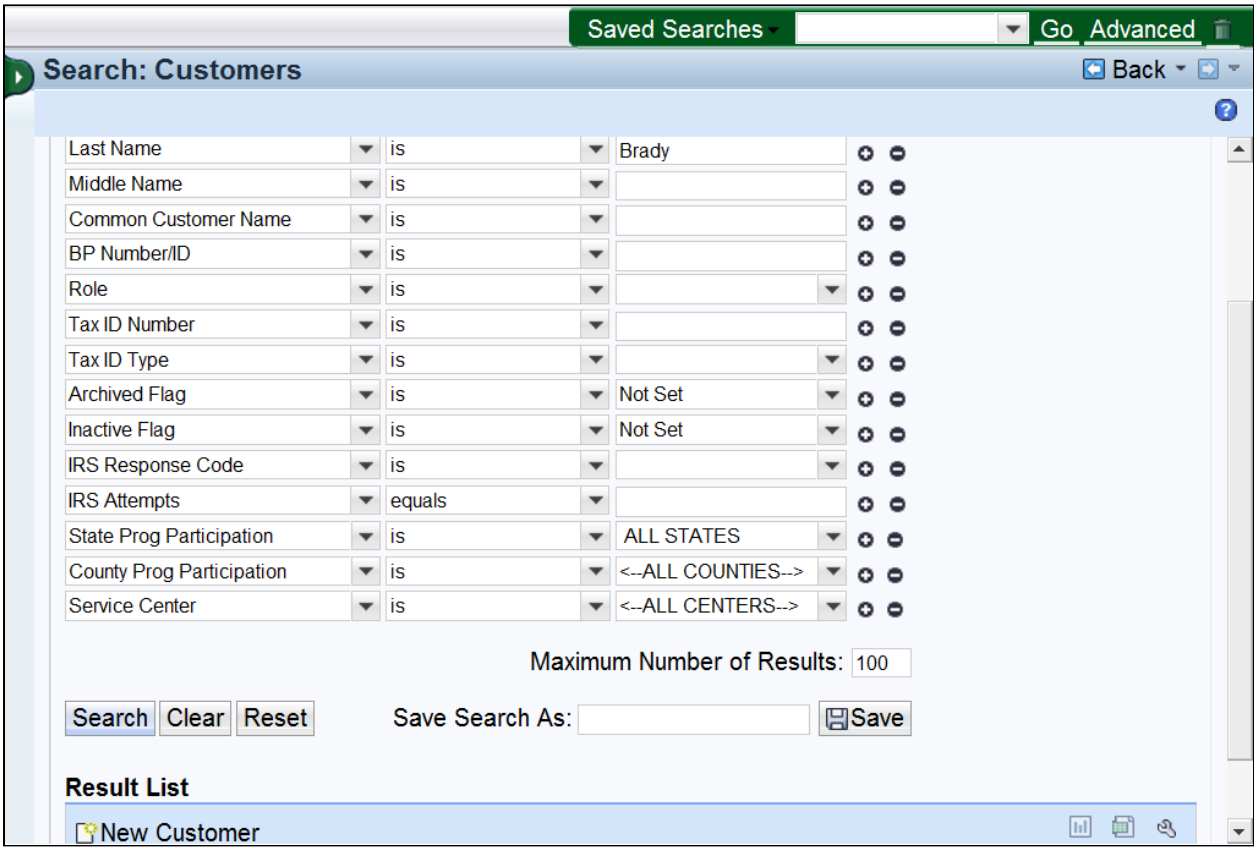


4. As required, complete/review the following fields:

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.

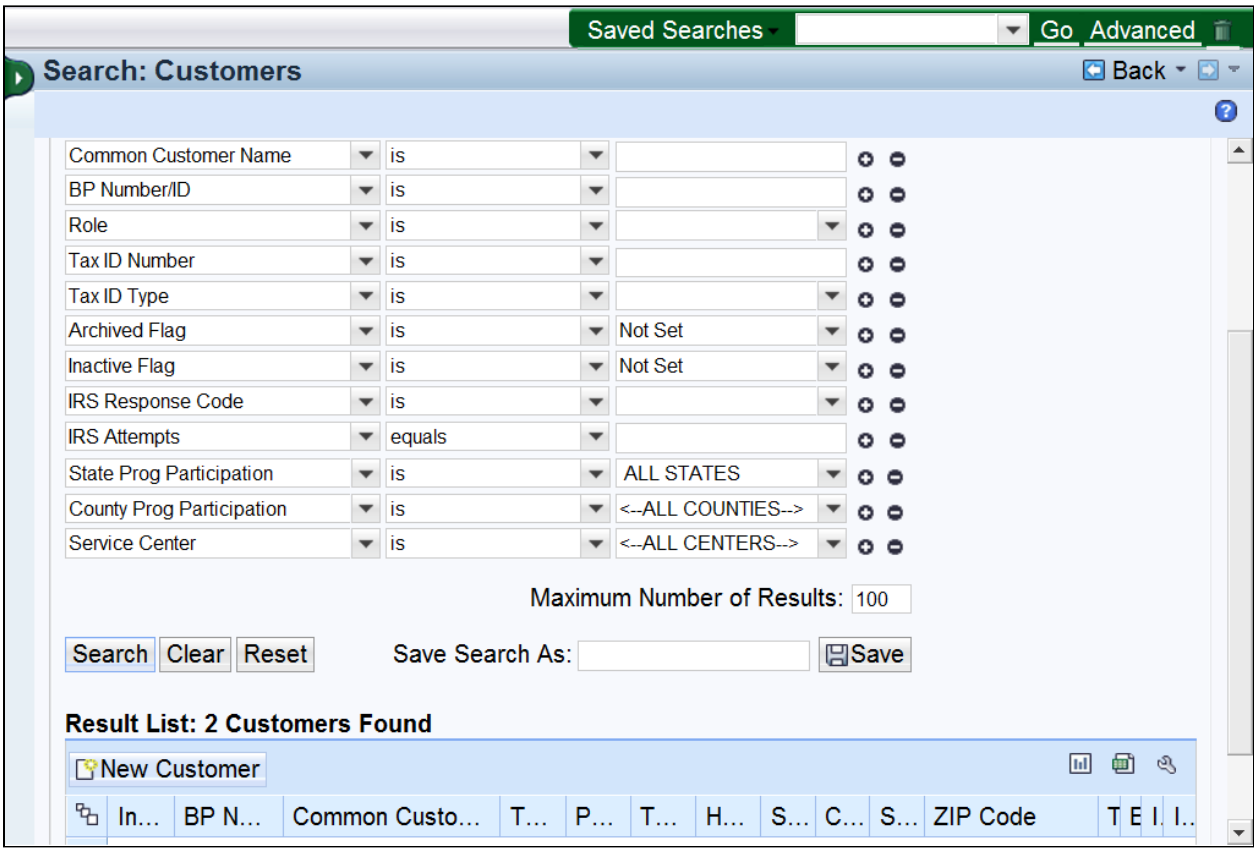
Search: Customers

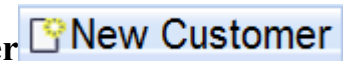


5. Click the **Search** Search button to view search results based on the search criteria entered.

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

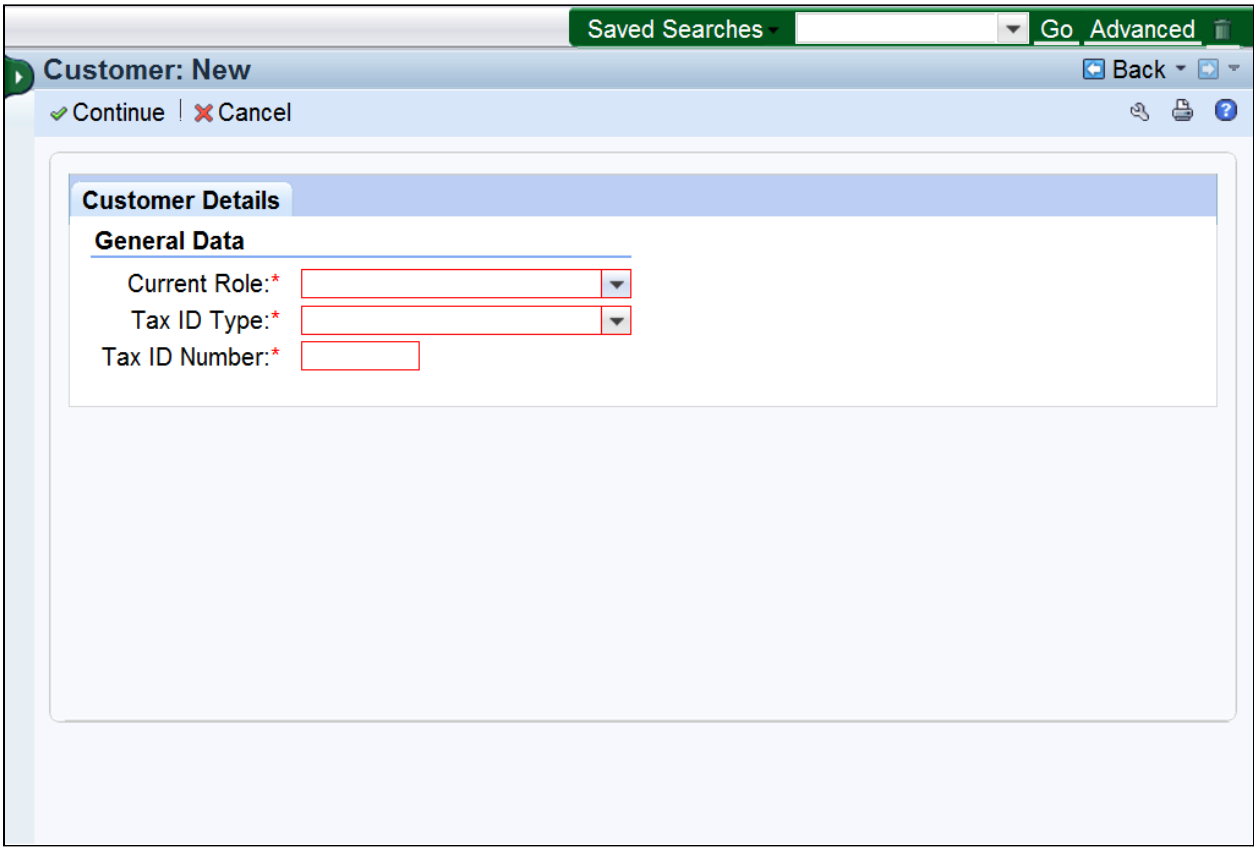
Search: Customers



6. Click the **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.

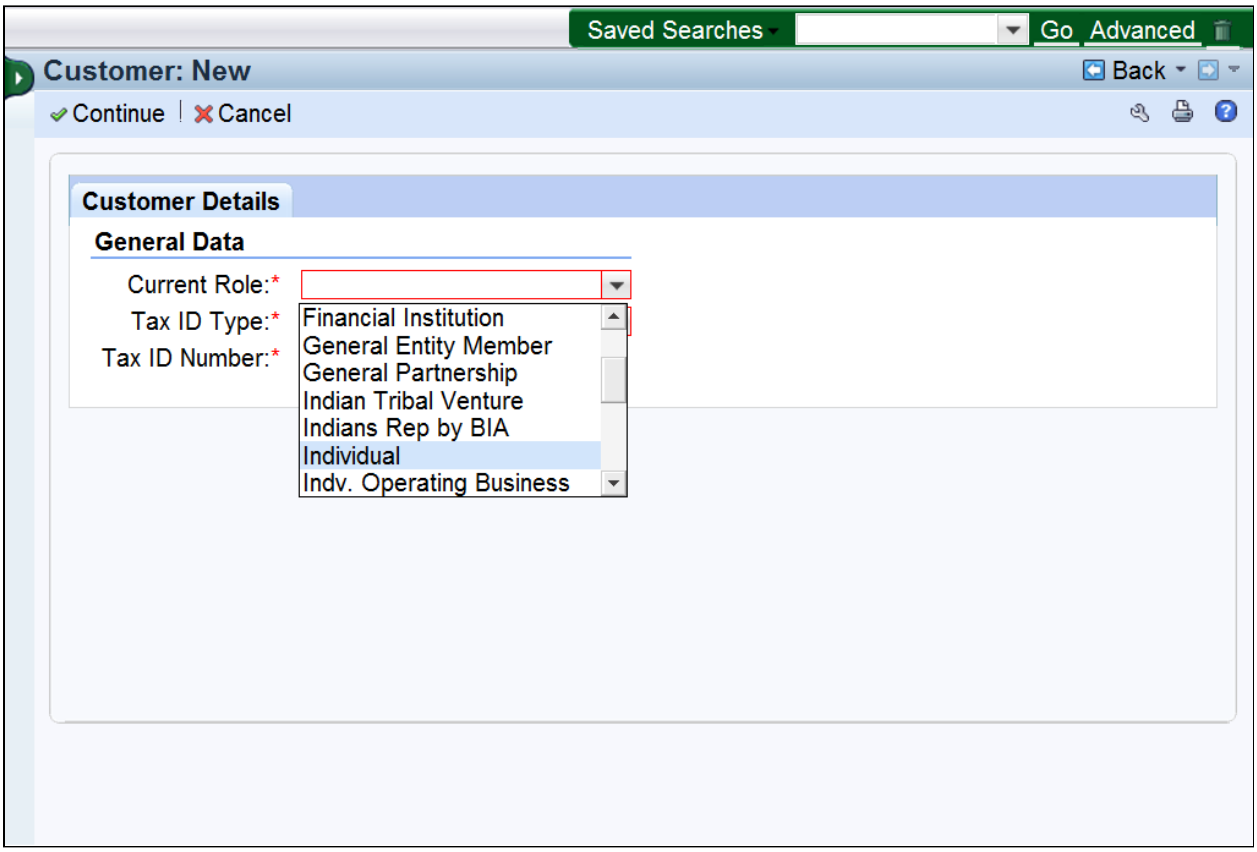
Customer: New



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



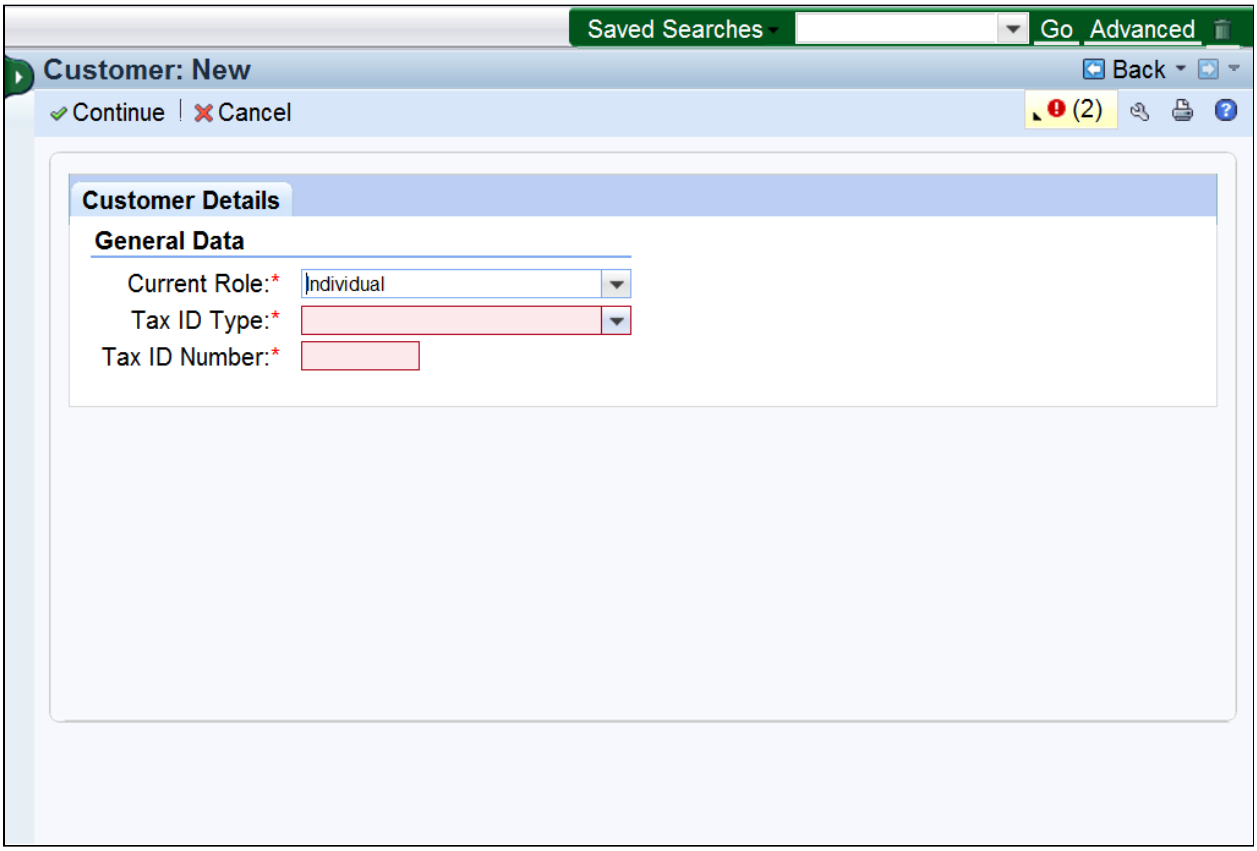
8. Select **Individual** Individual from the **Current Role** list.

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

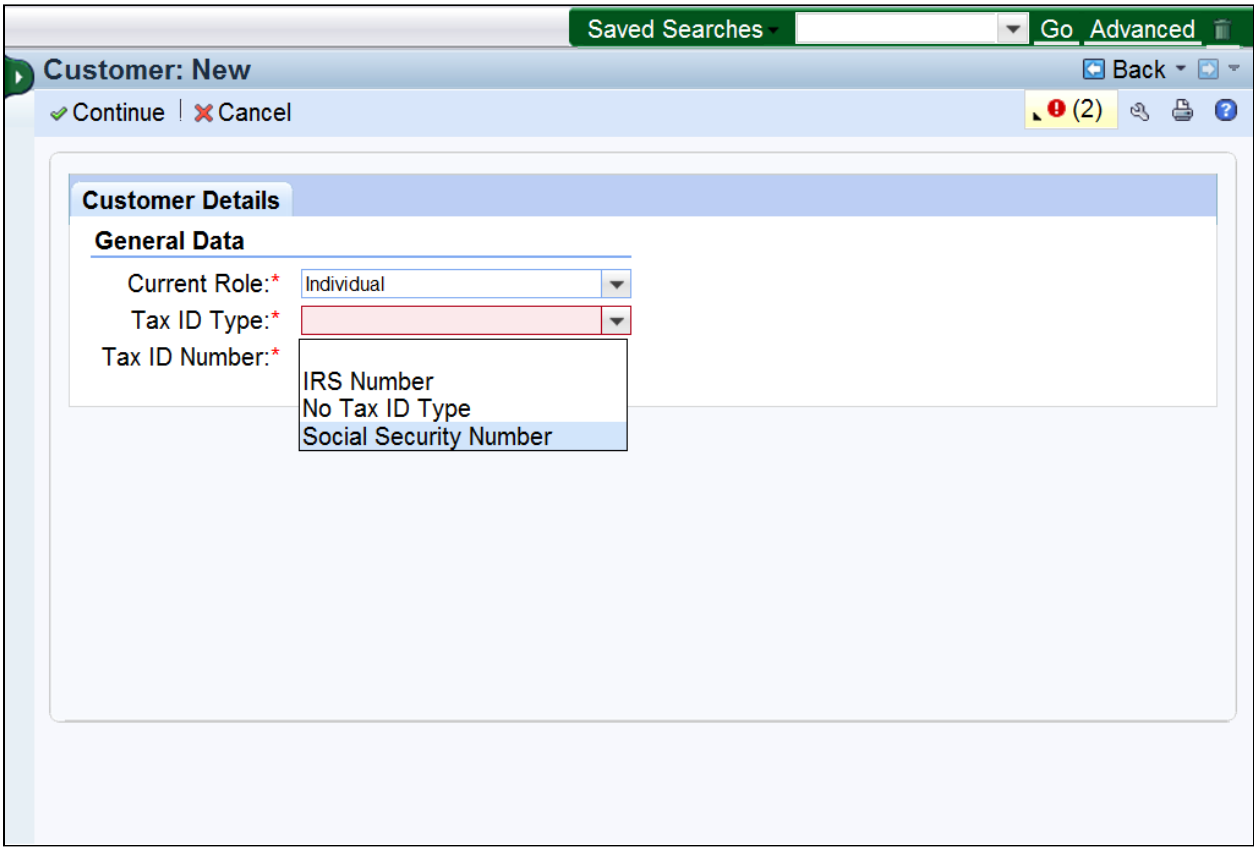
- Limited Partnership
- News Media
- Non-profit or Tax-Exempt
- Public School
- State/Local Gove
- Trust - Irrevocable
- Trust - Revocable

Customer: New



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

Customer: New



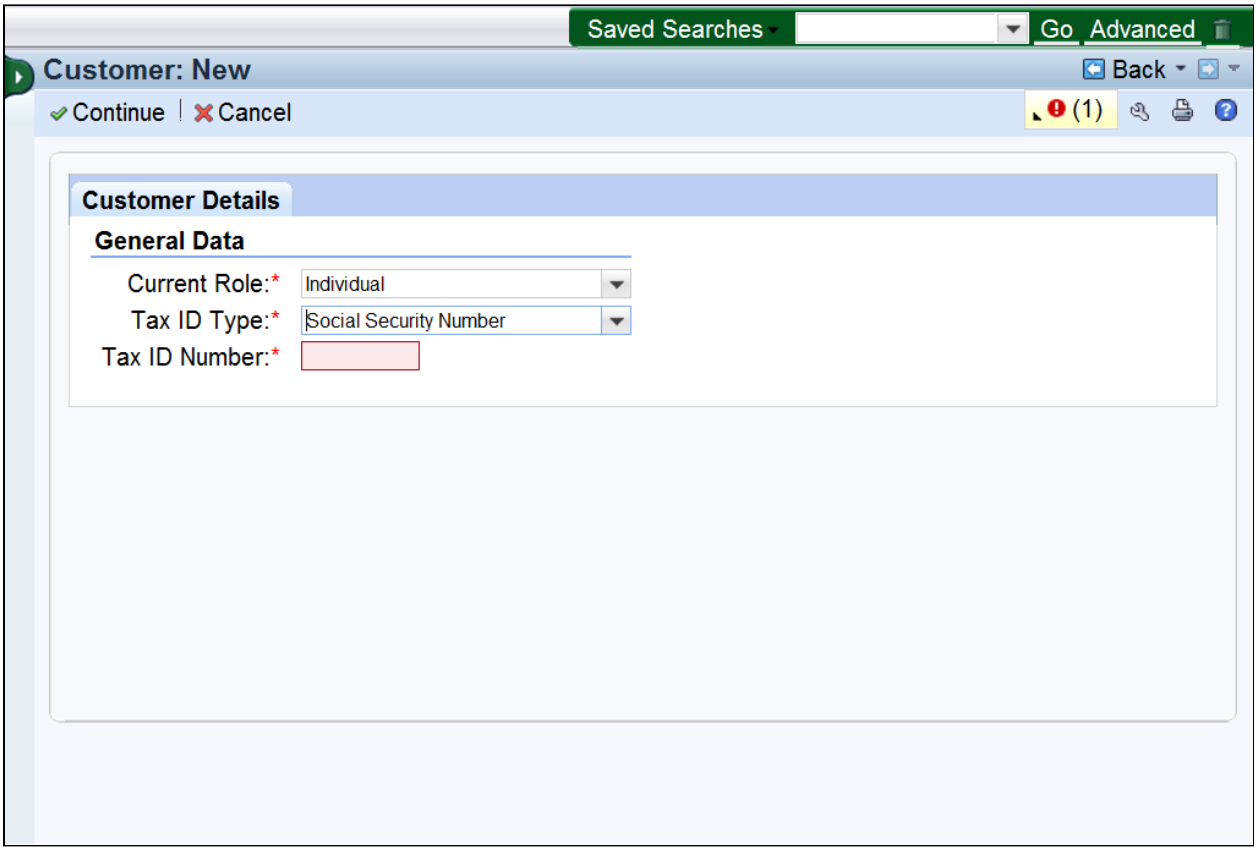
10. Select **Social Security Number** Social Security Number from the dropdown list.

