



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
 - 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. They 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 to show each updated field's historical value.
 - 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

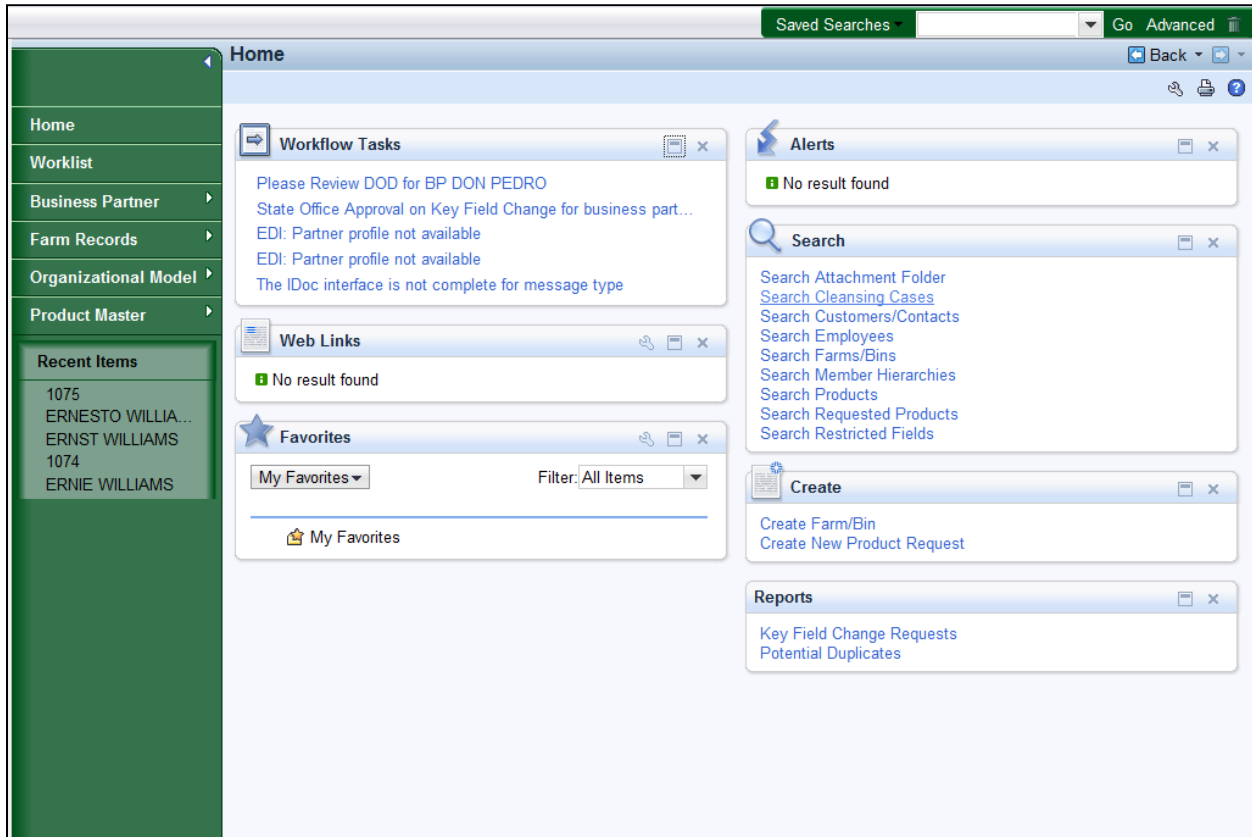


	location. You may reference SOPs, another system, or document.
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Procedure

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

Home



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

The screenshot shows the 'Search: Cleansing Cases' interface. On the left is a green navigation menu with items: Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items (listing 1075 ERNESTO WILLIA..., ERNST WILLIAMS, 1074 ERNIE WILLIAMS). The main content area has a header 'Search: Cleansing Cases' with 'Saved Searches' and 'Go Advanced' buttons. Below is the 'Search Criteria' section with fields for Case ID, Processor (User), Status (set to 'New'), and Account, each with a dropdown menu and search operators. There are 'Search', 'Clear', and 'Reset' buttons, and a 'Save Search As:' field with a 'Save' button. The 'Maximum Number of Results' is set to 100. Below the search criteria is a 'Result List' table with columns: Case ID, Account, Status, Priority, Processor, and Created On.

