

Purpose

The State and National Office Specialists process the Cleansing Cases which are initiated by either the State or County Offices by identifying the duplicate entries from either the Master or Source records. The selected entries are used to create a Master record for the duplicate Customer records.

The State or National Office Specialist can merge two or more BP records at the same time with only one BP record declared the Master (winning) while all other BP records are considered the Source (losing) records.

Trigger

Perform this procedure when a Cleansing Case has been initiated. The user can select to merge records from either the Business Partner (BP) Customer Overview page or from the Potential Duplicate Report, and updates are interfaced back to SCIMS.

Prerequisites

- The following data fields should ALWAYS remain with the Master record. In other words, the State Office Specialist should verify that they are selected from the Master record and not from the Source:
 - Duplicate Customer Code
 - Data Origin
 - Tax ID Number
 - \circ IRS Response Code

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.
- Two or more records can be merged at the same time with only one being a Master record and all others considered Source records.
- All relevant BP fields, where differences exist, will be presented to the user in two sections of the Cleansing Case: General Data and Reference Data.
- During the BP Cleansing Case confirmation, all relevant BP rules will be



executed. If discrepancies are found, an error message will be presented to the user, and the user will have to select Cancel and re-execute the Cleansing Case without errors.

• When merging two or more customers, Source records will be archived, not deleted/removed. The will remain in the system as a reference point and users will be able to search and navigate to those BP records. Additionally, processed Cleansing Cases will remain in the system and serve as an audit trail to be able to see what field values were selected from each of the winning and losing BP records. The Master will maintain a Change History which will be updated once a merge is executed t oshow each updated field's historical value.

| Note type | Icon | Description |
|--------------------------------------|--------------|---|
| A general note of information | f | 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 | \bigotimes | Use this note to specify something that MUST NOT 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 reference is available | | Use this note to specify that more information is available in another |

• The following notes may be used throughout this work instruction:



| location. You may reference SOPs, |
|-----------------------------------|
| another system, or document. |



Procedure

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

Home

| | | Saved Searches | Go Advanced 🗑 |
|--|---|---|---------------|
| | Home | | 🖸 Back 👻 💟 👻 |
| | | | હ્ 🖨 📀 |
| Home | Workflow Tasks | | |
| Worklist | Sector Workflow Tasks | Alerts | ⊟ × |
| Business Partner | Please Review DOD for BP DON PEDRO State Office Approval on Key Field Change for business part | No result found | |
| Farm Records | EDI: Partner profile not available EDI: Partner profile not available | Q Search | □ × |
| Organizational Model Product Master | The IDoc interface is not complete for message type | Search Attachment Folder Search Cleansing Cases Search Customers/Contacts | |
| Recent Items | Web Links 🗠 🖻 🗙 | Search Employees Search Farms/Bins Search Member Hierarchies | |
| 1075 ERNESTO WILLIA ERNST WILLIAMS | No result found Favorites | Search Member Hierarchies Search Products Search Requested Products Search Restricted Fields | |
| 1074 ERNIE WILLIAMS | My Favorites Filter: All Items | Create | E × |
| | | Create Farm/Bin Create New Product Request | |
| | | Reports | ■ × |
| | | Key Field Change Requests Potential Duplicates | |
| | | | |
| | | | |
| | | | |
| | | | |

- 2. Click the Search Cleansing Cases Search Cleansing Cases link to go to the Search: Cleansing Cases page.
 - In this example, the County Office has initiated the Cleansing Case (Merge) record and a Workflow Task was sent to the assigned State Office Specialist to process the Cleansing Case. The State Specialist must perform a field-by-field value assignment to decide which values to keep when creating a Master BP record. The County Offices are not allowed to decide which values to keep to create the Master record. Two or more records can be merged at the same time with only one being defined as a Master BP record and all other records considered the Source BP record(s).

The Cleansing Case record will not automatically create the Master



record as the system can not determine which fields to keep, as this will be strictly the State Office Specialist determination.

Search: Cleansing Cases

| | | | | Saved Searche | s 👻 | 🔻 Go Advanced 湔 |
|----------------------------------|----------------------------|-------------------------------------|----------------|--------------------------|-----------|--------------------|
| | Search: Cleansing Cas | es | | | | 🖸 Back 👻 💟 👻 |
| | | | | | | |
| Home | Search Criteria | | | | | Hide Search Fields |
| Worklist | | | | | | |
| Business Partner | Case ID | ▼ is | - | | • | |
| | Processor (User) Status | ▼ is▼ is | • | | | |
| Famil Records | Account | v is | • | | | |
| Organizational Model 🕨 | / coount | | | | | |
| Product Master | | | Max | mum Number of Results: 1 | 00 | |
| Recent Items | Search Clear Reset | S | ave Search As: | | Save | |
| 1075 | Result List | | | | | |
| ERNESTO WILLIA ERNST WILLIAMS | | | | | | u 🗉 & |
| 1074 | | Account | Status | Priority | Processor | Created On |
| ERNIE WILLIAMS | Case ID | Account | Status | Priority | Processor | Created On |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

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

| Field | R/O/C | Description |
|---------|-------|---|
| Case ID | Ο | Identification code for Cleansing Case. |
| | | Example: 1075 |

In this example, the County Office has initiated the Cleansing Case (Merge) record, and a Workflow Task was sent to the assigned State Office Specialist to process the Cleansing Case. The State Office Specialist is searching for the Cleansing Case that was initiated by the County.



| | | | Saved Searche | s 👻 | ▼ Go Advanced 前 |
|------------------------|-----------------------------------|-----------------|-----------------------------|------------|--------------------|
| | Search: Cleansing Cases | | | | 🖸 Back 👻 💽 👻 |
| | | | | | |
| Home | Search Criteria | | | | Hide Search Fields |
| Worklist | | | | | |
| Business Partner | | is T | |) 0 | |
| Farm Records | | | | | |
| Organizational Model 🕨 | Account 🗸 | is | | | |
| Product Master | | M | aximum Number of Results: 1 | 100 | |
| Product Master | | | | | |
| Recent Items | Search Clear Reset | Save Search As: | | Save | |
| 1075 ERNESTO WILLIA | Result List: 0 Cleansing Cases Fo | und | | | |
| ERNST WILLIAMS | Ĵ | | | | u 🗉 a |
| 1074 ERNIE WILLIAMS | Case ID Accoun | t Status | Priority | Processor | Created On |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

4. Click the Status dropdown icon button to view available options.



| | | | | | | | Saved Searc | :hes - | | - 0 | 60 Advanced 🗎 |
|------------------------|-----------------------------|---------|--------|-----------|--------|------------------|-------------|--------|-----------|-------|-----------------|
| | Search: Cleansing Cas | ses | | | | | | | | | 🖸 Back 🝷 💽 👻 |
| | | | | | | | | | | | |
| Home | Search Criteria | | | | | | | | | Hid | e Search Fields |
| Worklist | | | | | _ | | | _ | | | |
| Business Partner | Case ID Processor (User) | • | | | ▼ ▼ | 1075 | - | 0 | | | |
| Farm Records | Status | • • | | | | New | <u> </u> | | | | |
| | Account | • | | | • | | | ŏ | | | |
| Organizational Model 🕨 | | | | | | Complete | ed | | | | |
| Product Master | | | | N | /Ja> | In Proces New | 55 | 100 | | | |
| Recent Items | Search Clear Reset | | Save S | earch As: | | Rejected | | Sa | ve | | |
| 1075 | B 644 | | | | | | | | | | |
| ERNESTO WILLIA | Result List: | | | | | | | | | | u 🗉 a |
| ERNST WILLIAMS 1074 | | | | 0 | | | D: 1 | | | | |
| ERNIE WILLIAMS | Case ID | Account | t | Status | | | Priority | | Processor | Creat | ed On |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

5. Select the blank option from the dropdown list to search all Cleansing Case statuses.



In this example, the search was not filter by any Status field values. The **Status** field has different statuses to search by:

Completed - The Cleansing Case record has been processed and the Master record was created.

In Process - The Cleansing Case record has not been processed and the Master record has not been created yet.

New - The County Office has submitted a new Cleansing Case record and the State Office Specialist has been notified.

