

Purpose

The purpose of this work instruction is to show how to add or delete a document and a folder in the Attachments assignment block in the BP record.

Trigger



Perform this procedure when the attachment is to be added to a multicounty customer Business Partner record.




Prerequisites

- Electronic version of the document to be attached must be scanned and saved on the user's computer.

Helpful Hints

- When scanning documents to be attached, users should save the scanned document using Adobe Acrobat resulting in a PDF file.
- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates the action is optional, and **C** indicates the action is conditional.
- The following notes may be used throughout this work instruction:

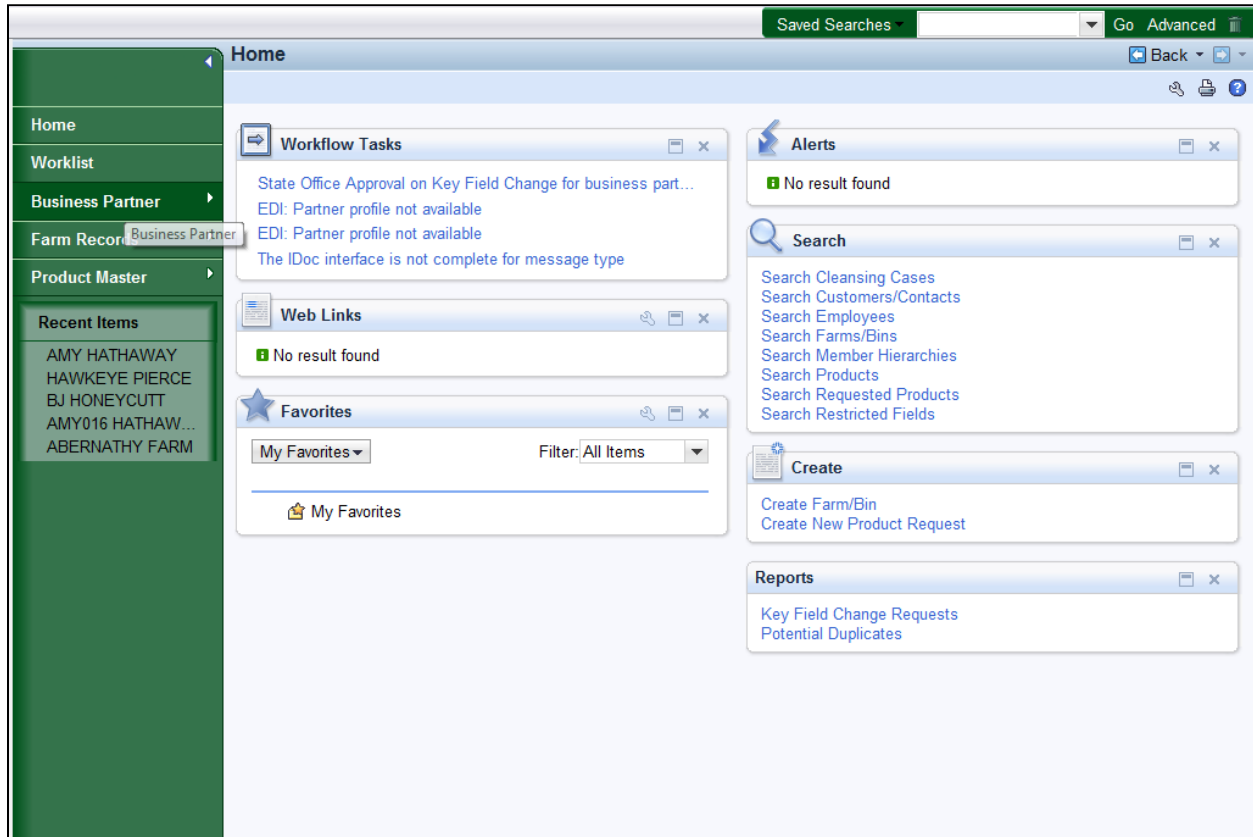
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the end-user of something that MUST be completed or another trigger that should be started and is related to the procedure.

A critical note		Use this note to specify something that MUST NOT be done during the procedure.
Contact someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A reference is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

Procedure

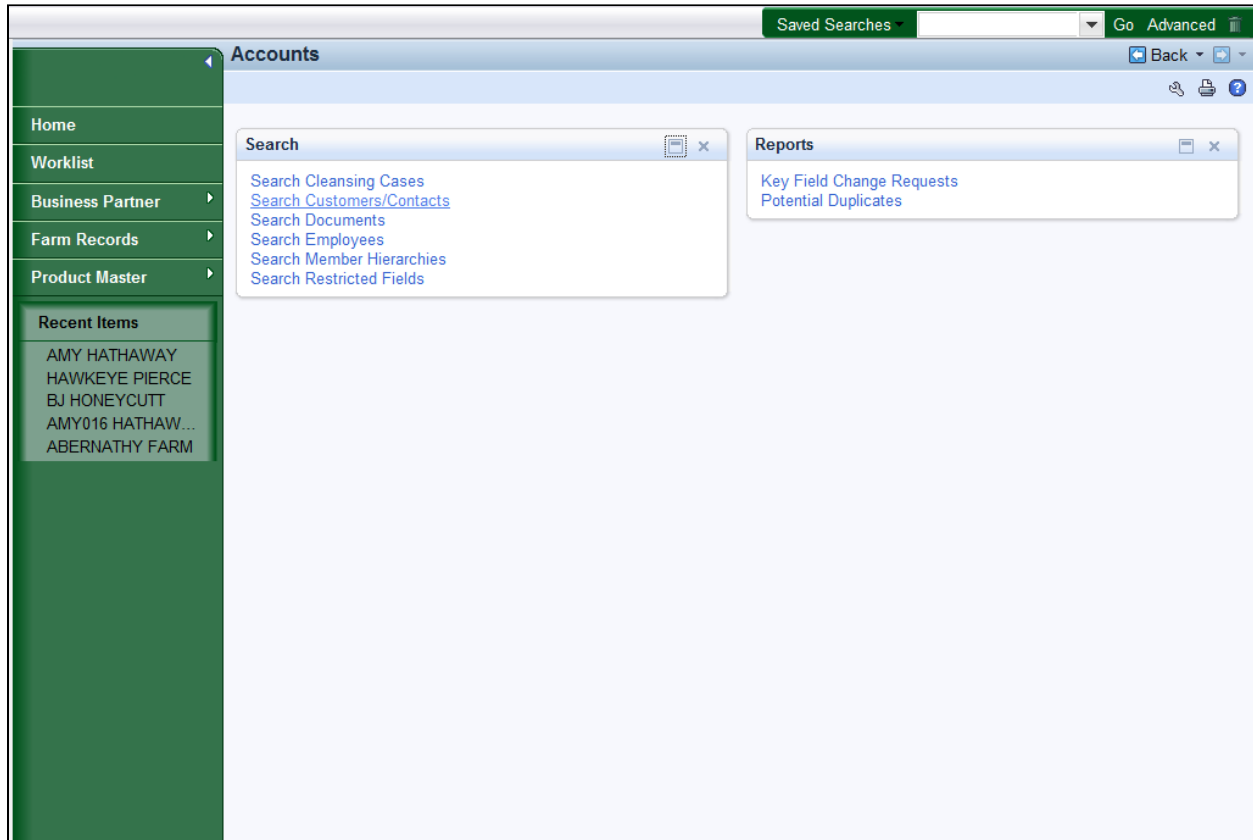
1. Start the transaction from the MIDAS CRM Home Page.