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

Field	R/O/C	Description
Case ID	O	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.

Search: Cleansing Cases

Search: Cleansing Cases

Search Criteria Hide Search Fields

Case ID is 1075

Processor (User) is

Status is New

Account is

Maximum Number of Results: 100

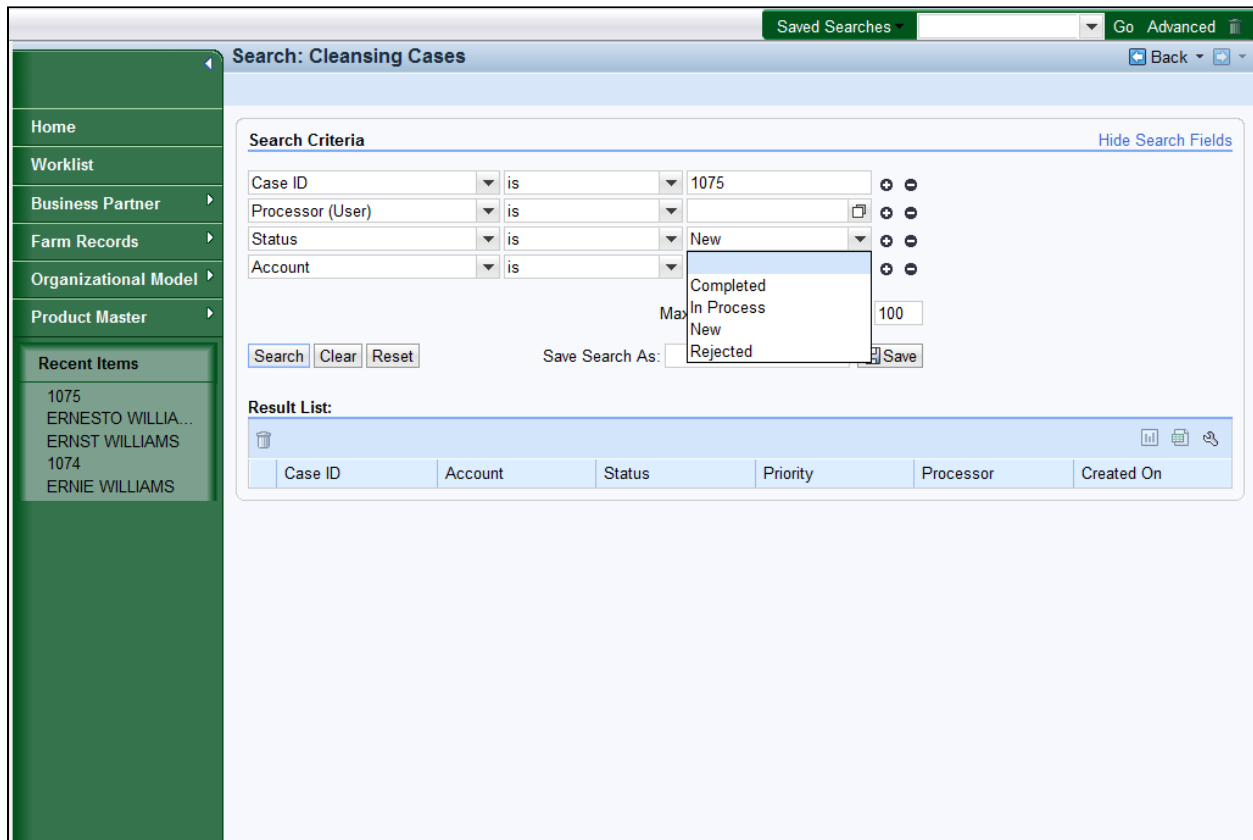
Search Clear Reset Save Search As: Save

Result List: 0 Cleansing Cases Found

Case ID	Account	Status	Priority	Processor	Created On
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4. Click the **Status** dropdown icon button to view available options.