Rejected - The State Office Specialist has rejected the Cleansing Case record.



| | | | Saved Searches - | Go Advanced | Î |
|------------------------|-----------------------------|-----------------|------------------------------|----------------------|---|
| | Search: Cleansing Cases | | | 🖸 Back 🔻 🖸 | - |
| | | | | | |
| Home | Search Criteria | | | Hide Search Fields | |
| Worklist | | | | | 1 |
| Business Partner | Case ID Processor (User) | | 1075 0 | | |
| Farm Records | Status V | | | | |
| Organizational Model | Account | is 💌 | 0 0 | | |
| Product Master | | Ma | ximum Number of Results: 100 | | |
| | Search Clear Reset | | | | |
| Recent Items | Search Clear Reset | Save Search As: | Sa | ve | |
| 1075 ERNESTO WILLIA | Result List | | | | |
| ERNST WILLIAMS | Û | | | II 🗐 🍕 | |
| 1074 ERNIE WILLIAMS | Case ID Account | t Status | Priority | Processor Created On | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

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



| | | | | Saved Searche | 5 🔻 | 🔻 Go Advanced 🗑 |
|--|----------------------|-------------------------------------|--------------------------|----------------------|-----------|--------------------|
| 1 | Search: Cleansing Ca | ises | | | | 🕒 Back 👻 💟 👻 |
| | | | | | | |
| Home | Search Criteria | | | | | Hide Search Fields |
| Worklist | Case ID | | 4075 | | | |
| Business Partner | Processor (User) | ▼ is▼ is | ▼ 1075 | | | |
| Farm Records | Status | ▼ is | ▼ | | | |
| Organizational Model > | Account | ▼ is | • | 0 0 | | |
| Product Master | | | Maximun | Number of Results: 1 | 00 | |
| Product Master | | | | | | |
| Recent Items | Search Clear Reset | Save | e Search As: | | Save | |
| 1075 ERNESTO WILLIA ERNST WILLIAMS | Result List: | | | | | LI 画 & |
| 1074 | Case ID | Account | Status | Priority | Processor | Created On |
| ERNIE WILLIAMS | 1075 | ERNST WILLIAMS | | | | 01/08/2015 |
| | 1075 | | | | | |

7. Click the Case ID 1075 1075 link to go to the Cleansing Case (Merge) record.



| | | | | | | | S | aved Se | arches | | Go Advance |
|------|----------------------|------------|---------|--------------------|--------|-----------|------------|--------------------------|-----------------|------------------|--------------------------------|
| lear | nsing Case: | 1075 | | | | | | | | | 🖸 Back |
|]Sav | ve 🗙 Cancel | Reject | | | | | | | | | |
| CI | leansing Case | Details | | | | | | | | | |
| | | Case ID: | 1075 | | | | | Status: | In Proce | ISS | |
| | | Source: | UIU | | | | Crea | ted On: | 01/08/20 |)15 | |
| | Proc | cessor ID: | MIPA | TTERSONS | đ | | Crea | ted By: | Steven F | Patterson | |
| | Process | sor Name: | Steve | n Patterson | | | Des | cription: | Merge F | Records | |
| | | | | | | | | | | | |
| Acc | counts | | | | | | | | | | 画 3 |
| ጜ | BP Number | Common | Custor | ner Name | Status | | Created | l On | | Created By | Archived |
| | 8000126938 | ERNST W | VILLIAN | IS | | | 01/07/2015 | | | Steven Patterson | |
| | 8000126939 | ERNIE W | ILLIAM | S | Source | • | 01/07/2 | 01/07/2015 Steve | | Steven Patterson | |
| | 8000126940 | ERNEST | | IAMS | Source | • | 01/07/2 | 07/2015 Steven Patterson | | Steven Patterson | |
| _ | | | | | | | | | | | |
| Co | ompare Accou | | | | | | | | | | |
| | Master | Account: | 8000 | 126938 | | Source Ac | count: | 8000120 | 5939 🔻 | | |
| | Confirm Your C | hanges: | Confirm | | | | | | | | |
| | | langee. | ooniin | · | | | | | | | |
| _ | | | | | | | | | | | |
| | neral Data ata | | Sel | Master | | | | Sel | Source | | |
| | ata ternal number | | Sei | Master 11660424 | | | | Sel | Source 11660425 | | |
| | st Name | | | ERNST | | | | | ERNIE | | |
| | mmon Custome | r Name | | ERNST WILLIAMS | | | | | ERNIE W | ILLIAMS | |
| | ferenced Data | | - | | | | | - | | | |
| | ata Entity | | Sel | Master | | | | Sel | Source | | |

8. Scroll to the **Reference Data** assignment block.

The Cleansing Case provides a side-by-side comparison of the Potential Duplicate BP records and allows the State Office Specialist to select which field values should be retained to create the BP Master record. Any data field that is listed and is different between the Master and Source is displayed to allow the State Office Specialist the ability to choose which values need to be kept on the Master record. During this process, the State Office Specialist must comply with all the same rules that are applied during the BP record creation. For example, the user cannot create a BP record with Race and Ethnicity Determinations that do not match.

In this example, the State Specialist will remove the duplicate Program Participation, Associated Counties and verify the Race entry to form a Master BP record from a total of three BP records.



| eansing Case: 1075 | | | | | Saved Se | arches | | - | Go Advan |
|--|--------------|--|-------------------------------------|--------|----------|-------------------------------------|--|----------------|----------|
| | | | | | | | | | 🖸 Back |
| | | | | | | | | | |
| 8000126939 ERNIE WI | ILLIAM | S So | urce 🔻 | 01/07 | 7/2015 | | Steven Patterson | | |
| 8000126940 ERNESTO |) WILL | IAMS So | urce 🔻 | 01/07 | 7/2015 | | Steven Patterson | | |
| Compare Accounts | | | | | | | | | |
| Master Account: | 8000 | 126938 | Source Acc | count: | 800012 | 6939 🔻 | | | |
| Confirm Your Changes: | Confirm | | | | | | | | |
| | Sel | Master | | | Sel | Source | | | |
| External number | \checkmark | 11660424 | | | | 11660425 | | | |
| First Name | ~ | ERNST | | | | ERNIE | | | |
| Common Customer Name | ~ | ERNST WILLIAMS | | | | ERNIE WI | LLIAMS | | |
| | | | | | | | | | |
| Referenced Data | | | | | | | | | |
| | Sel | Master | | | Sel | Source | | | |
| | Sel | Master 11660424,SCIMS Core Customer | r ID | | Sel | | SCIMS Core Cust | tomer ID |) |
| Data Entity \$ | | | · ID | | | 11660425, | SCIMS Core Cust No Tax Identificati | |) |
| Data Entity S ID Numbers | \checkmark | 11660424,SCIMS Core Customer | | | | 11660425, NOTAXID | | on | |
| Data Entity \$ ID Numbers Tax Numbers | | 11660424, SCIMS Core Customer NOTAXID No Tax Identification | S MD 21117-4776 | ICE | | 11660425, NOTAXID I 1 WINNING | No Tax Identificati | on 6 MILL N | ID 21117 |
| Data Entity S ID Numbers Tax Numbers Main Address | N N N | 11660424,SCIMS Core Customer NOTAXID No Tax Identification 1 WINNING DR / OWINGS MILLS | S MD 21117-4776 COUNTY FARM SERV | ICE | | 11660425, NOTAXID I 1 WINNING | No Tax Identificati G DR / OWNINGS | on 6 MILL N | ID 21117 |

9. Click AG NRCS CUSTOMER | ALLEGANY COUNTY NRCS Service Agency | Y I AG NRCS CUSTOMER | ALLEGANY COUNTY... check box to remove from the master record.

The State Office Specialist recognizes a Program Participation (AG NRCS Customer - Allegany County) entry listed on the Source doesn't need to be assigned to the Master record. By unchecking the box, the entry from the Source record will be removed from the Cleansing Case. If a Program Participation is selected, then the corresponding Associated County needs to be removed from the same record (Master or Source). Failure to do this will yield an error when the "Confirm" button is selected and the State Office Specialist must exit and return to the Cleansing Case to reprocess.