Home



2. Click the **Business Partner** button to go to the Accounts page.

Accounts



3. Click the **Search Customers/Contacts** [Search Customers/Contacts](#) link to go to the Search: Customer page.





Search: Customers

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

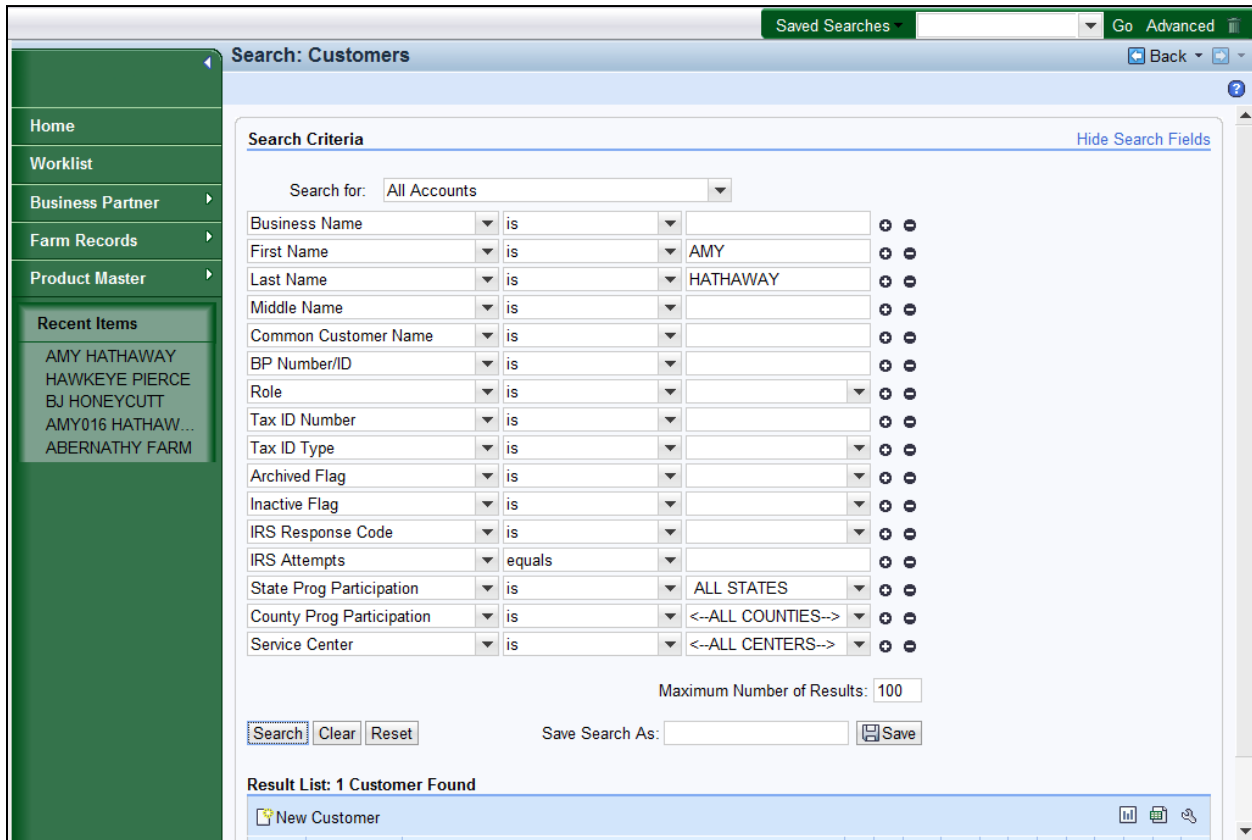
Field	R/O/C	Description
First Name	O	The first name of an individual or a wildcard search for an individual's first name (example: a letter or fragment of a name plus *) used as part of a search criteria. Example: Amy

Field	R/O/C	Description
Last Name	O	The last name of an individual or a wildcard search for an individual's last name (example: a letter or fragment of a name plus *) used as part of a search criteria. Example: Hathaway

 There are multiple ways to search for a Customer record. See the *BP_Search for Business Partner Customer Record* work instruction for more information on search.

- Click the **Search**  button to display the Search results for the search criteria entered.

Search: Customers



The screenshot displays the 'Search: Customers' interface. On the left is a navigation menu with options like Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The main area contains a search criteria form with the following fields and values:

- Search for: All Accounts
- Business Name: is
- First Name: is AMY
- Last Name: is HATHAWAY
- Middle Name: is
- Common Customer Name: is
- BP Number/ID: is
- Role: is
- Tax ID Number: is
- Tax ID Type: is
- Archived Flag: is
- Inactive Flag: is
- IRS Response Code: is
- IRS Attempts: equals
- State Prog Participation: is ALL STATES
- County Prog Participation: is <-ALL COUNTIES-->
- Service Center: is <-ALL CENTERS-->

At the bottom, there are buttons for Search, Clear, and Reset. Below the search criteria, it says 'Maximum Number of Results: 100' and 'Save Search As:'. The result list shows '1 Customer Found' and a 'New Customer' button.

- Scroll to display the **Result List** and to view the search results based on the search criteria entered.

Search: Customers

Saved Searches
Go Advanced

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
- AMY HATHAWAY
- HAWKEYE PIERCE
- BJ HONEYCUTT
- AMY016 HATHAW...
- ABERNATHY FARM

Back
?

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is	AMY	⊕ ⊖
Last Name	is	HATHAWAY	⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
Tax ID Number	is		⊕ ⊖
Tax ID Type	is		⊕ ⊖
Archived Flag	is		⊕ ⊖
Inactive Flag	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Attempts	equals		⊕ ⊖
State Prog Participation	is	ALL STATES	⊕ ⊖
County Prog Participation	is	<-ALL COUNTIES-->	⊕ ⊖
Service Center	is	<-ALL CENTERS-->	⊕ ⊖

Maximum Number of Results: 100

Search Clear Reset
Save Search As: Save

Result List: 1 Customer Found

New Customer

Ina...	BP Num...	Common Customer Name	T..	P..	T...	H...	S..	C..	S..	Z..	T..	E..	I...	I...
<input type="checkbox"/>	8000058...	AMY HATHAWAY	N..	<input checked="" type="checkbox"/>	N..	1..	S..	M..	6..	+..	I..	0		

7. Select the **Common Customer Name (Amy Hathaway)** [AMY HATHAWAY](#) link to go to the Customer page.

Wednesday, December 17, 2014

BP_Manage_Attachments.udc

7/26



Customer: AMY HATHAWAY

Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change || Fact Sheet
 PDF Fact Sheet | More ▾

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

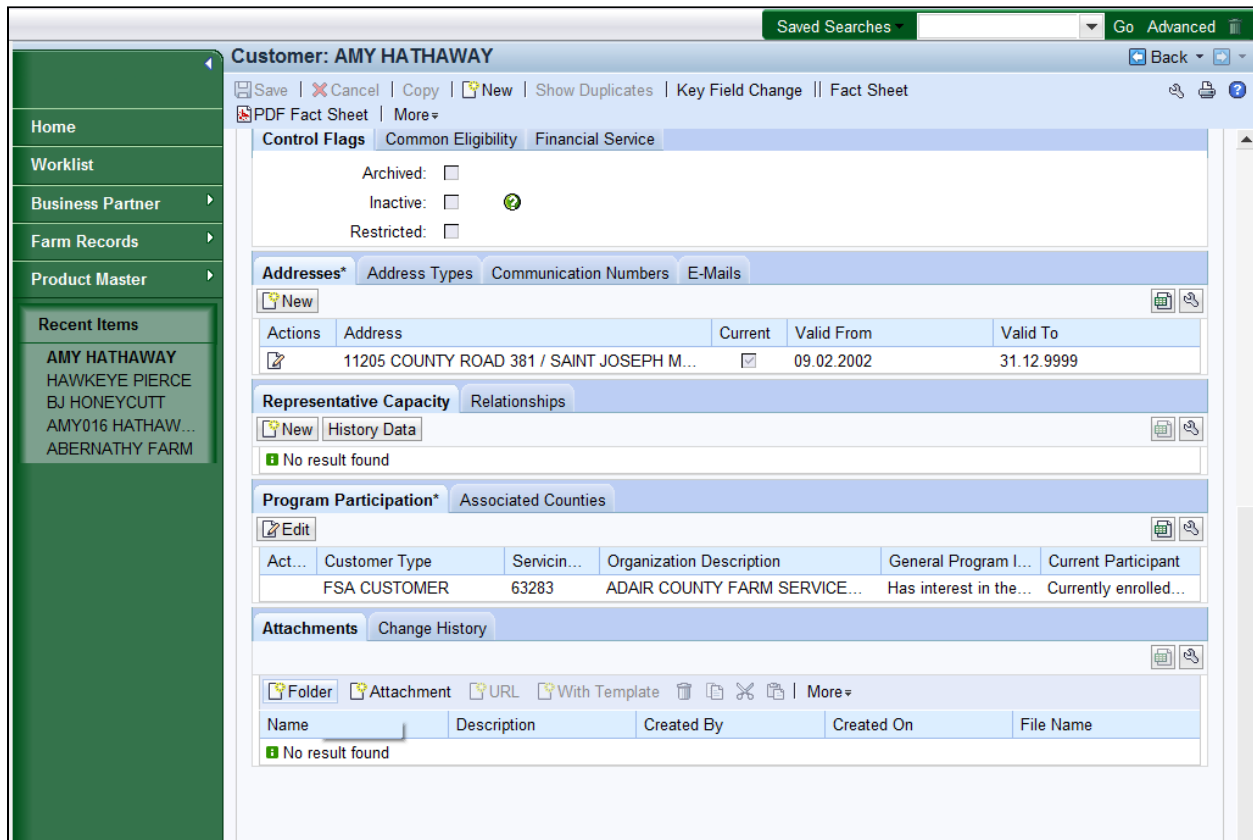
Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number / ID: 8000058867	Address Lin... 11205 COUNTY ROAD 381
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: AMY	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: HATHAWAY	City: SAINT JOSEPH
Suffix:	State: MO MISSOURI
Common Customer.. AMY HATHAWAY	ZIP Code: 64505-4074
Legal Name: No	Country: US USA
Language Preference: English	Telephone: (816) 233-4452
Data Origin: SCIMS	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: R003
Date of Death:	Delivery Bar... 050
Death Confirmed: <input type="checkbox"/>	Congressio... MISSOURI 06

