



Purpose

When a Business Partner record is created or being edited, two real-time system validations are performed: Address Validation and Business Partner Duplicate Check.

The goal of the Address Validation is to prevent invalid addresses from being entered into the CRM system.

The goal of the Business Partner Duplicate Check is to not have multiple entries based on TIN, Business Name, Individual's Name and Address, and Date of Birth.

Trigger

When entering or editing an address, the Address Validation is triggered when the user selects the Enter key or save button. The address that was entered is validated against the United States Post Service (USPS) data. The Business Partner Duplicate Check is triggered during creation or maintenance of a BP record based on the following fields:

- TIN Type and TIN
- Business Name
- First, Middle, Last Name and Suffix (Individual)
- Address: House Number, Street, City, State, and Zip Code
- Date of Birth (Individual)
- Business Role

Prerequisites

- None

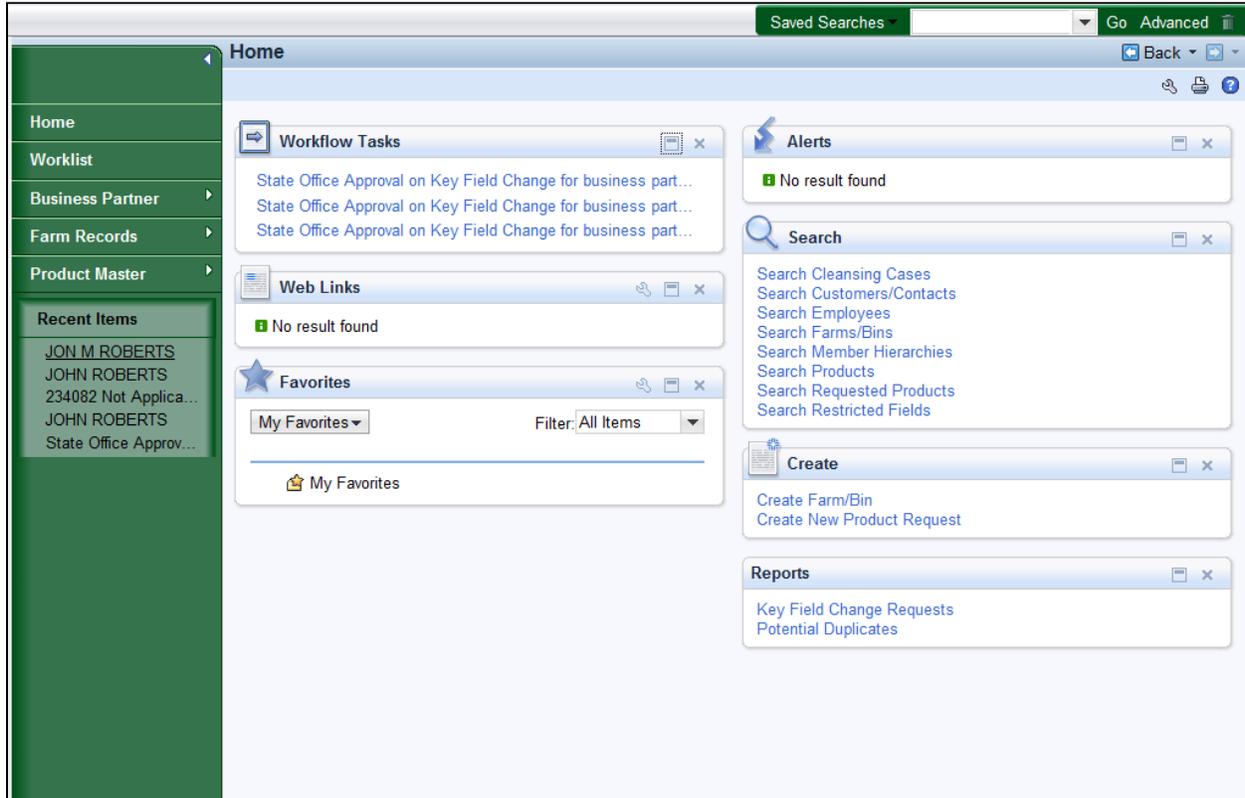
Helpful Hints

- "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

Home

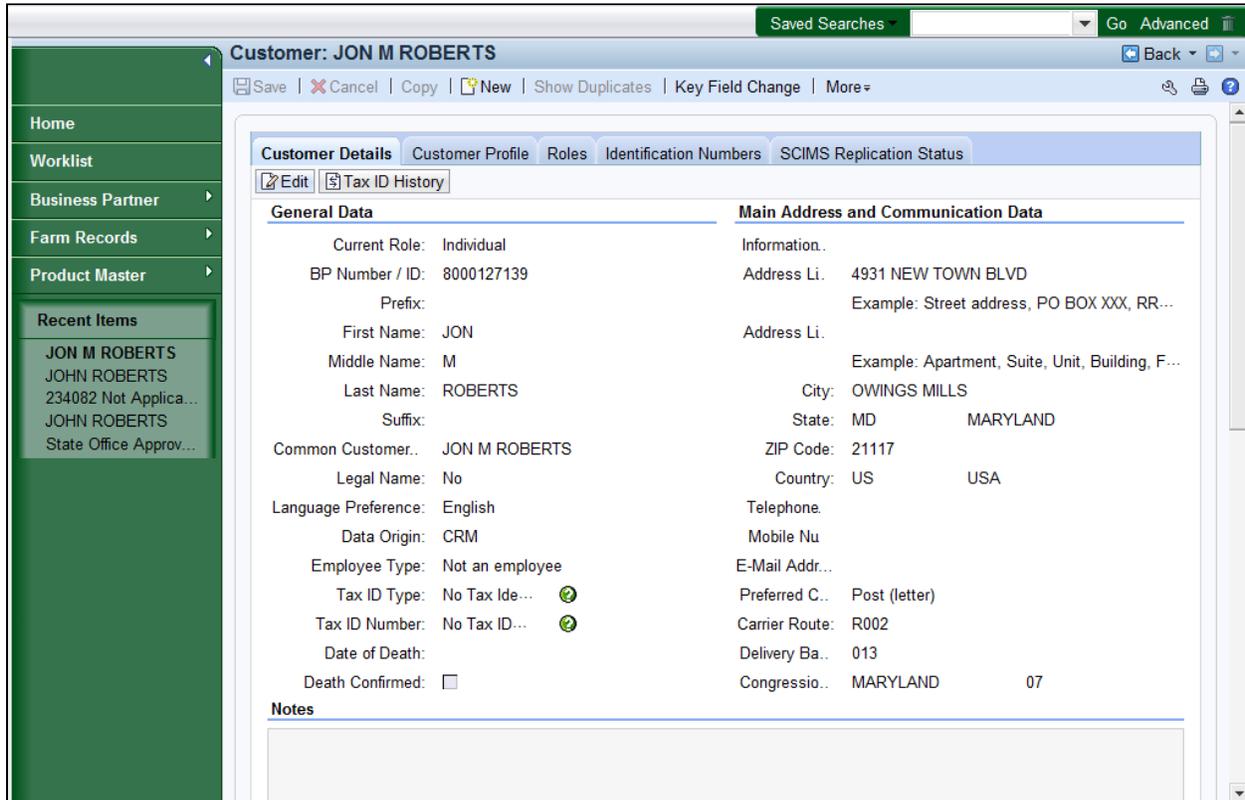


1. Click the **JON M ROBERTS** **JON M ROBERTS** link from the **Recent Items**.