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.

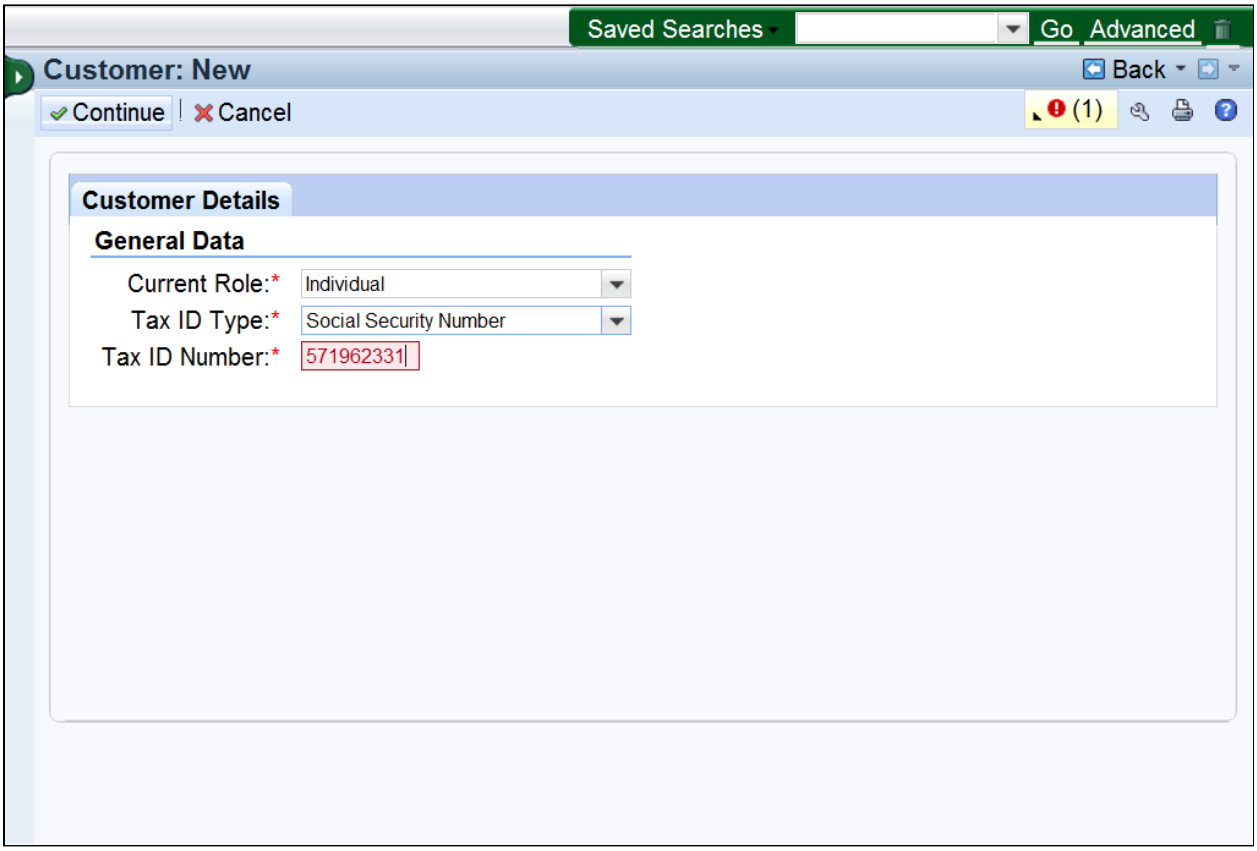
Customer: New



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

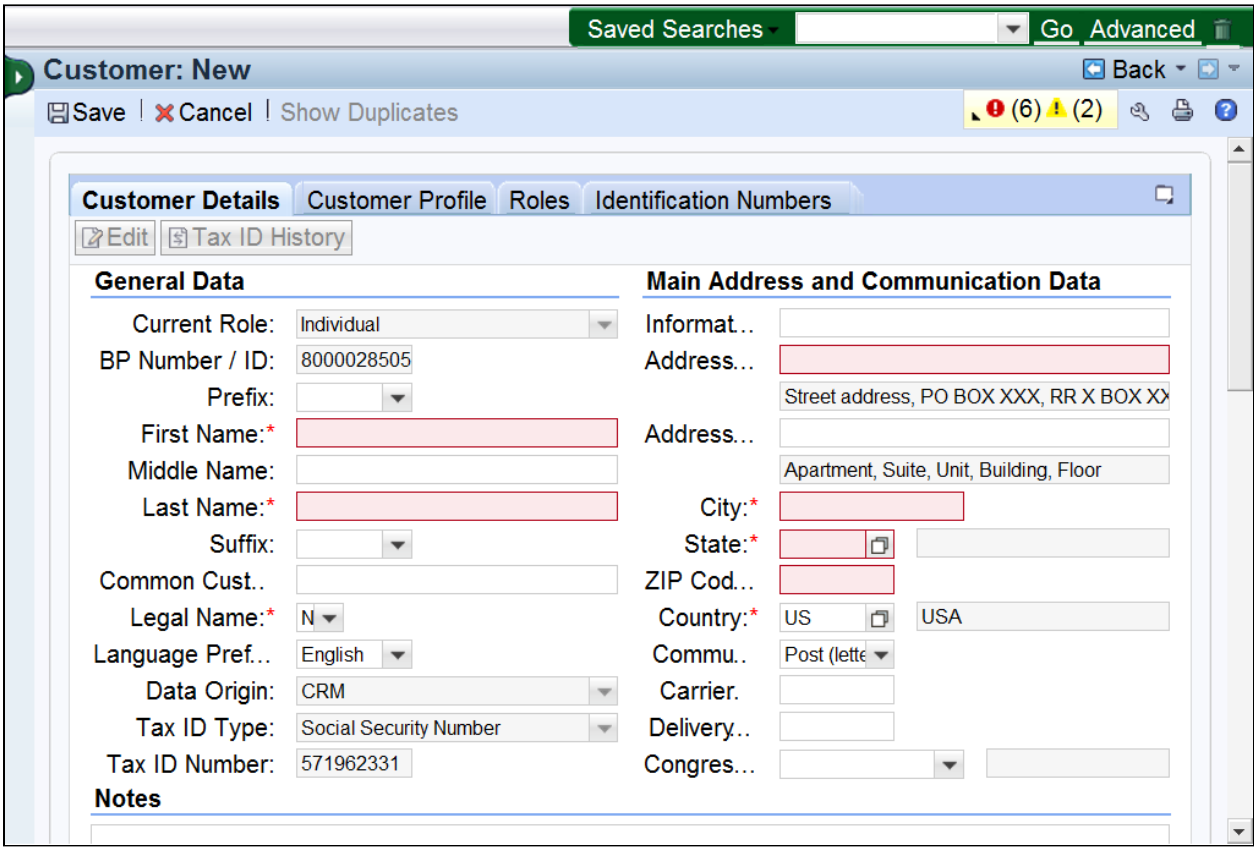
Field		Description
Tax ID Number:	R	A Taxpayer Identification Number (TIN) is an identifying number used for tax purposes in the United States. It is also known as a Tax Identification Number or Federal Taxpayer Identification Number. A TIN may be assigned by the Social Security Administration or by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

Customer: New



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

Customer: New

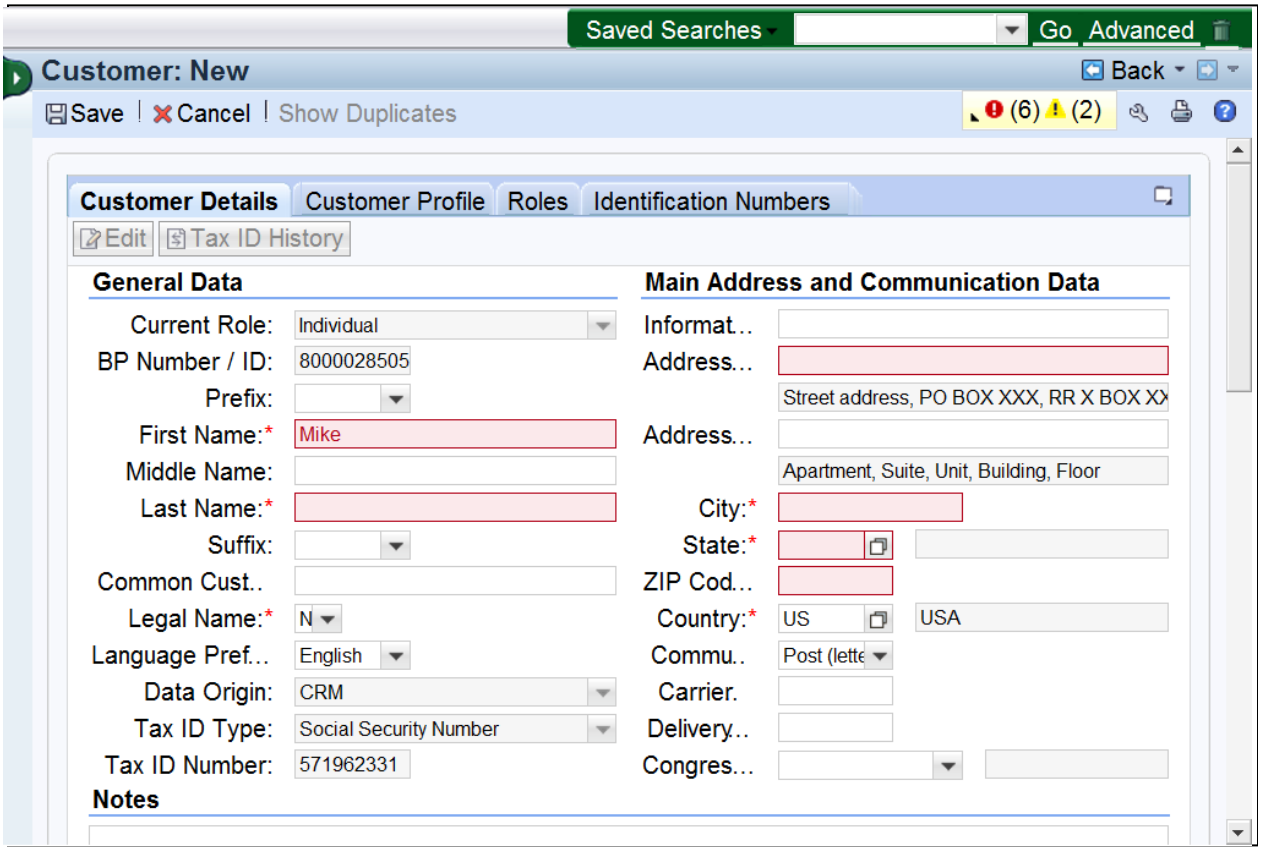


13. As required, complete/review the following fields:

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

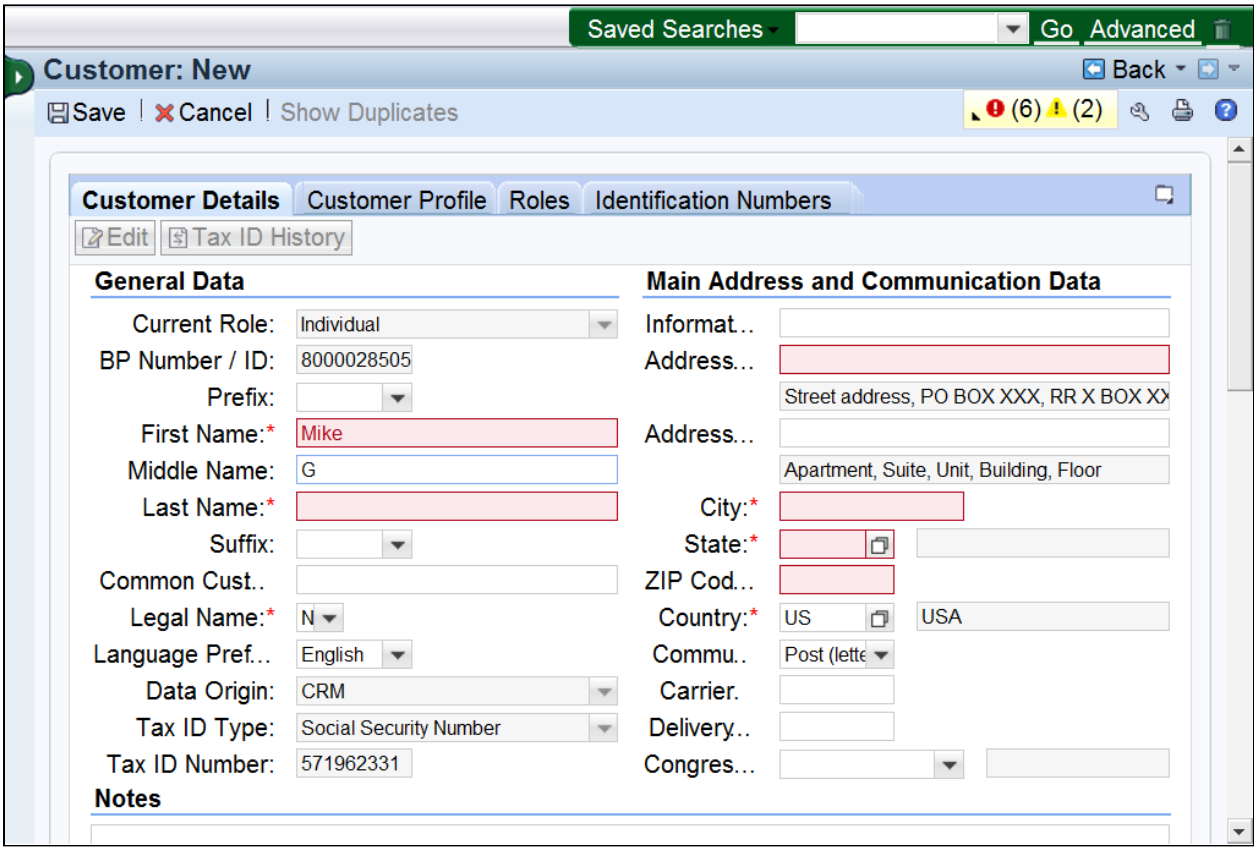


14. As required, complete/review the following fields:

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.

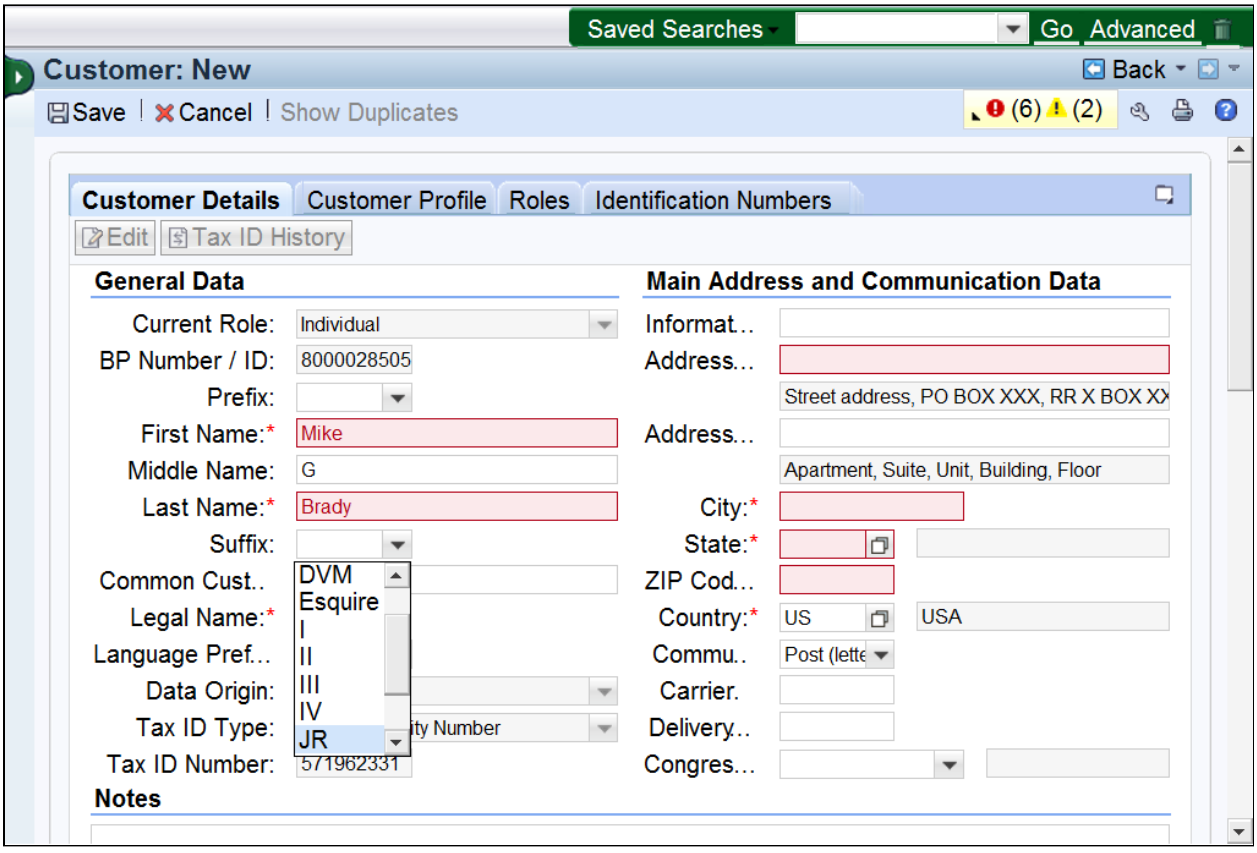
Customer: New



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

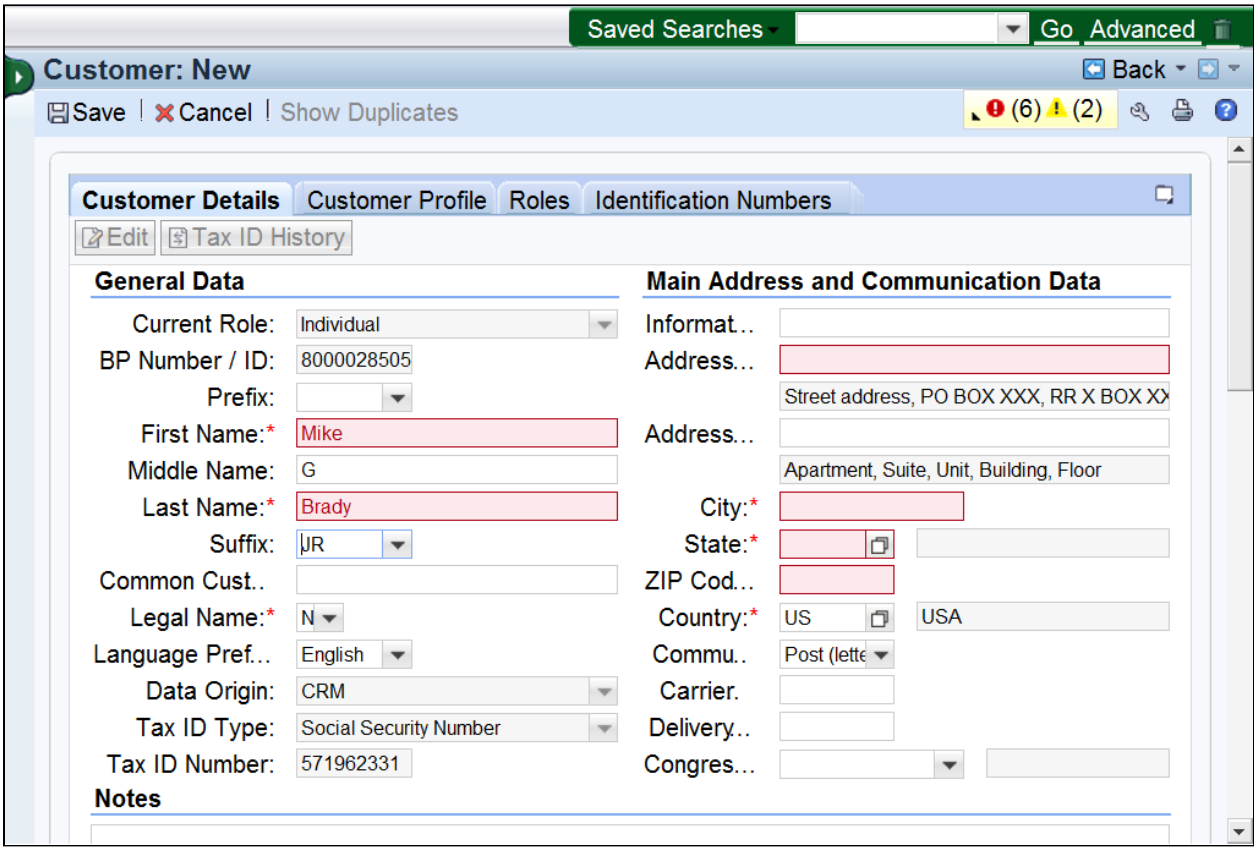
Field	R/O/C	Description
Last Name:	R	Business Partner's Last Name **Example:** Brady

Customer: New



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

Customer: New



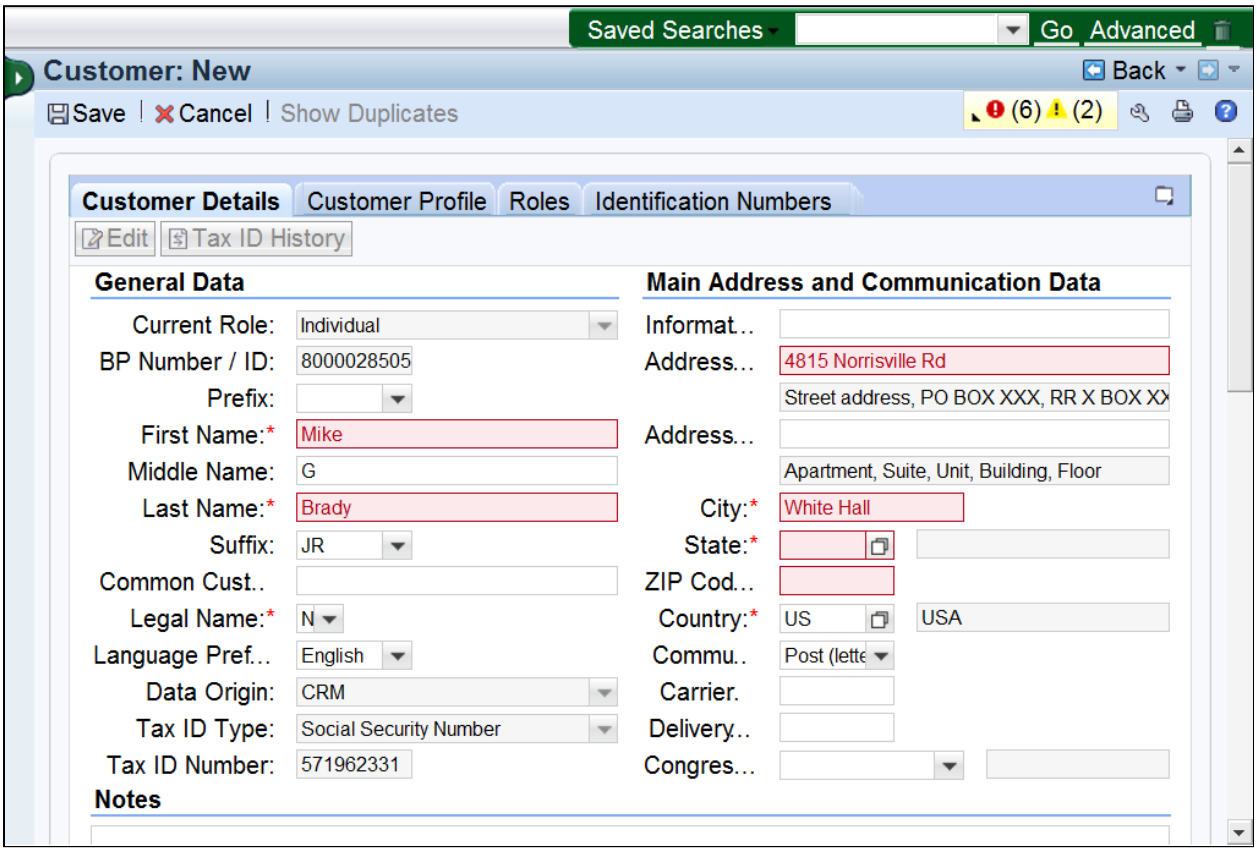
17. As required, complete/review the following fields:

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



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.