Search: Cleansing Cases



Search: Cleansing Cases

Search Criteria

Case ID is 1075

Processor (User) is

Status is New

Account is

Search Clear Reset Save Search As: Save

Result List:

Case ID	Account	Status	Priority	Processor	Created On
---------	---------	--------	----------	-----------	------------

- 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.

Search: Cleansing Cases

Search: Cleansing Cases

Search Criteria Hide Search Fields

Case ID is 1075

Processor (User) is

Status is

Account is

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

Case ID	Account	Status	Priority	Processor	Created On
---------	---------	--------	----------	-----------	------------

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



Search: Cleansing Cases

Saved Searches
Go Advanced

Search: Cleansing Cases
Back

- Home
- Worklist
- Business Partner
- Farm Records
- Organizational Model
- Product Master
- Recent Items
- 1075
- ERNESTO WILLIA...
- ERNST WILLIAMS
- 1074
- ERNIE WILLIAMS

Search Criteria
Hide Search Fields

Case ID
is

Processor (User)
is

Status
is

Account
is

Maximum Number of Results:

Save Search As:

Result List:

Case ID	Account	Status	Priority	Processor	Created On
1075	ERNST WILLIAMS	In Process			01/08/2015

- Click the **Case ID** 1075 [1075](#) link to go to the Cleansing Case (Merge) record.

Thursday, February 12, 2015

BP_Merge_Business_Partner_Record.udc

9/35



Cleansing Case: 1075

Saved Searches Go Advanced
Back

Save Cancel Reject

Cleansing Case Details

Case ID: <input type="text" value="1075"/>	Status: <input type="text" value="In Process"/>
Source: <input type="text" value="UIU"/>	Created On: <input type="text" value="01/08/2015"/>
Processor ID: <input type="text" value="MIPATTERSONS"/>	Created By: <input type="text" value="Steven Patterson"/>
Processor Name: <input type="text" value="Steven Patterson"/>	Description: <input type="text" value="Merge Records"/>

Accounts

BP Number...	Common Customer Name	Status	Created On	Created By	Archived
8000126938	ERNST WILLIAMS	Master	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes:

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data 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.



Cleansing Case: 1075

Account Number	Customer Name	Account Type	Effective Date	Created By	Checked
8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts
 Master Account:
 Source Account:

Confirm Your Changes:

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425,SCIMS Core Customer ID
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input checked="" type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input checked="" type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

- Click **AG NRCS CUSTOMER | ALLEGANY COUNTY NRCS Service Agency | Y** **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.



Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Save | Cancel | Reject

8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes:

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424.SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425.SCIMS Core Customer ID
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input checked="" type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
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.

Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Save | Cancel | Reject

8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: Confirm

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424.SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425.SCIMS Core Customer ID
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

- 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.

Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Start | ✖ Cancel | Reject
i (1)

Account ID	Name	Type	Date	User
8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: (Confirmed)

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input checked="" type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

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.

Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Start | ✖ Cancel | Reject
(1) (1)

Account ID	Name	Type	Date	User
8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: (Confirmed)

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input checked="" type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message 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.



Cleansing Case: 1075

Start | Cancel | Reject
(1) (1)

	Source
8000126939	ERNIE WILLIAMS
8000126940	ERNESTO WILLIAMS

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: (Confirmed)

