

Purpose

The purpose of this work instruction is to describe how to create a Marriage Representative Capacity relationship.

Trigger



Perform this procedure when Marriage representative capacity must be created.




Prerequisites

- A customer record for the person who will have a Marriage relationship must be saved in Business Partner.

Helpful Hints

- To see the details of a Representative Capacity you must go in from the customer record of the individual who has granted the relationship. As an example, if a husband has given his wife Spousal Signature authority you must go in from the husband's customer record to see the details.
- "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:

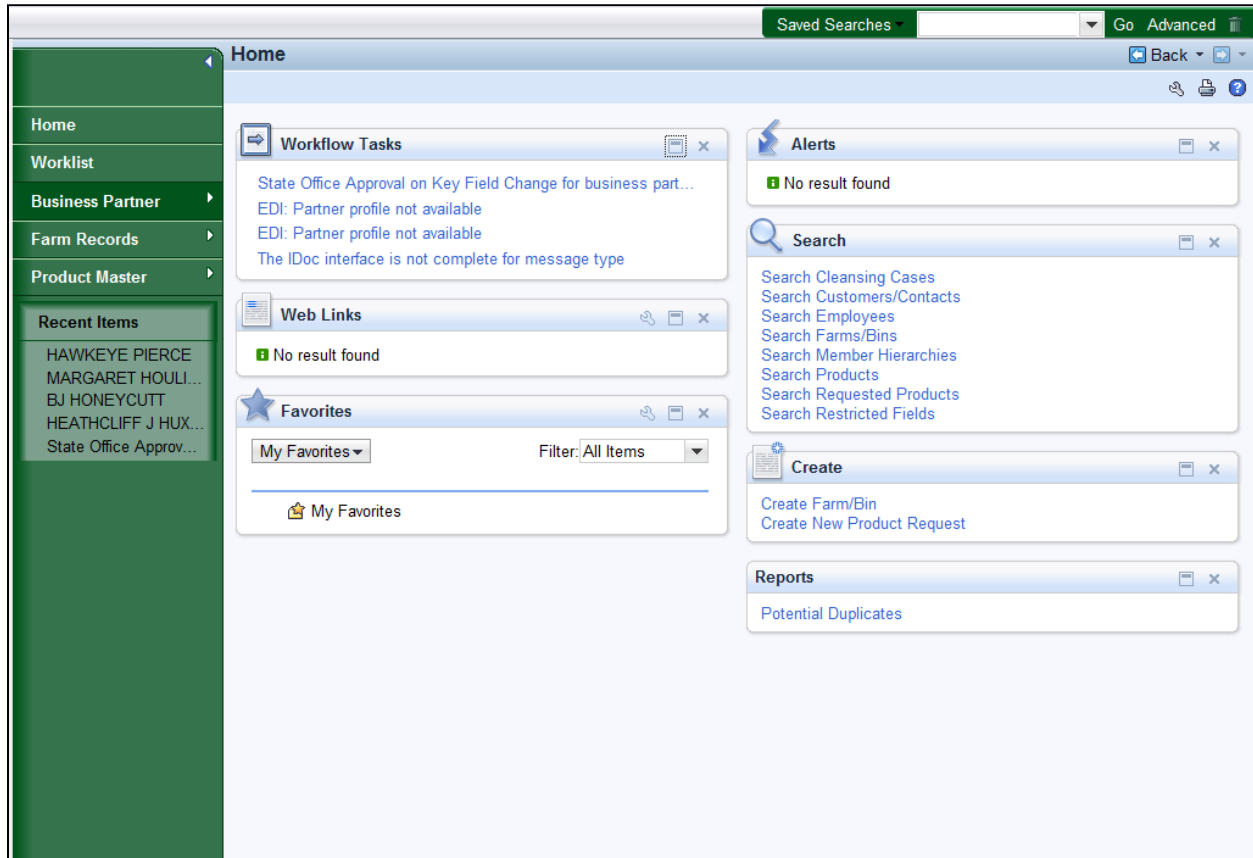
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A cautionary note		Use this note to communicate to the 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

A screenshot of a web application interface for "Accounts". The interface has a dark green sidebar on the left with navigation links: Home, Worklist, Business Partner, Farm Records, Product Master, and a "Recent Items" section listing "HAWKEYE PIERCE", "MARGARET HOULI...", "BJ HONEYCUTT", "HEATHCLIFF J HUX...", and "State Office Approv...". The main content area is titled "Accounts" and contains two panels. The "Search" panel lists links: "Search Cleansing Cases", "Search Customers/Contacts", "Search Documents", "Search Employees", "Search Member Hierarchies", and "Search Restricted Fields". The "Reports" panel lists "Potential Duplicates". At the top right of the main area, there are "Saved Searches" and "Go Advanced" buttons, and a "Back" button.