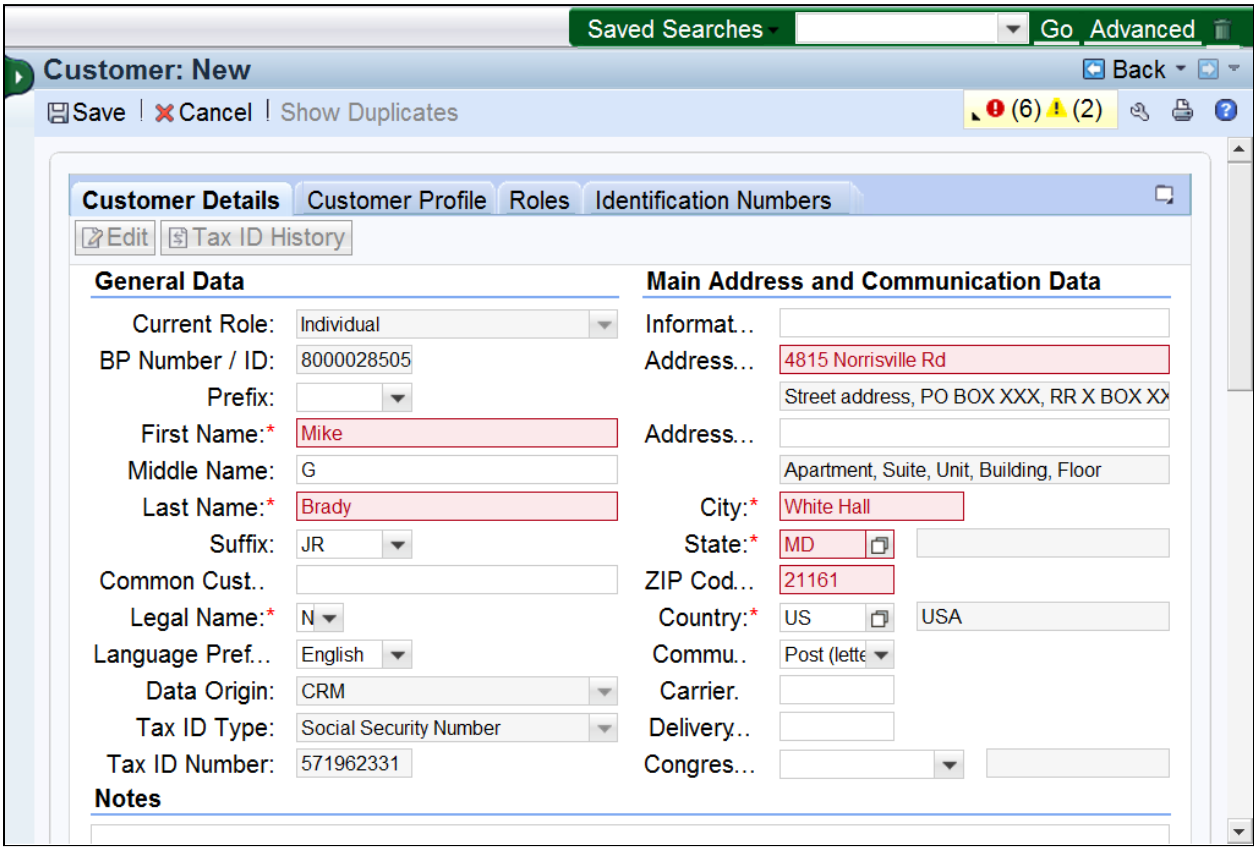
Country is required and is defaulted to *US.*

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.

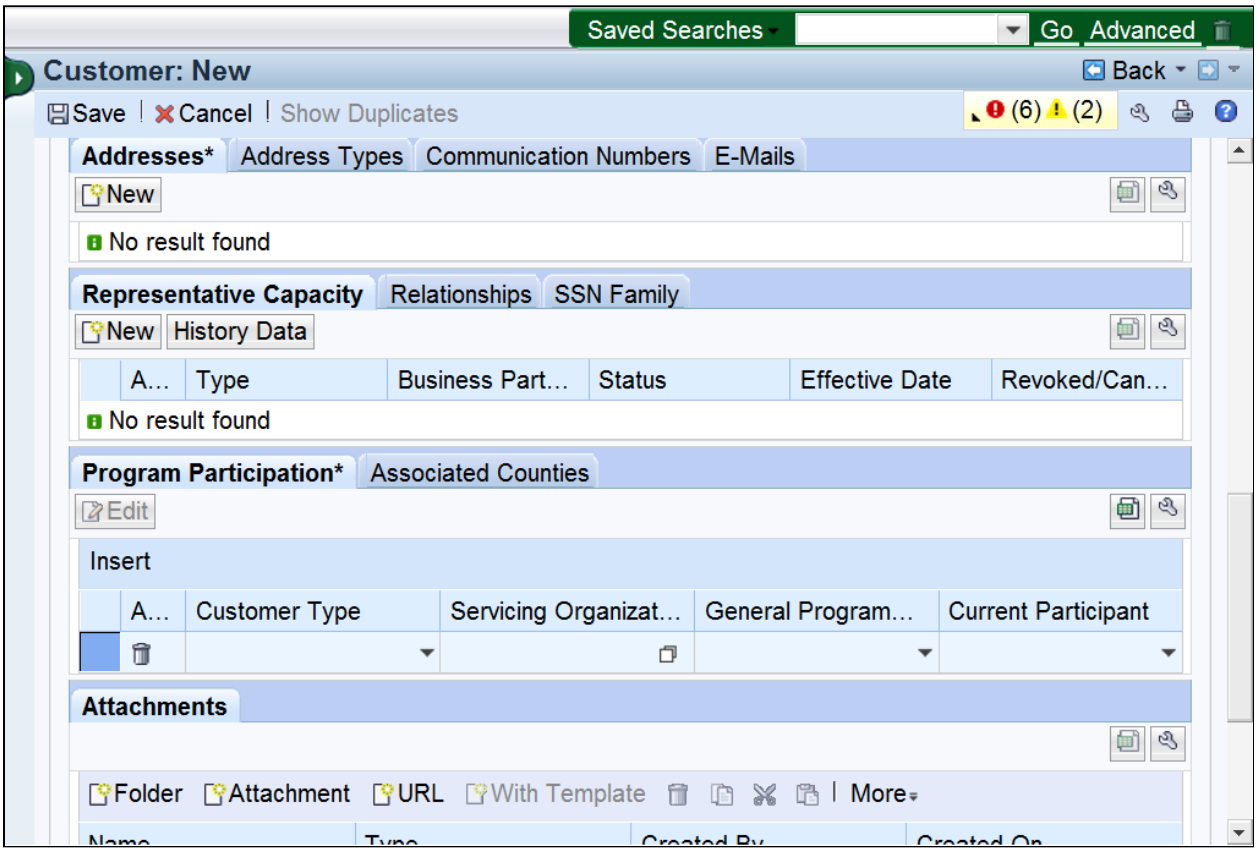
Zip Code is required. If a zip code is more than 2 digits off, the correct zip code may not be suggested in the Address Validation.

Customer: New



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

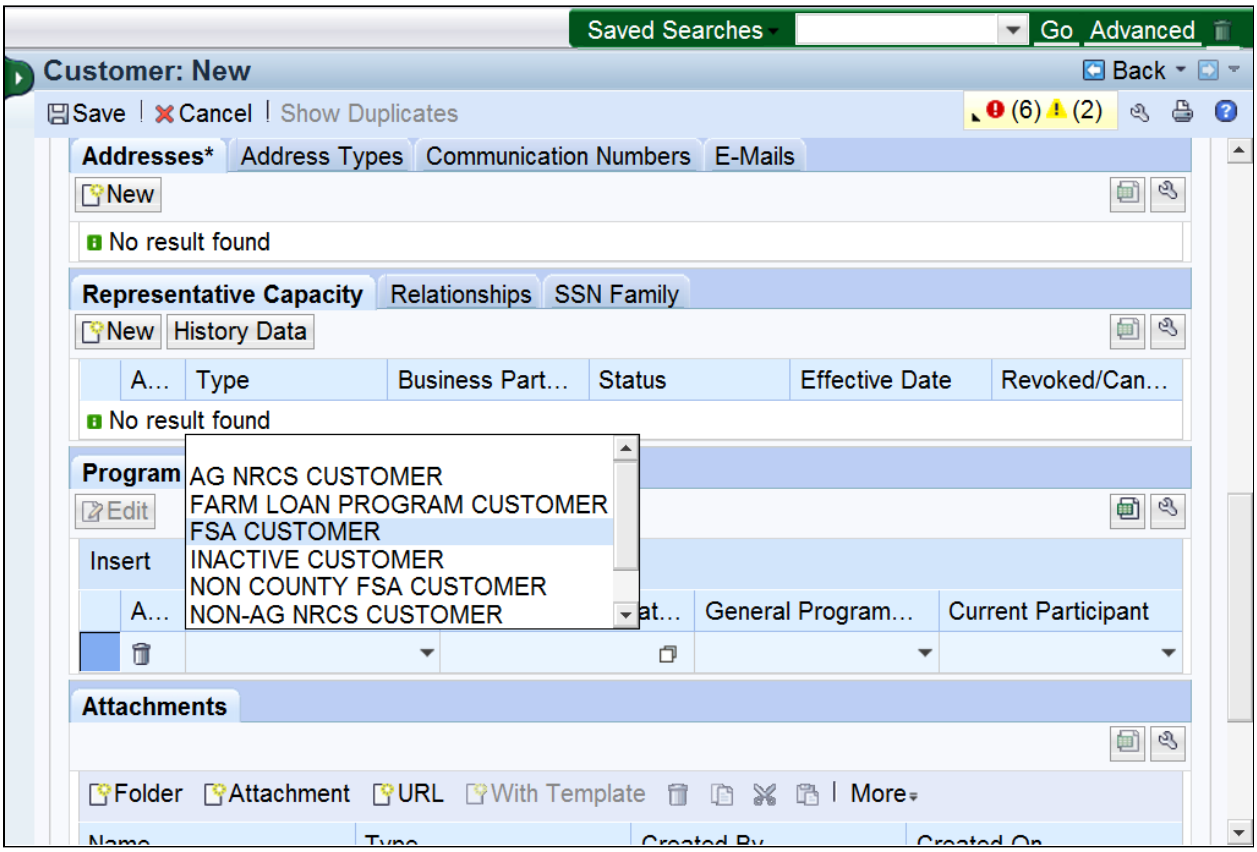
Customer: New



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

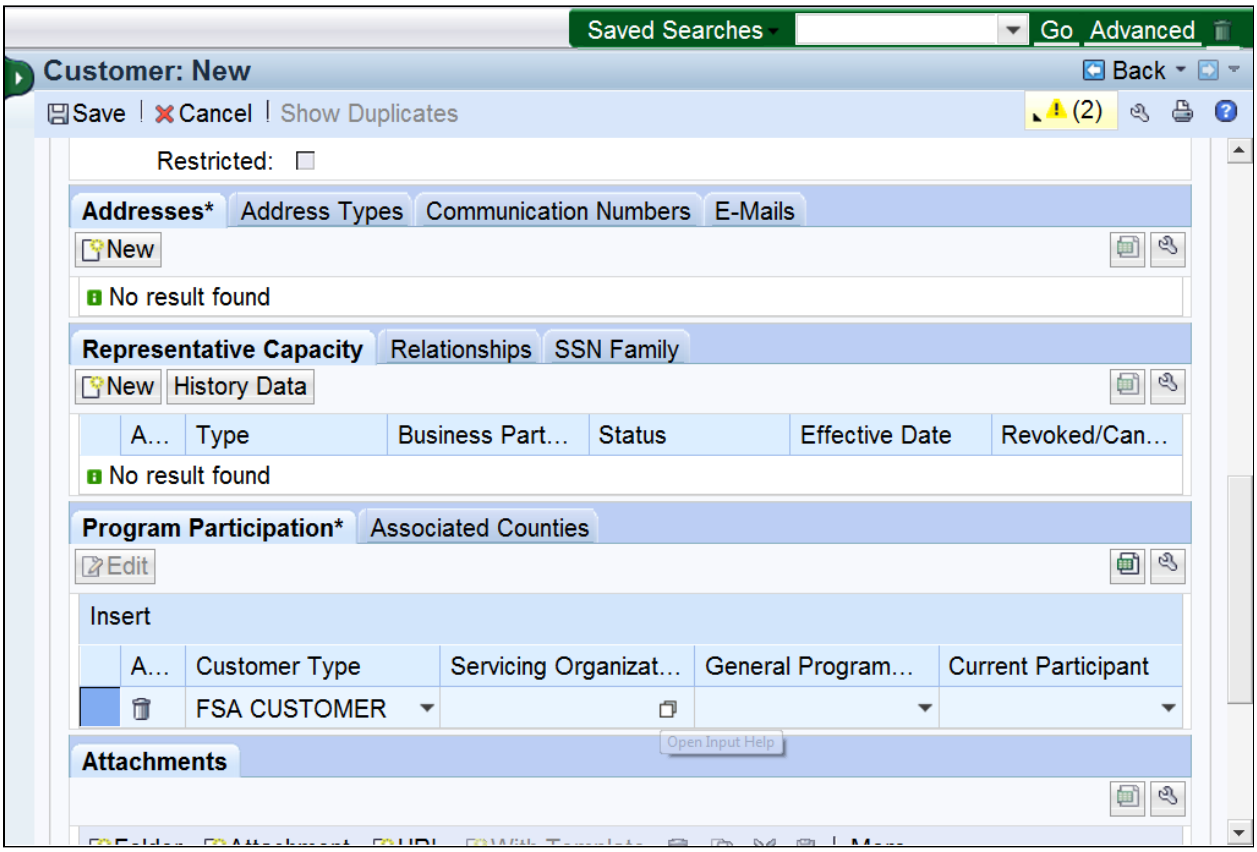
Program Participation and Associated Counties data are required to complete the BP record if the customer is an FSA or FLP customer. For all other Customer Types an Assoc. County is not required.

Customer: New



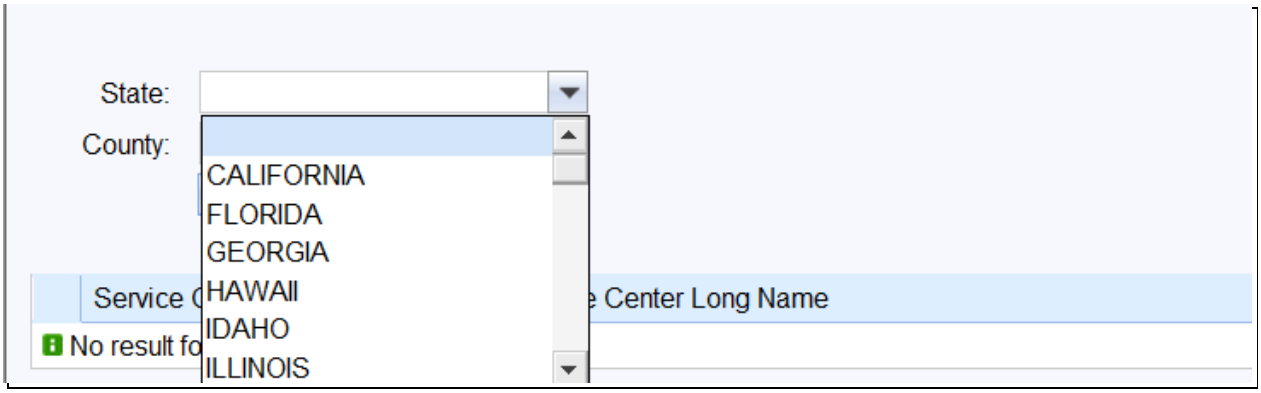
21. Select **FSA CUSTOMER** FSA CUSTOMER from the list.

Customer: New



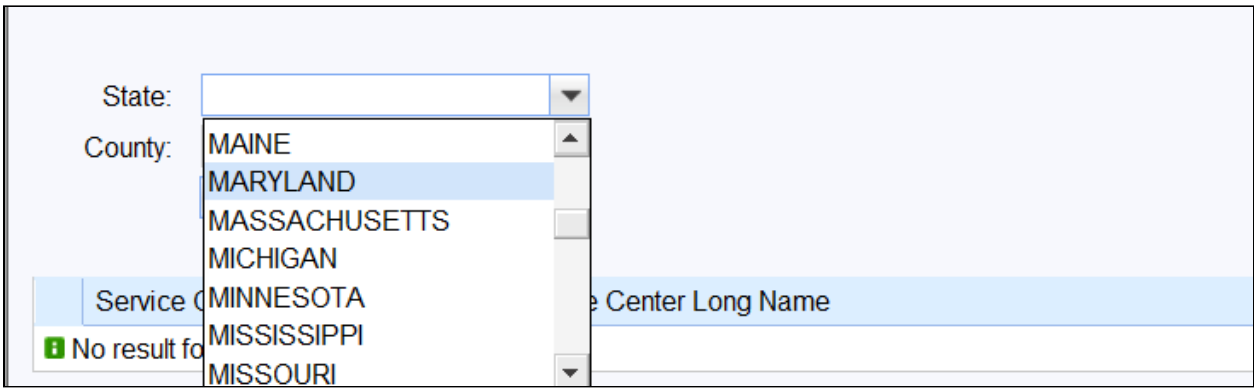
22. Click the **Servicing Organization** field Open Input Help button to view the dropdown list.

Service Center Search



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

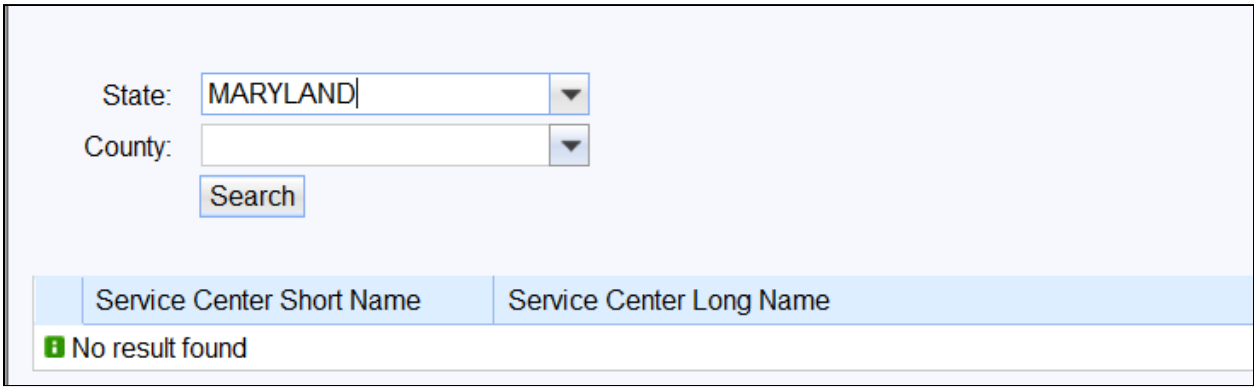
Service Center Search



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

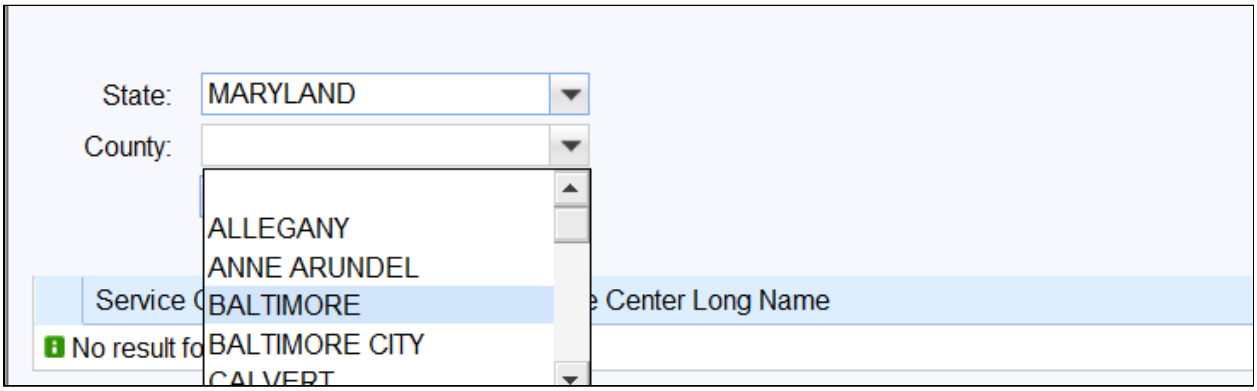
Scroll or Type State name to filter through the dropdown list.

Service Center Search



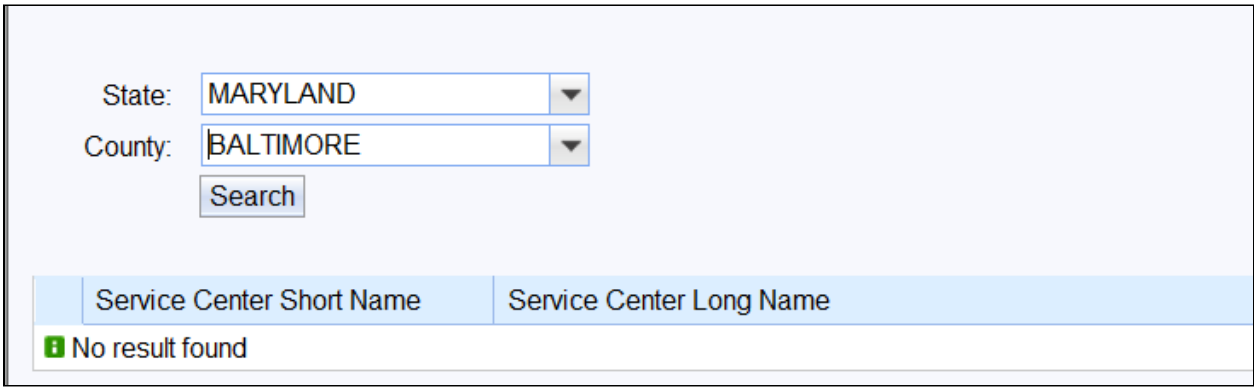
25. Click the **County** dropdown list icon button to view available options.