In this example, however, there was not an assigned Associated County, so no action is required to remove it.



| | | | - s | Saved Se | arches | | Go Advanc |
|--------------------------|--------------|--|---------|----------|-----------|-----------------------|-------------------------------|
| leansing Case: 1075 | | | | | | | 🖸 Back 🕚 |
| Save 🗙 Cancel Reject | | | | | | | |
| 8000126939 ERNIE | WILLIAM | IS Source | 01/07/2 | 2015 | | Steven Patterson | |
| 8000126940 ERNES | TO WILL | IAMS Source - | 01/07/2 | 2015 | | Steven Patterson | |
| Compare Accounts | | | | | | | |
| Master Account | 8000 | 126938 Source Acc | ount: | 800012 | 5939 🔻 | | |
| Master Account | | | ount. | 000012 | | | |
| Confirm Your Changes: | Confirm | 1 | | | | | |
| g | | · | | | | | |
| | | | | | | | |
| General Data | | | | | | | |
| Data | Sel | Master | | Sel | Source | | |
| External number | \checkmark | 11660424 | | | 11660425 | 5 | |
| First Name | \checkmark | ERNST | | | ERNIE | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | ERNIE W | /ILLIAMS | |
| Referenced Data | | | | | | | |
| Data Entity | Sel | Master | | Sel | Source | | |
| ID Numbers | \checkmark | 11660424, SCIMS Core Customer ID | | ~ | 11660425 | SCIMS Core Custom | ner ID |
| Tax Numbers | ~ | NOTAXID No Tax Identification | | | NOTAXID | No Tax Identification | |
| Main Address | ~ | 1 WINNING DR / OWINGS MILLS MD 21117-4776 | | | 1 WINNIN | IG DR / OWNINGS M | ILL MD 21117 |
| Program Participation | ~ | FSA CUSTOMER BALTIMORE COUNTY FARM SERVI | CE | | AG NRCS | S CUSTOMER ALLE | GANY COUNTY |
| Associated County | ~ | 1 WINNING DR MARYLAND BALTIMORE | | | | | |
| Race | | Native Hawaiian Customer Declared | | | Asian C | ustomer Declared | |
| | | | | | | | |
| Application Log File | | | | | | | |
| | | | | | | | u 🗉 🍕 |
| Me Lev Messag | je Text | | | | | Time Starr | р |
| No result found | | | | | | | |

10. Click Asian | Customer

Declared → Asian | Customer Declared checkbox to remove the entry from the Master record.

Ethnicity and Race Determinations must match. If the Ethnicity Determination and Race Determination are mismatched, then an error will occur when the "Confirm" button is selected. The State Office Specialist must exit and return to the Cleansing Case to reprocess.

If multiple BP records involved in the Cleansing Case share the same Race Determination, then the State Specialist must only select one as the Master BP cannot have duplicate races selected. Failure to do this will yield an error when the "Confirm" button is selected. The State Specialist must exit and return to the Cleansing Case to reprocess.



| eansing Case: 1075 | | | | | Saved Se | earches | | | Go Advan |
|---|---------------------|---|--|--------|----------|---|---|---------------------|----------|
| | | | | | | | | | 🖸 Back |
| Save 🗙 Cancel Reject | | | | | | | | | |
| 8000126939 ERNIE V | WILLIAM | S | Source 💌 | 01/07/ | /2015 | | Steven Patte | rson | |
| 8000126940 ERNEST | TO WILL | IAMS | Source 🔻 | 01/07/ | /2015 | | Steven Patte | rson | |
| Compare Accounts | | | | | | | | | |
| Master Account: | 8000 | 126938 | Source Acc | count: | 800012 | 6939 💌 | | | |
| Confirm Your Changes: | Confirm | | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | | |
| | | | | | | 44000405 | | | |
| External number | ~ | 11660424 | | | | 11660425 | | | |
| External number First Name | | 11660424 ERNST | | | | 11660425 ERNIE | | | |
| First Name | | | | | | | | | |
| | | ERNST | | | | ERNIE | | | |
| First Name Common Customer Name Referenced Data | | ERNST | | | | ERNIE | | | |
| First Name Common Customer Name | | ERNST ERNST WILLIAMS | ner ID | | | ERNIE ERNIE W | | Customer II | D |
| First Name Common Customer Name Referenced Data Data Entity | Sel | ERNST ERNST WILLIAMS Master | | | Sel | ERNIE ERNIE W Source 11660425 | ILLIAMS | | D |
| First Name Common Customer Name Referenced Data Data Entity ID Numbers | ✓ Sel | ERNST ERNST WILLIAMS Master 11660424,SCIMS Core Custor | | | Sel | ERNIE ERNIE W Source 11660425 NOTAXID | ILLIAMS | ication | |
| First Name Common Customer Name Referenced Data Data Entity ID Numbers Tax Numbers | Sel | ERNST ERNST WILLIAMS Master 11660424, SCIMS Core Custor NOTAXID No Tax Identification | LLS MD 21117-4776 | 1CE | Sel | ERNIE ERNIE W Source 11660425 NOTAXID 1 WINNIN | ILLIAMS SCIMS Core No Tax Identif | ication NGS MILL | MD 21117 |
| First Name Common Customer Name Referenced Data Data Entity ID Numbers Tax Numbers Main Address | Sel | ERNST ERNST WILLIAMS Master 11660424, SCIMS Core Custor NOTAXID No Tax Identification 1 WINNING DR / OWINGS MI | LLS MD 21117-4776 RE COUNTY FARM SERV | 1CE | Sel | ERNIE ERNIE W Source 11660425 NOTAXID 1 WINNIN | ILLIAMS SCIMS Core, No Tax Identif G DR / OWNI | ication NGS MILL | MD 21117 |

- **11.** Click the **Confirm** Confirm button to confirm your entries for the Cleansing Case.
 - The State Office Specialist can verify that the selections have been confirmed in CRM by checking the status update just under the **Confirm** button. If the changes have been successfully confirmed in CRM, The State Office Specialist should see a defined status of "(Confirmed)" listed.



| | | | | | Saved S | earches 🗸 | | - Go Advanc |
|---------------------------------------|---------------------|------------------------------|---------------------|--------|--------------|-----------|-----------------------|---------------|
| eansing Case: 1075 | | | | | | | | 🖸 Back 🤊 |
| art 🗙 Cancel Reject | | | | | | | | |
| 8000126939 ERNIE | WILLIAN | IS | Source 🔻 | 01/07 | /2015 | | Steven Patterson | |
| 8000126940 ERNES | TO WILL | IAMS | Source 💌 | 01/07 | /2015 | | Steven Patterson | |
| | | | | | | | | |
| Compare Accounts | | | | | | | | |
| Master Account | 8000 | 126938 | Source Ace | count: | 800012 | 6939 🔻 | | |
| Confirm Your Changes: General Data | Confirm (Confirm | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | |
| External number | \checkmark | 11660424 | | | | 11660425 | 5 | |
| First Name | \checkmark | ERNST | | | | ERNIE | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNIE W | /ILLIAMS | |
| Referenced Data | | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | |
| ID Numbers | \checkmark | 11660424, SCIMS Core Custo | mer ID | | \checkmark | 11660425 | 5,SCIMS Core Custon | ner ID |
| ID Numbers | \checkmark | 8000126939,Losing Business | Partner ID | | \checkmark | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identificatio | n | | | NOTAXID | No Tax Identification | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS M | ILLS MD 21117-4776 | | | 1 WINNIN | NG DR / OWNINGS N | IILL MD 21117 |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMO | RE COUNTY FARM SERV | ICE | | AG NRCS | S CUSTOMER ALLE | GANY COUNTY |
| Associated County | \checkmark | 1 WINNING DR MARYLANE | BALTIMORE | | | | | |
| Race | \checkmark | Native Hawaiian Customer D | eclared | | | Asian C | ustomer Declared | |
| | | | | | | | | |
| Application Log File | | | | | | | | M # & |
| Me Lev Messag | e Text | | | | | | Time Stan | |
| No result found | | | | | | | nino Otan | ·F |

12. Click the Start Start button to complete the Cleansing Case.

CRM has "(Confirmed)" the changes, the Cleansing Case is ready to be executed. After the **Start** button is clicked, CRM will update the Master (Winning) record based on the values selected from each Source record.