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	Business Partner's First Name Example: Hawkeye



Multiple different ways to search for a BP record. In this example, we used the First Name only. Refer to the *BP Search Customer Business Partner Record* work instruction for further details.

Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is	Hawkeye	⊕ ⊖
Last Name	is		⊕ ⊖
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		⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖
Associated County	is	ALL COUNTIES	⊕ ⊖
Service Center	is	ALL CENTERS	⊕ ⊖

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

Inact...	BP Number/ID	Common Customer Name	Ta...	Pa...	Ta...	Ho...	S	C	S	Z	T	E	IRS Resp...	I...
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- Click the **Search** button to display the Search results for the criteria entered.



Search: Customers

Saved Searches
Go Advanced

Search: Customers
Back

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
 - HAWKEYE PIERCE
 - MARGARET HOULI...
 - ALAN A SMITH
 - BENJIMAN H PIER...
 - JED CLAMPETT

Search Criteria
Hide Search Fields

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is	HAWKEYE	⊕ ⊖
Last Name	is		⊕ ⊖
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		⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖
Associated County	is	ALL COUNTIES	⊕ ⊖
Service Center	is	ALL CENTERS	⊕ ⊖

Maximum Number of Results: 100

Save Search As:

Result List: 2 Customers Found

Inact...	BP Number/ID	Common Customer Name	Ta...	Pa...	Ta...	Ho...	S	C	S	Z	T	E	IRS Resp...	I...
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6. Scroll to display the **Result List** table to view the search results.

Thursday, October 09, 2014

BP_Representative_Capacity_Create_a_Marriage_Relationship.udc

7/20

Search: Customers

Search: Customers
Go Advanced

- Home
- Worklist
- Business Partner
- Farm Records
- Product Master
- Recent Items
 - HAWKEYE PIERCE
 - MARGARET HOULI...
 - ALAN A SMITH
 - BENJIMAN H PIER...
 - JED CLAMPETT

Business Name	is	
First Name	is	HAWKEYE
Last Name	is	
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	
Associated State	is	ALL STATES
Associated County	is	ALL COUNTIES
Service Center	is	ALL CENTERS

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List: 2 Customers Found

New Customer

Inact...	BP Number/ID	Common Customer Name	Ta...	Pa...	Ta...	Ho...	S...	C...	S...	Z...	T...	E...	IRS Resp...	I...
<input type="checkbox"/>	8000028399	HAWKEYE PIERCE	12...	<input checked="" type="checkbox"/>	So...	6...	S...	V...	2...	+			Waiting fo...	0
<input checked="" type="checkbox"/>	8000028424	HAWKEYE PIERCE	NO...	<input type="checkbox"/>	No...								Waiting fo...	0

- Select the **Common Customer Name** from the **Results List** (HAWKEYE PIERCE) [HAWKEYE PIERCE](#) to go to the Customer page.