Service Center Search



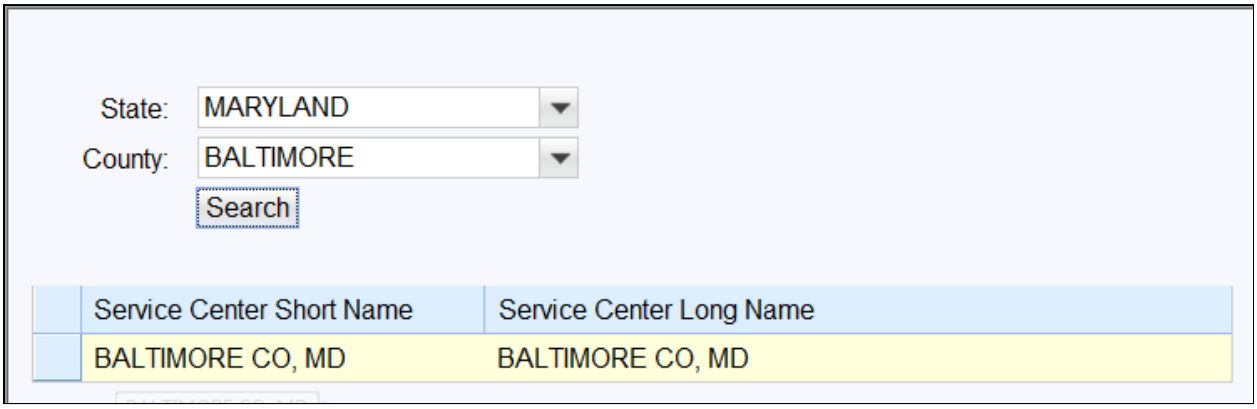
26. Select **BALTIMORE** BALTIMORE from the **County** list.

Service Center Search



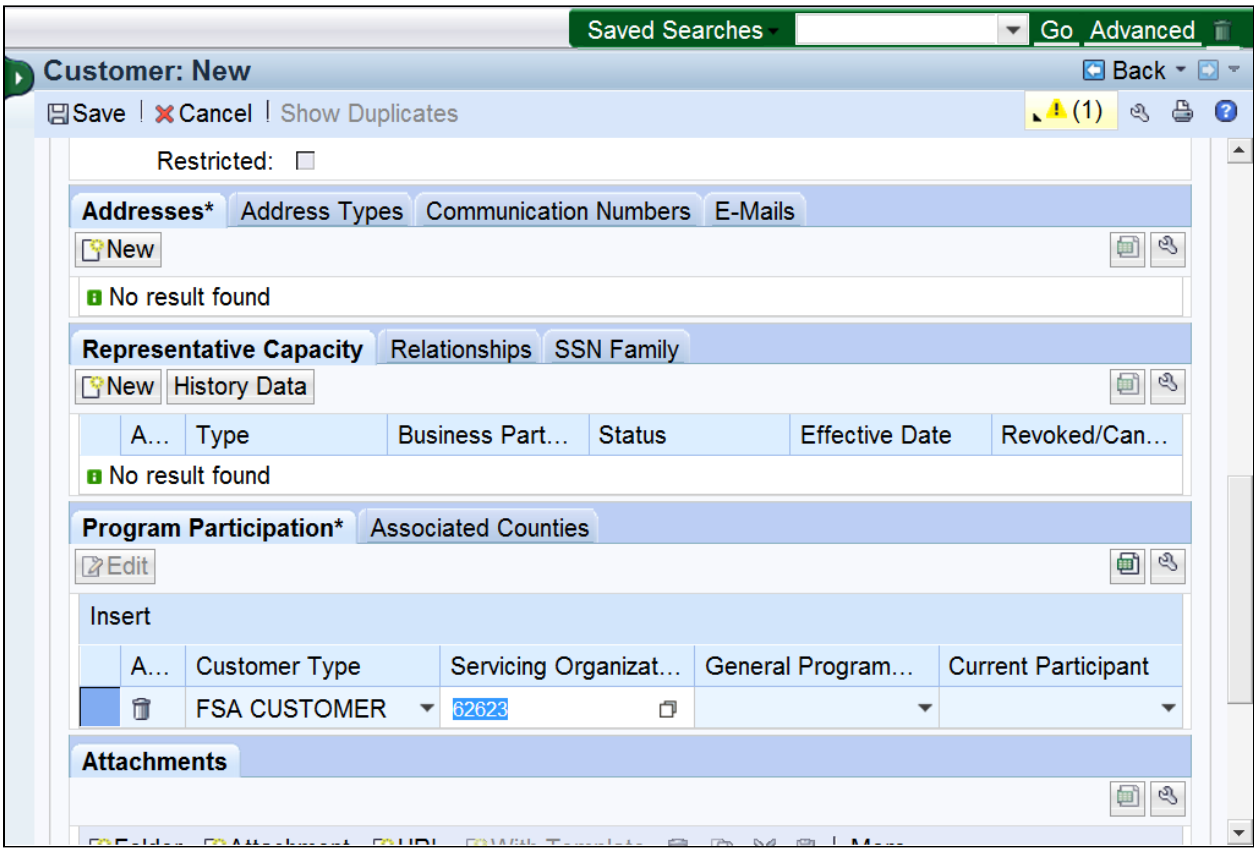
27. Click the **Search** Search button to search for the Service Center based on entered search criteria.

Service Center Search



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

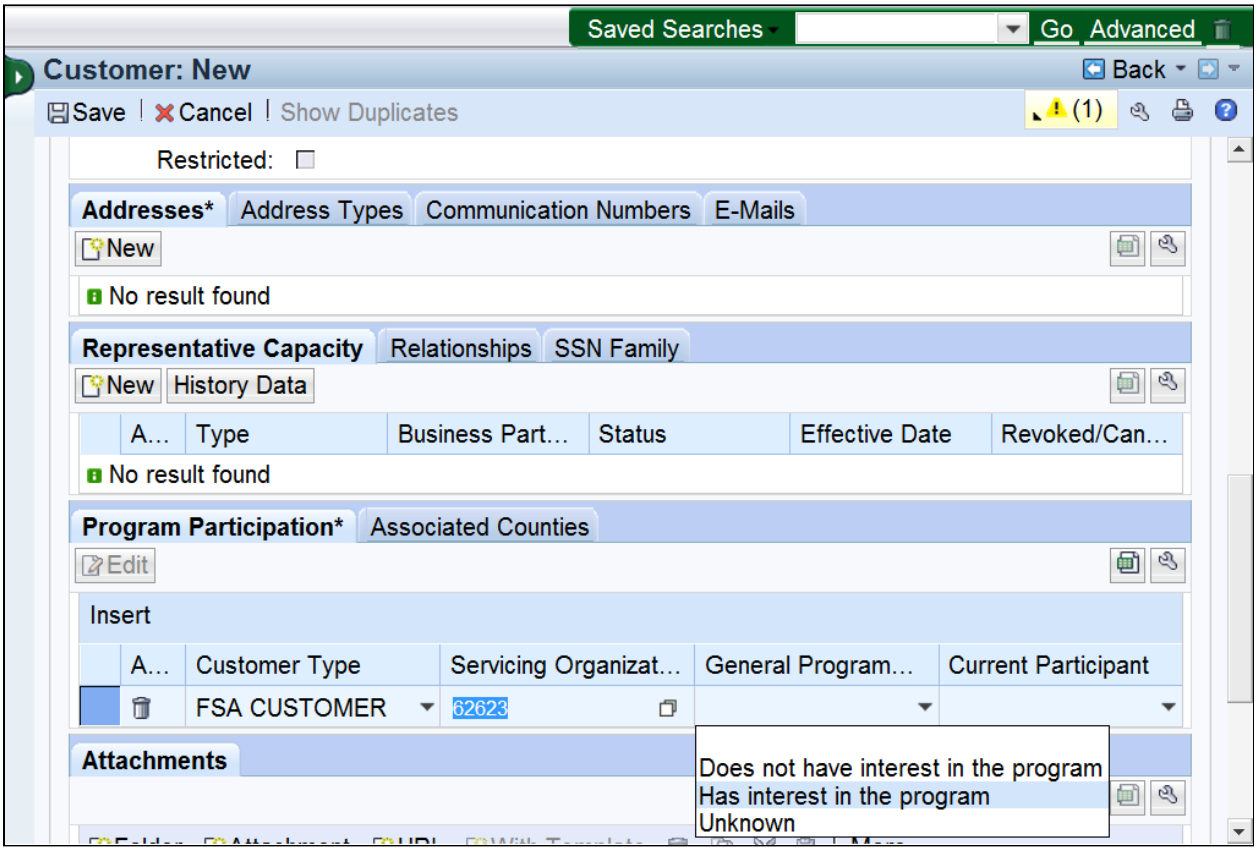
Customer: New



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

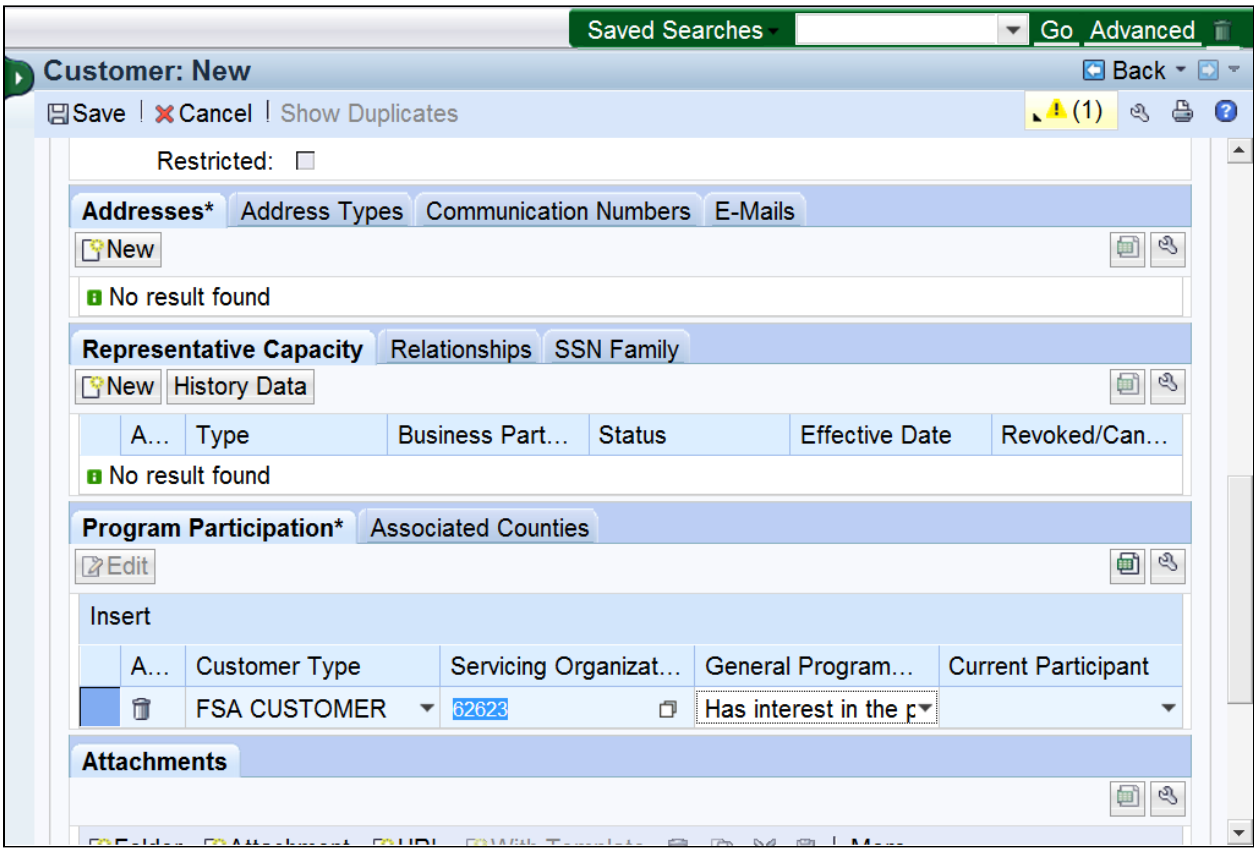
The Service Center ID will appear in the Servicing Organization field.

Customer: New



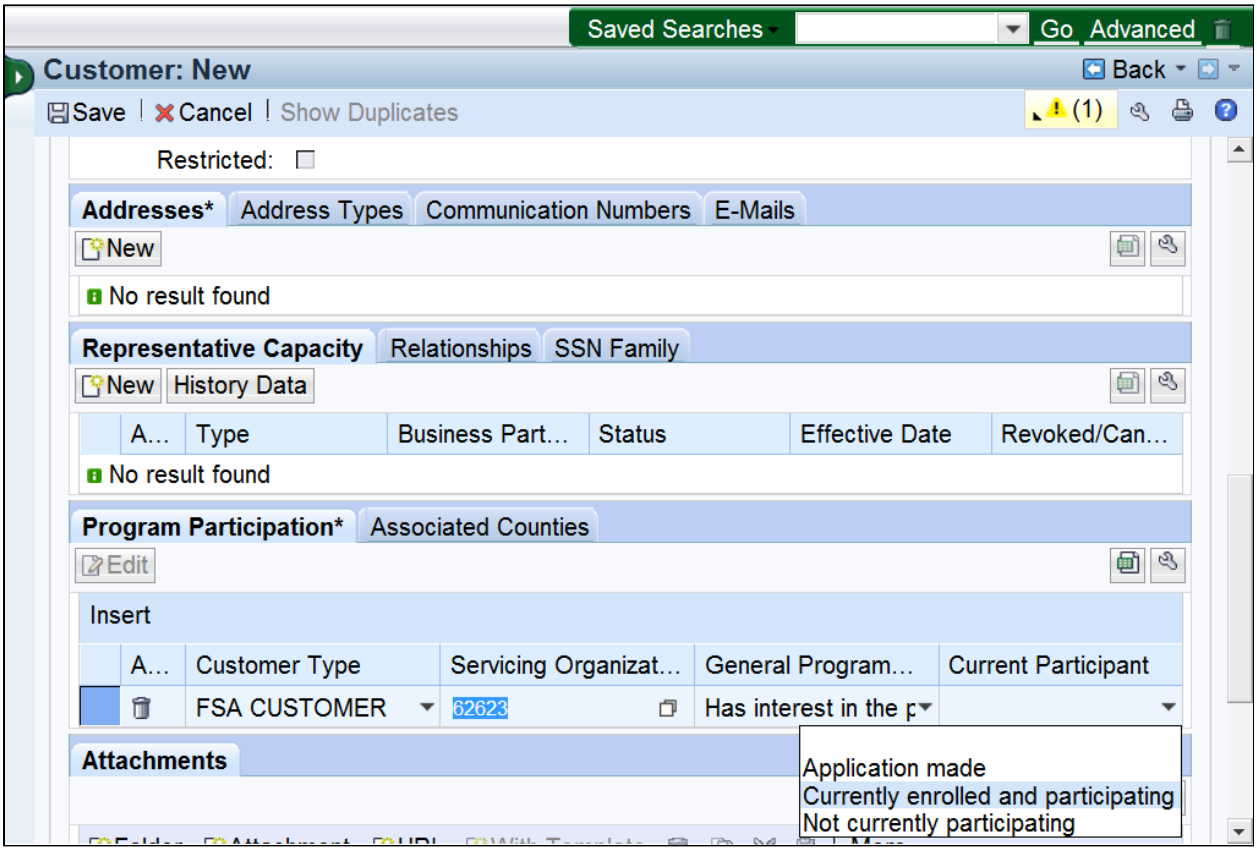
30. Select **Has interest in the program** Has interest in the program from the **General Program Interest** list.

Customer: New



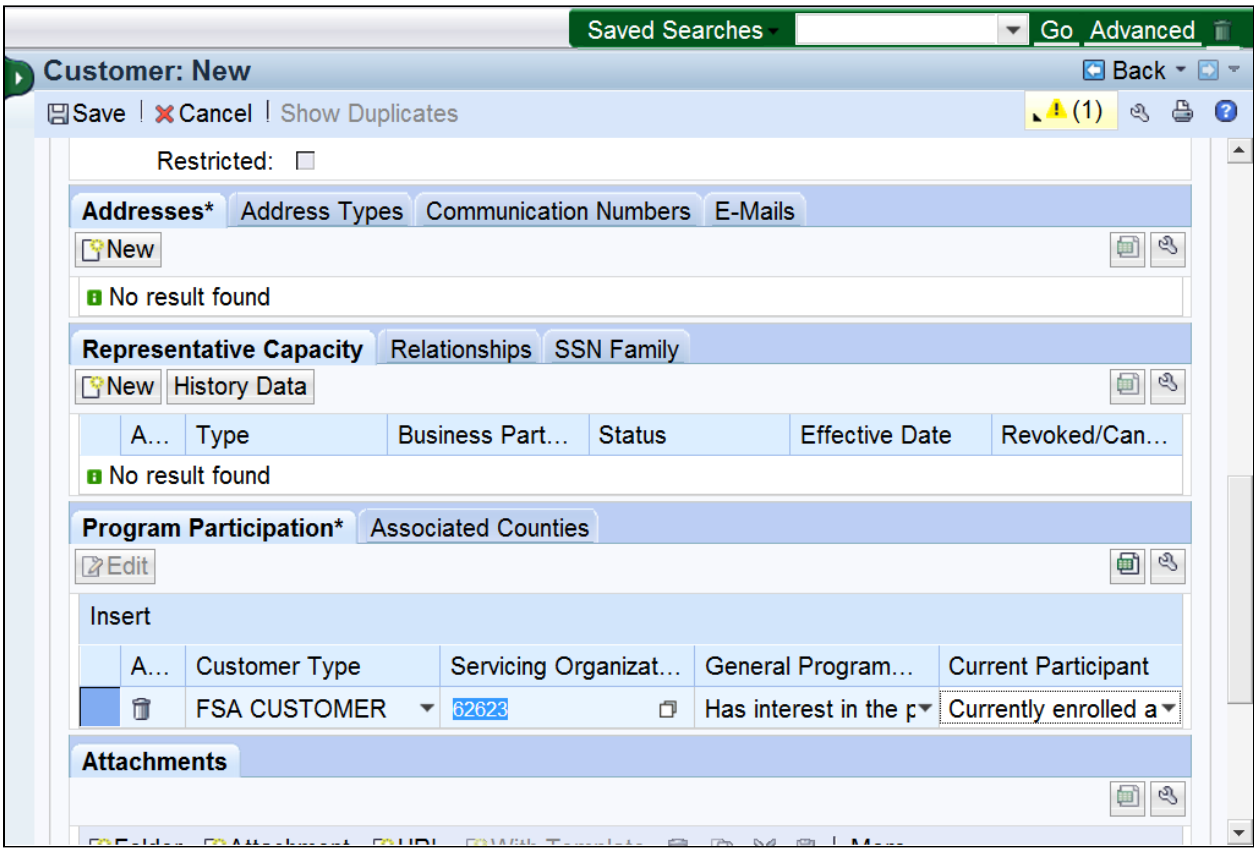
31. Click the **Current Participation** dropdown list icon button to view available options.

Customer: New



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

Customer: New



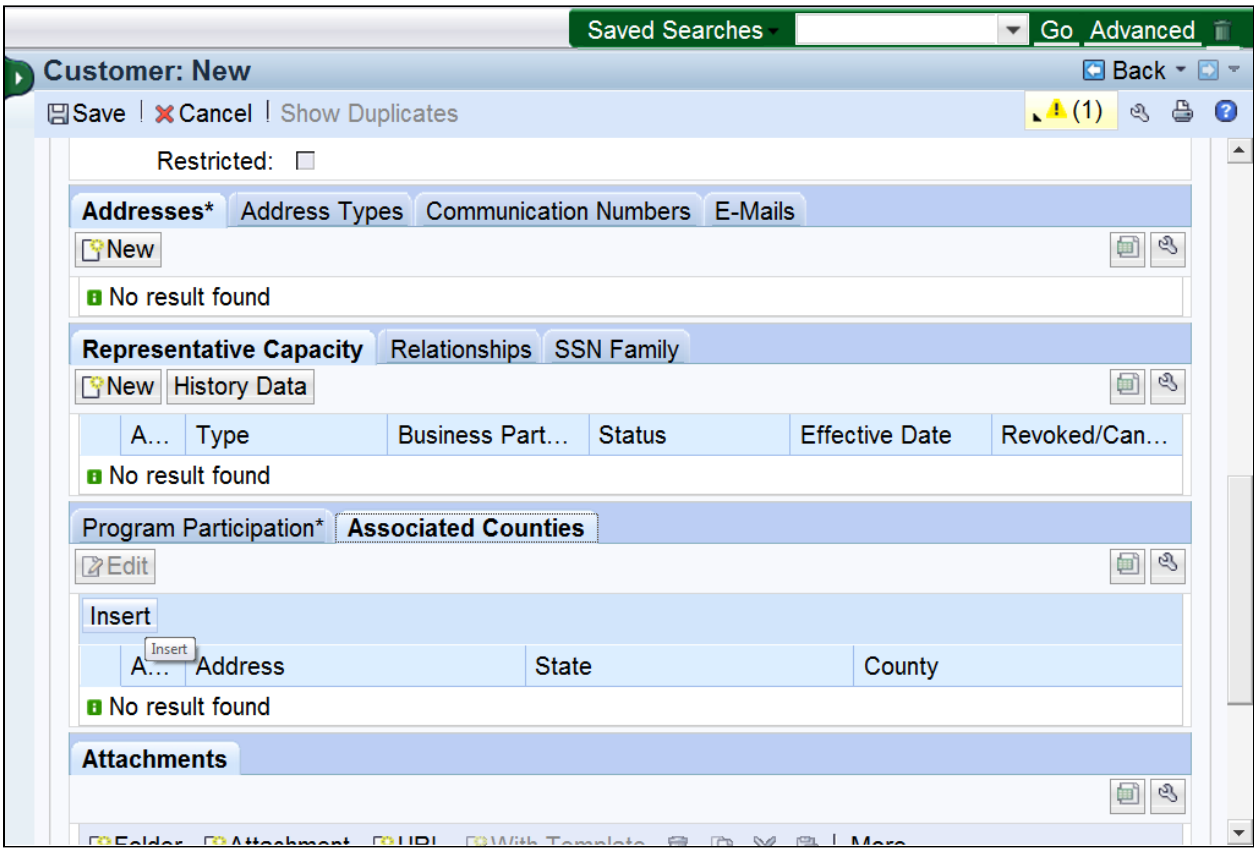
33. Click the Associated Counties tab.