 When a Business Partner record is created or edited, two real-time system validations are performed after the **Save** button is executed: Address Validation and Business Partner Duplicate Check.

Please refer to the *BP Search Customer Business Partner Record* work instruction.

Customer: JON M ROBERTS



Customer: JON M ROBERTS

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

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

Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number / ID: 8000127139	Address Li. 4931 NEW TOWN BLVD
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: JON	Address Li.
Middle Name: M	Example: Apartment, Suite, Unit, Building, F...
Last Name: ROBERTS	City: OWINGS MILLS
Suffix:	State: MD MARYLAND
Common Customer.. JON M ROBERTS	ZIP Code: 21117
Legal Name: No	Country: US USA
Language Preference: English	Telephone.
Data Origin: CRM	Mobile Nu
Employee Type: Not an employee	E-Mail Addr..
Tax ID Type: No Tax Ide... 	Preferred C.. Post (letter)
Tax ID Number: No Tax ID... 	Carrier Route: R002
Date of Death:	Delivery Ba.. 013
Death Confirmed: <input type="checkbox"/>	Congressio.. MARYLAND 07

Notes

- Click the **Edit**  button to open the fields that can be changed without a KFC form.

 In this example, user has received a customer request to update the address. At the conclusion of the address update the Address and Duplicate Check validation checks are triggered.