Customer: HAWKEYE PIERCE

Customer: HAWKEYE PIERCE

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

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

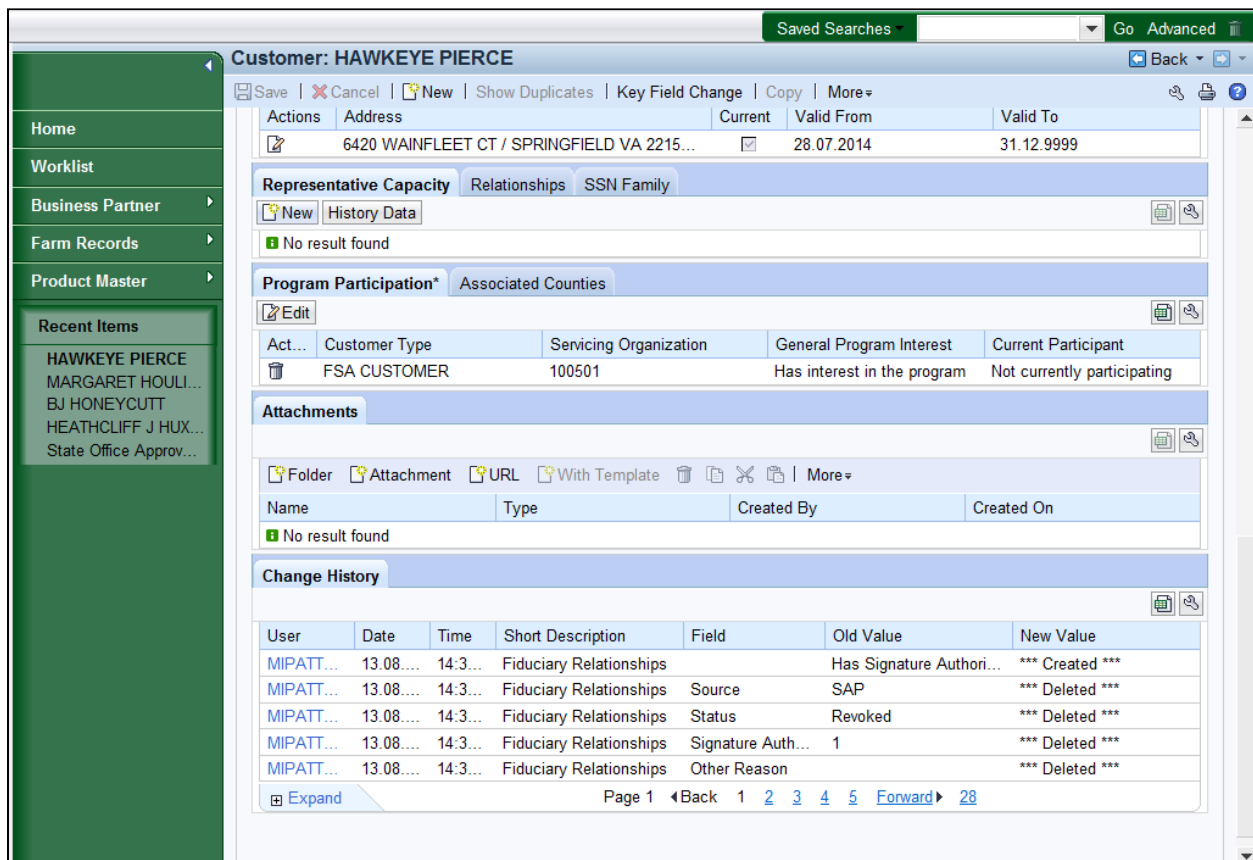
Edit | Tax ID History

General Data	Main Address and Communication Data
Current Role: Individual	Information.
BP Number / ID: 8000028399	Address Li. 6420 WAINFLEET CT
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: HAWKEYE	Address Li.
Middle Name:	Example: Apartment, Suite, Unit, Building, F...
Last Name: PIERCE	City: SPRINGFIELD
Suffix:	State: VA VIRGINIA
Common Customer.. HAWKEYE PIERCE	ZIP Code: 22152-2432
Legal Name: No	Country: US USA
Language Preference: English	Telephone: 7034349628
Data Origin: CRM	E-Mail Addr..
Employee Type: Not an employee	Communic. Post (letter)
Tax ID Type: Social Sec... ?	Carrier Route: C011
Tax ID Number: 123456789 ?	Delivery Ba.. 205
IRS Response Code: Waiting for IRS response	Congressio.. VIRGINIA 11
IRS Attempts: 0	
Date of Death:	
Death Confirmed: <input type="checkbox"/>	

Notes

8. Scroll to display the **Representative Capacity** assignment block.

Customer: HAWKEYE PIERCE



Customer: HAWKEYE PIERCE

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

Actions	Address	Current	Valid From	Valid To
	6420 WAINFLEET CT / SPRINGFIELD VA 2215...	<input checked="" type="checkbox"/>	28.07.2014	31.12.9999

Representative Capacity Relationships SSN Family

No result found

Program Participation* Associated Counties

Act...	Customer Type	Servicing Organization	General Program Interest	Current Participant
	FSA CUSTOMER	100501	Has interest in the program	Not currently participating