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

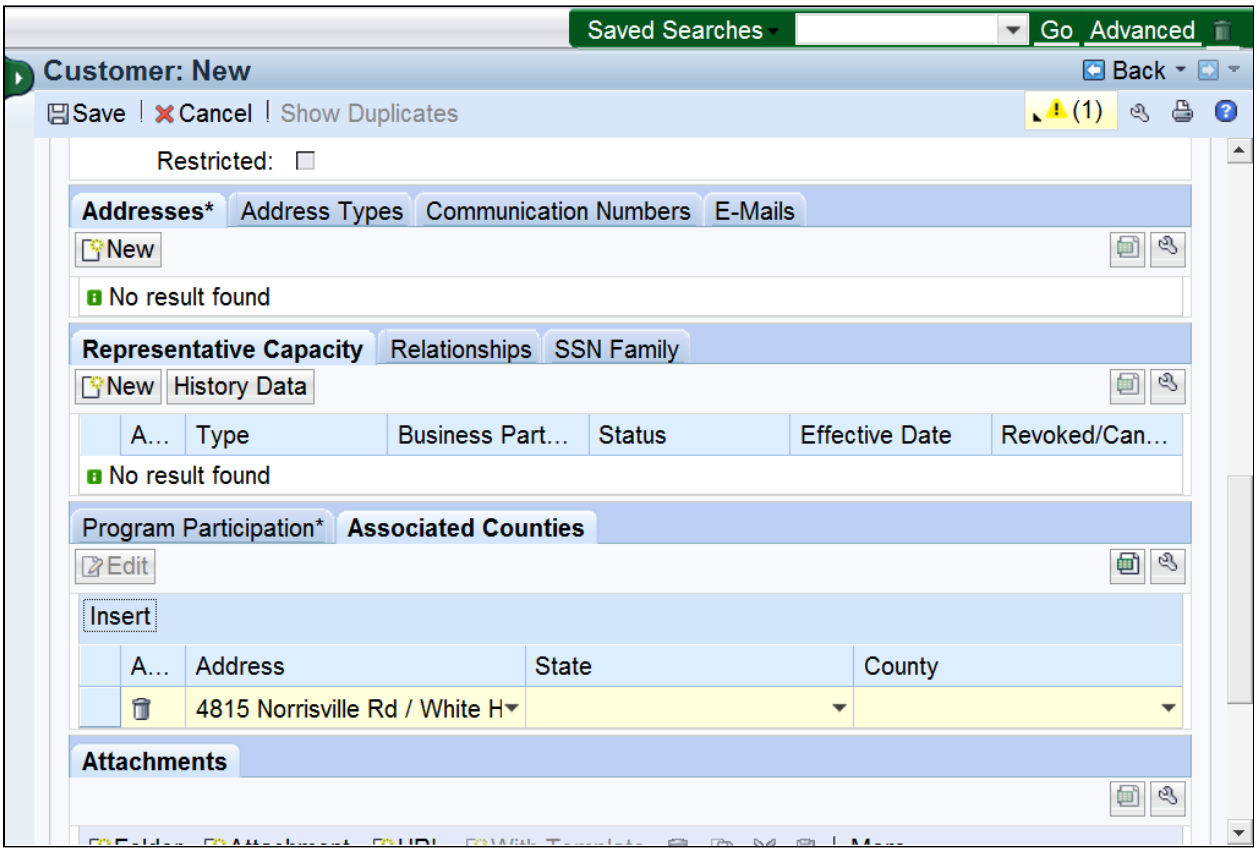


34. Click the **Insert** Insert button to add a new line to the Associated Counties tab.

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.

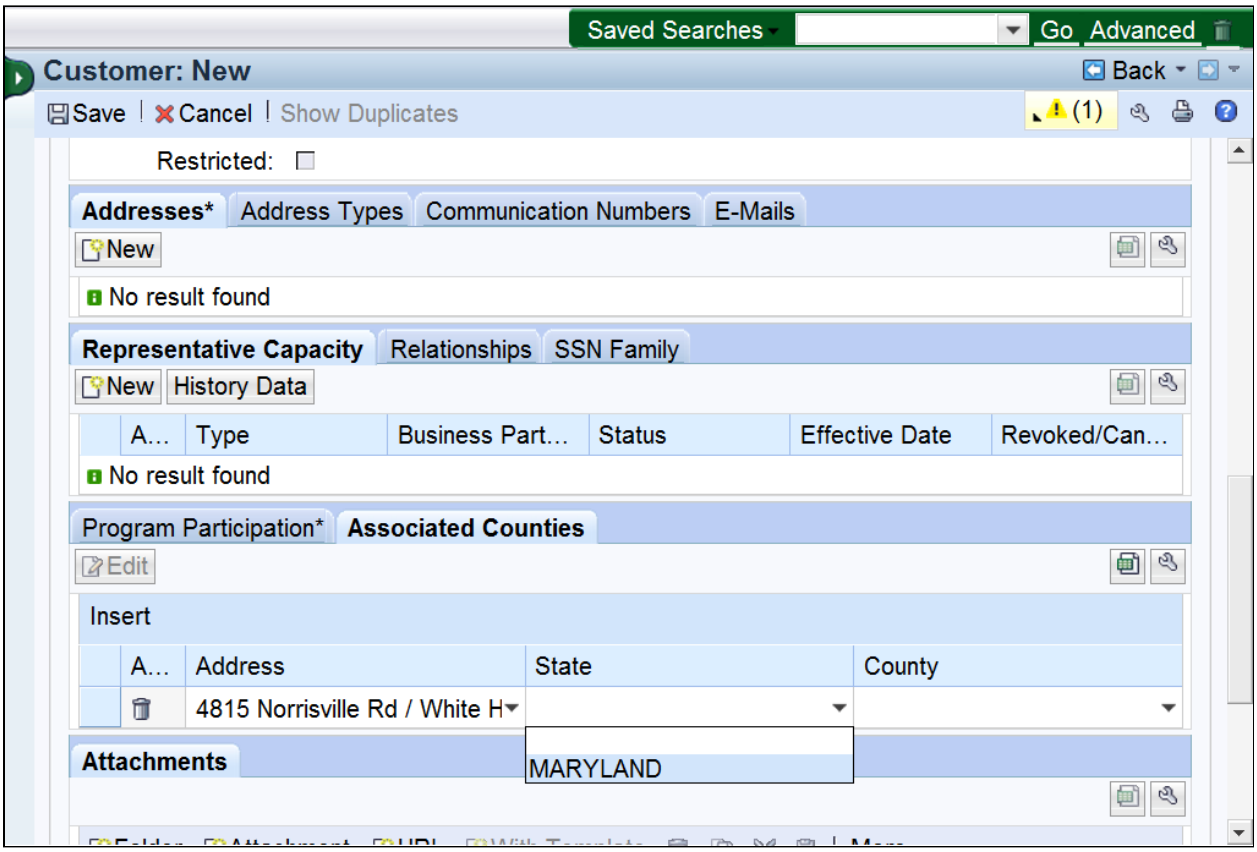
If a customer has multiple addresses, the user will select the corresponding address for the Associated County.

Customer: New



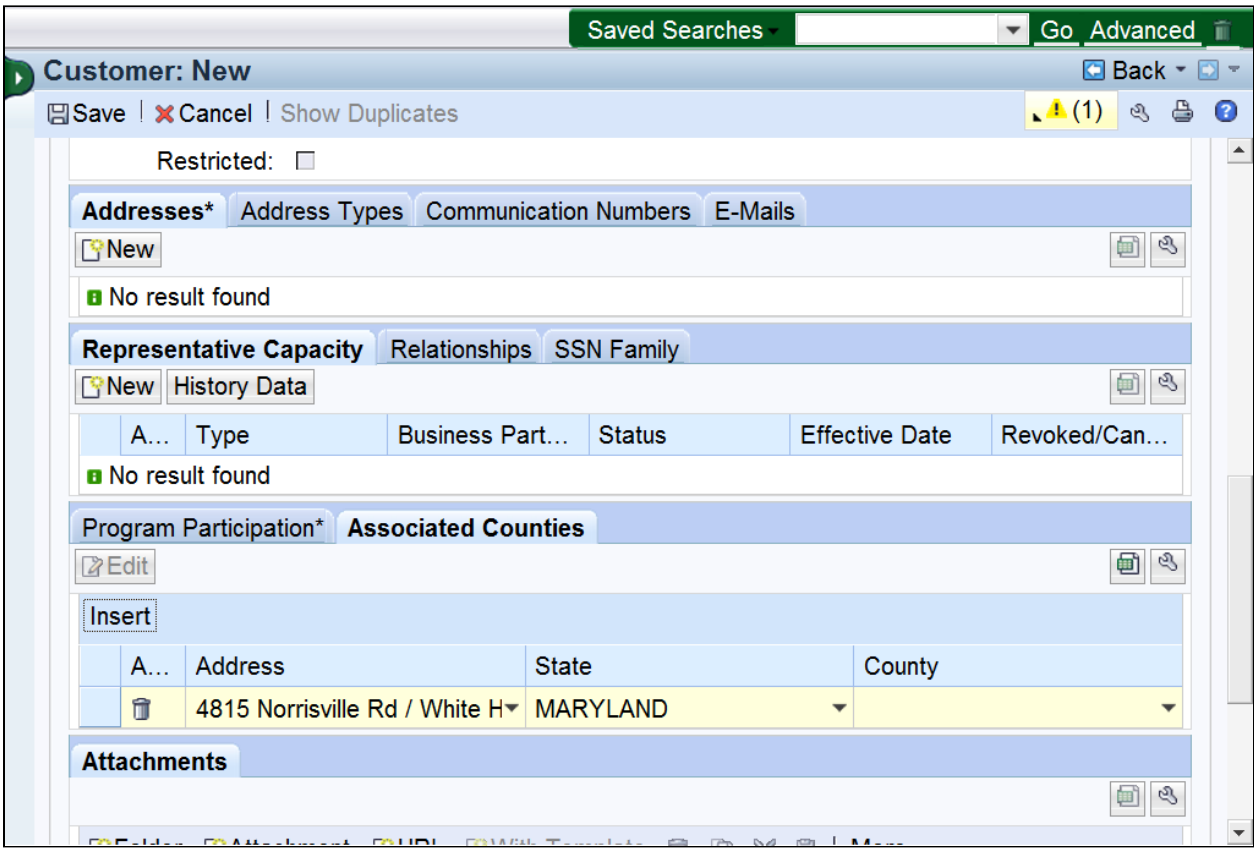
35. Click the **State** dropdown list icon button.

Customer: New



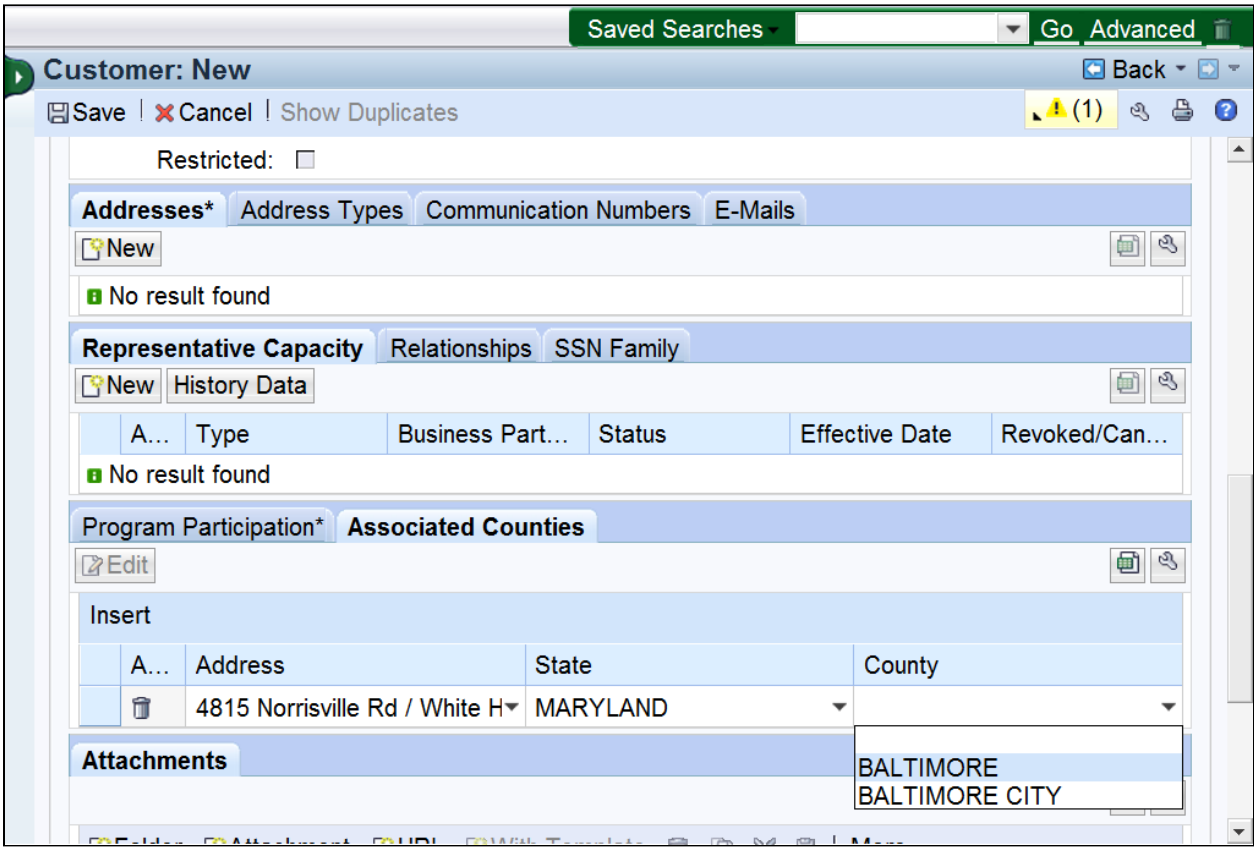
36. Select **MARYLAND** MARYLAND from the **State** list.

Customer: New



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

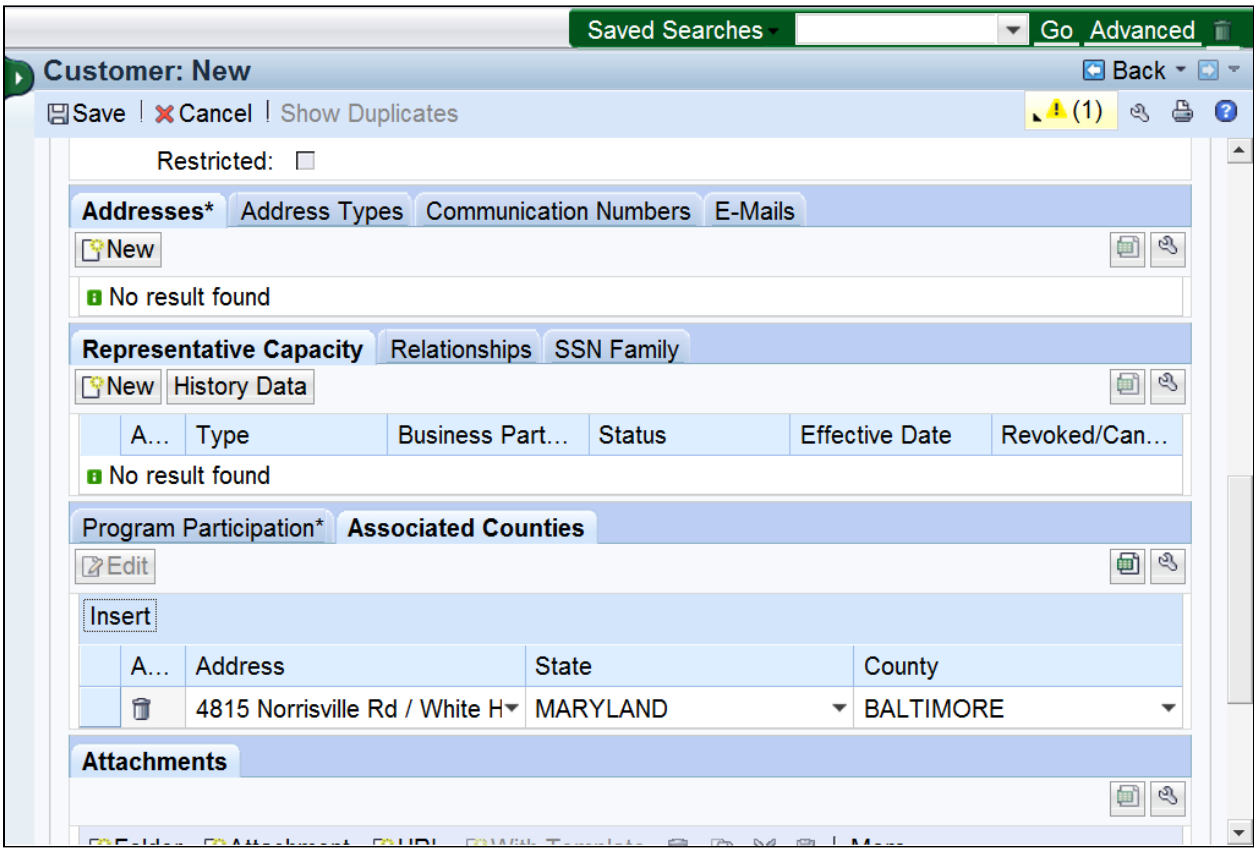
Customer: New



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

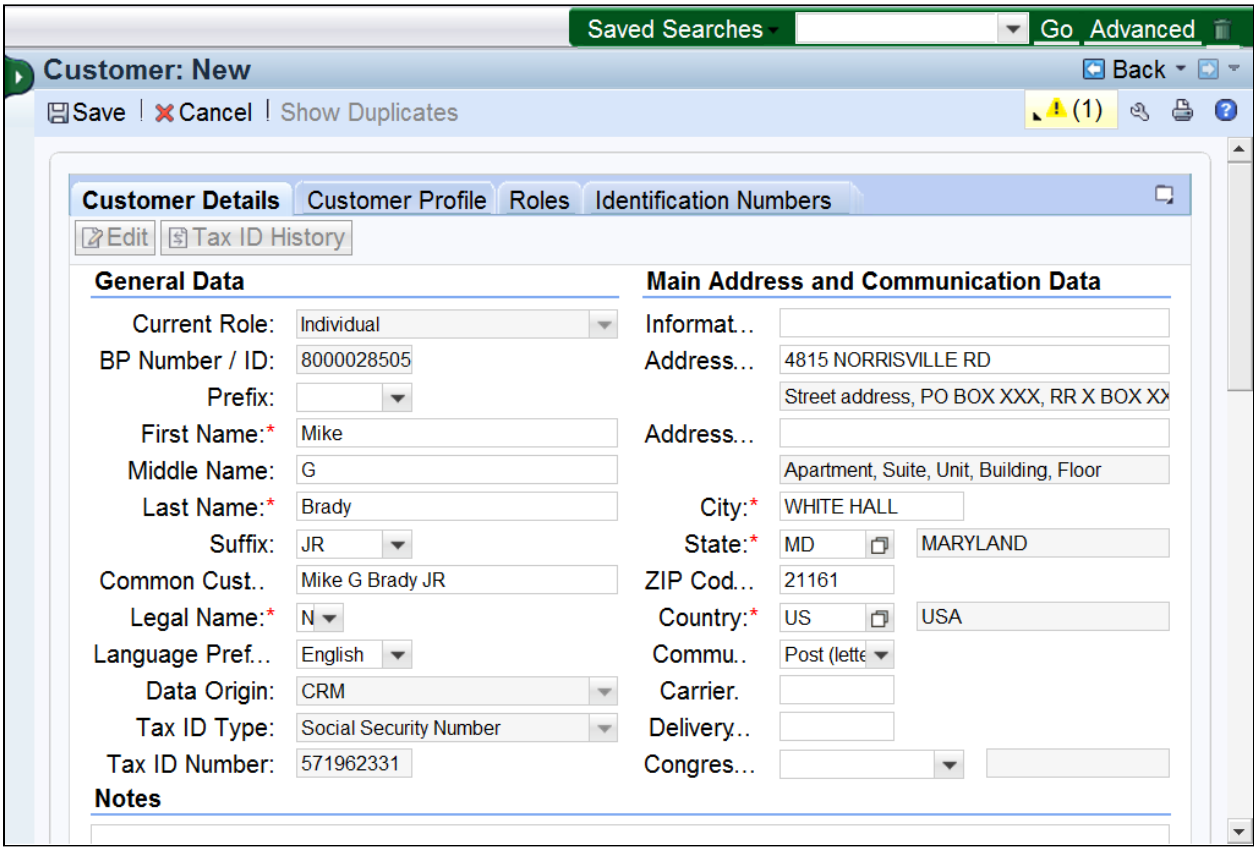
If multiple counties are associated to a Service Center, multiple options will appear.

Customer: New



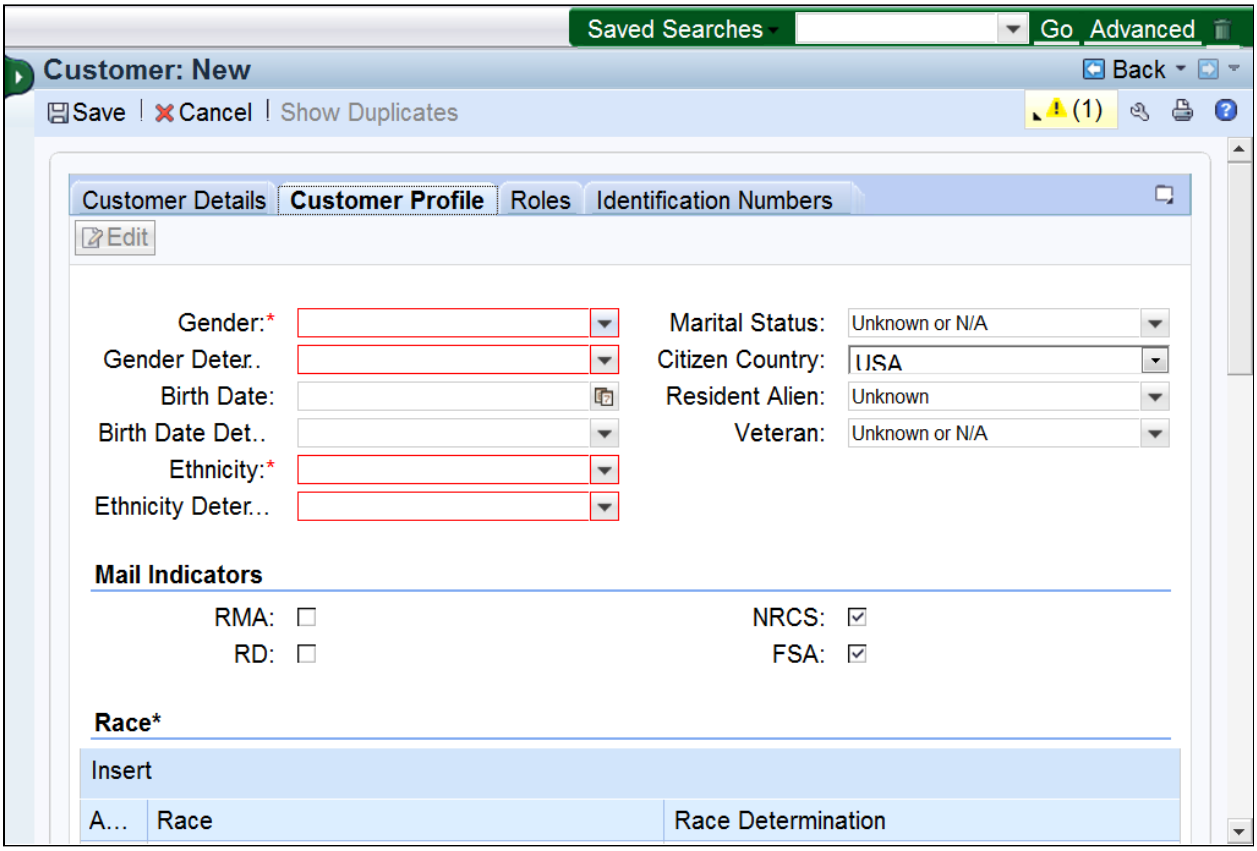
39. Scroll to the top of the customer record to proceed to the **Customer Profile** tab.