Customer: JON M ROBERTS

Customer: JON M ROBERTS

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

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

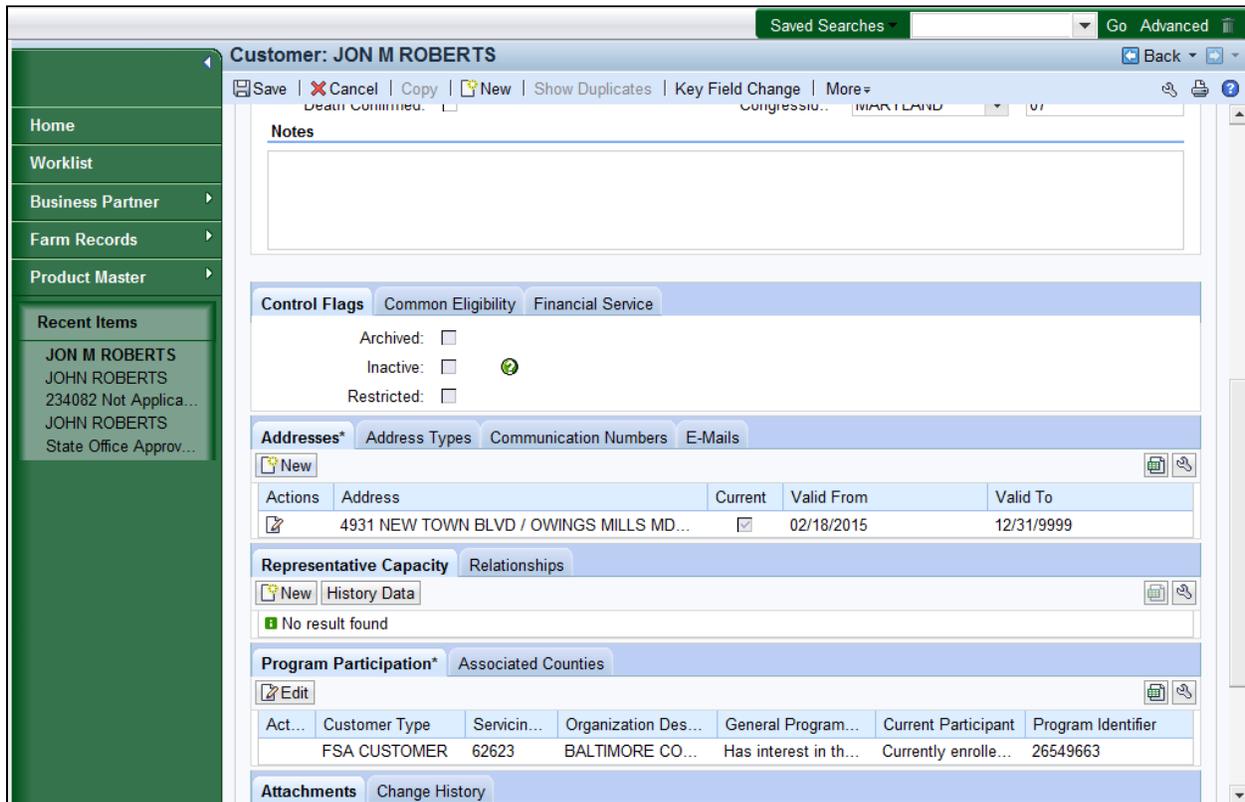
General Data | Main Address and Communication Data

Current Role:	Individual	Information:	
BP Number / ID:	8000127139	Address Li:	4931 NEW TOWN BLVD
Prefix:		Example:	Street address, PO BOX XXX, RR...
First Name:*	JON	Address Li:	
Middle Name:	M	Example:	Apartment, Suite, Unit, Building, F...
Last Name:*	ROBERTS	City:*	OWINGS MILLS
Suffix:		State:*	MD MARYLAND
Common Customer..	JON M ROBERTS	ZIP Code:*	21117
Legal Name:*	N	Country:*	US USA
Language Preference:	English	Telephone:	
Data Origin:	CRM	Mobile Nu	
Employee Type:	Not an employee	E-Mail Addr..	
Tax ID Type:*	No Tax Id	Preferred C..	Post (lette
Tax ID Number:	No Tax ID Nu	Carrier Route:	R002
Date of Death:		Delivery Ba..	013
Death Confirmed:	<input type="checkbox"/>	Congressio..	MARYLAND 07

Notes

3. Scroll down to the **Address** tab.

Customer: JON M ROBERTS



Customer: JON M ROBERTS

Notes

Control Flags Common Eligibility Financial Service

Archived:
 Inactive: 
 Restricted:

Addresses* Address Types Communication Numbers E-Mails

[New](#)

Actions	Address	Current	Valid From	Valid To
	4931 NEW TOWN BLVD / OWINGS MILLS MD...	<input checked="" type="checkbox"/>	02/18/2015	12/31/9999

Representative Capacity Relationships

[New](#) [History Data](#)

No result found

Program Participation* Associated Counties

[Edit](#)

Act...	Customer Type	Servic...	Organization Des...	General Program...	Current Participant	Program Identifier
	FSA CUSTOMER	62623	BALTIMORE CO...	Has interest in th...	Currently enrole...	26549663

Attachments Change History

4. Click the [New](#)  [New](#) button to update the current address.

 A Business Partner has basic information that may need to be regularly updated or modified, including name, address, phone number, email, and notes.