Notes

8. Scroll down to the **Attachment** assignment block.

Customer: AMY HATHAWAY




Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet


PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

Archived:
Inactive: 
Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data




No result found

Program Participation* | Associated Counties

Edit


Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments | Change History

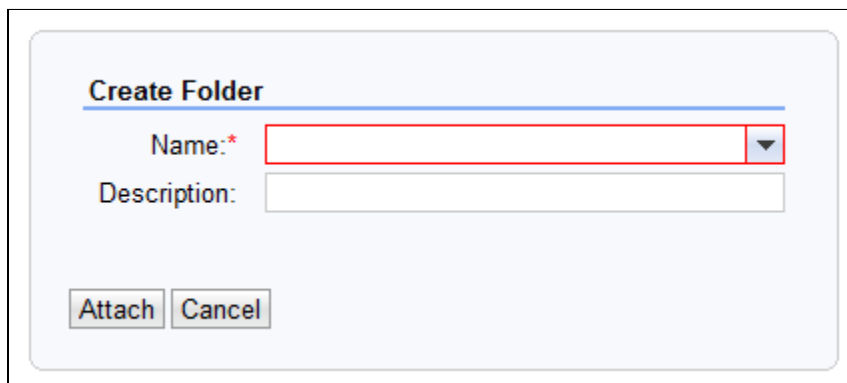
Folder | Attachment | URL | With Template |    | More

Name	Description	Created By	Created On	File Name
No result found				

9. Click the **Folder**  **Folder** button.

 If the user selected to add attachment first, then "Select or Create a folder first" error message displays.

New Folder




Create Folder

Name:* ▼

Description:

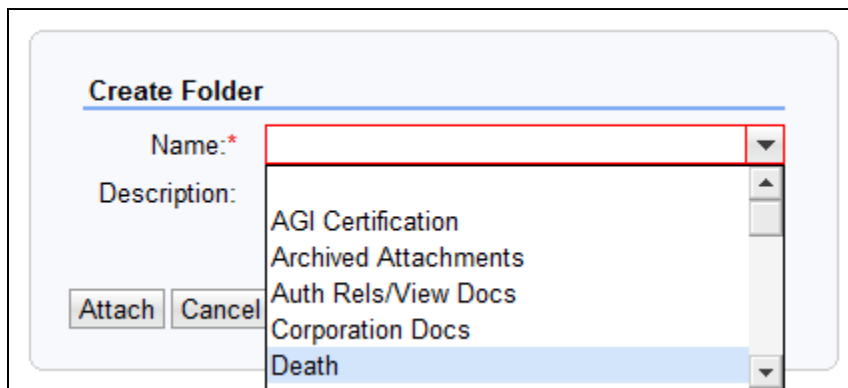
Attach Cancel

10. Click the **Name:**  dropdown list icon button to select a predefined folder

from the list.

- When the user clicks the **Create Folder** button, a dialog window appears with the **Name** and **Description** fields. However, the **Name** field is blocked for manual entry. User must select an entry from a predefined list of folders.

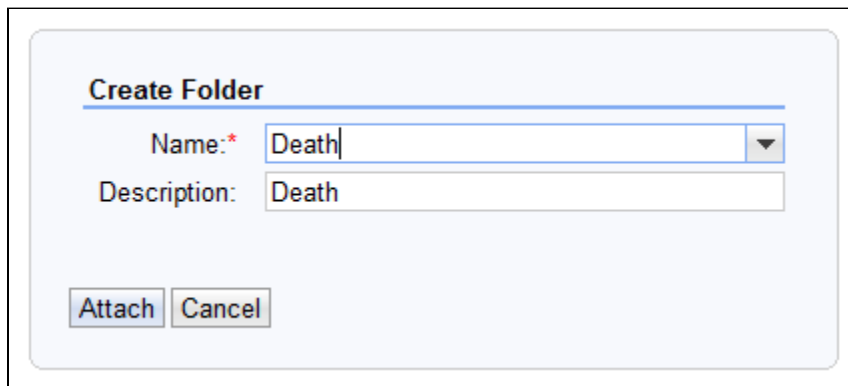
New Folder



- Select **Death** from the available list of folder options.

- Once the folder has been created on the BP record that folder isn't available for selection again for that BP record.

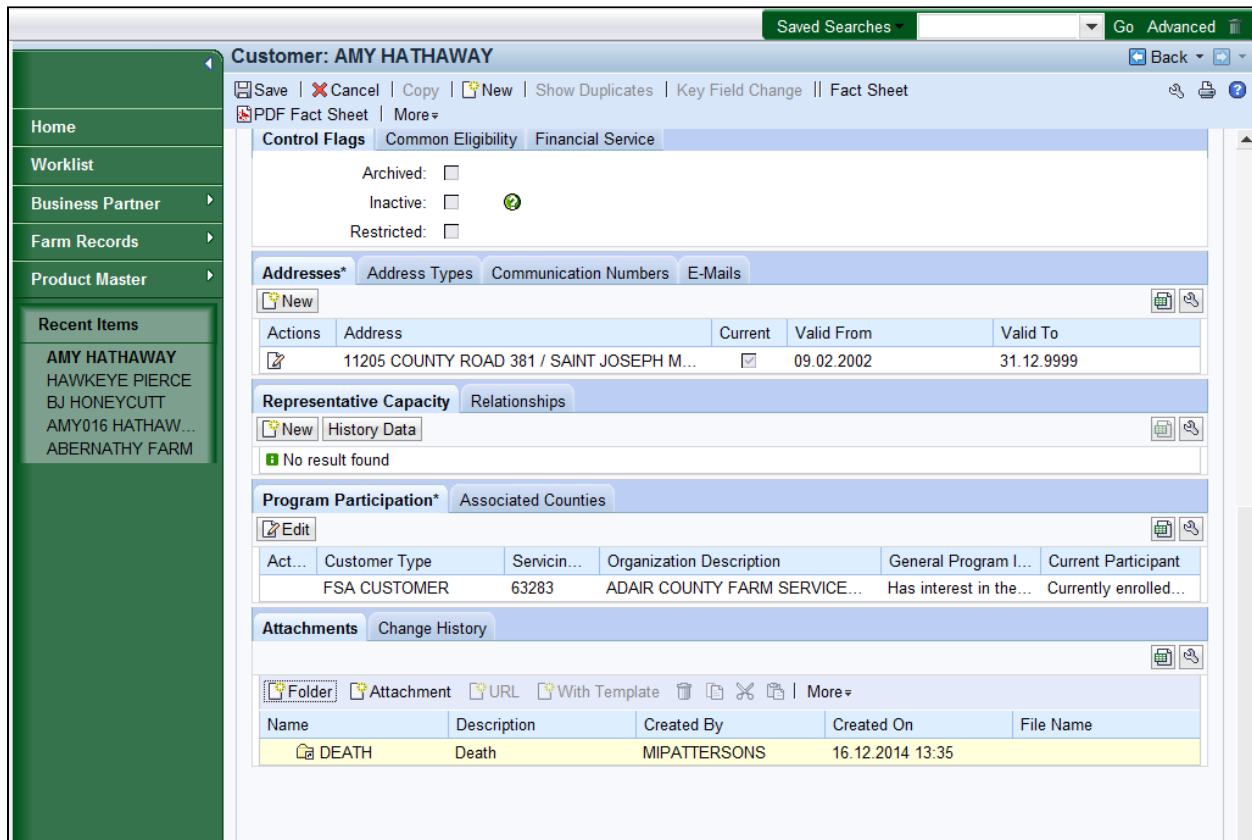
New Folder



- Click the **Attach** button to return to the Customer page.

- Users can manually enter information that would provide additional clarification in the **Description** field.