| | | | | | Saved S | earches | | Go Advance | ed |
|--------------------------|---------------------|--------------------------------|------------------|-------|--------------|-----------|-----------------------|--------------|-----|
| leansing Case: 1075 | | | | | | | | 🖸 Back 🤊 | - (|
| tart 🛛 🗙 Cancel 🛛 Reject | | | | | | | | 9 (1) | A |
| 8000126939 ERNIE | WILLIAN | IS S | ource 🔻 | 01/0 | 7/2015 | | Steven Patterson | | |
| 8000126940 ERNES | TO WILL | IAMS S | ource 🔻 | 01/0 | 7/2015 | | Steven Patterson | | |
| | | | | | | | | | |
| Compare Accounts | | | | | | | | | |
| Master Account | : 8000 | 126938 | Source Acc | count | 800012 | 6939 💌 | | | |
| Confirm Your Changes: | Confirm (Confirm | | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | | 1 |
| External number | \checkmark | 11660424 | | | | 11660425 | 5 | | |
| First Name | \checkmark | ERNST | | | | ERNIE | | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNIE W | /ILLIAMS | | |
| Referenced Data | | | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | | |
| ID Numbers | \checkmark | 11660424,SCIMS Core Custom | er ID | | \checkmark | 11660425 | 5,SCIMS Core Customer | ID | |
| ID Numbers | \checkmark | 8000126939,Losing Business P | artner ID | | \checkmark | | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID | No Tax Identification | | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILL | S MD 21117-4776 | | | 1 WINNIN | IG DR / OWNINGS MILL | MD 21117 | |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE | COUNTY FARM SERV | ICE | | AG NRCS | S CUSTOMER ALLEGA | ANY COUNTY | |
| Associated County | \checkmark | 1 WINNING DR MARYLAND | BALTIMORE | | | | | | |
| Race | \checkmark | Native Hawaiian Customer Dec | lared | | | Asian C | ustomer Declared | | |
| Application Log File | | | | | | | | | |
| | | | | | | | | II 🗐 🍕 | |
| Me Lev Messag | je Text | | | | | | Time Stamp | | |
| No result found | | | | | | | | | |

13. Click the **Expand message area** label **•** to view the error message.

In this example, when the State Office Specialist selected the **Start** button an error message was displayed. In the upper right corner the user will see all displayed messages. This message indicates that the State Office Specialist has not processed all BP Source records in the Cleansing Case which will not allow the Cleansing Case to be processed.

In this example, the Cleansing Case had multiple BP records to merge into a single Master record. When there are multiple source records, all must be confirmed before the Cleansing Case can be processed by the State Office Specialist.



| | | | | Saved S | earches - | ✓ Go Advanced |
|---|---------------------|---------------------------------------|-----------------|--------------|----------------|--------------------------------------|
| leansing Case: 1075 | | | | | | 🖸 Back 🝷 [|
| tart 🗙 Cancel Reject | | | | | | |
| 8000126939 ERNIE | WILLIAN | IS Source | 0.1/07 | 100.15 | | D |
| 8000126940 ERNES | TO WILL | IAMS Source | O Details | All source | accounts must | be confirmed before executing the mo |
| C | | | | | t been merged | Ŭ |
| Compare Accounts | | | ba. | | | |
| Master Account Confirm Your Changes: General Data | Confirm (Confirm | | Source Account: | 00012 | | |
| Data | Sel | Master | | Sel | Source | |
| External number | \checkmark | 11660424 | | | 11660425 | |
| First Name | \checkmark | ERNST | | | ERNIE | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | ERNIE WILLIA | MS |
| Referenced Data | | | | | | |
| Data Entity | Sel | Master | | Sel | Source | |
| ID Numbers | \checkmark | 11660424, SCIMS Core Customer ID | | \checkmark | 11660425,SCI | MS Core Customer ID |
| ID Numbers | \checkmark | 8000126939,Losing Business Partner ID | | \checkmark | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | NOTAXID No 1 | Tax Identification |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILLS MD 2111 | 7-4776 | | 1 WINNING D | R / OWNINGS MILL MD 21117 |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE COUNTY F | FARM SERVICE | | AG NRCS CU | STOMER ALLEGANY COUNTY |
| Associated County | \checkmark | 1 WINNING DR MARYLAND BALTIMORE | E | | | |
| Race | \checkmark | Native Hawaiian Customer Declared | | | Asian Custor | mer Declared |
| Application Log File | | | | | | III III & |
| Me Lev Messag | ge Text | | | | | Time Stamp |
| No result found | | | | | | |

14. Click the **Details** link to view further details of the error message.



- -🟉 Message Details - Windows Internet Explorer Diagnosis All source accounts must be confirmed before executing the merge Procedure For instructions on how to execute multi-customer merges, please see the Execute BP Merge simulation / work instruction

15. Click the X button in the upper right corner to close Message Details window.

Message Details - Windows Internet Explorer



| | | | | | Saved S | earches | Go Advanced |
|---------------------------|---------------------|------------------------------------|----------------|---------|--------------|-------------|---|
| leansing Case: 1075 | | | | | | | 🖸 Back 🔻 |
| Start 🗙 Cancel Reject | | | | | | | • (1) 4 |
| 8000126939 ERNIE | WILLIAN | IS Sourc | e | 0.1/0 | 7/00/5 | | <u></u> |
| 8000126940 ERNES | TO WILL | IAMS Source | e 🛛 | Details | All source | accounts m | ust be confirmed before executing the m |
| | | | 4 | Accourt | ts have no | t been merg | ed |
| Compare Accounts | | | Ba. | | | | |
| Master Account | : 8000 | 126938 | Source | Account | 800012 | 6939 🔻 | |
| Confirm Your Changes: | Confirm (Confirm | | | | | | |
| Data | Sel | Master | | | Sel | Source | |
| External number | \checkmark | 11660424 | | | | 11660425 | |
| First Name | \checkmark | ERNST | | | | ERNIE | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNIE WI | LIAMS |
| Referenced Data | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | |
| ID Numbers | \checkmark | 11660424, SCIMS Core Customer ID |) | | \checkmark | 11660425, | SCIMS Core Customer ID |
| ID Numbers | \checkmark | 8000126939,Losing Business Partne | er ID | | \checkmark | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID I | No Tax Identification |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILLS N | /ID 21117-4776 | | | 1 WINNING | G DR / OWNINGS MILL MD 21117 |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE CO | DUNTY FARM SE | RVICE | . 🔲 | AG NRCS | CUSTOMER ALLEGANY COUNTY |
| Associated County | \checkmark | 1 WINNING DR MARYLAND BAL | TIMORE | | | | |
| Race | \checkmark | Native Hawaiian Customer Declare | d | | | Asian Cu | stomer Declared |
| Application Log File | | | | | | | |
| | | | | | | | III 🗐 🍕 |
| Me Lev Messag | je Text | | | | | | Time Stamp |
| No result found | | | | | | | |

16. Click the X ⊠ to close the message area and continue processing the Cleansing Case.



| | | | | | Saved Se | arches - | | Go Advance |
|---------------------------------------|---------------------|---------------------------------------|--------------|--------|--------------|------------|-----------------------|---------------|
| leansing Case: 1075 | | | | | | | | 🖸 Back 👻 |
| tart 🗙 Cancel Reject | | | | | | | | . (1) |
| 8000126939 ERNIE | WILLIAN | S Source | • | 01/07 | /2015 | | Steven Patterson | |
| 8000126940 ERNES | | IAMS Source | - | 01/07 | /2015 | | Steven Patterson | |
| | | | | | | | | |
| Compare Accounts | | | | | | | | |
| Master Account | : 8000 | 126938 | Source Ace | count: | 800012 | 6939 💌 | | |
| Confirm Your Changes: General Data | Confirm (Confirm | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | |
| External number | \checkmark | 11660424 | | | | 11660425 | | |
| First Name | \checkmark | ERNST | | | | ERNIE | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNIE W | ILLIAMS | |
| Referenced Data | | · | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | |
| ID Numbers | \checkmark | 11660424, SCIMS Core Customer ID | | | \checkmark | 11660425 | SCIMS Core Custor | ier ID |
| ID Numbers | \checkmark | 8000126939,Losing Business Partner ID |) | | \checkmark | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID | No Tax Identification | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILLS MD 2 | 1117-4776 | | | 1 WINNIN | IG DR / OWNINGS M | ILL MD 21117 |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE COUN | TY FARM SERV | /ICE | | AG NRCS | CUSTOMER ALLE | GANY COUNTY |
| Associated County | \checkmark | 1 WINNING DR MARYLAND BALTIM | ORE | | | | | |
| Race | \checkmark | Native Hawaiian Customer Declared | | | | Asian Cu | ustomer Declared | |
| Application Log File | ie Text | | | | | | Time Starr | ii 🗐 🍕 |
| No result found | le rext | | | | | | Time Starr | Ϋ́Υ |
| INO RESULT TOUND | | | | | | | | |

- 17. Click the Source Account: dropdown list to update the Master record values and process the second Source BP record.
 - Once one BP record (Source) has been successfully processed and confirmed, the State Office Specialist should change the Source account to process all records. This will refresh the screen so that the Master will now display all fields that have been retained or copied from any previous sources and show the comparison of these fields.