For further details on how to maintain the BP record, please refer to *BP Maintain Business Partner Customer Record* work instruction.



Customer: JON M ROBERTS

Customer: JON M ROBERTS

Back

Address

Information Line:

Address Line1:*

Example: Street address, PO BOX XXX, RR X BOX XXX, HC X B...

Address Line 2:

Example: Apartment, Suite, Unit, Building, Floor

City:*

State:*

ZIP Code:*

Country:* US USA

Carrier Route:

Delivery Bar Code:

Congressional Voting District:

Valid From: 02/18/2015 Valid To: 12/31/9999

Address Types

Insert

Address Type	Valid From	Valid To

5. 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: 1 Winning Drive
City:	R	Incorporated municipality, usually governed by a mayor and a board of alderman or councilman Example: Ownings Mills



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: 21117

Customer: JON M ROBERTS

Customer: JON M ROBERTS
Saved Searches
Go Advanced

Home
Worklist
Business Partner
Farm Records
Product Master

Address

Information Line:

Address Line1:*
Example: Street address, PO BOX XXX, RR X BOX XXX, HC X B...

Address Line 2:
Example: Apartment, Suite, Unit, Building, Floor

City:*

State:*

ZIP Code:*

Country:*

Carrier Route:

Delivery Bar Code:

Congressional Voting District:

Valid From: Valid To:

Address Types

Insert

Address Type	Valid From	Valid To
▼		

6. Click the **Address Type** drop-down icon to view the available options.



Customer: JON M ROBERTS

Customer: JON M ROBERTS

Home
Worklist
Business Partner
Farm Records
Product Master

Recent Items
JON M ROBERTS
JOHN ROBERTS
234082 Not Applica...
JOHN ROBERTS
State Office Approv...

Address

Information Line:

Address Line 1:*
Example: Street address, PO BOX XXX, RR X BOX XXX, HC X B...

Address Line 2:
Example: Apartment, Suite, Unit, Building, Floor

City:*

State:*

ZIP Code:*

Country:*

Carrier Route:

Delivery Bar Code:

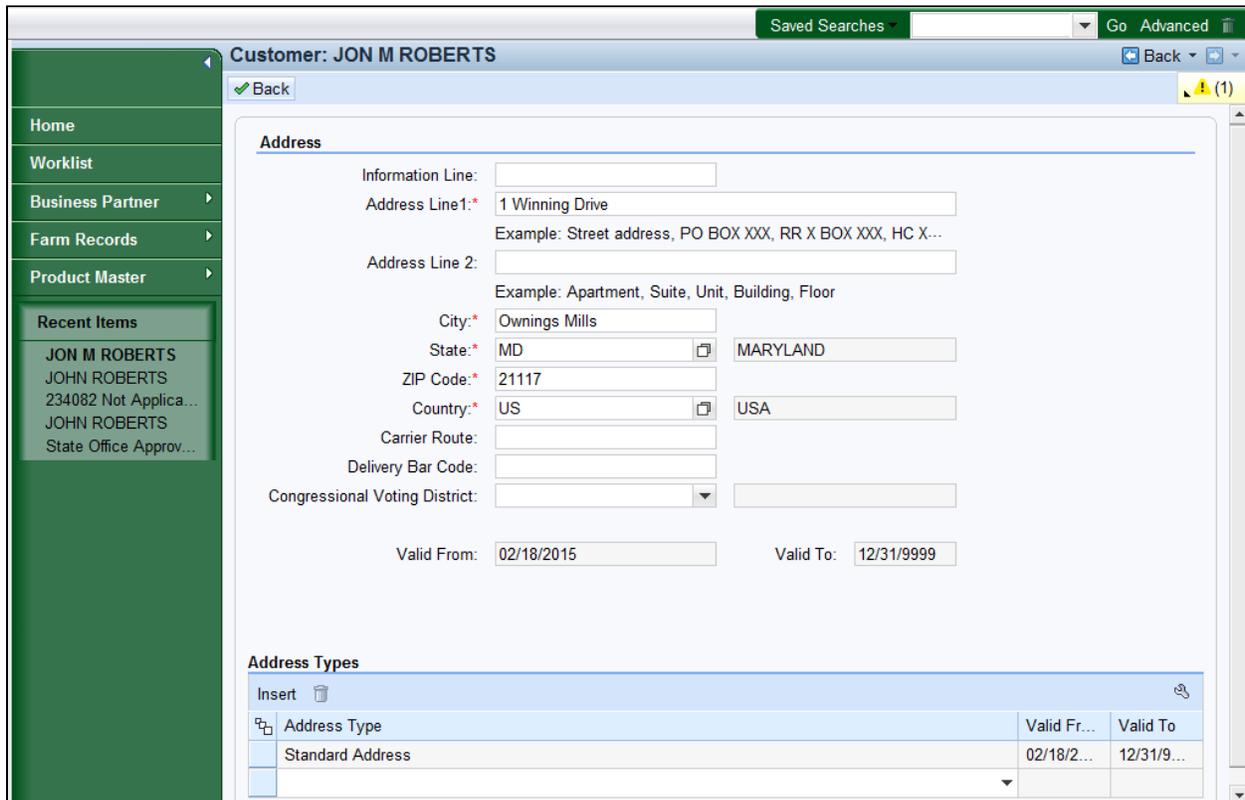
Congressional Voting District:

Valid From: Valid To:

Add	Ins		Valid From	Valid To
		BILL_TO Billing Address		
		SHIP_TO Shipping Address		
		XXDEFAULT Standard Address		
		ZMAIL_TO Mailing Address		
		ZPRIMARY Primary Address		
		ZSTREET Street Address		

- Select **Standard Address** list item **Standard Address** from the Address Type list.

Customer: JON M ROBERTS



Customer: JON M ROBERTS

Back

Address

Information Line:

Address Line1:*
Example: Street address, PO BOX XXX, RR X BOX XXX, HC X...

Address Line 2:
Example: Apartment, Suite, Unit, Building, Floor

City:*

State:*

ZIP Code:*

Country:*

Carrier Route:

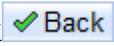
Delivery Bar Code:

Congressional Voting District:

Valid From: Valid To:

Address Types

Address Type	Valid Fr...	Valid To
Standard Address	02/18/2...	12/31/9...

8. Click the **Back**  button to return to the Customer: page.



After entering all required address data, the address will be validated. The validated Address will be automatically populated with the Zip+4, Congressional Voting District, Carrier Route and Barcode.

The purpose of the address validation is to prevent invalid or incomplete addresses from being saved in BP, resulting in returned mail and wasted postage. If the user chooses to **Use the Original Address** button, the Zip +4, Congressional Voting District, Carrier Route and Barcode will need to be manually entered into the customer record.

The Address Validation is only performed for one address at a time; when either a new address is being created, or an existing address is updated. The user will have the option to accept the recommended validated address, use the original address entered, or cancel to the update the record manually.

Error at address check

Please review Address validation results.

Address Component	Original Address	Validated Address
Address Line 1	1 WINNING DRIVE	1 WINNING DR
Secondary Number		
Street 2		
Address Line 2		
DPV/Carr./Cong.dist		013 R002 2407
Building Code		
Room Number		
Floor		
City	OWNINGS MILLS	OWINGS MILLS
ZIP Code	21117	21117-4776
State	MD	MD
Country	US	US

- Click the **Accept** button to accept the Validated Address change.
 -  If the user selects the **Accept** button, the Customer page returns with the validated address data populating the address fields in the **Mail and Communications Data** section on the **Customer Details** tab.
 -  If the user selects the **Use Original Address** button, the Customer page returns with the original (user entered) address and the Carrier Route, Bar Code and Congressional Voting District are not automatically updated. Those fields will require manual entry.
 -  If the user selects the **Cancel** button, the Customer page returns with the address validation cancelled. However, when the user selects the **Save** button again from the customer record, the address validation is performed again.



Customer: JON M ROBERTS

Customer: JON M ROBERTS

Notes

Control Flags Common Eligibility Financial Service

Archived: Inactive: Restricted:

Addresses* Address Types Communication Numbers E-Mails

New

Actions	Address	Current	Valid From	Valid To
	4931 NEW TOWN BLVD / OWINGS MILLS MD...	<input type="checkbox"/>	02/18/2015	12/31/9999
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	02/18/2015	12/31/9999