Customer: AMY HATHAWAY




Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet


PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

Archived:
Inactive: 
Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data

No result found


Program Participation* | Associated Counties


Edit

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

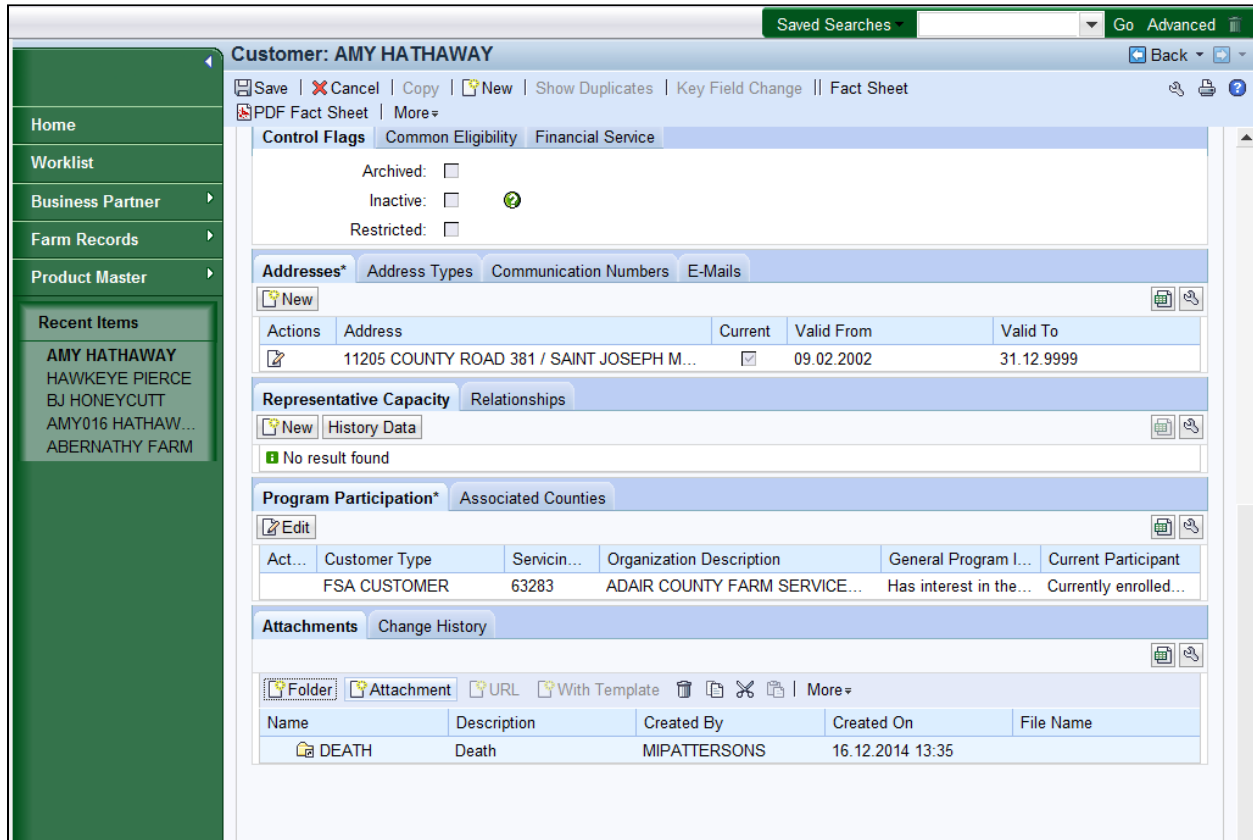
Name	Description	Created By	Created On	File Name
 DEATH	Death	MIPATTERSONS	16.12.2014 13:35	

13. Select the **DEATH**  **DEATH** folder to choose the line item.



The folder has been created for BP record and is ready for the next step in the Attachment process.

Customer: AMY HATHAWAY




Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet


PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

Archived:
Inactive: 
Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data




No result found


Program Participation* | Associated Counties


Edit

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template |    | More


Name	Description	Created By	Created On	File Name
 DEATH	Death	MIPATTERSONS	16.12.2014 13:35	

14. Click the **Attachment**  **Attachment** button to add documents to the defined folder.

New Attachment

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you choose to enter a name, this name is displayed in the attachment list. If you do not enter a name, the file name is displayed.


Upload Document From Local Hard Disk

Name: 

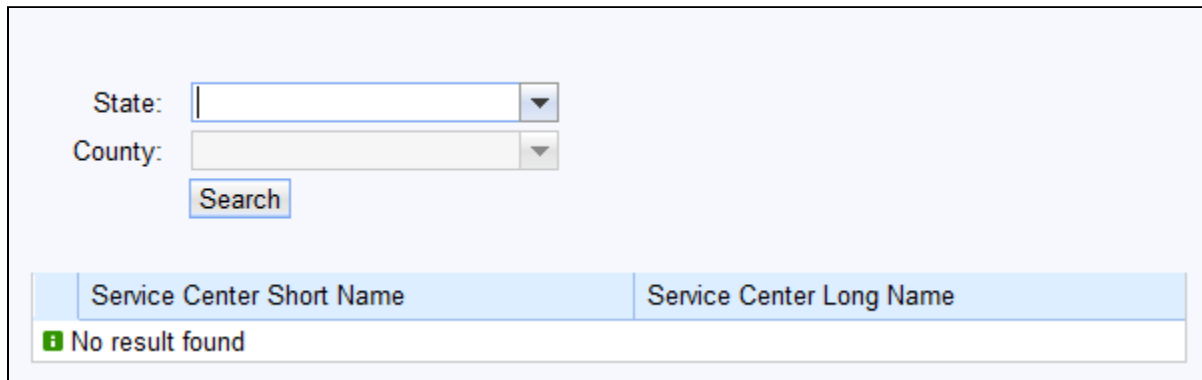
Description:

Upload Document From Local Hard Disk:

15. Click the **Name** field Open Input Help  button to search for the assigned Service Center.

 The **Name** field is not an editable field but the **Description** field is available for manual entry. If you attempt to manually enter a value into the **Name** field an error message displays.

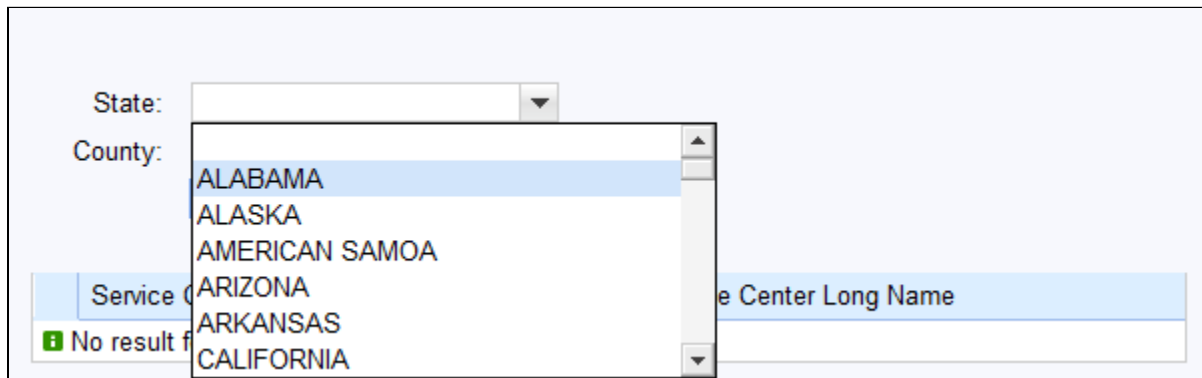
Receiving Service Center Search



Service Center Short Name	Service Center Long Name
No result found	

16. Click the **State:**  dropdown list icon button to search for the Receiving Service Center State.

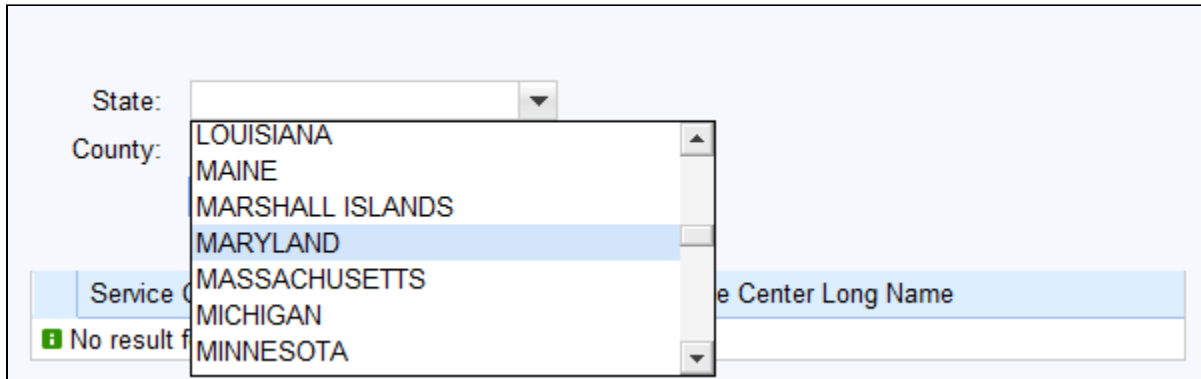
Receiving Service Center Search



Service Center Short Name	Service Center Long Name
No result found	

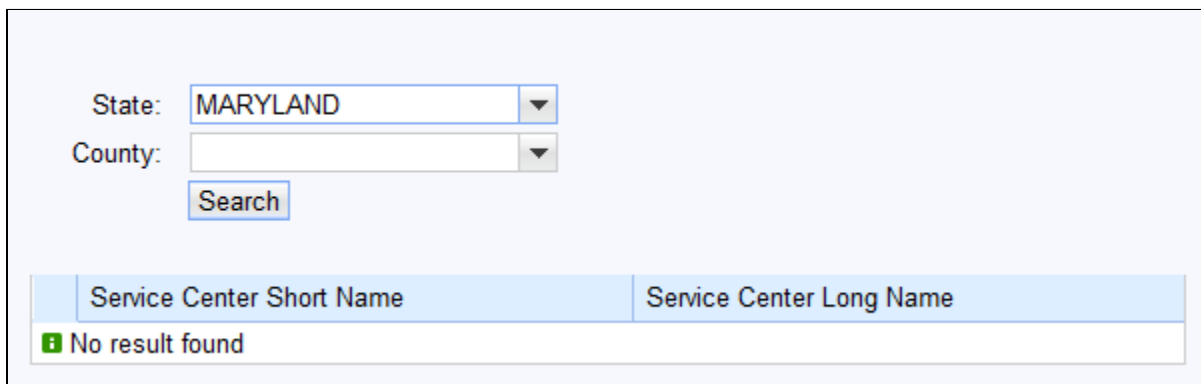
17. Click the dropdown  list icon to scroll through the State list.