| | | | | | Saved Se | earches | | • | Go Advan | ce |
|--------------------------|--------------|------------------------------------|-----------------|-------|--------------|-----------|-----------------------|--------|----------|----|
| leansing Case: 1075 | | | | | | | | | 🔄 Back | • |
| tart 🗙 Cancel Reject | | | | | | | | | .0(1 |) |
| 8000126939 ERNIE | WILLIAN | IS Source | ce 🔻 | 01/0 | 7/2015 | | Steven Patterson | | | |
| 8000126940 ERNES | TO WILL | IAMS Source | ce 🔻 | 01/0 | 7/2015 | | Steven Patterson | | | |
| | | | | | | | | | | |
| Compare Accounts | | | | | | | | | | _ |
| Master Account | : 8000 | 126938 | Source Acc | count | | | | | | |
| | Confirm | | | | 800012 | | | | | |
| Confirm Your Changes: | (Confirm | | | | 800012 | 6940 | | | | |
| | (| , | | | | | | | | |
| General Data | | | | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | | | |
| External number | \checkmark | 11660424 | | | | 11660425 | 5 | | | |
| First Name | \checkmark | ERNST | | | | ERNIE | | | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNIE W | /ILLIAMS | | | |
| Referenced Data | | | | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | | | |
| ID Numbers | \checkmark | 11660424,SCIMS Core Customer II |) | | \checkmark | 11660425 | SCIMS Core Custor | ner ID | | |
| ID Numbers | \checkmark | 8000126939,Losing Business Partr | er ID | | \checkmark | | | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID | No Tax Identification | | | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILLS I | VID 21117-4776 | | | 1 WINNIN | IG DR / OWNINGS M | ILL N | ID 21117 | |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE C | OUNTY FARM SERV | ICE | . 🗖 | AG NRCS | S CUSTOMER ALLE | GAN | Y COUNTY | |
| Associated County | \checkmark | 1 WINNING DR MARYLAND BA | TIMORE | | | | | | | |
| Race | \checkmark | Native Hawaiian Customer Declare | d | | | Asian C | ustomer Declared | | | |
| | | | | | | | | | | |
| Application Log File | | | | | | | | | | |
| | | | | | | | | | III 🗐 🖉 | 5 |
| Me Lev Messag | e Text | | | | | | Time Starr | np | | |
| No result found | | | | | | | | | | - |

18. Select **Source Account:** 8000126940 **B000126940** from the available list.



| | | | | | Saved Se | earches - | | • | Go Advance | ed |
|---------------------------|--------------|--------------------------------|------------------|-------|--------------|-----------|-----------------------|----------|------------|-----|
| leansing Case: 1075 | | | | | | | | | 🖸 Back 🝷 | • (|
| Start 🗙 Cancel Reject | | | | | | | | | | |
| | WILLIAN | IS S | ource 🔻 | 01/0 | 7/2015 | | Steven Patterson | | | |
| 8000126940 ERNES | TO WILL | IAMS S | ource 🔻 | 01/0 | 7/2015 | | Steven Patterson | | | |
| | | | | | | | | | | |
| Compare Accounts | | | | | | | | | | |
| Master Account | 8000 | 126938 | Source Acc | count | 800012 | 6940 🔻 | | | | |
| | | | | | | | | | | |
| Confirm Your Changes: | Confirm | 1 | | | | | | | | |
| Ŭ | | | | | | | | | | |
| | | | | | | | | | | |
| General Data | | | | | | | | | | 4 |
| Data | Sel | Master | | | Sel | Source | | | | |
| External number | \checkmark | 11660424 | | | | 11660426 | 6 | | | |
| First Name | \checkmark | ERNST | | | | ERNEST | 0 | | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNEST | O WILLIAMS | | | |
| Referenced Data | | | | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | | | |
| ID Numbers | \checkmark | 11660424,SCIMS Core Custome | er ID | | \checkmark | 11660426 | SCIMS Core Cust | omer ID | | |
| ID Numbers | \checkmark | 8000126939,Losing Business P | artner ID | | | | | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID | No Tax Identification | on | | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILL | S MD 21117-4776 | | | 1 WINNIN | IG DR / OWNINGS | MILL M | ID 21117 | |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE | COUNTY FARM SERV | ICE | 🗹 | FSA CUS | STOMER BALTIMO | ORE CO | UNTY FAR | |
| Associated County | \checkmark | 1 WINNING DR MARYLAND | BALTIMORE | | \checkmark | 1 WINNIN | IG DR MARYLAN | D BAL | TIMORE | |
| Race | \checkmark | Native Hawaiian Customer Dec | lared | | ~ | Native Ha | waiian Customer I | Declared | đ | |
| | | | | | | | | | | |
| Application Log File | | | | | | | | | | |
| | | | | | | | | | | |
| Me Lev Messag | e Text | | | | | | Time St | amp | | |
| No result found | | | | _ | | | | | | 4 |

19. Click **FSA CUSTOMER** | **BALTIMORE COUNTY FARM SERVICE AGENC** | Y | Y | FSA CUSTOMER | BALTIMORE COUNTY FAR... check box to remove from the Source record.

> The State Office Specialist recognizes Source record 8000126940 has duplicate Program Participation (FSA Customer / Baltimore County) entries. The duplicate entries need to be deselected to be removed from the Source record. If both the Master and Source records have the same Program Participations only one entry can be kept.

For example, the Master and Source have Program Participation (Baltimore County, MD) and Associated County (Baltimore County, MD). Keep one entry from either the Master or Source record but not both. Failure to do this will yield an error when the "Confirm" button is selected and the State Office Specialist must exit and return to the Cleansing Case to reprocess.



| | | | | | Saved S | earches - | | 🔻 Go Advan | ced |
|--------------------------|--------------|------------------------------------|-----------------|-------|--------------|-----------|-----------------------|----------------|-----|
| eansing Case: 1075 | | | | | | | | C Back | - [|
| tart 🗙 Cancel Reject | | | | | | | | | |
| 8000126939 ERNIE | WILLIAN | S Source | e 🔻 | 01/0 | 7/2015 | | Steven Patterson | | |
| 8000126940 ERNES | TO WILL | IAMS Source | e 🔻 | 01/0 | 7/2015 | | Steven Patterson | | |
| | | | | | | | | | |
| Compare Accounts | | | | | | | | | _ |
| Master Account | 8000 | 126938 | Source Ace | count | : 800012 | 6940 💌 | | | |
| | | | | | | | | | |
| Confirm Your Changes: | Confirm | 1 | | | | | | | |
| g | | <u> </u> | | | | | | | |
| | | | | | | | | | |
| General Data | | | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | | |
| External number | \checkmark | 11660424 | | | | 11660426 | 6 | | |
| First Name | ~ | ERNST | | | | ERNEST | 0 | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNEST | O WILLIAMS | | |
| Referenced Data | | | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | | |
| ID Numbers | \checkmark | 11660424,SCIMS Core Customer ID |) | | \checkmark | 11660426 | 6,SCIMS Core Custor | ner ID | |
| ID Numbers | \checkmark | 8000126939,Losing Business Partn | er ID | | | | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID | No Tax Identification | | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILLS N | ND 21117-4776 | | | 1 WINNIN | IG DR / OWNINGS N | IILL MD 21117 | |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE CO | OUNTY FARM SERV | ICE | . 🗍 | FSA CUS | STOMER BALTIMOR | RE COUNTY FAR. | |
| Associated County | \checkmark | 1 WINNING DR MARYLAND BAL | TIMORE | | | 1 WINNIN | IG DR MARYLAND | BALTIMORE | |
| Race | \checkmark | Native Hawaiian Customer Declare | d | | ~ | Native Ha | waiian Customer De | eclared | |
| | | | | | | | | | |
| Application Log File | | | | | | | | | |
| ippiloulion 20g i no | | | | | | | | | |
| | | | | | | | | III 🗐 d | 5 |
| Me Lev Messag | e Text | | | | | | Time Star | np | |
| No result found | | | | | | | | | |

20. Click 1 WINNING DR | MARYLAND |

BALTIMORE 1 WINNING DR | MARYLAND | BALTIMORE check box to remove from the Source record.

