

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	\mathbf{P}	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.

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- 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

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

Field	R/O/C	Description
Case ID	0	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.



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



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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.



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



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



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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.



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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.



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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.



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- **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.



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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.



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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.



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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



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



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- 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.



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



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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.



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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.



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21. Click the Native Hawaiian | Customer

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



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



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- 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.



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ERNIE WILLIAMS	1075	FRNST WILLIA	MS Completed	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.



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ERNST WILLIAMS		Last Name:	WILLIAMS			City:	OWINGS MILL	S		
ERNIE WILLIAMS		Suffix:				State:	MD	MARYLAND		
1075		Common Customer	ERNST WILLIA	MS		ZIP Code:	21117-4776			
		Legal Name:	No			Country:	US	USA		
		Language Preference:	English		Te	elephone.				
		Data Origin:	CRM		Mol	oile Num				
		Employee Type:	Not an employe	e	E-N	1ail Addr				
		Tax ID Type:	No Tax Iden	\odot	Cor	nmunica	Post (letter)			
		Tax ID Number:	No Tax ID	\odot	Car	rier Route:	R002			
		Date of Death:			Deli	very Bar	013			
		Death Confirmed:			Co	ngressio	MARYLAND	07		
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25. Scroll to the **Control** assignment block to verify that the Master record was not archived.



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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.



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Farm Records				
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Product Master	Gender Determination: Customer Declared	Citizen Country:	USA	
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1075 ERNESTO WILLIA ERNST WILLIAMS 1074 ERNIE WILLIAMS	Ethnicity: Hispanic or Latino Ethnicity Determina Customer Declared Mail Indicators			
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- 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.



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Organizational Model	Losing Business Partner ID	<u>8000126939</u>	01/08/2015	12/31/9999	
	Losing Business Partner ID	8000126940	01/08/2015	12/31/9999	
Product Master	SCIMS Core Customer ID	11660424	01/07/2015	12/31/9999	
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28. Click the **ID Number** 8000126939 ⁸⁰⁰⁰¹²⁶⁹³⁹ link to verify that the Source BP record has been archived.



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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.



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	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	Archived: Inactive: Restricted: Addresses* Address Types (Communication Numbers E-1	Aails		ک ا
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30. Click the **ID Number** 8000126940 8000126940 link to verify that the Source BP record has been archived.



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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.

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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.