Representative Capacity Relationships

New History Data

No result found

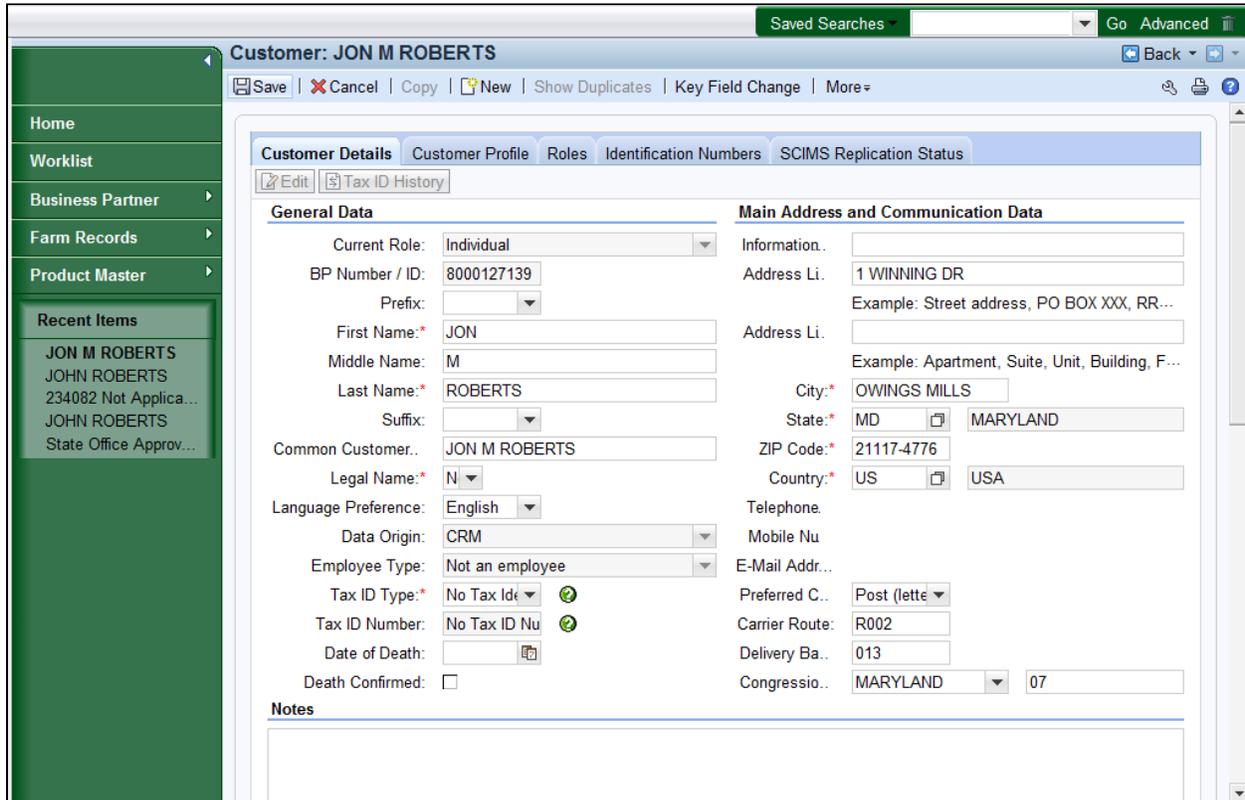
Program Participation* Associated Counties

Edit

Act...	Customer Type	Servicin...	Organization Des...	General Program...	Current Participant	Program Identifier
	FSA CUSTOMER	62623	BALTIMORE CO...	Has interest in th...	Currently enrole...	26549663

10. Scroll up to the **Customer Details** tab.

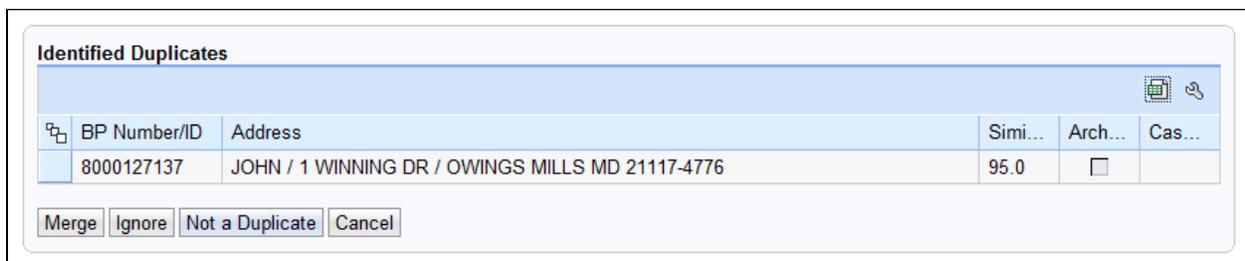
Customer: JON M ROBERTS



11. Click the **Save**  button to create your Business Partner record.

 The BP Duplicate Check Validation performs a system check for previously created BP records based on certain duplicate attributes and comparison rules. After performing the check, CRM displays a list of any potential matches, including the percentage to denote the likelihood of a valid match.