Customer: New



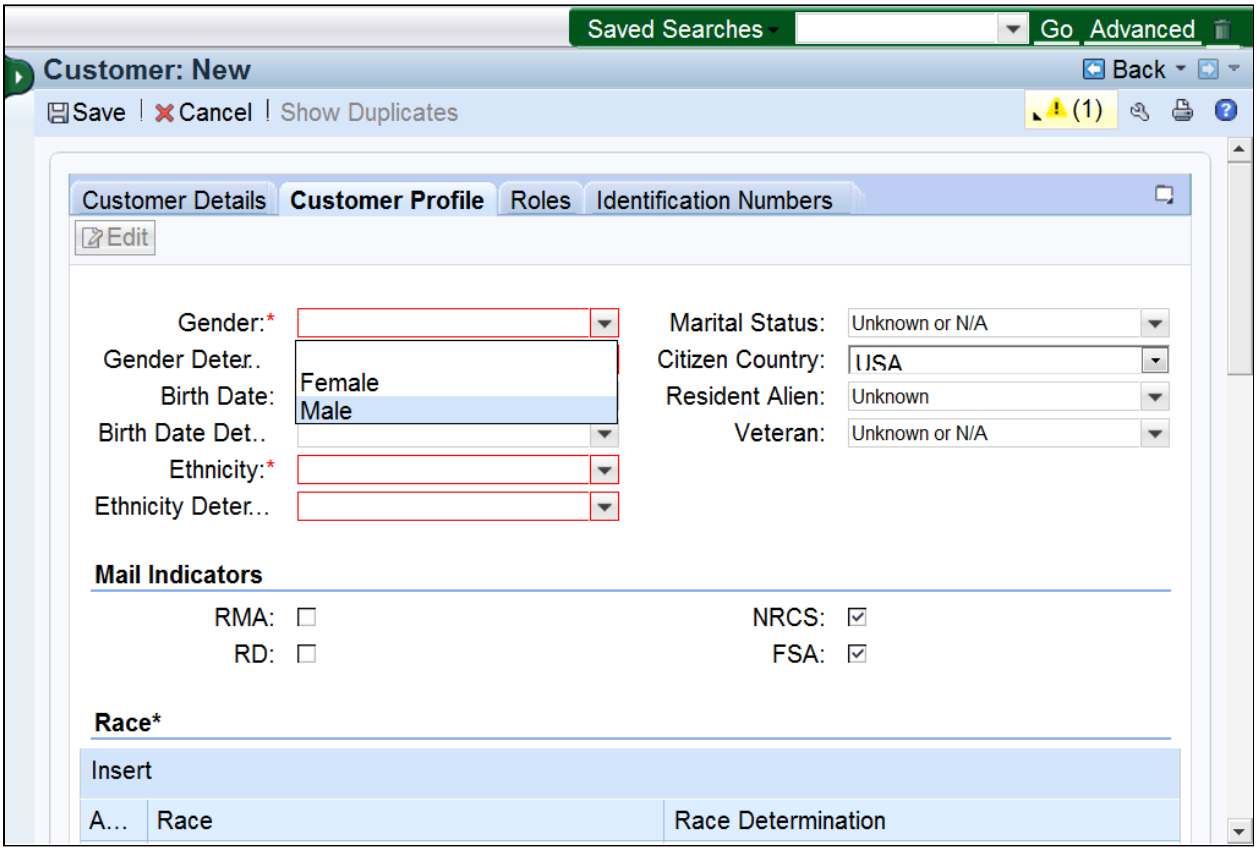
40. Click the **Customer Profile** Customer Profile tab.

Customer: New



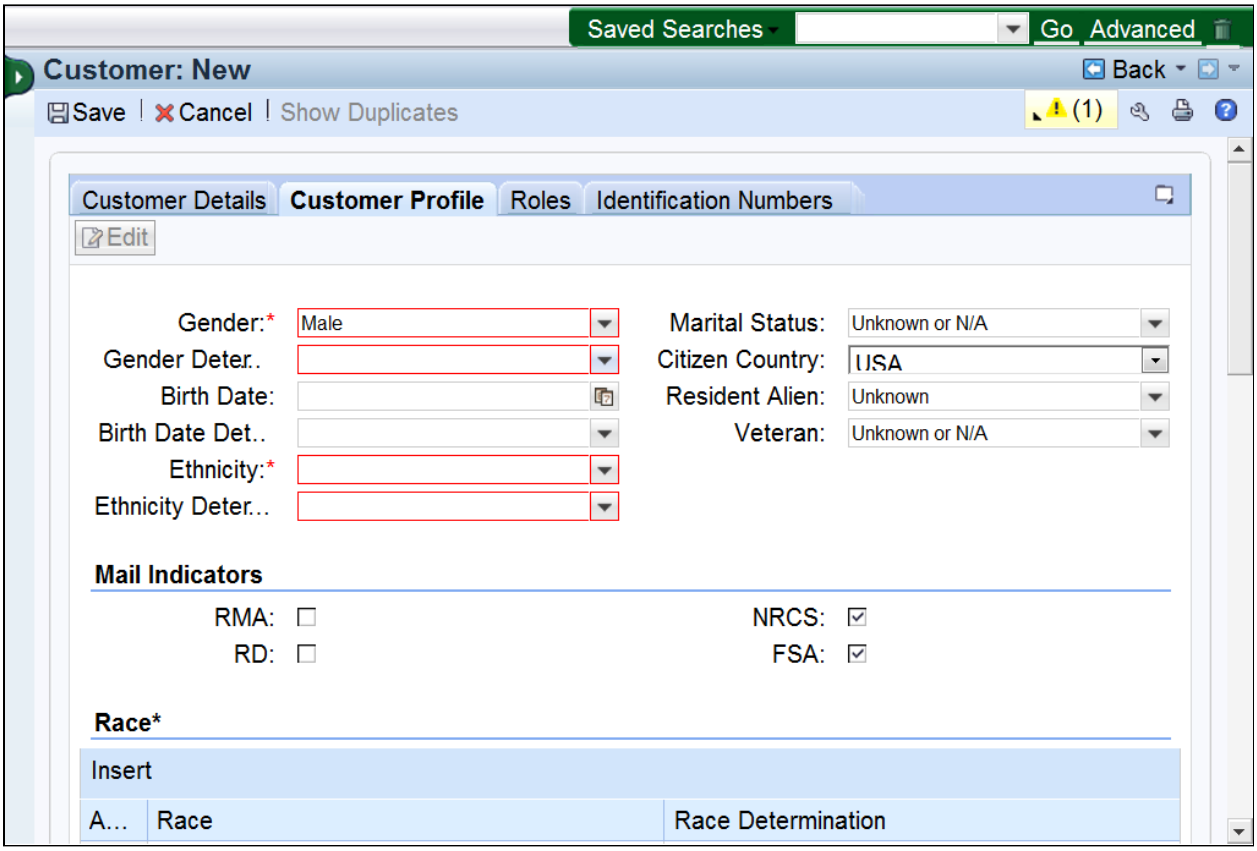
41. Click the **Gender** dropdown list icon button to view available options.

Customer: New



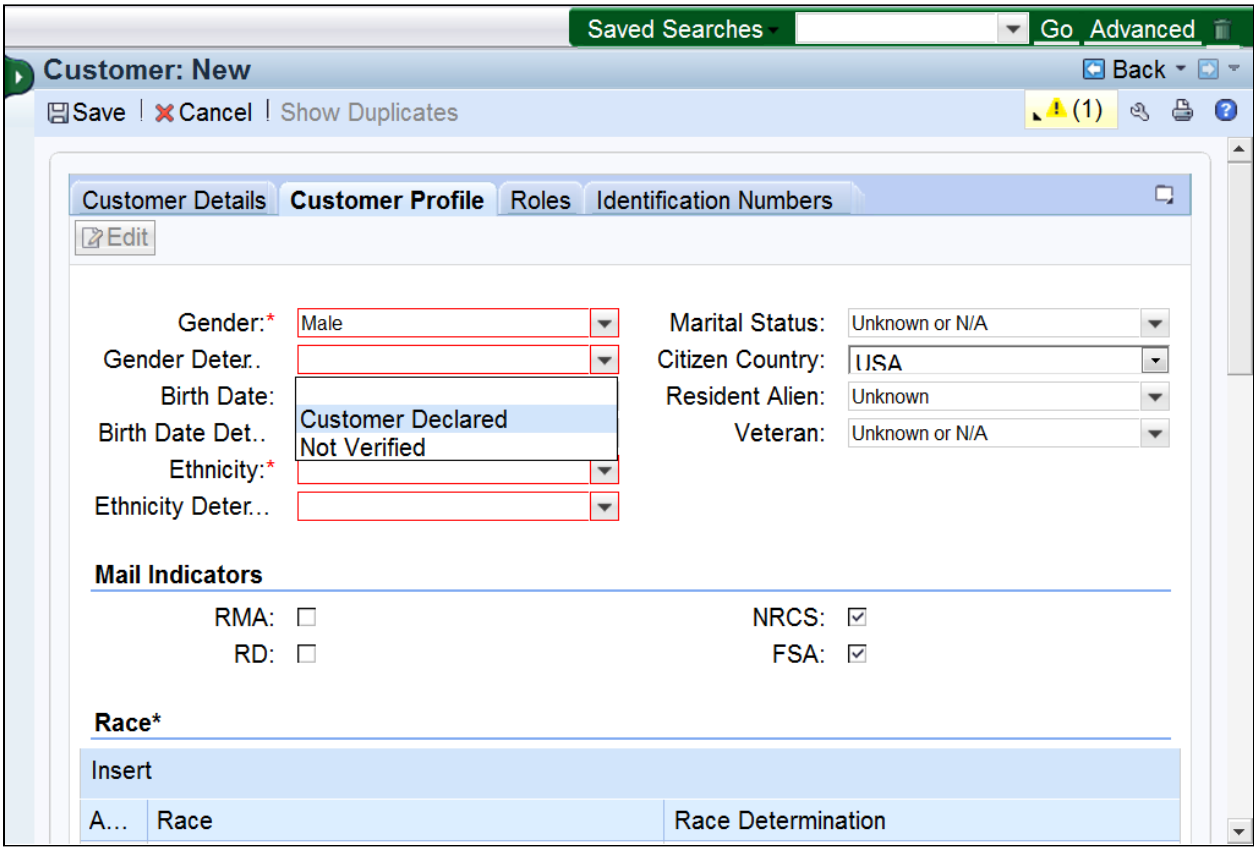
42. Select Male Male from the **Gender** list.

Customer: New



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

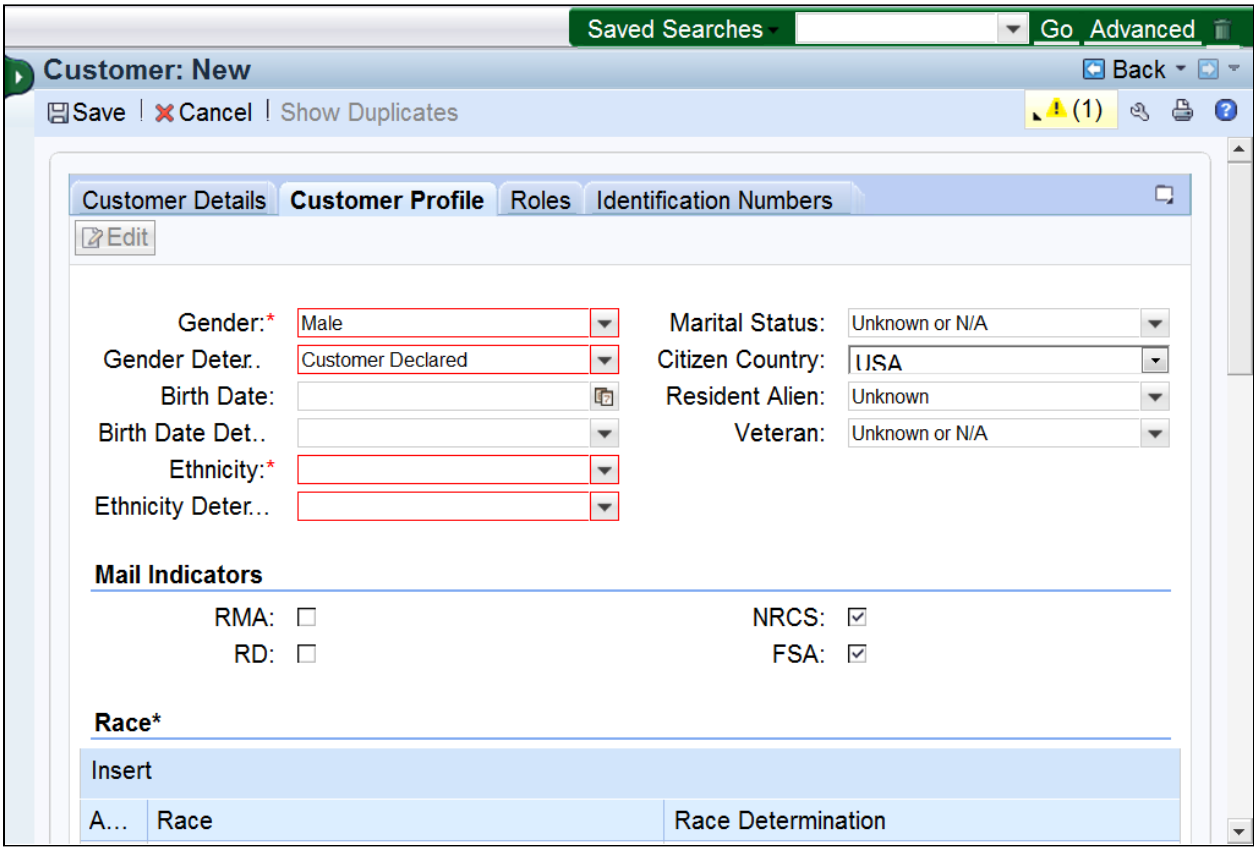
Customer: New



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

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

Customer: New



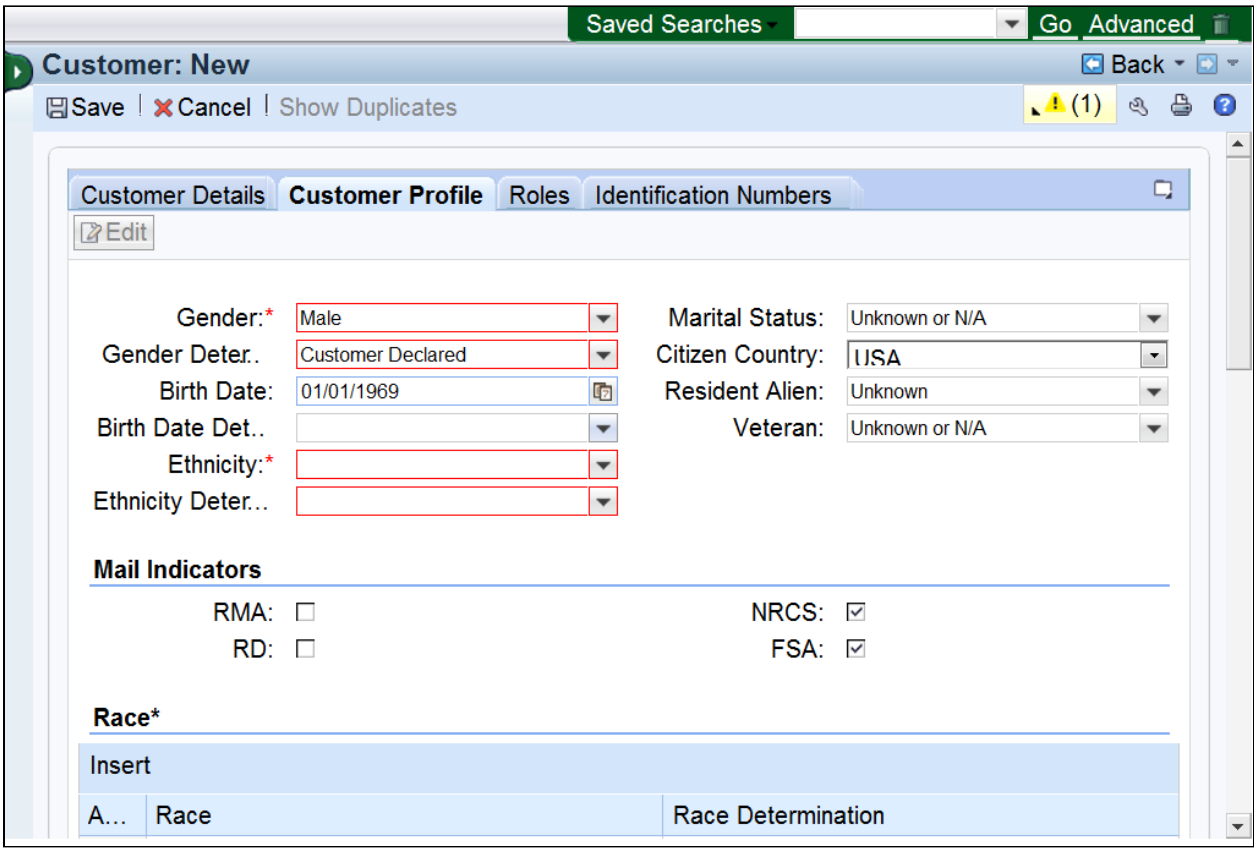
45. As required, complete/review the following fields:

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.

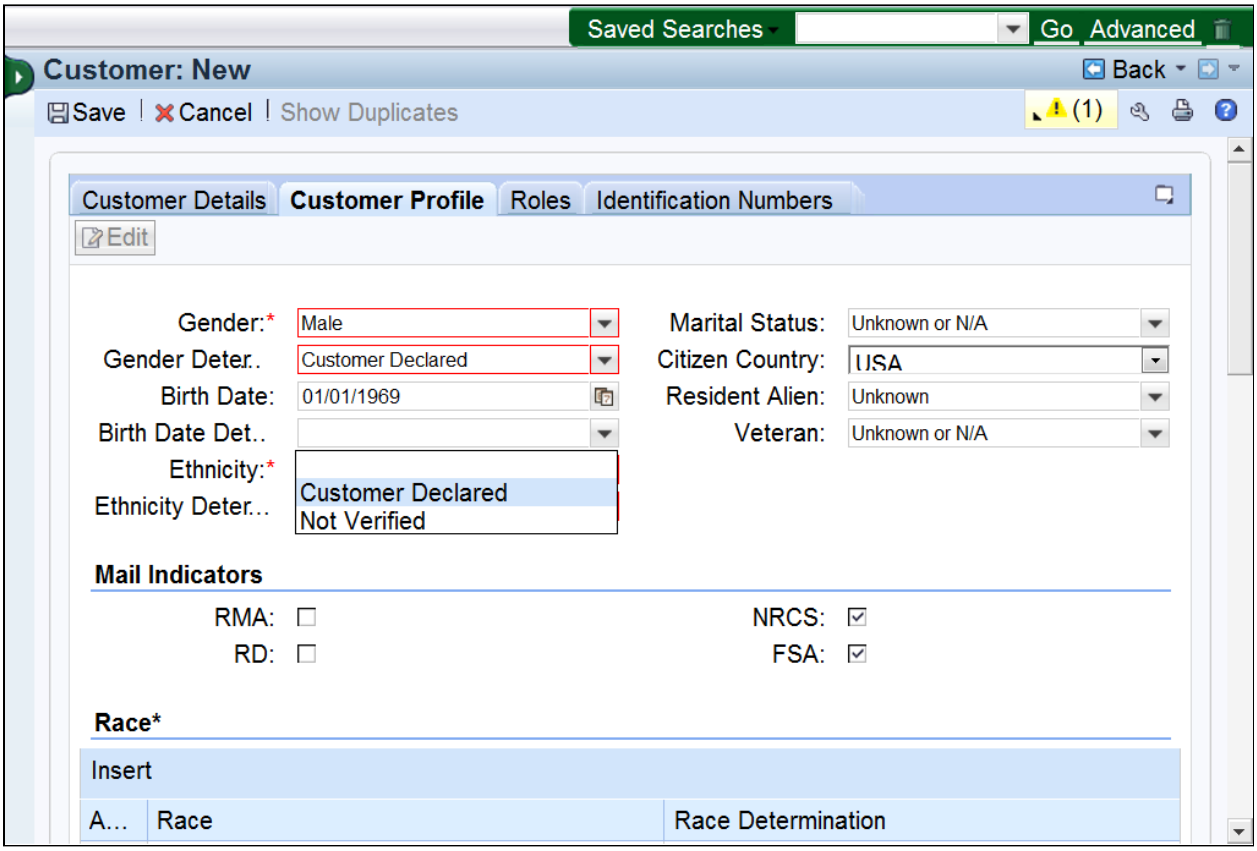
Only required if Customer is a minor or FLP customer.

Customer: New



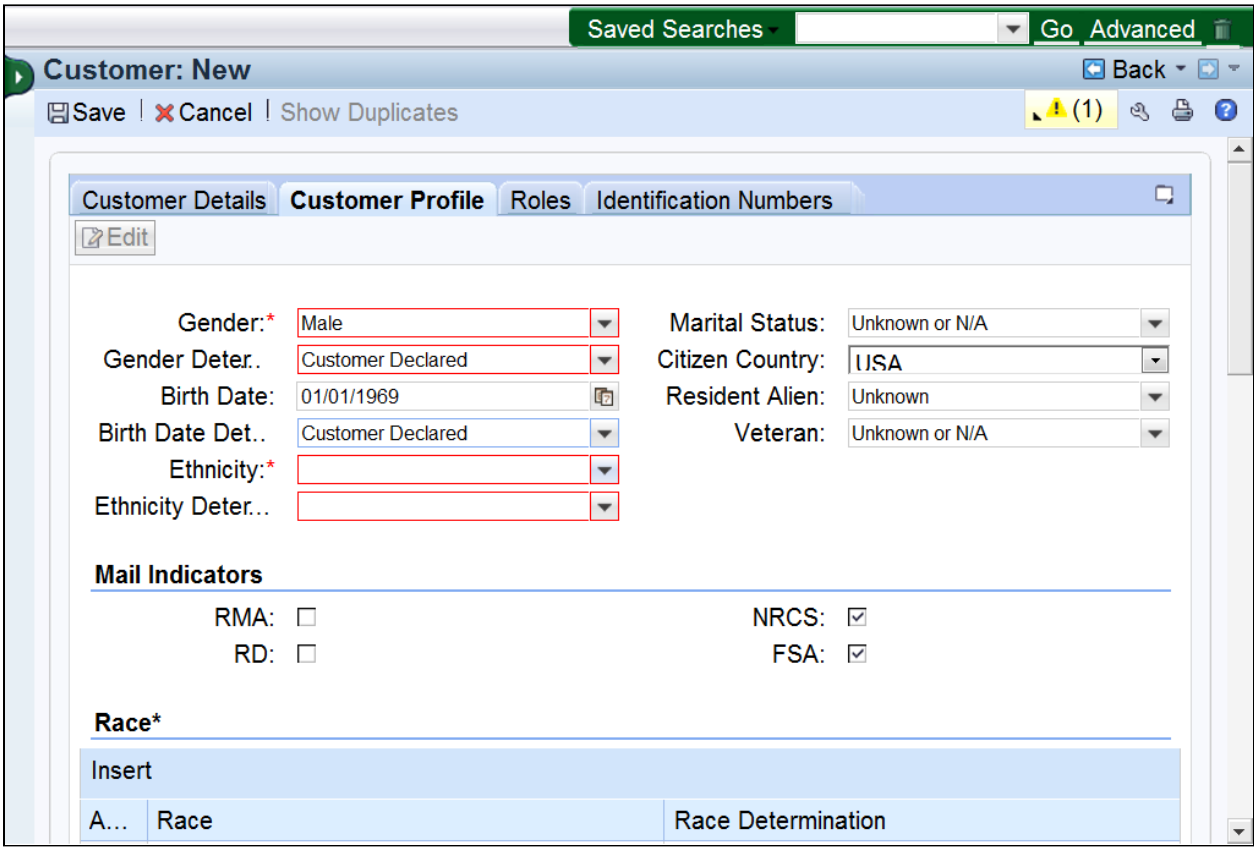
46. Click the **Birth Date Determination** dropdown list icon button to view available options.