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

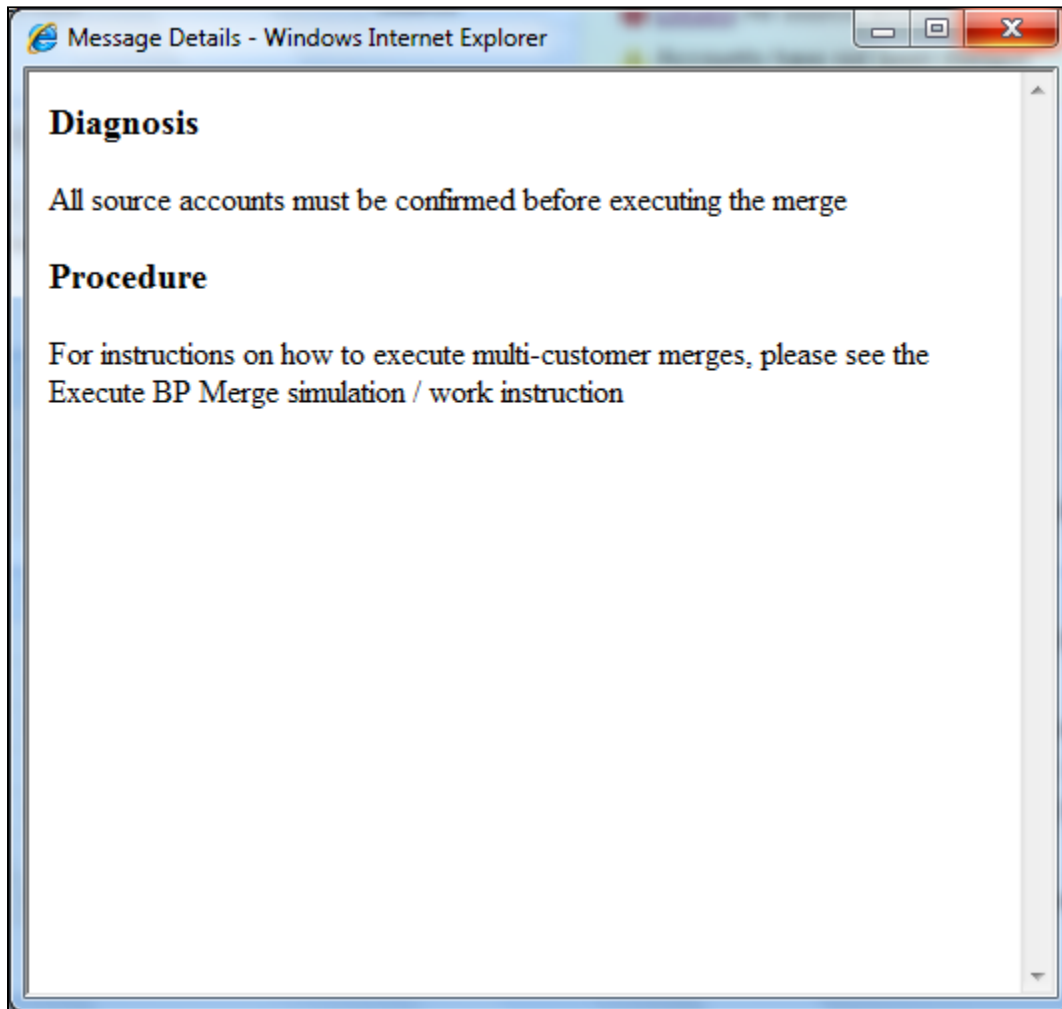
Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input checked="" type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Asian Customer Declared


Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

14. Click the **Details** [Details](#) link to view further details of the error message.

Message Details - Windows Internet Explorer



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



Cleansing Case: 1075

Saved Searches Go Advanced

Cleansing Case: 1075 Back

Start | | (1) (1)

8000126939	ERNIE WILLIAMS	Source
8000126940	ERNESTO WILLIAMS	Source

Details All source accounts must be confirmed before executing the merge

Accounts have not been merged

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: (Confirmed)

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input checked="" type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

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



Cleansing Case: 1075

Saved Searches Go Advanced
Cleansing Case: 1075 Back

Start Cancel Reject	(1) (1)
8000126939 ERNIE WILLIAMS Source 01/07/2015 Steven Patterson <input type="checkbox"/>	
8000126940 ERNESTO WILLIAMS Source 01/07/2015 Steven Patterson <input type="checkbox"/>	

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: (Confirmed)

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS


Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input checked="" type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

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.



Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Start | ✖ Cancel | Reject
(1) (1)

8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: (Confirmed)

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660425
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNIE
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNIE WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660425,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input checked="" type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	AG NRCS CUSTOMER ALLEGANY COUNTY...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Asian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

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



Cleansing Case: 1075

Start | Cancel | Reject

Account Number	Name	Type	Effective Date	Created By	Active
8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts
 Master Account: Source Account:

Confirm Your Changes:

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660426
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNESTO
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNESTO WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660426,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FAR...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

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.



Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Start | ✖ Cancel | Reject

8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes:

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660426
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNESTO
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNESTO WILLIAMS


Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424.SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660426.SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FAR...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
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.



Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Start | ✖ Cancel | Reject

8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes:

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660426
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNESTO
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNESTO WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660426,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FAR...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

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



Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Start | ✖ Cancel | Reject

8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: Confirm

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660426
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNESTO
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNESTO WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660426,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FAR...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Native Hawaiian Customer Declared

Application Log File

Me...	Lev...	Message Text	Time Stamp
No result found			

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

Cleansing Case: 1075

Saved Searches
Go Advanced

Cleansing Case: 1075
Back

Start | ✖ Cancel | Reject
i (1)

Account Number	Customer Name	Source	Date	Operator	Confirmed
8000126939	ERNIE WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>
8000126940	ERNESTO WILLIAMS	Source	01/07/2015	Steven Patterson	<input type="checkbox"/>

Compare Accounts

Master Account: Source Account:

Confirm Your Changes: Confirm (Confirmed)

General Data

Data	Sel...	Master	Sel...	Source
External number	<input checked="" type="checkbox"/>	11660424	<input type="checkbox"/>	11660426
First Name	<input checked="" type="checkbox"/>	ERNST	<input type="checkbox"/>	ERNESTO
Common Customer Name	<input checked="" type="checkbox"/>	ERNST WILLIAMS	<input type="checkbox"/>	ERNESTO WILLIAMS

Referenced Data

Data Entity	Sel...	Master	Sel...	Source
ID Numbers	<input checked="" type="checkbox"/>	11660424,SCIMS Core Customer ID	<input checked="" type="checkbox"/>	11660426,SCIMS Core Customer ID
ID Numbers	<input checked="" type="checkbox"/>	8000126939,Losing Business Partner ID	<input checked="" type="checkbox"/>	
ID Numbers	<input checked="" type="checkbox"/>	8000126940,Losing Business Partner ID	<input checked="" type="checkbox"/>	
Tax Numbers	<input checked="" type="checkbox"/>	NOTAXID No Tax Identification	<input type="checkbox"/>	NOTAXID No Tax Identification
Main Address	<input checked="" type="checkbox"/>	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	1 WINNING DR / OWNINGS MILL MD 21117
Program Participation	<input checked="" type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FARM SERVICE...	<input type="checkbox"/>	FSA CUSTOMER BALTIMORE COUNTY FAR...
Associated County	<input checked="" type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE	<input type="checkbox"/>	1 WINNING DR MARYLAND BALTIMORE
Race	<input checked="" type="checkbox"/>	Native Hawaiian Customer Declared	<input type="checkbox"/>	Native Hawaiian Customer Declared

Application Log File

Me...	Lev...	Message 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.

Search: Cleansing Cases

Saved Searches
Go Advanced

Search: Cleansing Cases
Back

Hide Search Fields
(2)

Search Criteria

Case ID is 1075

Processor (User) is

Status is

Account is

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 1 Cleansing Case Found

Case ID	Account	Status	Priority	Processor	Created On
1075	ERNST WILLIAMS	Completed			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.