Duplicate Check



BP Number/ID	Address	Simi...	Arch...	Cas...
8000127137	JOHN / 1 WINNING DR / OWINGS MILLS MD 21117-4776	95.0	<input type="checkbox"/>	

Merge Ignore Not a Duplicate Cancel

12. Click the **Ignore**  button to bypass the duplicate decision.

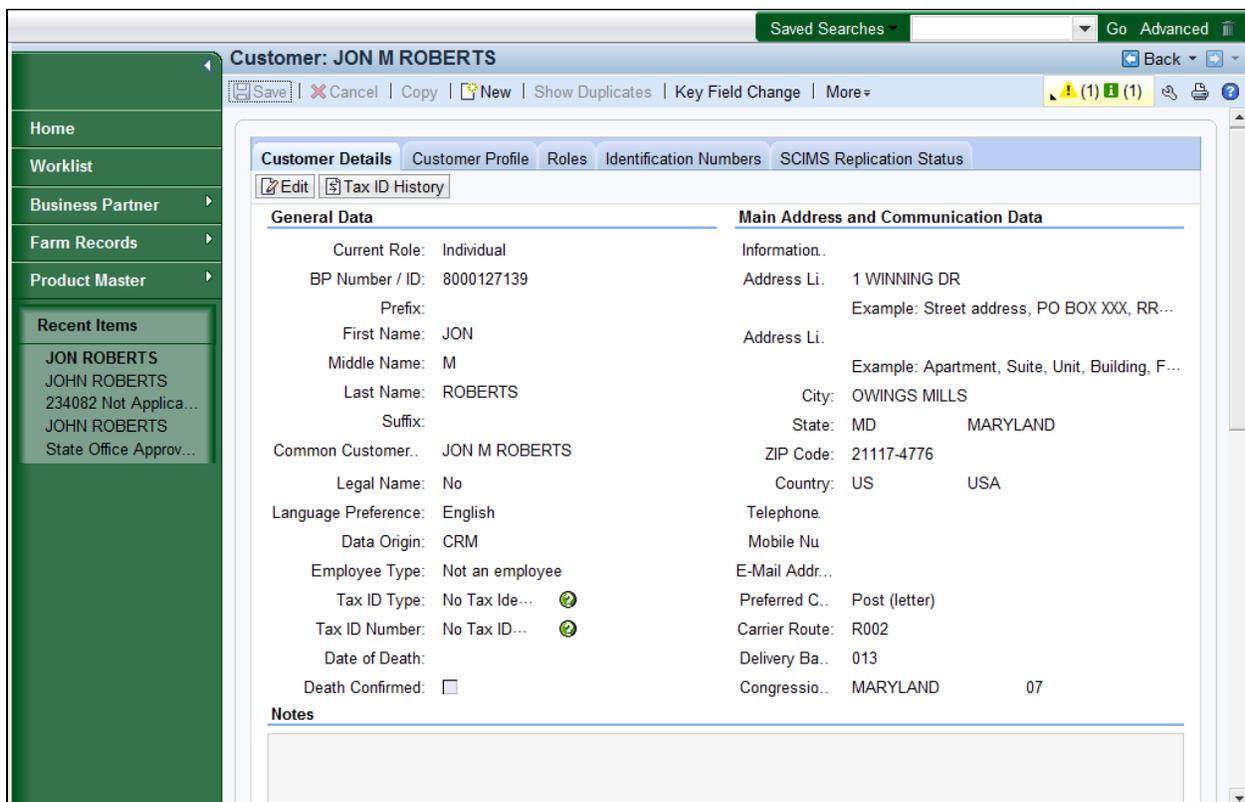
 The **Merge** record to open a new window and proceed with merging the newly created BP record with the existing matching BP record.

The **Ignore** button if they opt to temporarily bypass the decision and create the a new or modify the record. These potential matches will continue to appear on the Potential Duplicate Report until resolved.

The **Not a Duplicate** button to confirm that the newly created record is unique and not a duplicate of the identified potential matches.

The **Cancel** button to return to the previous screen without saving changes.