Since Program Participation (FSA Customer | Baltimore County) was removed from the Cleansing Case, then the Associated County (1 Winning DR | Maryland | Baltimore) needs to be removed from the same record. Failure to remove the Associated County will yield an error when the "Confirm" button is selected. If this occurs then the State Office Specialist must exit the Cleansing Case and return to the Cleansing Case to begin the process again.



| | | | | | Saved Se | arches | | - | Go Advance | 20 |
|------------------------------------|--|--|-----------|-------|----------|----------|-------------------------|--------|------------|----|
| leansing Case: 1075 | | | | | | | | | 🖸 Back 🝷 | |
| Start 🗙 Cancel Reject | | | | | | | | | | |
| 8000126939 ERNIE | WILLIAN | S Source | • | 01/0 | 7/2015 | | Steven Patterson | | | |
| 8000126940 ERNES | | IAMS Source | • | 01/0 | 7/2015 | | Steven Patterson | | | |
| | | | | | | | | | | |
| Compare Accounts | | | | | | | | | | |
| Master Account | 8000 | 126938 | Source Ac | count | 800012 | 6940 🔻 | | | | |
| Confirm Your Changes: | Confirm | | | | | | | | | |
| g | | • | | | | | | | | |
| | | | | | | | | | | |
| General Data | | •• | | | . | 0 | | | | |
| Data | Sel | Master | | | Sel | Source | . | | | |
| External number | Image: A state of the state | 11660424 | | | | 11660426 | | | | |
| First Name Common Customer Name | | ERNST | | | | ERNEST | - | | | |
| Referenced Data | ~ | ERNST WILLIAMS | | | | ERNEST | O WILLIAMS | | | |
| Data Entity | Sel | Master | | | Sel | Source | | | | i |
| ID Numbers | | | | | | | COMP Care Curtar | | | |
| ID Numbers | | 11660424,SCIMS Core Customer ID 8000126939,Losing Business Partner ID | | | | 11660426 | S,SCIMS Core Custom | ier ID | | |
| Tax Numbers | | NOTAXID No Tax Identification | | | | NOTAVID | No Tax Identification | | | |
| Main Address | | 1 WINNING DR / OWINGS MILLS MD 21117- | 1776 | | | | IG DR / OWNINGS M | | 21117 | |
| Program Participation | | FSA CUSTOMER BALTIMORE COUNTY FA | | | _ | | STOMER BALTIMOR | | | |
| Associated County | ▼ | 1 WINNING DR MARYLAND BALTIMORE | INFOLKV | IUL | | | IG DR MARYLAND | | | |
| Race | | Native Hawaiian Customer Declared | | | | | waiian Customer De | | NORL | |
| | | | | | | | and an a substantial De | o.urod | | |
| Application Log File | | | | | | | | | | |
| | | | | | | | | | | 1 |
| Me Lev Messag | je Text | | | | | | Time Starr | пр | | |
| No result found | | | | | | | | | | 1 |

21. Click the Native Hawaiian | Customer

Declared Native Hawaiian | Customer Declared check box to remove from the Source record.



| | | | | | Saved Se | arches | | - | Go Advance |
|--------------------------|--------------|--|----------|--------|--------------|-----------|-----------------------|--------|------------|
| leansing Case: 1075 | | | | | | | | | 🖸 Back 🝷 |
| tart 🗙 Cancel Reject | | | | | | | | | |
| 8000126939 ERNIE | WILLIAN | IS Source | • | 01/0 | 7/2015 | | Steven Patterson | | |
| 8000126940 ERNES | TO WILL | IAMS Source | • | 01/0 | 7/2015 | | Steven Patterson | | |
| | | | | | | | | | |
| Compare Accounts | | | | | | | | | |
| Master Account | 8000 | 126938 So | ource Ac | count: | 800012 | 6940 🔻 | | | |
| Confirm Your Changes: | Confirm | 1 | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | | |
| External number | \checkmark | 11660424 | | | | 11660426 | 6 | | |
| First Name | ~ | ERNST | | | | ERNEST | 0 | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNEST | O WILLIAMS | | |
| Referenced Data | | | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | | |
| ID Numbers | \checkmark | 11660424, SCIMS Core Customer ID | | | \checkmark | 11660426 | SCIMS Core Custom | er ID | |
| ID Numbers | \checkmark | 8000126939,Losing Business Partner ID | | | | | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID | No Tax Identification | | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILLS MD 21117-4 | 76 | | | 1 WINNIN | IG DR / OWNINGS M | ILL MD | 21117 |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE COUNTY FAR | M SERV | ICE | | FSA CUS | STOMER BALTIMOR | E COU | NTY FAR |
| Associated County | \checkmark | 1 WINNING DR MARYLAND BALTIMORE | | | | 1 WINNIN | IG DR MARYLAND | BALTI | MORE |
| Race | \checkmark | Native Hawaiian Customer Declared | | | | Native Ha | waiian Customer De | clared | |
| Application Log File | | | | | | | | | |
| | | | | | | | | | e 🖻 🔍 |
| Me Lev Messag | je Text | | | | | | Time Stam | р | |
| No result found | | | | | | | | | |

22. Click the **Confirm** button to confirm your entries for the Cleansing Case.



| | | | | | Saved S | earches | | 🔻 Go Advar | ced |
|---------------------------|---------------------|--------------------------------|------------------|--------|--------------|-----------|-----------------------|------------|-----|
| leansing Case: 1075 | | | | | | | | 🔄 Back | - 🖸 |
| Start 🗙 Cancel Reject | | | | | | | | | |
| | WILLIAN | IS So | ource 🔻 | 01/07 | 7/2015 | | Steven Patterson | | - |
| 8000126940 ERNES | TO WILL | IAMS So | ource 🔻 | 01/07 | 7/2015 | | Steven Patterson | | |
| | | | | | | | | | |
| Compare Accounts | | | | | | | | | _ |
| Master Account | 8000 | 126938 | Source Acc | count: | 800012 | 6940 💌 | | | |
| Confirm Your Changes: | Confirm (Confirm | | | | | | | | |
| Data | Sel | Master | | | Sel | Source | | | |
| External number | \checkmark | 11660424 | | | | 11660426 | ; | | |
| First Name | \checkmark | ERNST | | | | ERNEST | D | | |
| Common Customer Name | \checkmark | ERNST WILLIAMS | | | | ERNEST | O WILLIAMS | | |
| Referenced Data | | | | | | | | | |
| Data Entity | Sel | Master | | | Sel | Source | | | |
| ID Numbers | \checkmark | 11660424, SCIMS Core Custome | er ID | | \checkmark | 11660426 | SCIMS Core Custome | er ID | |
| ID Numbers | \checkmark | 8000126939,Losing Business Pa | artner ID | | \checkmark | | | | |
| ID Numbers | \checkmark | 8000126940,Losing Business Pa | artner ID | | \checkmark | | | | |
| Tax Numbers | \checkmark | NOTAXID No Tax Identification | | | | NOTAXID | No Tax Identification | | |
| Main Address | \checkmark | 1 WINNING DR / OWINGS MILL | S MD 21117-4776 | | | 1 WINNIN | IG DR / OWNINGS MI | L MD 21117 | |
| Program Participation | \checkmark | FSA CUSTOMER BALTIMORE | COUNTY FARM SERV | ICE | | FSA CUS | TOMER BALTIMORE | COUNTY FAR | |
| Associated County | \checkmark | 1 WINNING DR MARYLAND | BALTIMORE | | | 1 WINNIN | IG DR MARYLAND | BALTIMORE | |
| Race | \checkmark | Native Hawaiian Customer Dec | lared | | | Native Ha | waiian Customer Dec | lared | |
| Application Log File | | | | | | | | | |
| | | | | | | | | | 9 |
| Me Lev Messag | ge Text | | | | | | Time Stamp |) | |

- 23. Click the Start Start button to complete the process of the Cleansing Case.
 - If the State Office Specialist does not select a value it will not be part of the Master record (including Farm Records). Therefore, the State Office Specialist must ensure that every Source record value has been confirmed.



| | | | | Saved Sea | rches 👻 | 🔻 Go Advanced 湔 |
|----------------------------------|-----------------------------|-------------------------------------|----------------|-----------------------|----------------|--------------------|
| | Search: Cleansing Ca | ses | | | | 🖸 Back 👻 💟 👻 |
| | | | | | | 1 (2) |
| Home | Search Criteria | | | | | Hide Search Fields |
| Worklist | | | | | | |
| Business Partner | Case ID Processor (User) | ▼ is▼ is | • • | 1075 | 0 0 7 0 0 | |
| Farm Records | Status | ▼ is | • • | | - 0 0 - 0 0 | |
| | Account | ▼ is | • | | | |
| Organizational Model 🕨 | | | | | | |
| Product Master | | | Ma | kimum Number of Resul | ts: 100 | |
| Recent Items | Search Clear Reset | S | ave Search As: | | Save | |
| 1075 | Result List: 1 Cleansing | Case Found | | | | |
| ERNESTO WILLIA ERNST WILLIAMS | | Case Found | | | | u 🗉 & |
| 1074 | Case ID | Account | Status | Priority | Processor | Created On |
| ERNIE WILLIAMS | 1075 | ERNST WILLIA | | Filoncy | FICESSO | 01/08/2015 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