Customer: ERNST WILLIAMS

Customer: ERNST WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet | Determined acres | 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: 8000126938	Address Lin... 1 WINNING DR
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: ERNST	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: WILLIAMS	City: OWINGS MILLS
Suffix:	State: MD MARYLAND
Common Customer.. ERNST WILLIAMS	ZIP Code: 21117-4776
Legal Name: No	Country: US USA
Language Preference: English	Telephone.
Data Origin: CRM	Mobile Num...
Employee Type: Not an employee	E-Mail Addr...
Tax ID Type: No Tax Iden... ?	Communica... Post (letter)
Tax ID Number: No Tax ID... ?	Carrier Route: R002
Date of Death:	Delivery Bar... 013
Death Confirmed: <input type="checkbox"/>	Congressio.. MARYLAND 07

Notes

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

Customer: ERNST WILLIAMS

Customer: ERNST WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet |

Determined acres | More ▾

Language Preference: English Telephone:
 Data Origin: CRM Mobile Num...
 Employee Type: Not an employee E-Mail Addr...
 Tax ID Type: No Tax Iden... ② Communica... Post (letter)
 Tax ID Number: No Tax ID... ② Carrier Route: R002
 Date of Death: Delivery Bar... 013
 Death Confirmed: Congressio.. MARYLAND 07

Notes

Control Flags Common Eligibility Financial Service

Archived:
 Inactive: ②
 Restricted:

Addresses* Address Types Communication Numbers E-Mails

New


Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	01/07/2015	12/31/9999

Representative Capacity Relationships

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.



Customer: ERNST WILLIAMS

Customer: ERNST WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet | Determined acres | More

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

Edit

Gender: Male | Marital Status: Not Applicable or Unknown
 Gender Determination: Customer Declared | Citizen Country: USA
 Birth Date: | Resident Alien: Not Applicable or Unknown
 Birth Date Determin.. | Veteran: Not Applicable or Unknown
 Ethnicity: Hispanic or Latino
 Ethnicity Determina.. Customer Declared

Mail Indicators

RMA: | NRCS:
 RD: | FSA:

Race*

Act...	Race	Race Determination
	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.



Customer: ERNST WILLIAMS

Customer: ERNST WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet | Determined acres | More

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

ID Type Description	ID Number	Valid From	Valid To
Losing Business Partner ID	8000126939	01/08/2015	12/31/9999
Losing Business Partner ID	8000126940	01/08/2015	12/31/9999
SCIMS Core Customer ID	11660424	01/07/2015	12/31/9999

Control Flags | Common Eligibility | Financial Service

Archived:
 Inactive:
 Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	01/07/2015	12/31/9999