Receiving Service Center Search



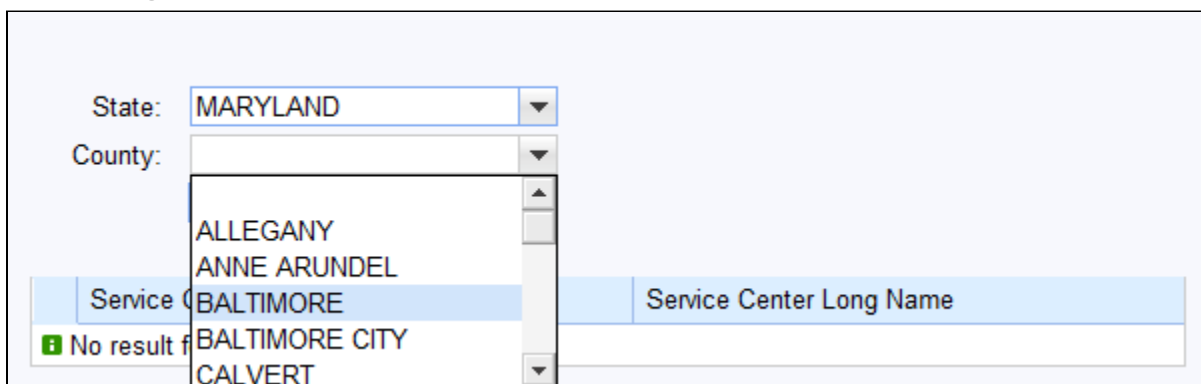
18. Select **MARYLAND** **MARYLAND** from the list.

Receiving Service Center Search



19. Click the **County:** dropdown list icon button to search for the Receiving County.

Receiving Service Center Search



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

Receiving Service Center Search

State: ▼

County: ▼

Service Center Short Name	Service Center Long Name
BALTIMORE CO, MD - FSA	BALTIMORE COUNTY FARM SERVICE A...

21. Click the **Service Center Short Name** **BALTIMORE CO, MD - FSA** located in the **Service Center Short Name** field.



The Receiving Service Center is attached from the user's ID however you can choose another Service Center if necessary.

New Attachment

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you choose to enter a name, this name is displayed in the attachment list. If you do not enter a name, the file name is displayed.

Upload Document From Local Hard Disk

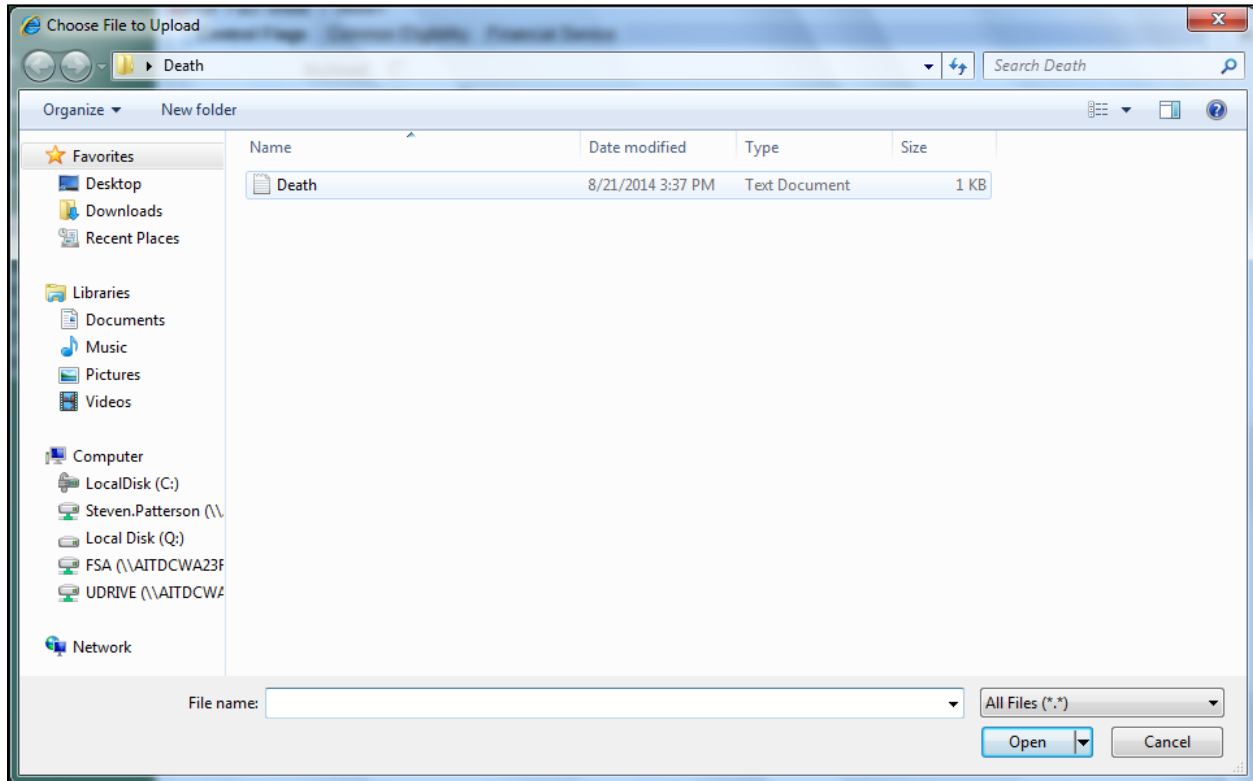
Name:

Description:

Upload Document From Local Hard Disk:

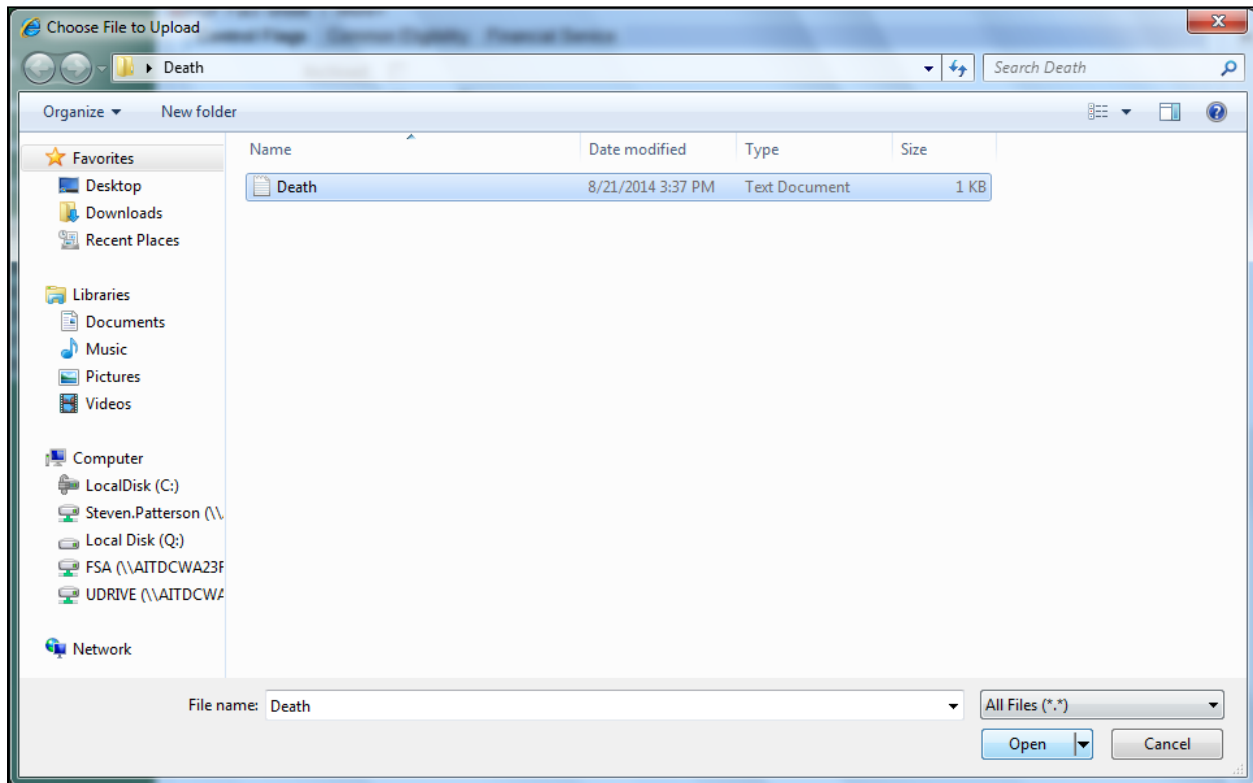
22. Click the **Browse** button to locate the document which needs to be attached to the BP record.