Customer: JON M ROBERTS



Customer: JON M ROBERTS

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

General Data | Main Address and Communication Data

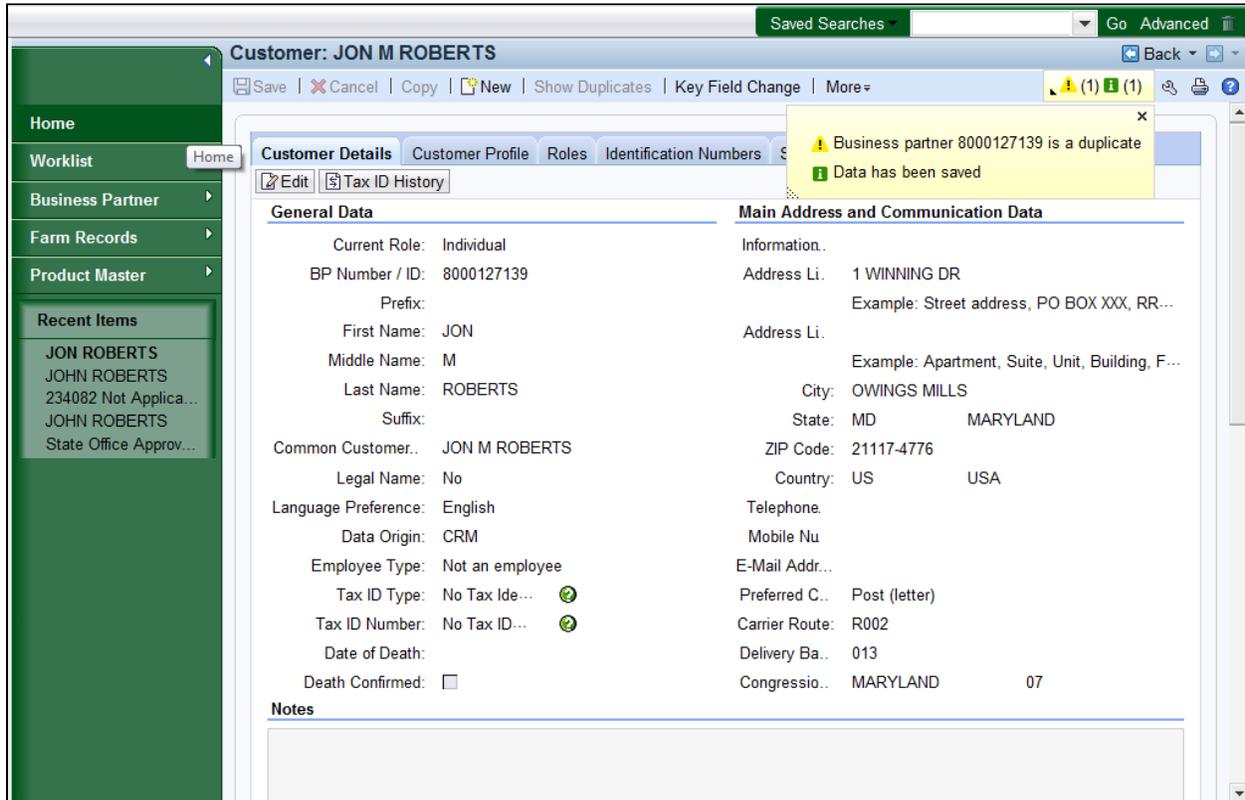
Current Role: Individual
 BP Number / ID: 8000127139
 Prefix:
 First Name: JON
 Middle Name: M
 Last Name: ROBERTS
 Suffix:
 Common Customer: JON M ROBERTS
 Legal Name: No
 Language Preference: English
 Data Origin: CRM
 Employee Type: Not an employee
 Tax ID Type: No Tax Ide...
 Tax ID Number: No Tax ID...
 Date of Death:
 Death Confirmed:

Information.
 Address Li. 1 WINNING DR
 Example: Street address, PO BOX XXX, RR...
 Address Li.
 Example: Apartment, Suite, Unit, Building, F...
 City: OWINGS MILLS
 State: MD MARYLAND
 ZIP Code: 21117-4776
 Country: US USA
 Telephone:
 Mobile Nu
 E-Mail Addr...
 Preferred C. Post (letter)
 Carrier Route: R002
 Delivery Ba. 013
 Congressio. MARYLAND 07

Notes

13. Click **Expand** message area  label to view the messages located in the upper right corner.

Customer: JON M ROBERTS



Customer: JON M ROBERTS

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

Business partner 8000127139 is a duplicate
Data has been saved

General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number / ID: 8000127139	Address Li. 1 WINNING DR
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: JON	Address Li.
Middle Name: M	Example: Apartment, Suite, Unit, Building, F...
Last Name: ROBERTS	City: OWINGS MILLS
Suffix:	State: MD MARYLAND
Common Customer.. JON M ROBERTS	ZIP Code: 21117-4776
Legal Name: No	Country: US USA
Language Preference: English	Telephone.
Data Origin: CRM	Mobile Nu
Employee Type: Not an employee	E-Mail Addr..
Tax ID Type: No Tax Ide... 	Preferred C.. Post (letter)
Tax ID Number: No Tax ID... 	Carrier Route: R002
Date of Death:	Delivery Ba.. 013
Death Confirmed: <input type="checkbox"/>	Congressio.. MARYLAND 07

Notes

14. Click the **Home**  button to return to the CRM page.

 The error message listed is just a warning that indicates a duplicate record has been found. Since the the Ignore button was selected it will continue to appear until the issue is resolved. The State Office Specialist will execute the Initiate Customer Merge from the Potential Duplicate report to merge the defined duplicate records.

 A existing Business Partner record was modified and the BP record passed the Address and Duplicate Validation checks.



Result

You have modified a BP record and completed the Address Validation and BP Duplicate Checks.