Representative Capacity | Relationships

New | History Data

No result found

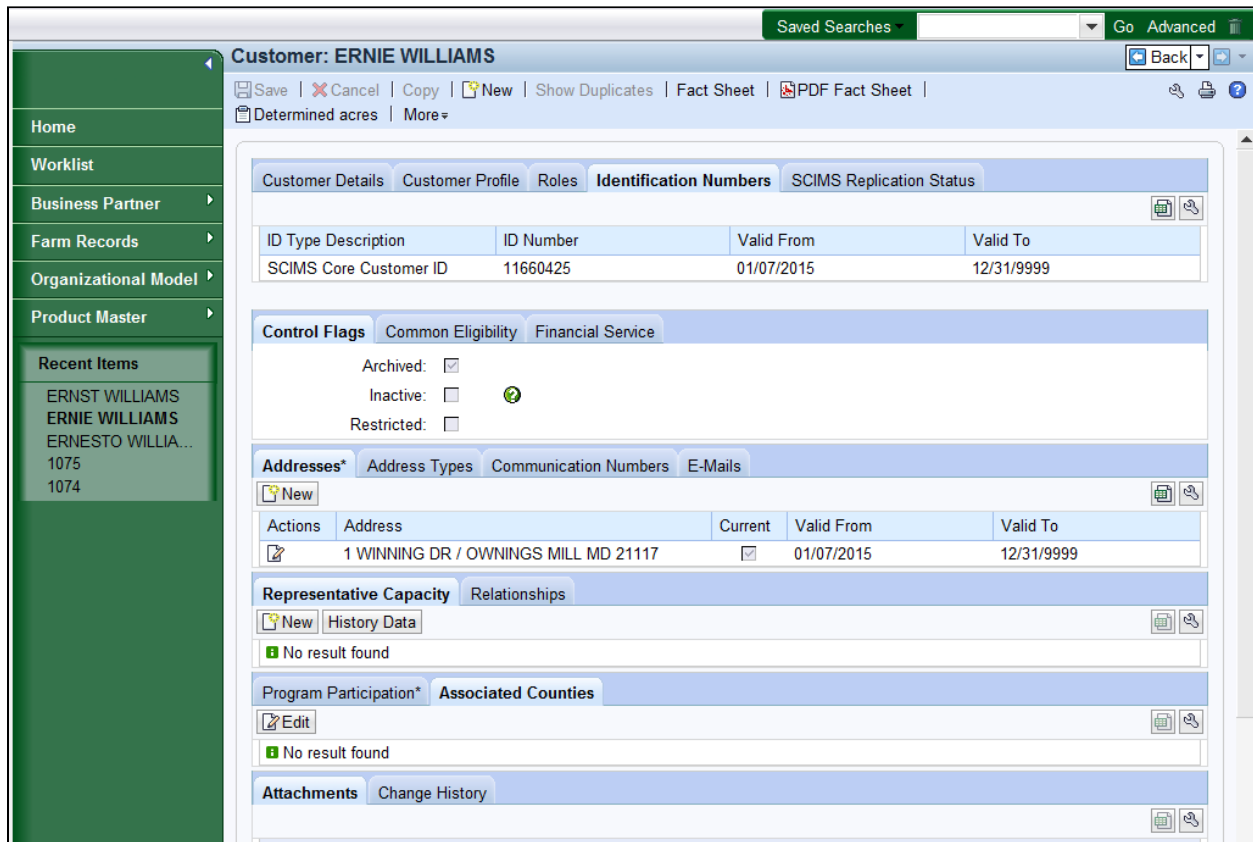
Program Participation* | Associated Counties

Edit

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.

Customer: ERNIE WILLIAMS



Customer: ERNIE WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet | Determined acres | More

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

ID Type Description	ID Number	Valid From	Valid To
SCIMS Core Customer ID	11660425	01/07/2015	12/31/9999

Control Flags | Common Eligibility | Financial Service

Archived: Inactive: Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWNINGS MILL MD 21117	<input checked="" type="checkbox"/>	01/07/2015	12/31/9999

Representative Capacity | Relationships

New | History Data


No result found


Program Participation* | Associated Counties

Edit

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.



Customer: ERNST WILLIAMS

Customer: ERNST WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet | Determined acres | More

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

ID Type Description	ID Number	Valid From	Valid To
Losing Business Partner ID	8000126939	01/08/2015	12/31/9999
Losing Business Partner ID	8000126940	01/08/2015	12/31/9999
SCIMS Core Customer ID	11660424	01/07/2015	12/31/9999

Control Flags | Common Eligibility | Financial Service

Archived:
 Inactive:
 Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	01/07/2015	12/31/9999