Choose File to Upload



23. Select **Death**  to select the file to be upload to CRM.

Choose File to Upload



24. Click the **Open**  button.

New Attachment

To attach a document, select the document using the value help. If you upload a document from your local hard disk, you can enter a name for the document. If you choose to enter a name, this name is displayed in the attachment list. If you do not enter a name, the file name is displayed.

Upload Document From Local Hard Disk


Name: 

Description:

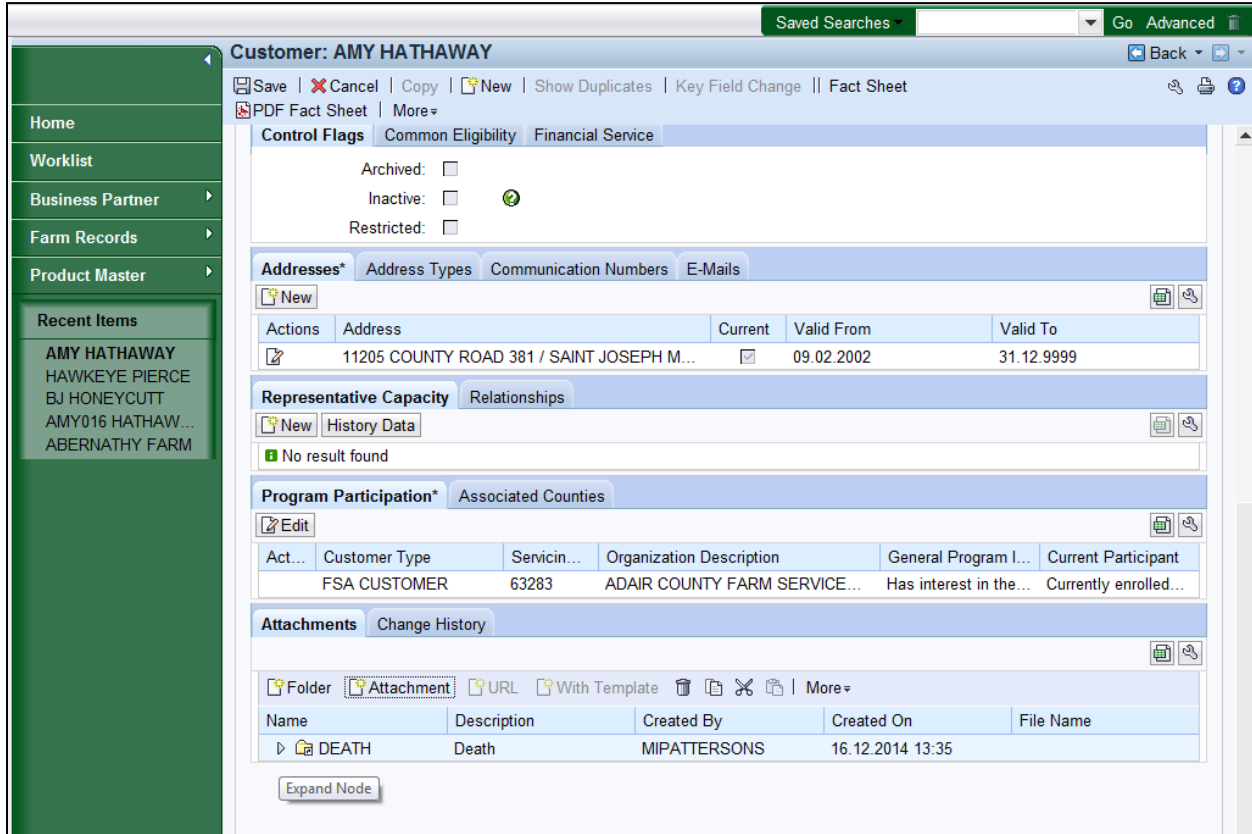
Upload Document From Local Hard Disk: 

25. Click the **Attach**  button to attach the document to the Business Partner

record.

-  The user can only attach files that are smaller than 1 MB, otherwise the user receives an error message advising that the file is larger than 1 MB. If greater than 1 MB then it is unable to attach to the BP record.

Customer: AMY HATHAWAY




Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet


PDF Fact Sheet | More ▾

Control Flags | Common Eligibility | Financial Service

Archived:
Inactive: 
Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data





No result found

Program Participation* | Associated Counties

Edit


Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...


Attachments | Change History

Folder | Attachment | URL | With Template |     | More ▾

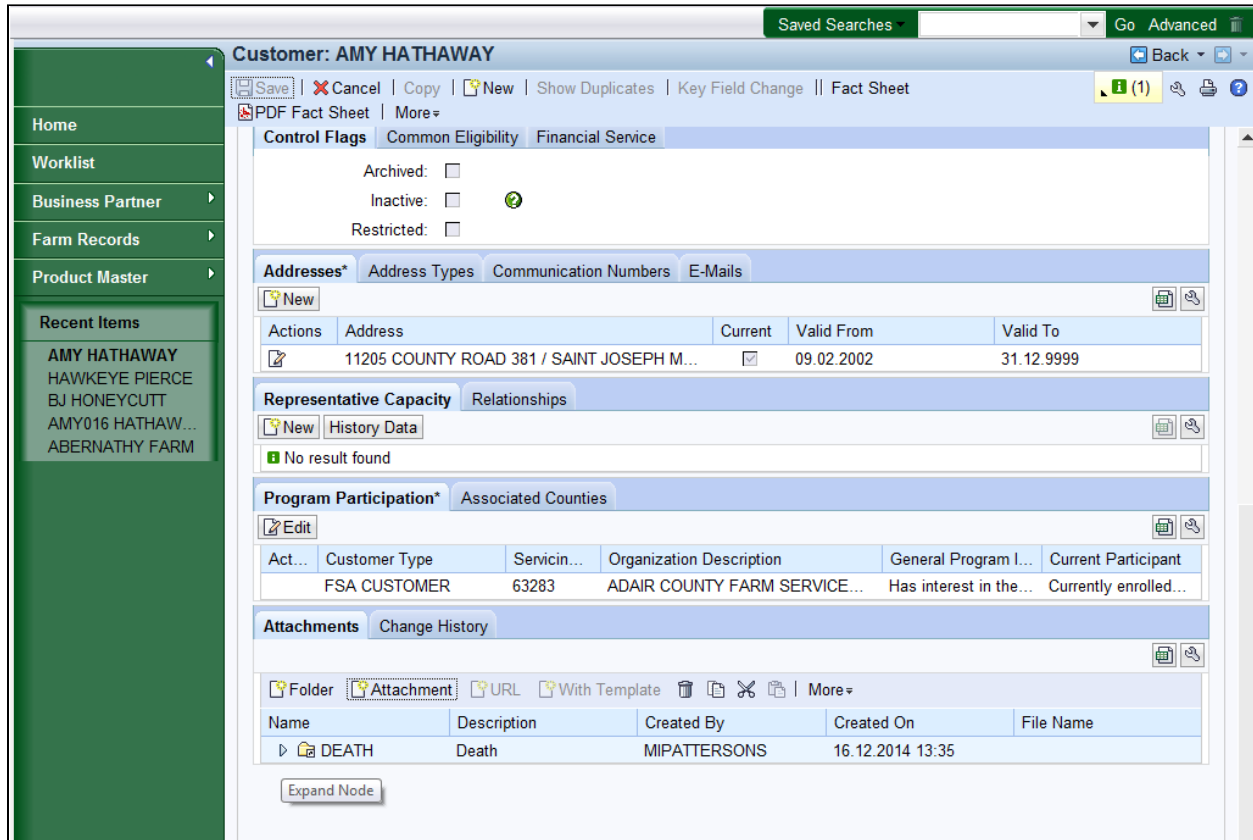
Name	Description	Created By	Created On	File Name
DEATH	Death	MIPATTERSONS	16.12.2014 13:35	

Expand Node

26. Click the **Save**  button at the top of the Customer Record, to save the updates to the Business Partner record.

-  The user can delete the folder and attachments that have been added to the BP record. The following steps will demonstrate how to delete an attachment.