Customer: New



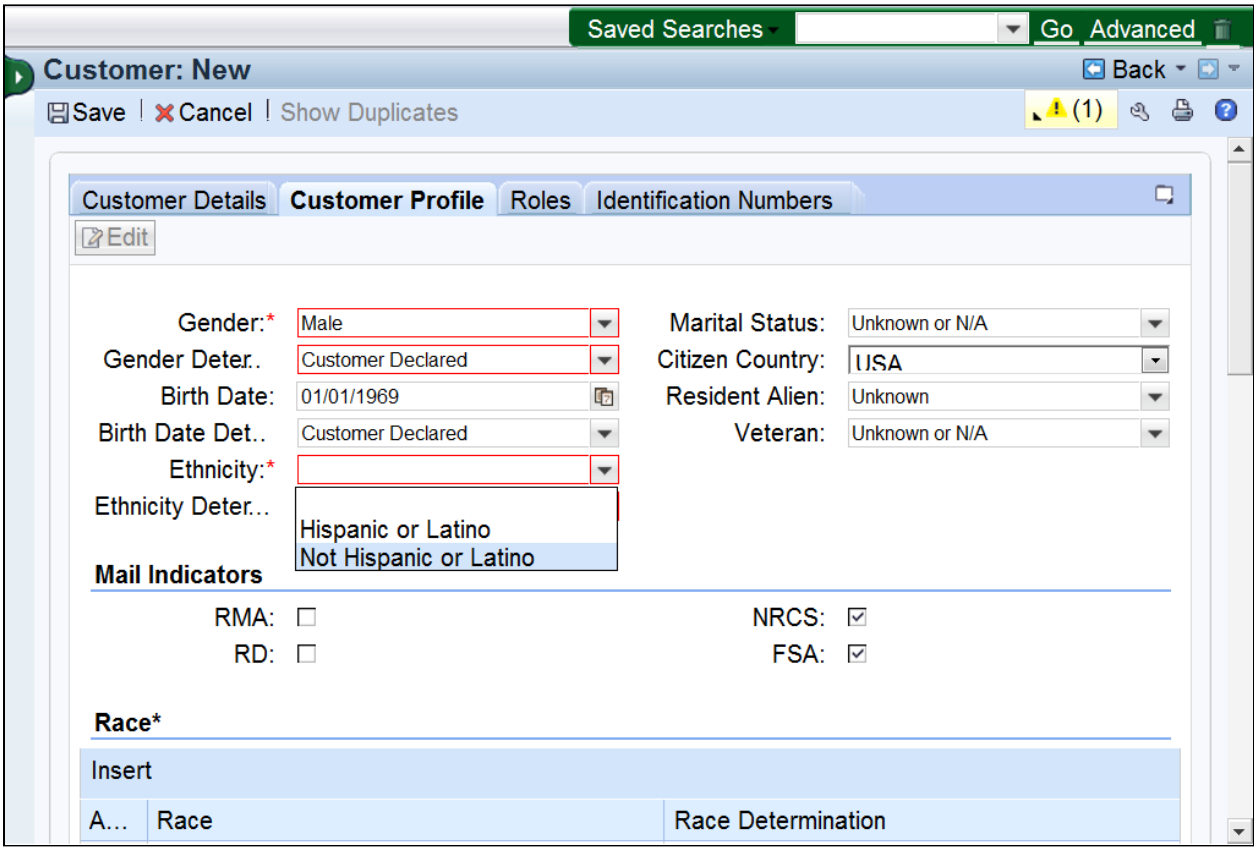
47. Select **Customer Declared** Customer Declared from the **Birth Date Determination** list.

Customer: New



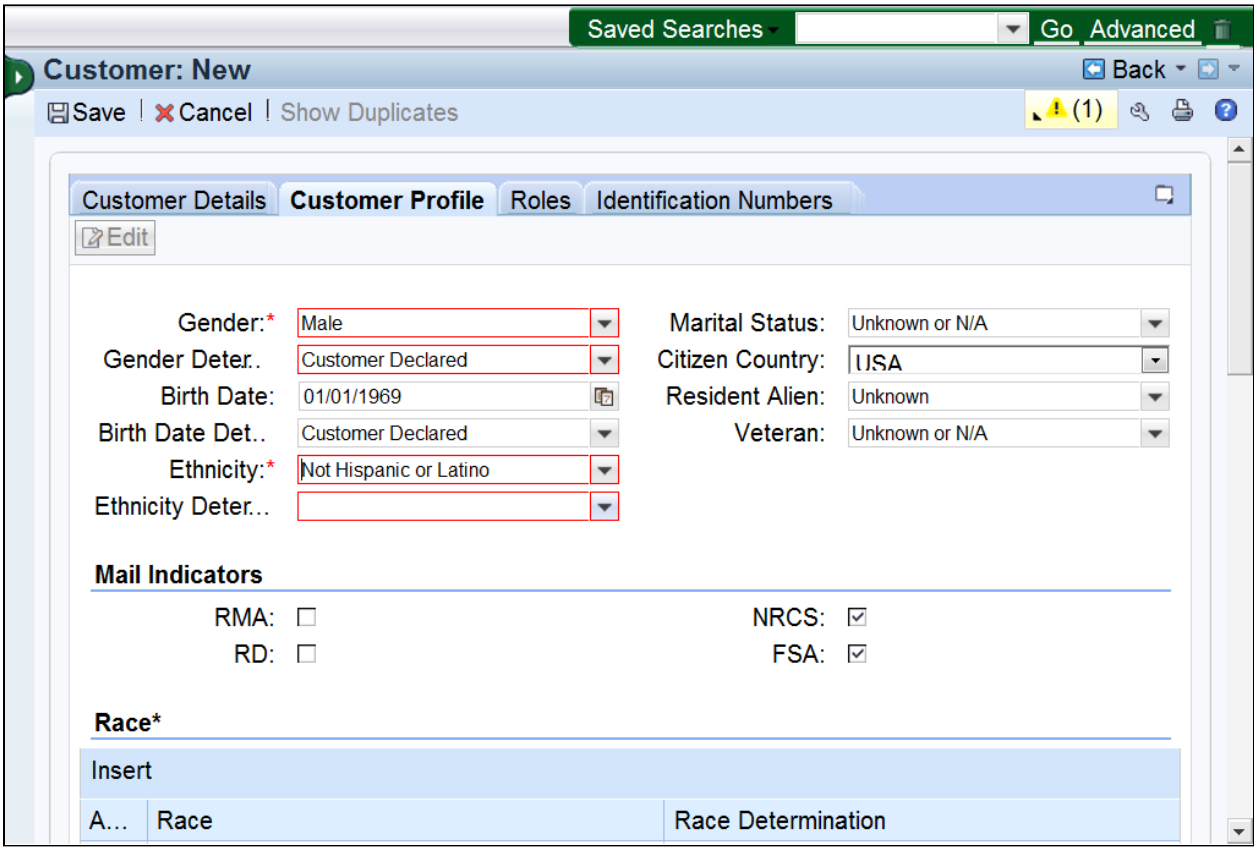
48. Click the **Ethnicity** dropdown list icon button.

Customer: New



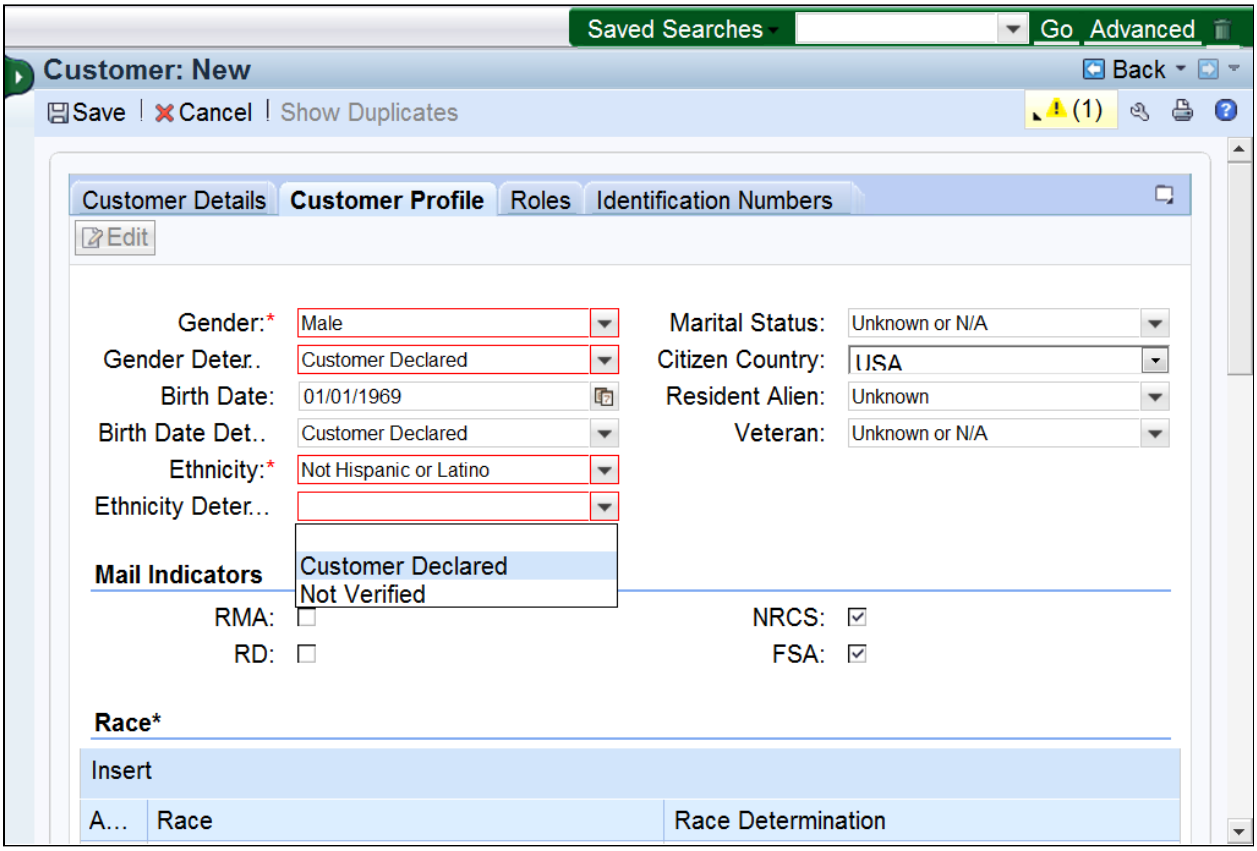
49. Select **Not Hispanic or Latino** Not Hispanic or Latino from the **Ethnicity Determination** list.

Customer: New



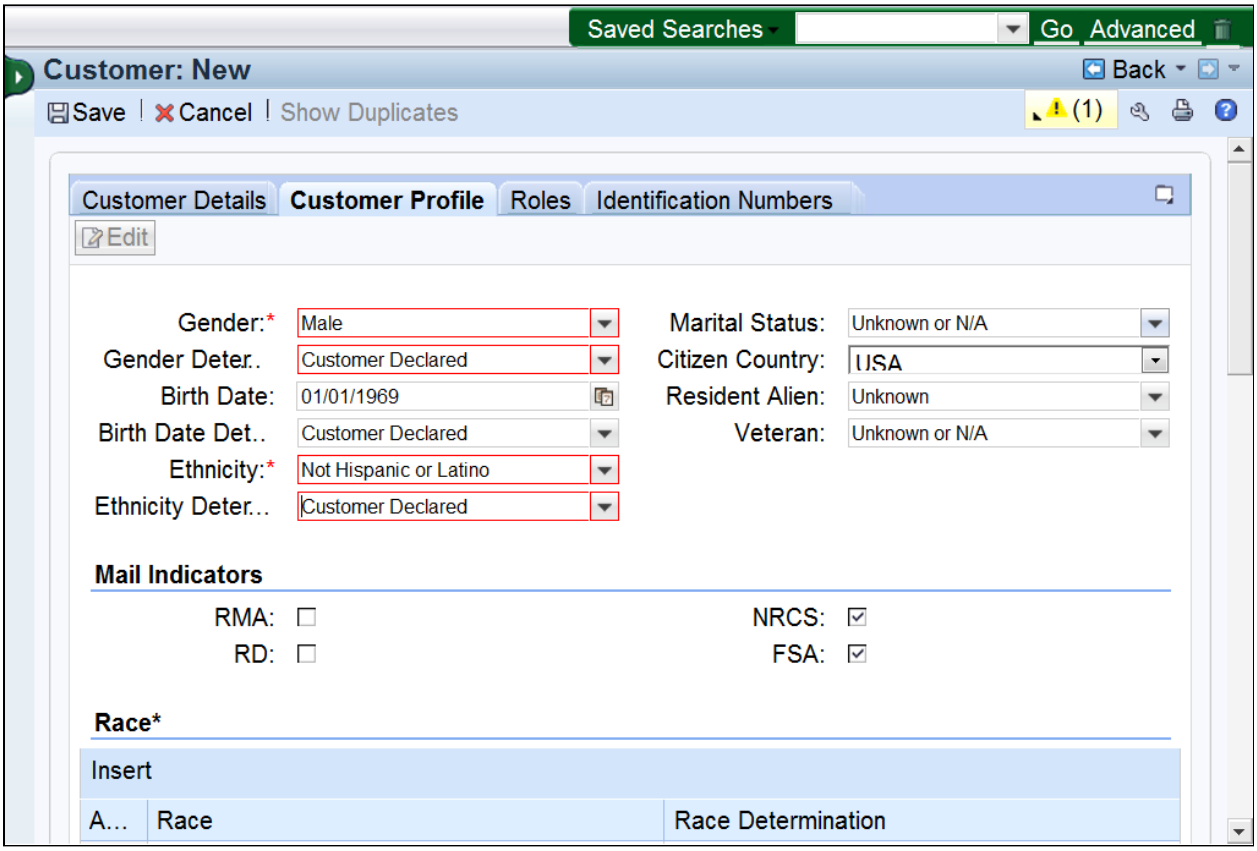
50. Click the **Ethnicity Determination** dropdown list icon button.

Customer: New



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

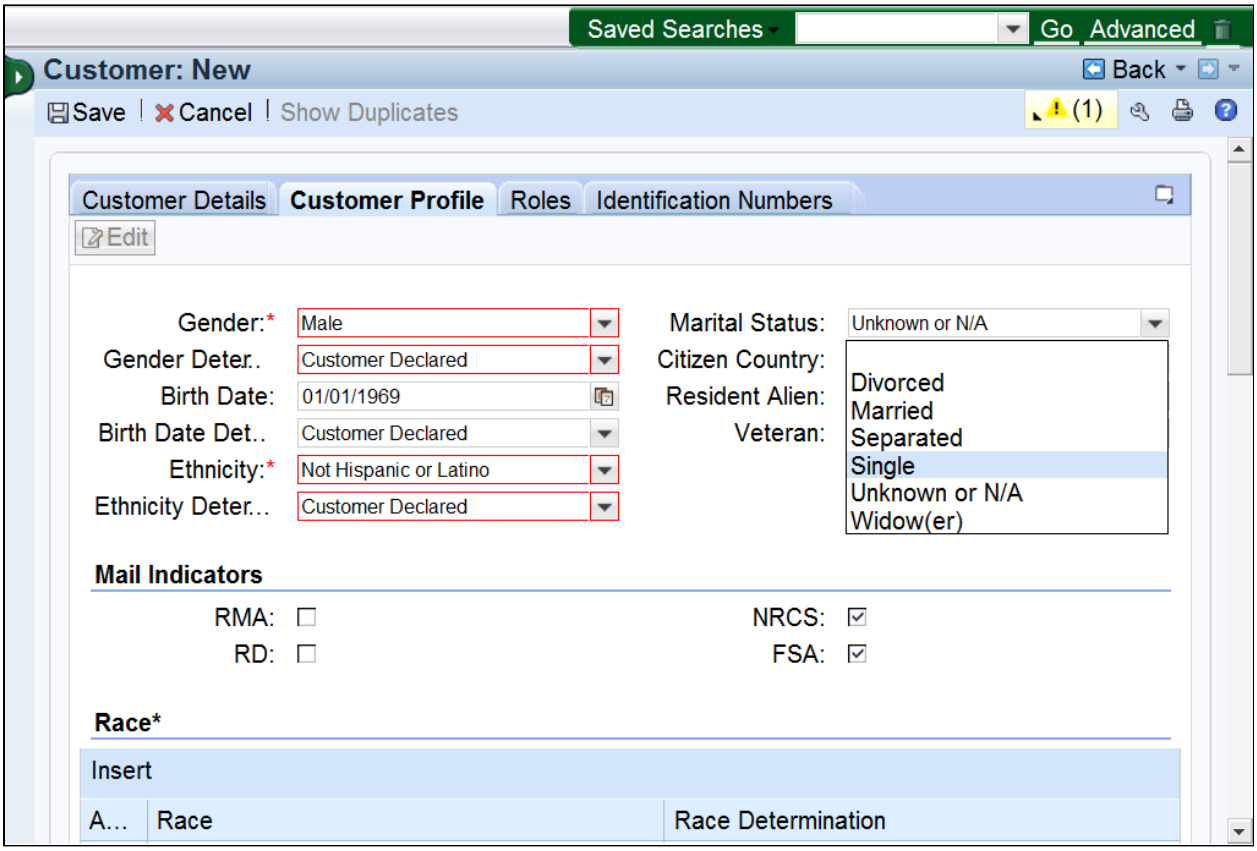
Customer: New



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

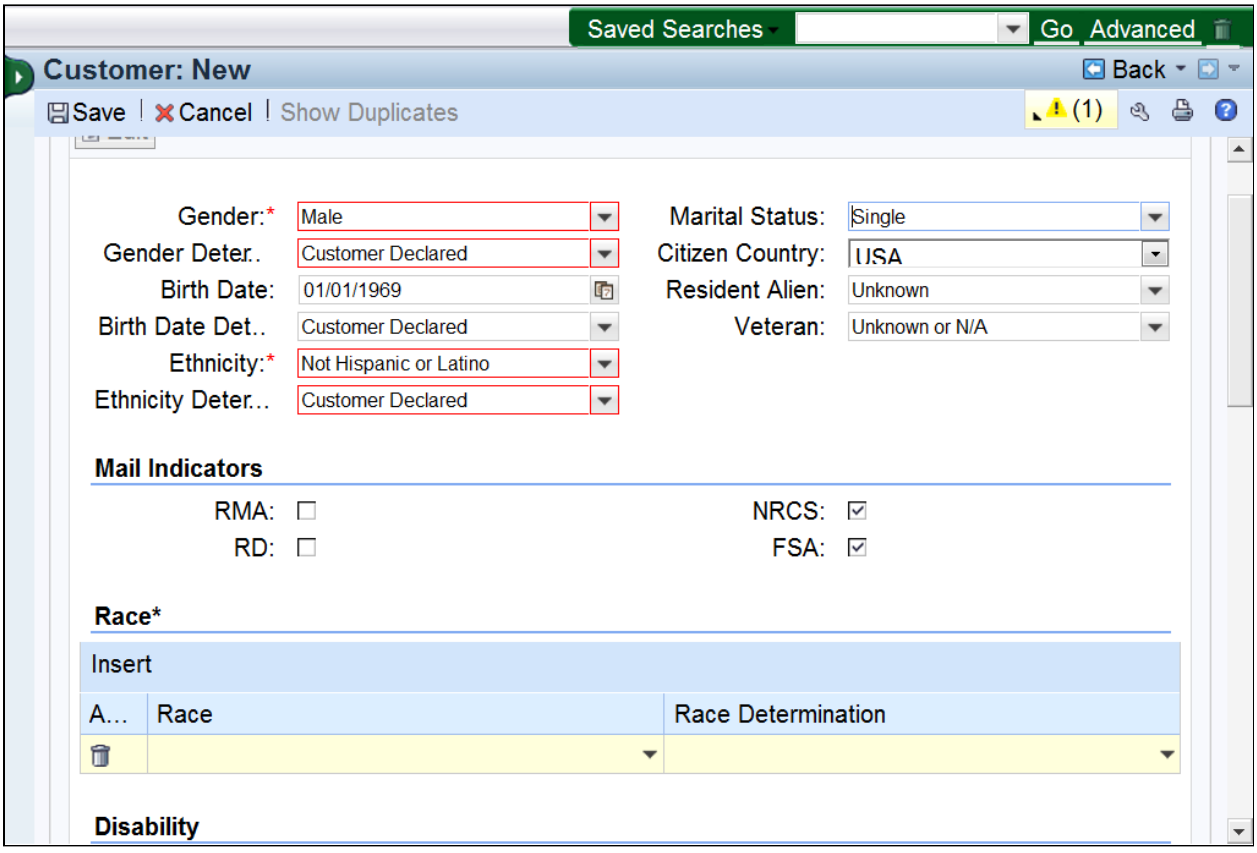
If the Customer has the Program Participation defined as a **Farm Loan Program (FLP)**, then the **Marital Status** and **Veteran** fields are required. The status can not be set to Unknown or N/A.