Representative Capacity | Relationships

New | History Data

No result found

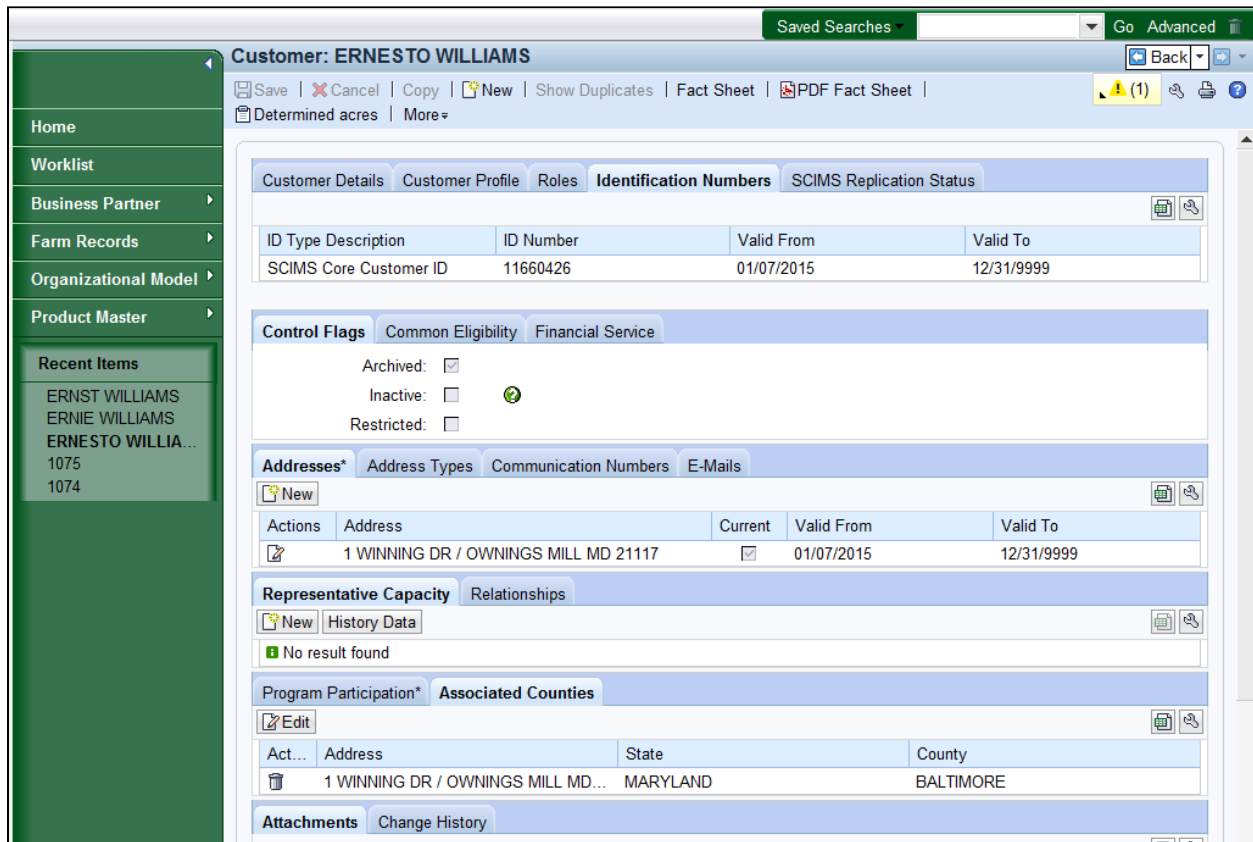
Program Participation* | Associated Counties

Edit

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.

Customer: ERNESTO WILLIAMS



Customer: ERNESTO WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet | Determined acres | More

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

ID Type Description	ID Number	Valid From	Valid To
SCIMS Core Customer ID	11660426	01/07/2015	12/31/9999

Control Flags | Common Eligibility | Financial Service

Archived: Inactive: Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWNINGS MILL MD 21117	<input checked="" type="checkbox"/>	01/07/2015	12/31/9999

Representative Capacity | Relationships

New | History Data

No result found

Program Participation* | **Associated Counties**

Edit

Act...	Address	State	County
	1 WINNING DR / OWNINGS MILL MD...	MARYLAND	BALTIMORE

Attachments | Change History

31. Click the **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.



Customer: ERNST WILLIAMS

Customer: ERNST WILLIAMS

Save | Cancel | Copy | New | Show Duplicates | Fact Sheet | PDF Fact Sheet | Determined acres | More

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

ID Type Description	ID Number	Valid From	Valid To
Losing Business Partner ID	8000126939	01/08/2015	12/31/9999
Losing Business Partner ID	8000126940	01/08/2015	12/31/9999
SCIMS Core Customer ID	11660424	01/07/2015	12/31/9999

Control Flags | Common Eligibility | Financial Service

Archived:
 Inactive:
 Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	01/07/2015	12/31/9999

Representative Capacity | Relationships

New | History Data

No result found

Program Participation* | Associated Counties

Edit

Act...	Address	State	County
	1 WINNING DR / OWINGS MILLS MD...	MARYLAND	BALTIMORE

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



Result

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