24. Click ERNST WILLIAMS ERNST WILLIAMS link to view the Master BP record.

The Cleansing Case has been processed and the Status has updated to Completed. Let's review the Master (Winning) BP record and the Source (Losing) record to verify the information.



| | | | | Saved Sea | arches 👻 | Go Advanced |
|------------------------|-------------------------|----------------------|------------------------|------------|-------------------|----------------------------------|
| • | Customer: ERNST WII | LLIAMS | | | | 🖸 Back 👻 🖸 |
| | Save X Cancel Copy | | uplicates Fact Sheet | BPDF Fa | act Sheet | L & |
| Home | Determined acres More | ∋≑ | | | | |
| Worklist | Customor Dotaile Cu | stamar Brafila Palas | Identification Numbers | SCIMS D | onligation Status | |
| Business Partner | Edit S Tax ID Histor | | Identification Numbers | SCINIS R | epication Status | • |
| Farm Records | General Data | 2 | Mai | n Address | and Communi | cation Data |
| Organizational Model 🕨 | Current Role: | Individual | Info | rmation. | | |
| Product Master | BP Number / ID: | 8000126938 | Addr | ess Lin | 1 WINNING DR | 2 |
| Product Master | Prefix: | | | | Example: Stree | et address, PO BOX XXX, RR |
| Recent Items | First Name: | ERNST | Addr | ess Lin | | |
| ERNESTO WILLIA | Middle Name: | | | | Example: Apar | tment, Suite, Unit, Building, FI |
| ERNST WILLIAMS | Last Name: | WILLIAMS | | City: | OWINGS MILL | S |
| ERNIE WILLIAMS 1075 | Suffix: | | | State: | MD | MARYLAND |
| 1075 | Common Customer | ERNST WILLIAMS | 2 | ZIP Code: | 21117-4776 | |
| | Legal Name: | No | | Country: | US | USA |
| | Language Preference: | English | Tel | ephone. | | |
| | Data Origin: | CRM | Mobi | le Num | | |
| | Employee Type: | Not an employee | E-Ma | ail Addr | | |
| | Tax ID Type: | No Tax Iden 🔞 | Com | munica | Post (letter) | |
| | Tax ID Number: | No Tax ID 🕜 | Carri | ier Route: | R002 | |
| | Date of Death: | | Deliv | ery Bar | 013 | |
| | Death Confirmed: | | Con | gressio | MARYLAND | 07 |
| | Notes | | | | | |

25. Scroll to the **Control** assignment block to verify that the Master record was not archived.



| | Saved Searches | Go Advanced 🗊 |
|------------------------|---|---------------|
| | Customer: ERNST WILLIAMS | 🖸 Back 🔻 🖸 🤊 |
| | Save X Cancel Copy PNew Show Duplicates Fact Sheet PDF Fact Sheet | a 🛱 🛛 |
| Home | Determined acres │ More → | |
| nome | Language Preference: English Telephone. | |
| Worklist | Data Origin: CRM Mobile Num | |
| Business Partner | Employee Type: Not an employee E-Mail Addr | |
| Farm Records | Tax ID Type: No Tax Iden 🔞 Communica Post (let | ter) |
| | Tax ID Number: No Tax ID 🔞 Carrier Route: R002 | |
| Organizational Model 🕨 | Date of Death: Delivery Bar 013 | |
| Product Master | Death Confirmed: Congressio MARYLA | AND 07 |
| | Notes | |
| Recent Items | | |
| ERNESTO WILLIA | | |
| ERNST WILLIAMS | | |
| ERNIE WILLIAMS | | |
| 1075 1074 | | |
| 1074 | Control Flags Common Eligibility Financial Service | |
| | | |
| | Archived: | |
| | Inactive: 🔲 🔞 | |
| | Restricted: | |
| | Addresses* Address Types Communication Numbers E-Mails | |
| | New | a |
| | Actions Address Current Valid From | Valid To |
| | 1 WINNING DR / OWINGS MILLS MD 21117-4776 01/07/2015 | 12/31/9999 |
| | | |
| | Representative Capacity Relationships | |
| | C New History Data | |
| | No result found | |

26. Scroll to return to the tabs at the top of the Customer record.

In this example, Ernst Williams was the defined Master record. In the **Control Flags** assignment block the **Archived** field is not selected.



| | | Saved Searches - | • | Go Advanced 🗑 |
|--|---|-----------------------|---------------------------|---------------|
| | Customer: ERNST WILLIAMS | | | 🖸 Back 🝷 💽 👻 |
| | 🖫 Save 💥 Cancel Copy 🍄 New Show Duplicates Fact Shee | et 📓 PDF Fact Shee | et | ۵ 🖨 🖉 |
| Home | Determined acres ↓ More | | | |
| Worklist | Customer Details Customer Profile Roles Identification Numb | ara SCIMS Daplicati | an Status | |
| Business Partner | | ers Solivio Replicati | UN GLALUS | |
| Farm Records | | | | |
| Organizational Model 🕨 | Gender: Male | Marital Status: | Not Applicable or Unknown | |
| Product Master | Gender Determination: Customer Declared | Citizen Country: | USA | |
| r rouuci master | Birth Date: | Resident Alien: | Not Applicable or Unknown | |
| Recent Items | Birth Date Determin | Veteran: | Not Applicable or Unknown | |
| 1075 ERNESTO WILLIA ERNST WILLIAMS 1074 ERNIE WILLIAMS | Ethnicity: Hispanic or Latino Ethnicity Determina Customer Declared Mail Indicators | | | |
| | RMA: | NRCS: | \checkmark | |
| | RD: | FSA: | \checkmark | |
| | Race* | | | |
| | Act Race | Race Determination | 1 | |
| | Native Hawaiian or Other Pacific Islander. Origins of Hawai | Customer Declared | | |
| | Disability | | | |
| | No result found | | | |
| | | | | |
| | Control Flags Common Eligibility Financial Service | | | |
| | Archived: | | | |

- 27. Click the Identification Numbers Identification Numbers tab.
 - The Master (Winning) and Source (Losing) customer records have references to each other in the **Identification** tab on the BP record. Farm Records are automatically transferred; however users will receive an alert to manually re-create any Representative Capacity relationships onto the Master (Winning) record, as necessary.



| | Saved Searches - | Go Advanced |
|--|---|-------------|
| | Customer: ERNST WILLIAMS | 🖸 Back 👻 🖸 |
| | 🗒 Save 💥 Cancel Copy 🎦 New Show Duplicates Fact Sheet 🗟 PDF Fact Sheet | 옷 🖨 🌔 |
| Home | Determined acres │ More ≠ | |
| Worklist | Customer Details Customer Profile Roles Identification Numbers SCIMS Replication Status | |
| Business Partner | | a |
| Farm Records | ID Type Description ID Number Valid From Valid To | |
| Organizational Model 🕨 | Losing Business Partner ID 8000126939 01/08/2015 12/31/9999 | |
| | Losing Business Partner ID 8000126939 01/08/2015 12/31/9999 | |
| Product Master | SCIMS Core Customer ID 11650424 01/07/2015 12/31/9999 | |
| ERNST WILLIAMS 1074 ERNIE WILLIAMS | Inactive: C Restricted: C Addresses* Address Types Communication Numbers E-Mails | |
| | Actions Address Current Valid From Valid To | |
| | 1 WINNING DR / OWINGS MILLS MD 21117-4776 01/07/2015 12/31/9999 | |
| | Representative Capacity Relationships | |
| | PNew History Data | a |
| | B No result found | |
| | Program Participation* Associated Counties | |
| | [] Edit | B |
| | Act Address State County | |
| | 1 WINNING DR / OWINGS MILLS MD MARYLAND BALTIMORE | |