Attachments


Name	Type	Created By	Created On
No result found			

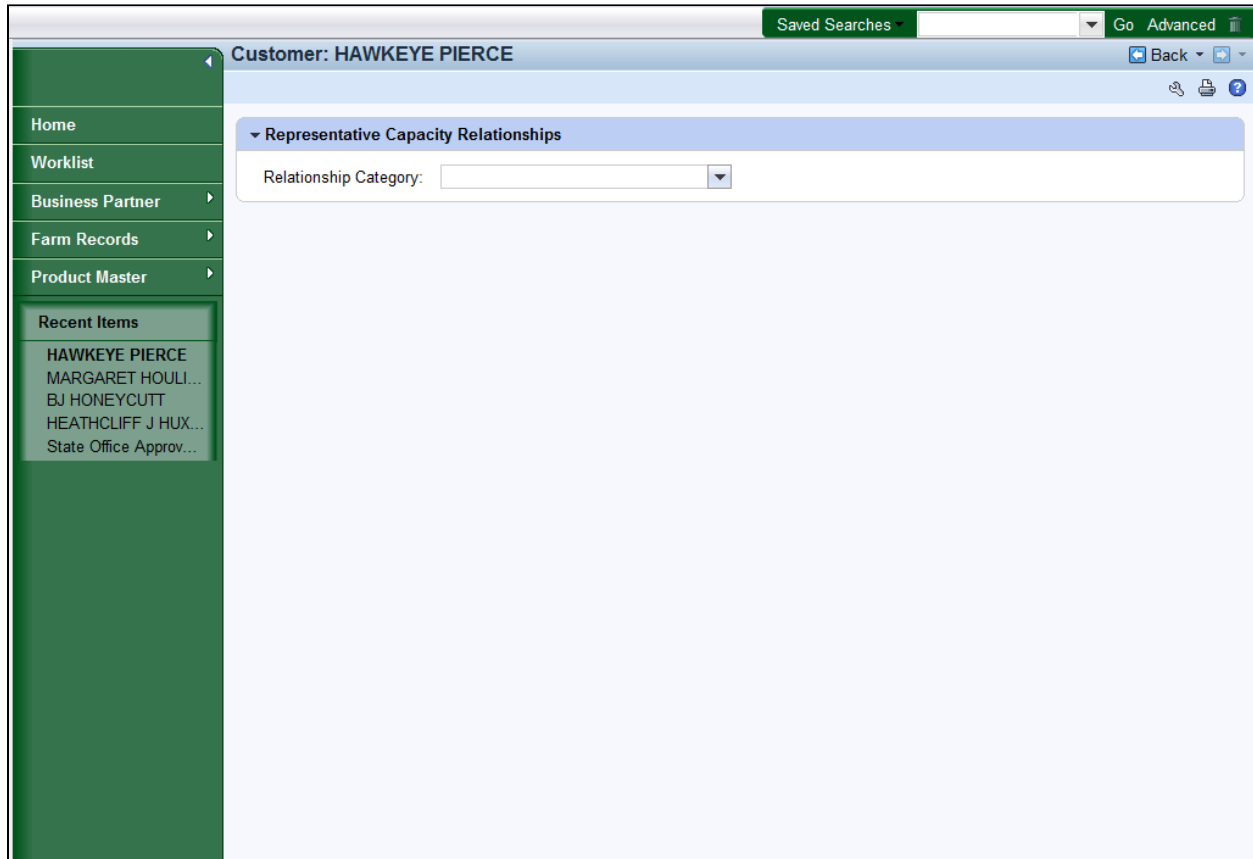
Change History

User	Date	Time	Short Description	Field	Old Value	New Value
MIPATT...	13.08....	14:3...	Fiduciary Relationships		Has Signature Authori...	*** Created ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships	Source	SAP	*** Deleted ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships	Status	Revoked	*** Deleted ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships	Signature Auth...	1	*** Deleted ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships	Other Reason		*** Deleted ***


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9. Click the **New**  button in the **Representative Capacity** assignment block to create a fiduciary relationship for the selected customer record.

 May need to use the bar along the right side to scroll or your mouse to move up or down the BP record.

Customer: HAWKEYE PIERCE

The screenshot displays the MIDAS web application interface for the customer 'HAWKEYE PIERCE'. The interface includes a navigation menu on the left with the following items: Home, Worklist, Business Partner, Farm Records, Product Master, and a Recent Items section listing HAWKEYE PIERCE, MARGARET HOULI..., BJ HONEYCUTT, HEATHCLIFF J HUX..., and State Office Approv... The main content area is titled 'Representative Capacity Relationships' and features a 'Relationship Category:' dropdown menu.