Customer: New



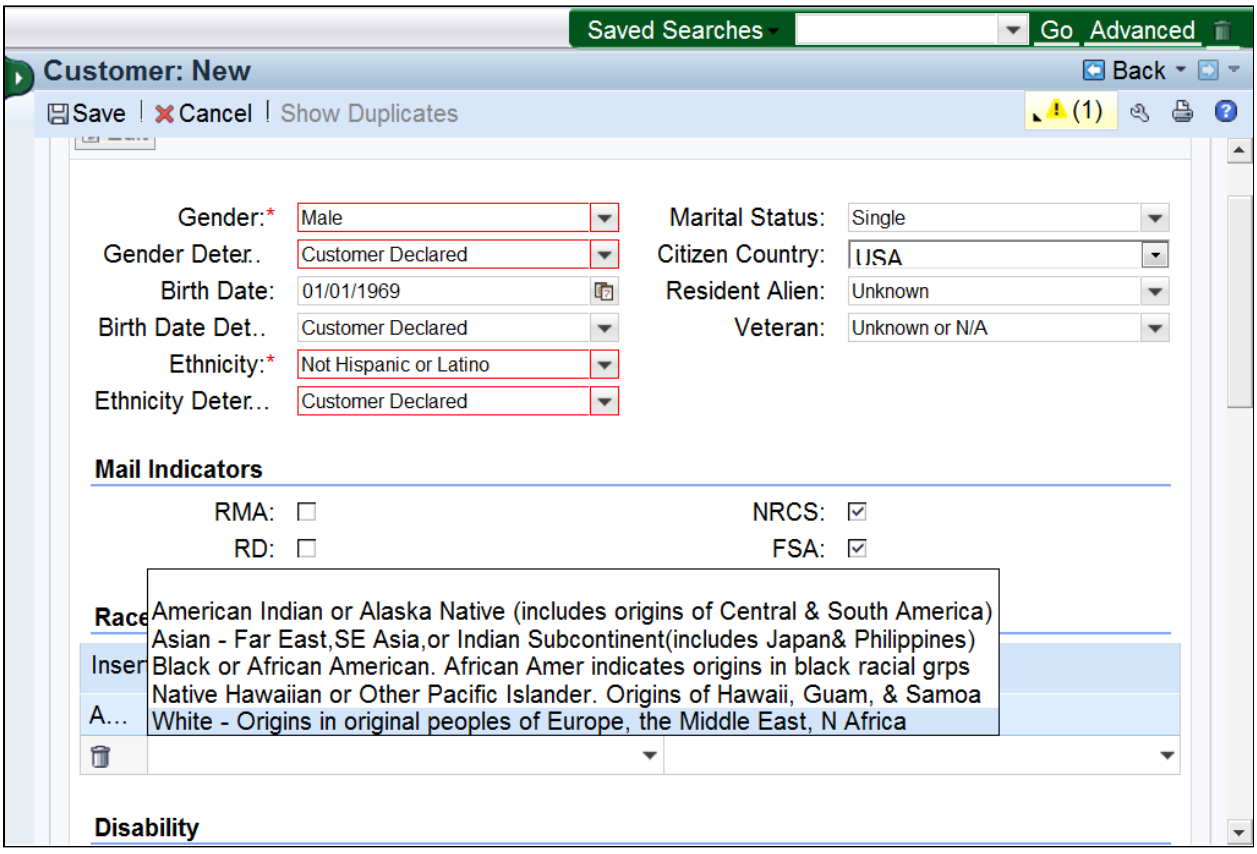
53. Select **Single** Single from the **Marital Status** list.

Customer: New



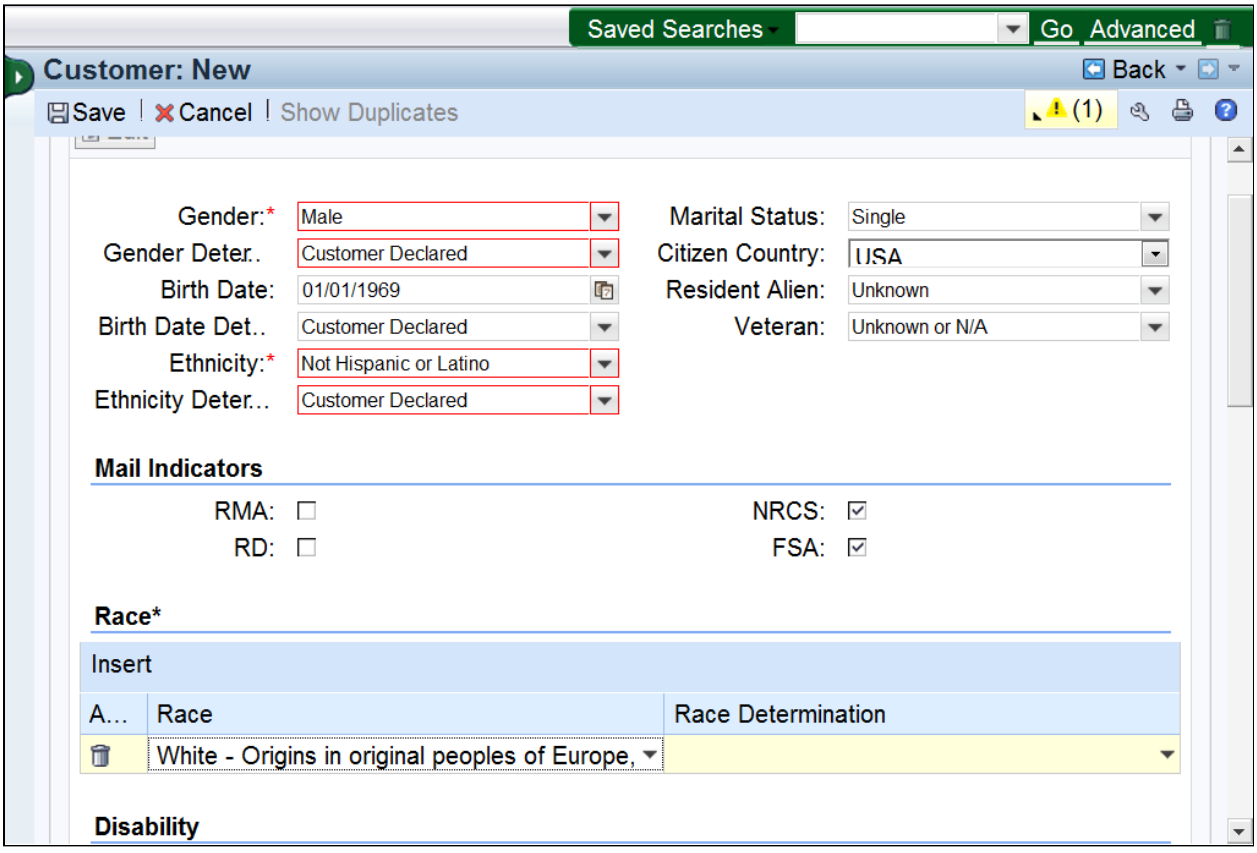
54. Click the **Race** dropdown list icon button.

Customer: New



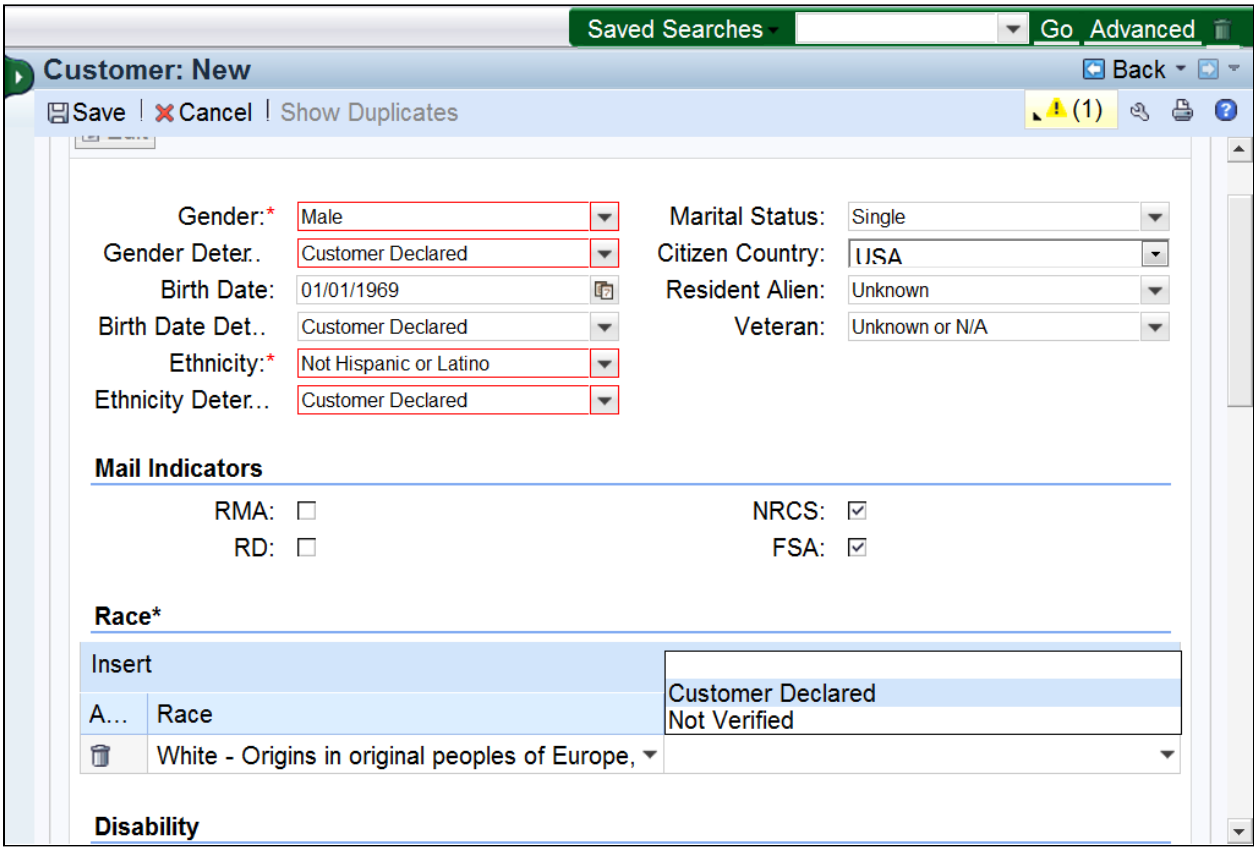
55. Select **White - Origins in original peoples of Europe, the Middle East, N Africa** from the **Race** list.

Customer: New



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

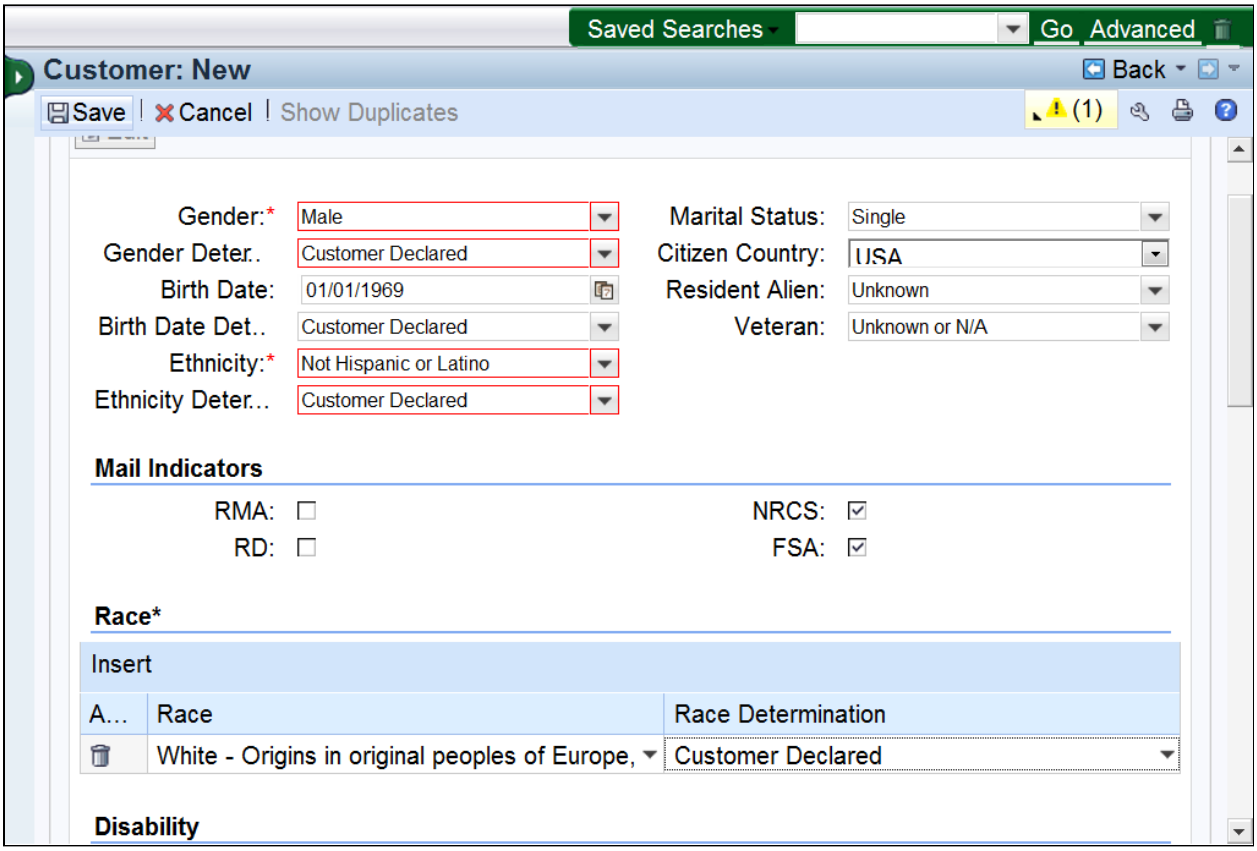
Customer: New



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



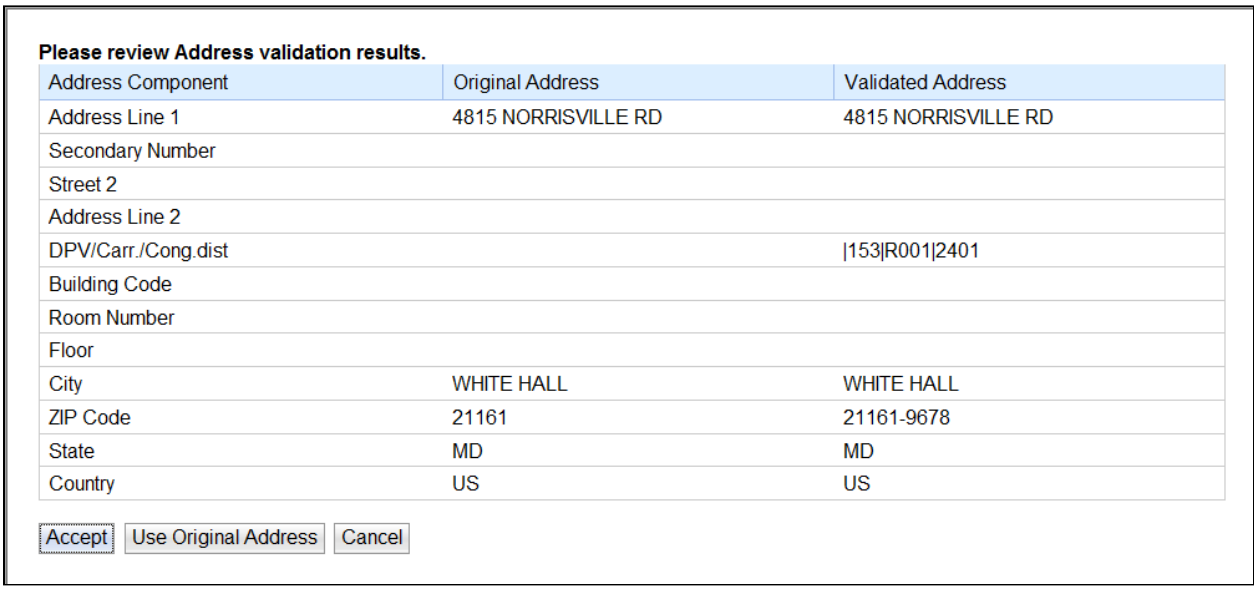
58. Click the **Save** Save button.

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

Accept | Use Original Address | Cancel

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

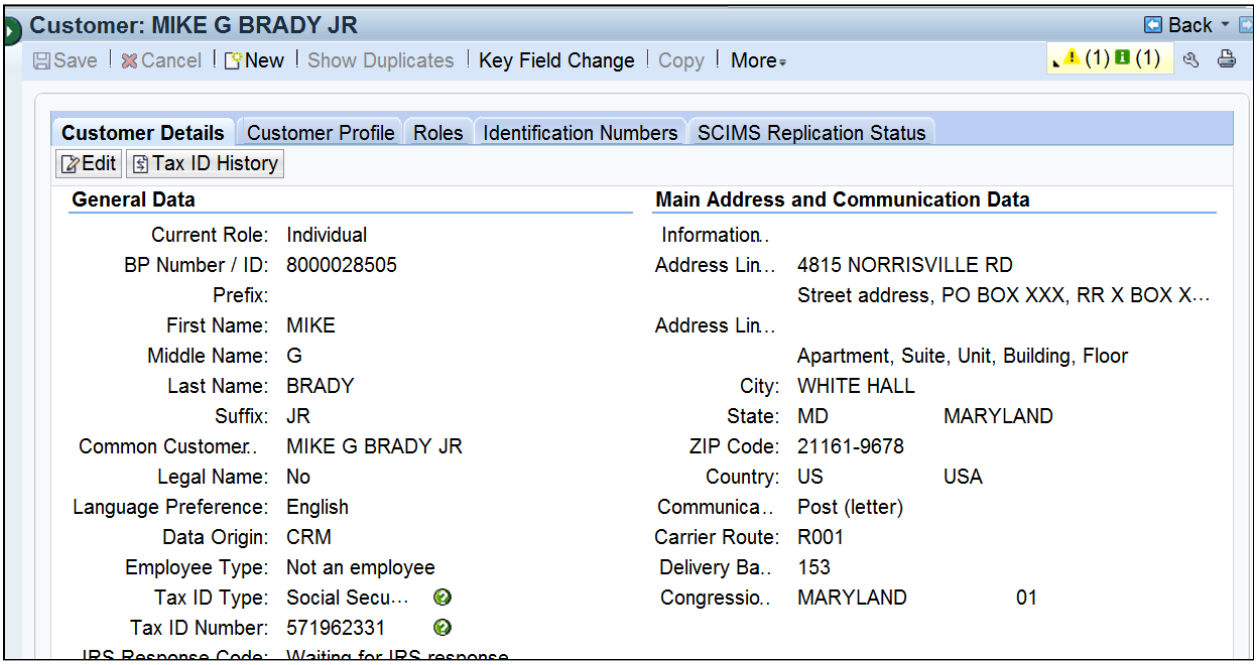
If the 4 digit postal code is unavailable, the Congressional Voting District must be entered manually.

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.

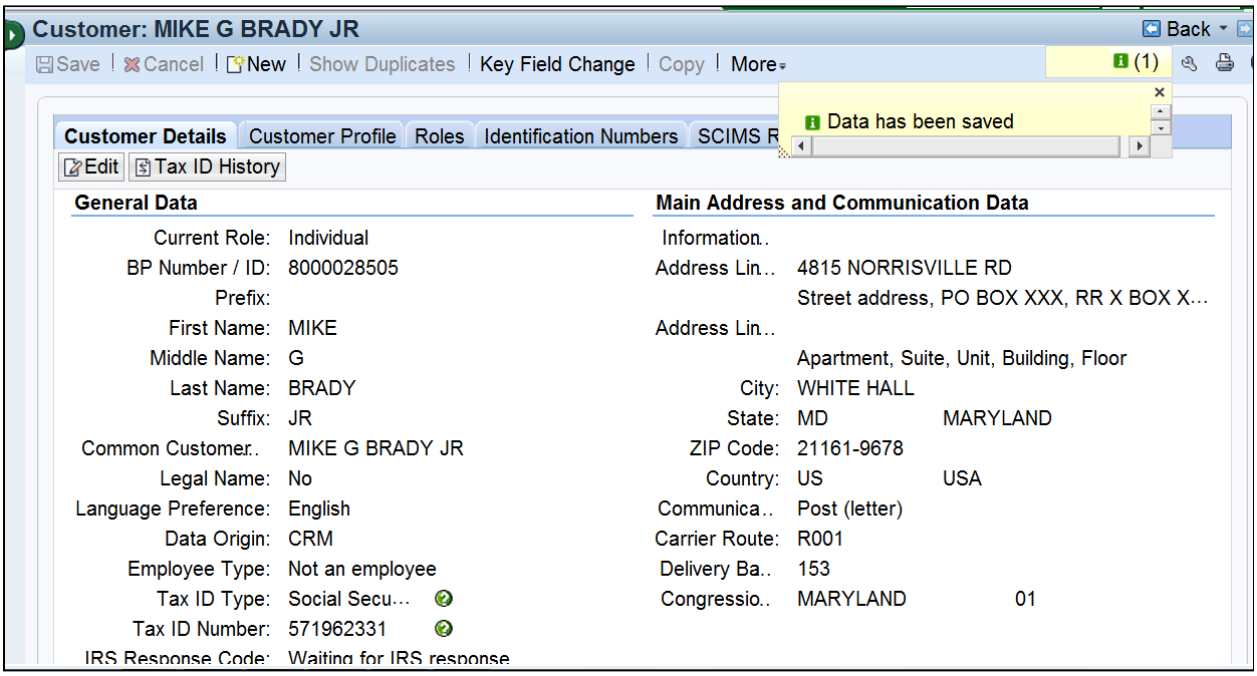
Customer: MIKE G BRADY JR



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

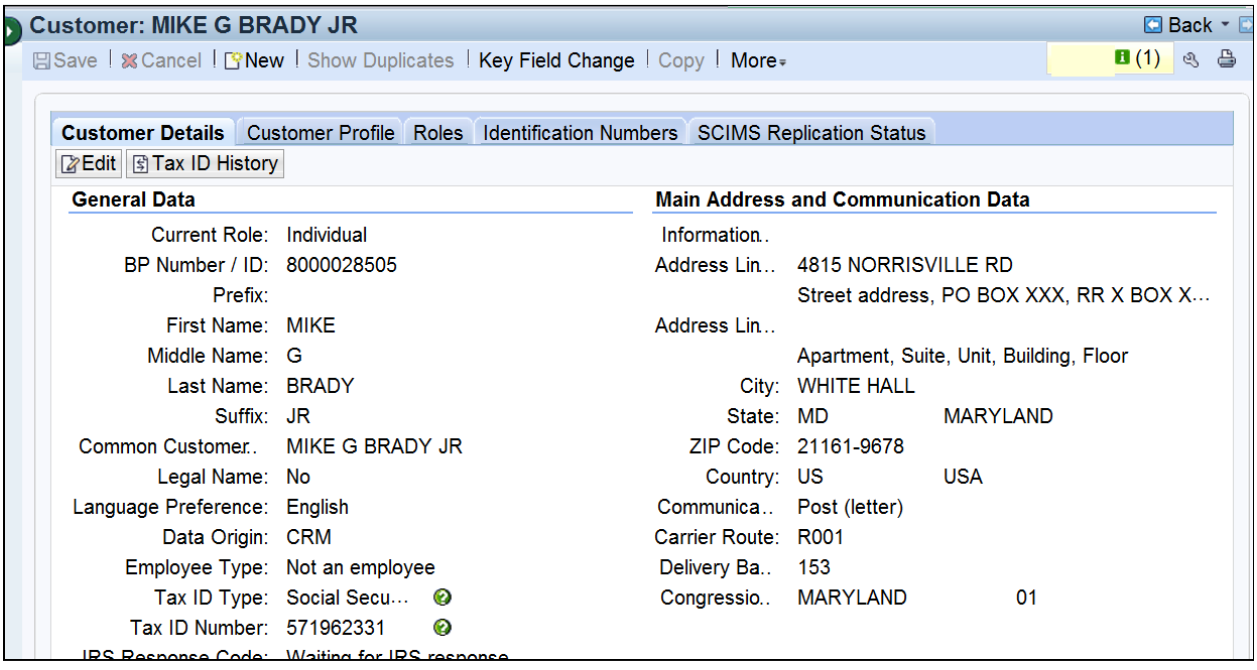
Error messages are displayed as an exclamation mark inside a red circle in the upper right corner and must be expanded to display their message. If CRM displays any error messages, then they must be solved before the save action can be completed. Yellow and Green messages are informational only.

Customer: MIKE G BRADY JR



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

Customer: MIKE G BRADY JR



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

completed the transaction.

Result

You have created a Business Partner customer record in CRM.