28. Click the **ID Number** 8000126939 ⁸⁰⁰⁰¹²⁶⁹³⁹ link to verify that the Source BP record has been archived.



| | Saved Searches * | ▼ Go Advanced 前 |
|----------------------------------|---|-----------------|
| | Customer: ERNIE WILLIAMS | 🔄 Back 🝷 💽 👻 |
| | 🗄 Save 🗙 Cancel Copy 🖺 New Show Duplicates Fact Sheet 🗟 PDF Fact Sheet | હ 🖨 😮 |
| Home | Determined acres │ More → | |
| Worklist | Customer Details Customer Profile Roles Identification Numbers SCIMS Replication Status | |
| Business Partner | | B |
| Farm Records | ID Type Description ID Number Valid From Valid To | |
| Organizational Model 🕨 | SCIMS Core Customer ID 11660425 01/07/2015 12/31/9999 | |
| Product Master | Control Flags Common Eligibility Financial Service | |
| Recent Items | Archived: 🗹 | |
| ERNST WILLIAMS | Inactive: 🔲 🔞 | |
| ERNIE WILLIAMS ERNESTO WILLIA | Restricted: | |
| 1075 | Addresses* Address Types Communication Numbers E-Mails | |
| 1074 | [^o New | 1 |
| | Actions Address Current Valid From Valid To | |
| | | 9 |
| | Representative Capacity Relationships | |
| | C New History Data | a |
| | B No result found | |
| | Program Participation* Associated Counties | |
| | []∂ Edit | 1 |
| | No result found | |
| | Attachments Change History | |
| | | (|

29. Click the **Back** Back button to return to the Master BP record.

When merging two or more customer records, the Source (Losing) record is Archived, not deleted from the CRM environment. The records remain in the system as a reference point where users are able to search and navigate to the BP record.



| | Saved Searches | Go Advanced ĭ |
|--|---|---------------|
| | Customer: ERNST WILLIAMS | 🖸 Back 👻 🗋 |
| | 吕Save │ 業Cancel │ Copy │ ြ New │ Show Duplicates │ Fact Sheet │ 廢PDF Fact Sheet │ | 옷 🖨 🄇 |
| Home | Determined acres │ More → | |
| Worklist | Customer Details Customer Profile Roles Identification Numbers SCIMS Replication Status | |
| Business Partner | | B |
| Farm Records | ID Type Description ID Number Valid From Valid To | |
| Organizational Model 🕨 | Losing Business Partner ID 8000126939 01/08/2015 12/31/9999 | |
| Organizational model * | Losing Business Partner ID 8000126940 01/08/2015 12/31/9999 | |
| Product Master | SCIMS Core Customer ID 11660424 01/07/2015 12/31/9999 | |
| ERNIE WILLIAMS ERNST WILLIAMS ERNESTO WILLIA 1075 1074 | Control Flags Common Eligibility Financial Service Archived: Inactive: Inactive: Inactive: Imactive: Imactive: Restricted: Imactive: Imactive: Addresses* Address Types Communication Numbers E-Mails Imactive: Imactive: Imactive: Imactive: Imactive: Actions Address Current Valid From Valid To Imactive: Imactive: Imactive: Imactive: Imactive: Actions Address Current Valid From Valid To Imactive: Imactive: Imactive: Imactive: Imactive: Actions Address Current Valid From Valid To Imactive: Imactive: Imactive: Imactive: Imactive: Actions Address Current Valid From Valid To Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: Imactive: | 8 |
| | Representative Capacity Relationships | |
| | New History Data | a |
| | B No result found | |
| | Program Participation* Associated Counties | |
| | | a |
| | Act Address State County | |
| | 1 WINNING DR / OWINGS MILLS MD MARYLAND BALTIMORE | |

30. Click the **ID Number** 8000126940 8000126940 link to verify that the Source BP record has been archived.



| | Saved Searches - | Go Advanced m |
|--|--|-----------------------------------|
| | Customer: ERNESTO WILLIAMS | 🖸 Back 🔻 💟 👻 |
| | Save XCancel Copy PNew Show Duplicates Fact Sheet BPDF Fact Sheet | 🙏(1) 🧕 🔒 🕗 |
| Home | Determined acres More = | |
| Worklist | Customer Details Customer Profile Roles Identification Numbers SCIMS Replication Status | |
| Business Partner | | a |
| Farm Records | ID Type Description ID Number Valid From Valid To | |
| Organizational Model 🕨 | SCIMS Core Customer ID 11660426 01/07/2015 12/31/9999 | |
| Product Master | Control Flags Common Eligibility Financial Service | |
| Recent Items ERNST WILLIAMS ERNIE WILLIAMS ERNESTO WILLIA 1075 | Archived: Inactive: Restricted: Addresses* Address Types Communication Numbers E-Mails | |
| 1074 | Prove Provide State Stat | 1 |
| | Actions Address Current Valid From Valid To 2 1 WINNING DR / OWNINGS MILL MD 21117 01/07/2015 12/31/9995 | 9 |
| | Representative Capacity Relationships | |
| | Yew History Data B No result found B | |
| | Program Participation* Associated Counties | |
| | [⊉ Edit | 1 |
| | Act Address State County | |
| | 1 WINNING DR / OWNINGS MILL MD MARYLAND BALTIMORE | |
| | Attachments Change History | |

31. Click the **Back** Back button to return to the Master BP record.

In this example there are two Source BP records, it is important to confirm that all Source (Losing) records have been archived.

T



| | | | | | | | Saved Searches * | | | Go Advanced |
|---|---|---|--|--------------|--------------------------------|------------------|--------------------------|-----------|------------------------|-------------|
| • | Customer: | ERNST | WILLIAMS | | | | | | | 🖸 Back 🝷 (|
| | | | | w Show Du | uplicates Fact | Sheet [| PDF Fact Shee | t | | 2 B |
| ne | 🖹 Determine | d acres N | lore ≠ | | | | | | | |
| rklist | Custome | r Details C | ustomer Prof | file Roles | Identification 1 | lumbers | SCIMS Replicati | on Status | | |
| iness Partner 🔹 🕨 | | | | | | | | | | B |
| m Records | ID Type | Description | | ID Number | | Valid F | From | Val | id To | |
| anizational Model 🕨 | Losing E | Business Par | tner ID | 8000126939 | | 01/08/2 | 2015 | 12/ | 31/9999 | |
| | Losing E | Business Par | tner ID | 8000126940 | | 01/08/2 | 2015 | 12/ | 31/9999 | |
| duct Master | SCIMS | Core Custom | er ID | 11660424 | | 01/07/2 | 2015 | 12/ | 31/9999 | |
| RNIE WILLIAMS RNST WILLIAMS RNESTO WILLIA)75)74 | Control | Archive Inactiv Restricte | d: | ity Financia | | | | | | |
| RNST WILLIAMS RNESTO WILLIA 075 | Address | Archive Inactiv Restricte | d: | Ø | n Numbers E-1 | Aails | | | | a |
| RNST WILLIAMS RNESTO WILLIA 075 | | Archive Inactiv Restricte es* Addres | d: | Ø | | Aails Current | Valid From | | Valid To | a |
| RNST WILLIAMS RNESTO WILLIA 075 | Address New | Archive Inactiv Restricte es* Addres Address | d: e: d: ss Types C | ommunicatio | | | Valid From 01/07/2015 | | Valid To 12/31/9999 | |
| RNST WILLIAMS RNESTO WILLIA 075 | Address New Actions | Archive Inactiv Restricte es* Addres Address | d: e: d: ss Types C | ommunicatio | n Numbers E-f | Current | | | | 1 |
| RNST WILLIAMS RNESTO WILLIA 075 | Address New Actions Represe | Archive Inactiv Restricte es* Address Address 1 WINNIN | d: e: d: G DR / OWIN | ommunicatio | n Numbers E-f | Current | | | | |
| RNST WILLIAMS RNESTO WILLIA 075 | Address Pew Actions Represe Prev | Archive Inactiv Restricte es* Address Address 1 WINNIN Intative Cap | d: e: d: G DR / OWIN | ommunicatio | n Numbers E-f | Current | | | | |
| RNST WILLIAMS RNESTO WILLIA 075 | Address New Actions Represe New Nores | Archive Inactiv Restricte es* Address Address 1 WINNIN Intative Cap History Data sult found | d: e: d: ss Types C G DR / OWIN acity Relat | ommunicatio | n Numbers E-1 ND 21117-4776 | Current | | | | |
| RNST WILLIAMS RNESTO WILLIA 075 | Address New Actions Represe New Nores | Archive Inactiv Restricte es* Address Address 1 WINNIN Intative Cap History Data sult found | d: e: d: ss Types C G DR / OWIN acity Relat | ommunicatio | n Numbers E-1 ND 21117-4776 | Current | | | | |
| RNST WILLIAMS RNESTO WILLIA 075 | Address New Actions Represe New B No res Program Program | Archive Inactiv Restricte es* Address Address 1 WINNIN Intative Cap History Data sult found | d: e: d: ss Types C G DR / OWIN acity Relat | ommunicatio | n Numbers E-1 ND 21117-4776 | Current | | County | | |

Click **Home** button Home. You have completed the transaction.

Thursday, February 12, 2015



Result

You have successfully merged multiple BP Customer Records into a single record.