10. Click the **Relationship Category**  dropdown list icon button to display the list of relationship categories.



Customer: HAWKEYE PIERCE

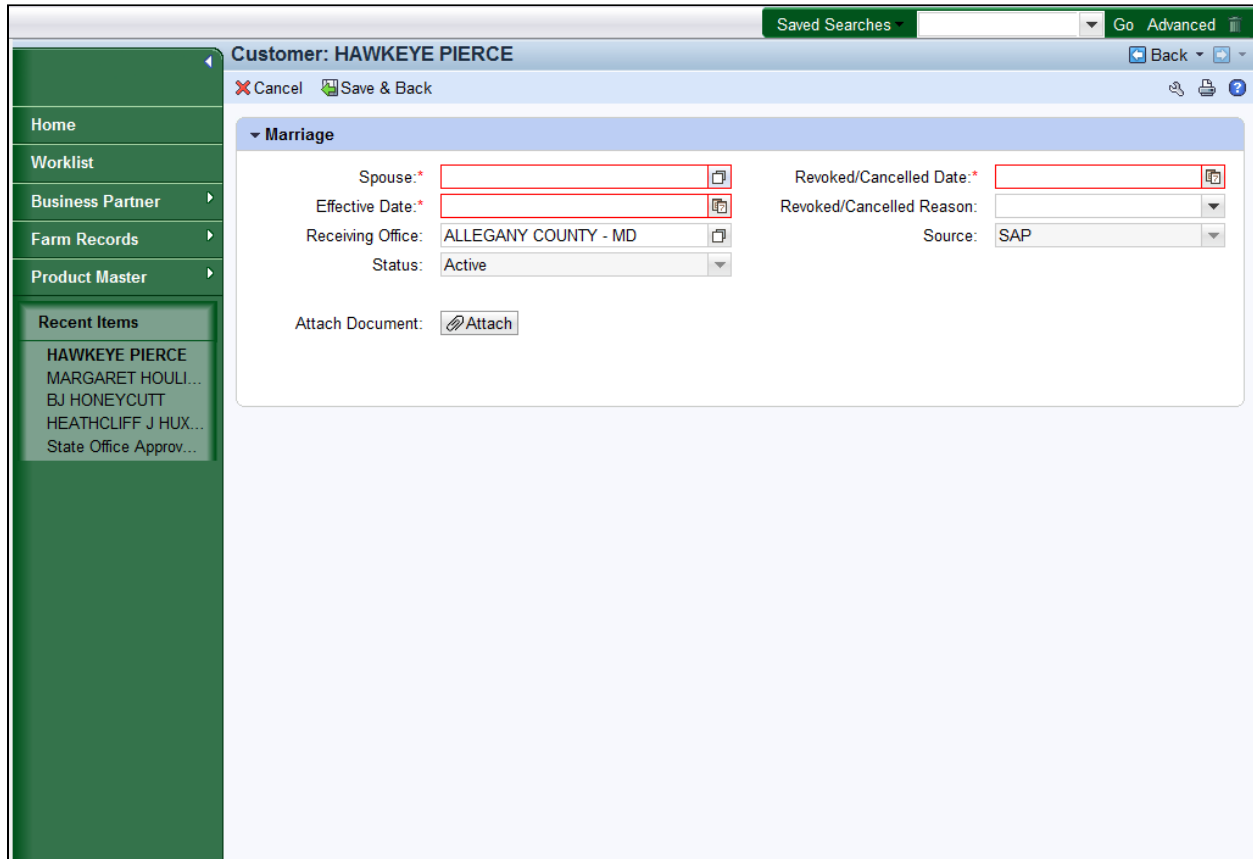
11. Scroll to display the entire list of relationship options.



Customer: HAWKEYE PIERCE

The screenshot shows a web application interface for a customer named HAWKEYE PIERCE. The page title is "Customer: HAWKEYE PIERCE". On the left is a green navigation sidebar with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The "Recent Items" list includes: HAWKEYE PIERCE, MARGARET HOULI..., BJ HONEYCUTT, HEATHCLIFF J HUX..., and State Office Approv... The main content area is titled "Representative Capacity Relationships" and contains a "Relationship Category:" dropdown menu. The dropdown is open, showing a list of relationship types: Has Conservator, Has FSA Attorney in Fact, Has Non-FSA Attorney in Fact, Has Parent/Guardian, Has Revoked Spousal Signature Authority, Has Signature Authority, and Is Married To. The "Is Married To" option is highlighted in blue.