Customer: AMY HATHAWAY



Customer: AMY HATHAWAY

Control Flags: Archived: Inactive: Restricted:

Addresses*

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity
 No result found

Program Participation*

Act...	Customer Type	Servicin...	Organization Description	General Program l...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments

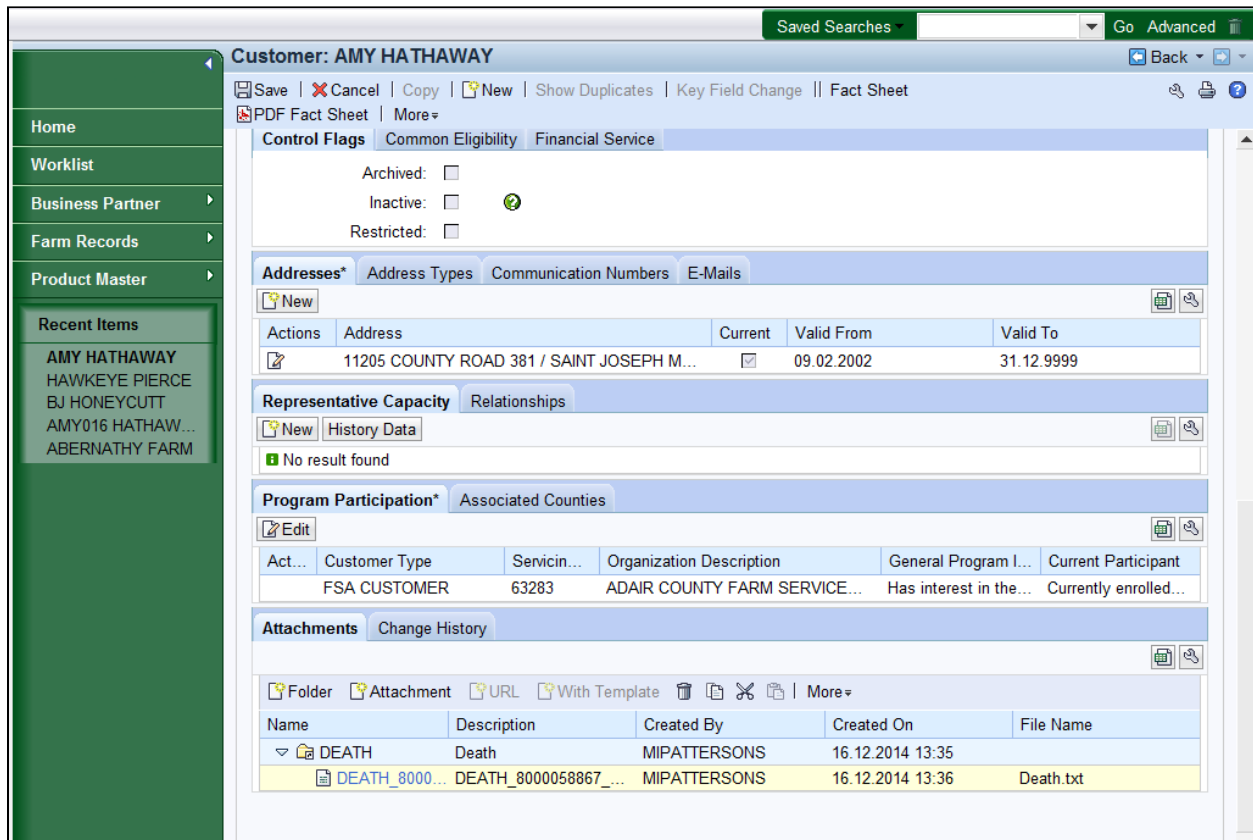
Name	Description	Created By	Created On	File Name
▷ DEATH	Death	MIPATTERSONS	16.12.2014 13:35	

27. Click the **DEATH** tree item to expand the folder to view the content of the folder.



A folder can only be deleted if there are no attachments in it. If the folder contains document attachments then the attachments deleted first.

Customer: AMY HATHAWAY



Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet

PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

Archived: Inactive: Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data

No result found

Program Participation* | Associated Counties

Edit


Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...


Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
DEATH	Death	MIPATTERSONS	16.12.2014 13:35	
DEATH_8000058867_...	DEATH_8000058867_...	MIPATTERSONS	16.12.2014 13:36	Death.txt

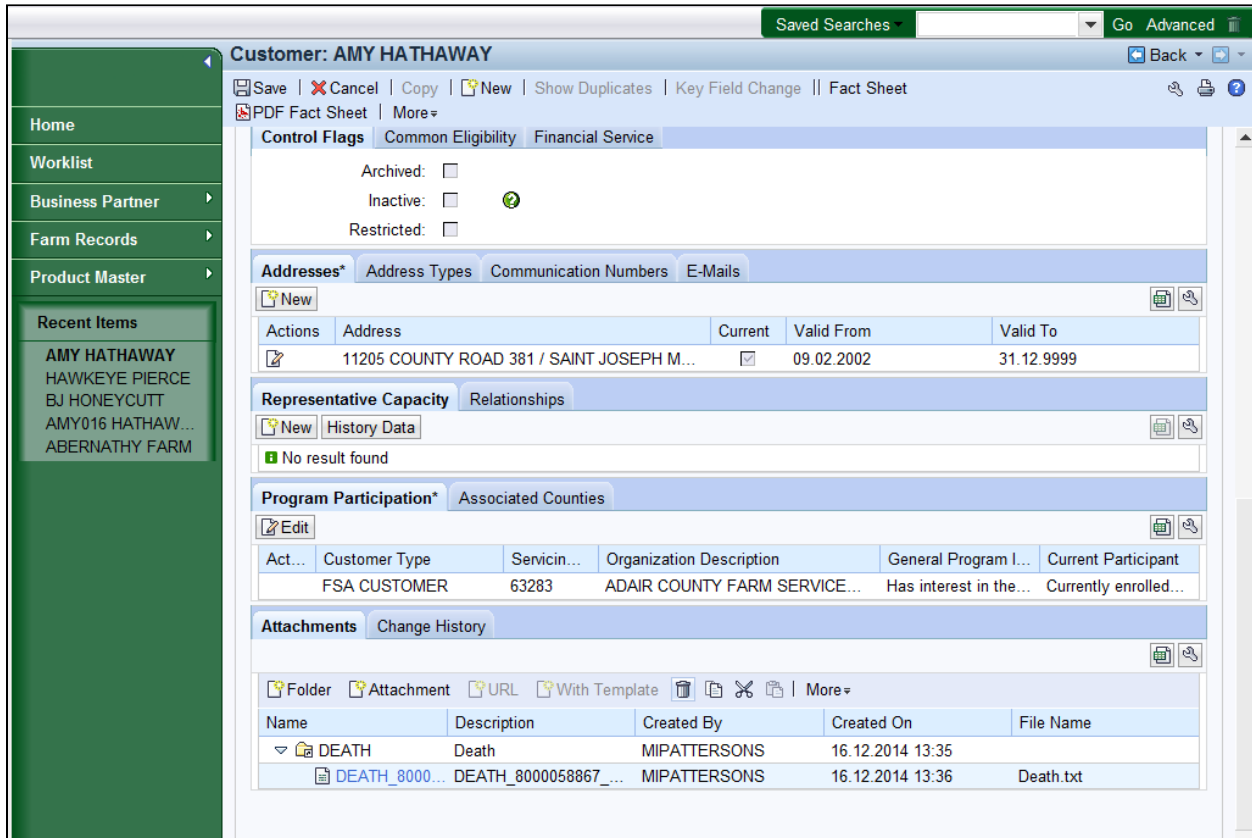
28. Select the attached **DEATH_8000058867_** document to choose the item to be deleted.

 To view the document, click the document name and will open in another window with the appropriate application.

 CRM indicates the name of the document and the folder; who created the entry and the date when the document was attached to the Business Partner record. The attachment file name includes the following details:

- Brief Description of file:
 - Folder ID (e.g. DEATH)
 - BP Number / ID (e.g. 8000058867)
 - Service County (e.g. BALTIMORECO)

Customer: AMY HATHAWAY




Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet


PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

Archived:
Inactive: 
Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data




No result found

Program Participation* | Associated Counties

Edit


Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments | Change History

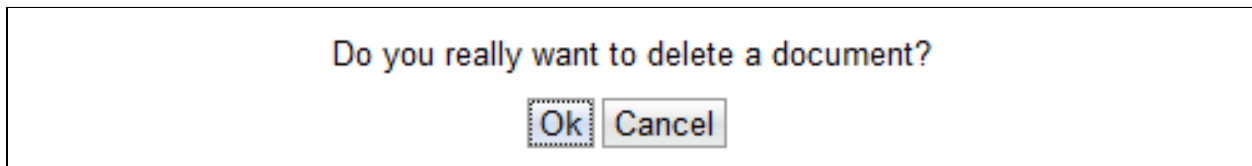
Folder | Attachment | URL | With Template |  |  |  | More

Name	Description	Created By	Created On	File Name
DEATH	Death	MIPATTERSONS	16.12.2014 13:35	
DEATH_8000...	DEATH_8000058867_...	MIPATTERSONS	16.12.2014 13:36	Death.txt

29. Click the **Delete**  button.


 You know the line has been selected when it turns blue.


Confirm Deletion



Do you really want to delete a document?

Ok Cancel

30. Click the **Ok**  button to acknowledge the deletion of the attachment.

 The next steps will demonstrate how to delete an folder.


Customer: AMY HATHAWAY

Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet


PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data

No result found


Program Participation* | Associated Counties

Edit

Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

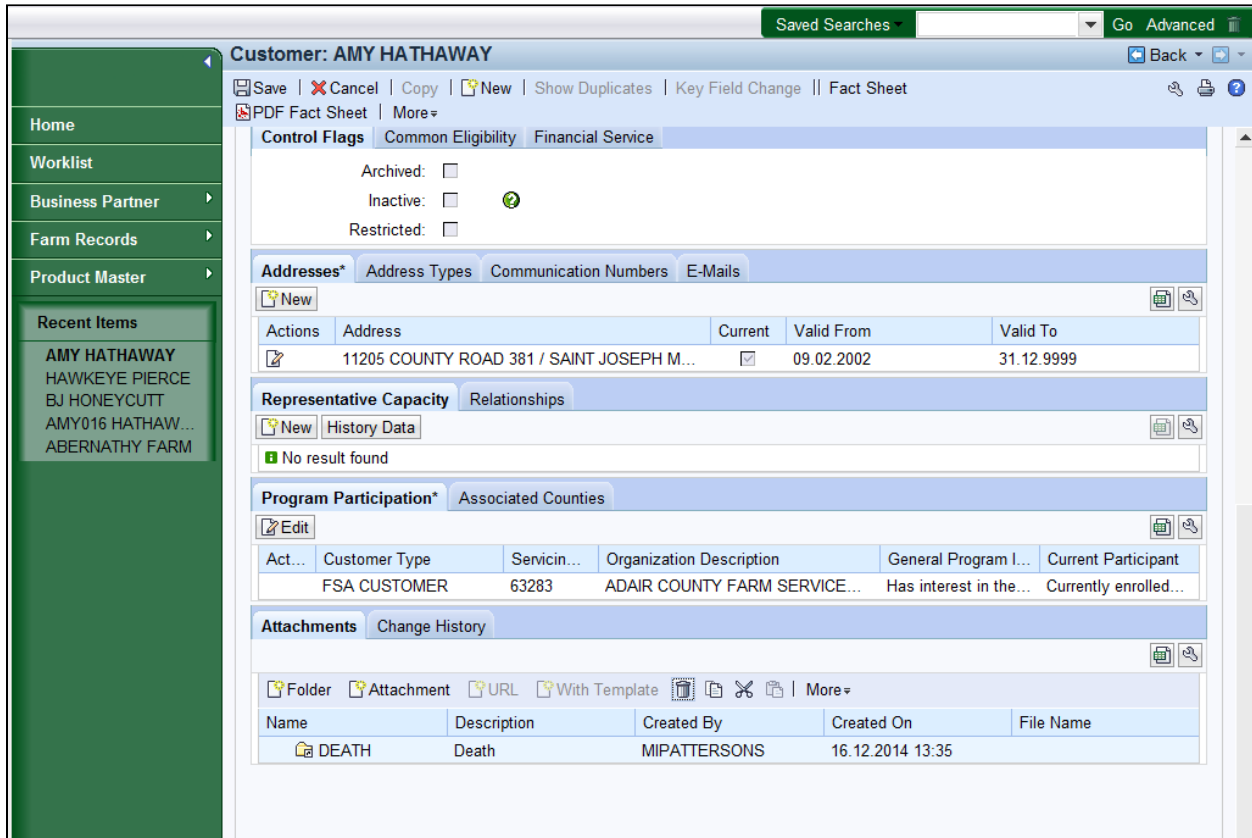
Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
 DEATH	Death	MIPATTERSONS	16.12.2014 13:35	

31. Click the **DEATH**  DEATH folder to choose the folder to be deleted.

Customer: AMY HATHAWAY



Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet

PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

Archived: Inactive: Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data

No result found

Program Participation* | Associated Counties

Edit


Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
	DEATH	Death	MIPATTERSONS	16.12.2014 13:35

32. Click the **Delete**  button.

 A user can delete a folder by clicking the Delete trash can and the folder is deleted. The folder name is returned and can be selected in the Create folder process. A folder can only be deleted if there are no attachments in it.

Confirm Deletion

Do you really want to delete this folder with all its content (All subfolders/documents would be permanently deleted)?

33. Click the **Ok**  button to to acknowledge the deletion of the folder.


Customer: AMY HATHAWAY

Customer: AMY HATHAWAY

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | Fact Sheet


PDF Fact Sheet | More

Control Flags | Common Eligibility | Financial Service

Archived:
 Inactive: 
 Restricted:

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

New

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity | Relationships

New | History Data





No result found

Program Participation* | Associated Counties

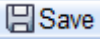
Edit


Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments | Change History

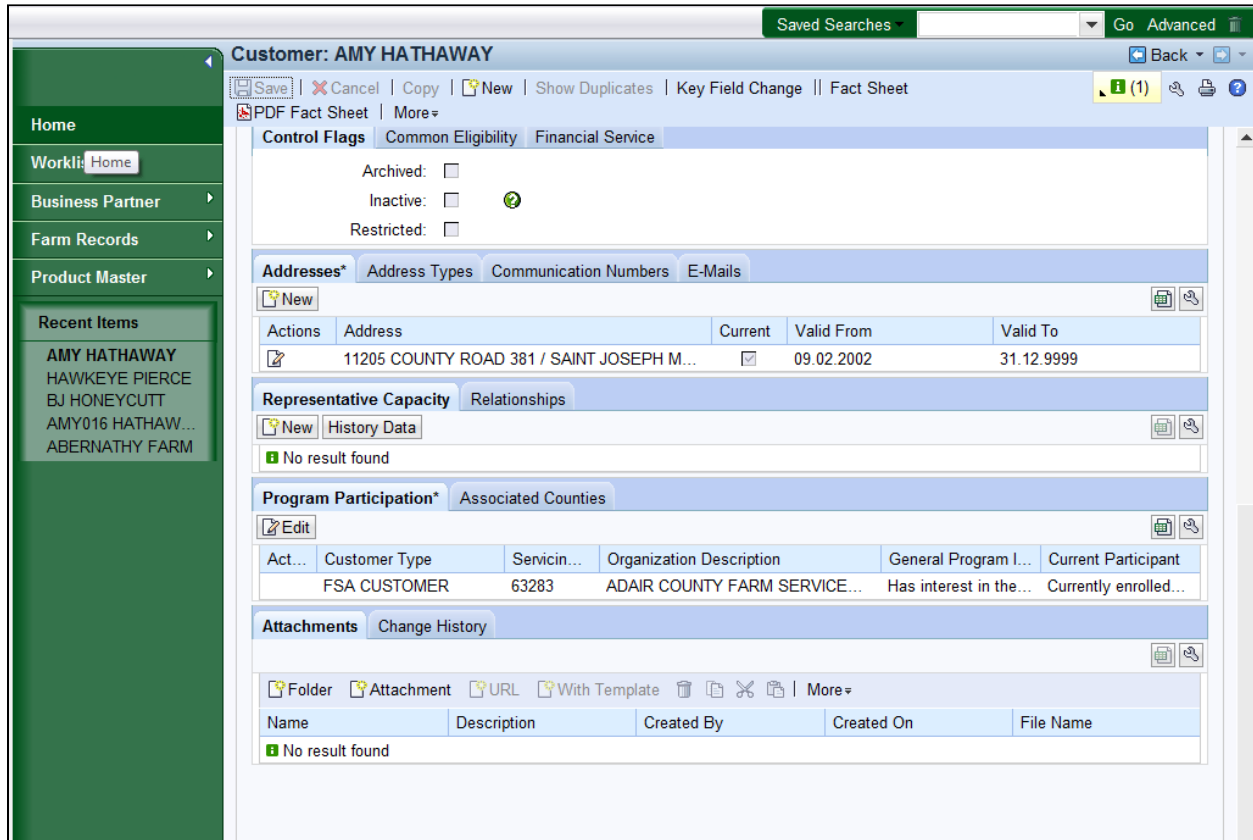
Folder | Attachment | URL | With Template |     | More

Name	Description	Created By	Created On	File Name
No result found				

34. Click the **Save**  button to save the changes to the BP record.

 The folder has been deleted from the BP record.

Customer: AMY HATHAWAY



Customer: AMY HATHAWAY

Control Flags: Archived: Inactive: Restricted:

Addresses

Actions	Address	Current	Valid From	Valid To
	11205 COUNTY ROAD 381 / SAINT JOSEPH M...	<input checked="" type="checkbox"/>	09.02.2002	31.12.9999

Representative Capacity

Program Participation*

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	63283	ADAIR COUNTY FARM SERVICE...	Has interest in the...	Currently enrolled...

Attachments

Name	Description	Created By	Created On	File Name
No result found				

35. Click the **Home**  button return to the Main page. You have completed the transaction.



Result

You have added or deleted a document and folder in the Attachments assignment block in the BP record.