12. Select **Is Married To** **Is Married To** from the **Relationship Category** list.


Customer: HAWKEYE PIERCE


Customer: HAWKEYE PIERCE

Cancel Save & Back


Marriage

Spouse:* 

Effective Date:* 


Receiving Office: ALLEGANY COUNTY - MD 

Status: Active

Revoked/Cancelled Date:* 

Revoked/Cancelled Reason:

Source: SAP

Attach Document:  Attach

Recent Items

- HAWKEYE PIERCE
- MARGARET HOULI...
- BJ HONEYCUTT
- HEATHCLIFF J HUX...
- State Office Approv...

13. Click the **Spouse** field Open Input Help  button to go to the Search Criteria screen.

Search Criteria

Search Criteria
Hide Search Fields

Search for:

Business Name	is	<input type="text"/>	+	-
First Name	is	<input type="text"/>	+	-
Last Name	is	<input type="text"/>	+	-
Middle Name	is	<input type="text"/>	+	-
Common Customer Name	is	<input type="text"/>	+	-
BP Number/ID	is	<input type="text"/>	+	-
Role	is	<input type="text"/>	+	-
Tax ID Type	is	<input type="text"/>	+	-
Tax ID Number	is	<input type="text"/>	+	-
Archived Flag	is	Not Set	+	-
Inactive Flag	is	Not Set	+	-
IRS Response Code	is	<input type="text"/>	+	-
IRS Attempts	equals	<input type="text"/>	+	-
Associated State	is	ALL STATES	+	-
Associated County	is	ALL COUNTIES	+	-
Service Center	is	ALL CENTERS	+	-

Maximum Number of Results:

Result List

[] [?]

Ina...	BP Num...	Common Customer N...	Tax I...	Tax I...	Hou...	Street	City	State	ZIP...	Tele...	E-Mail
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14. As required, complete/review the following fields:

Field	R/O/C	Description
First Name	O	Business Partner's First Name Example: Margaret
Last Name	O	Business Partner's Last Name Example: Houl*



Wildcard placed before and after the search term displays results that contain the search term anywhere. A wildcard before the search term



displays results where the term is NOT the first word. A wildcard after the search term displays results where the word IS the first word.

Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for:

Business Name	is	<input type="text"/>	⊕ ⊖
First Name	is	Margaret	⊕ ⊖
Last Name	is	Houl*	⊕ ⊖
Middle Name	is	<input type="text"/>	⊕ ⊖
Common Customer Name	is	<input type="text"/>	⊕ ⊖
BP Number/ID	is	<input type="text"/>	⊕ ⊖
Role	is	<input type="text"/>	⊕ ⊖
Tax ID Type	is	<input type="text"/>	⊕ ⊖
Tax ID Number	is	<input type="text"/>	⊕ ⊖
Archived Flag	is	Not Set	⊕ ⊖
Inactive Flag	is	Not Set	⊕ ⊖
IRS Response Code	is	<input type="text"/>	⊕ ⊖
IRS Attempts	equals	<input type="text"/>	⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖
Associated County	is	ALL COUNTIES	⊕ ⊖
Service Center	is	ALL CENTERS	⊕ ⊖

Maximum Number of Results:

Result List

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Ina...	BP Num...	Common Customer N...	Tax I...	Tax I...	Hou...	Street	City	State	ZIP...	Tele...	E-Mail
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- Click the **Search** button to search for a list of Customers that meet the search criteria entered.

Search Criteria

Search Criteria
Hide Search Fields

Search for: Customer ▼

Business Name	▼	is	▼		⊕	⊖
First Name	▼	is	▼	MARGARET	⊕	⊖
Last Name	▼	is	▼	HOUL*	⊕	⊖
Middle Name	▼	is	▼		⊕	⊖
Common Customer Name	▼	is	▼		⊕	⊖
BP Number/ID	▼	is	▼		⊕	⊖
Role	▼	is	▼		⊕	⊖
Tax ID Type	▼	is	▼		⊕	⊖
Tax ID Number	▼	is	▼		⊕	⊖
Archived Flag	▼	is	▼	Not Set	⊕	⊖
Inactive Flag	▼	is	▼	Not Set	⊕	⊖
IRS Response Code	▼	is	▼		⊕	⊖
IRS Attempts	▼	equals	▼		⊕	⊖
Associated State	▼	is	▼	ALL STATES	⊕	⊖
Associated County	▼	is	▼	ALL COUNTIES	⊕	⊖
Service Center	▼	is	▼	ALL CENTERS	⊕	⊖

Maximum Number of Results: 100

Search Clear Reset

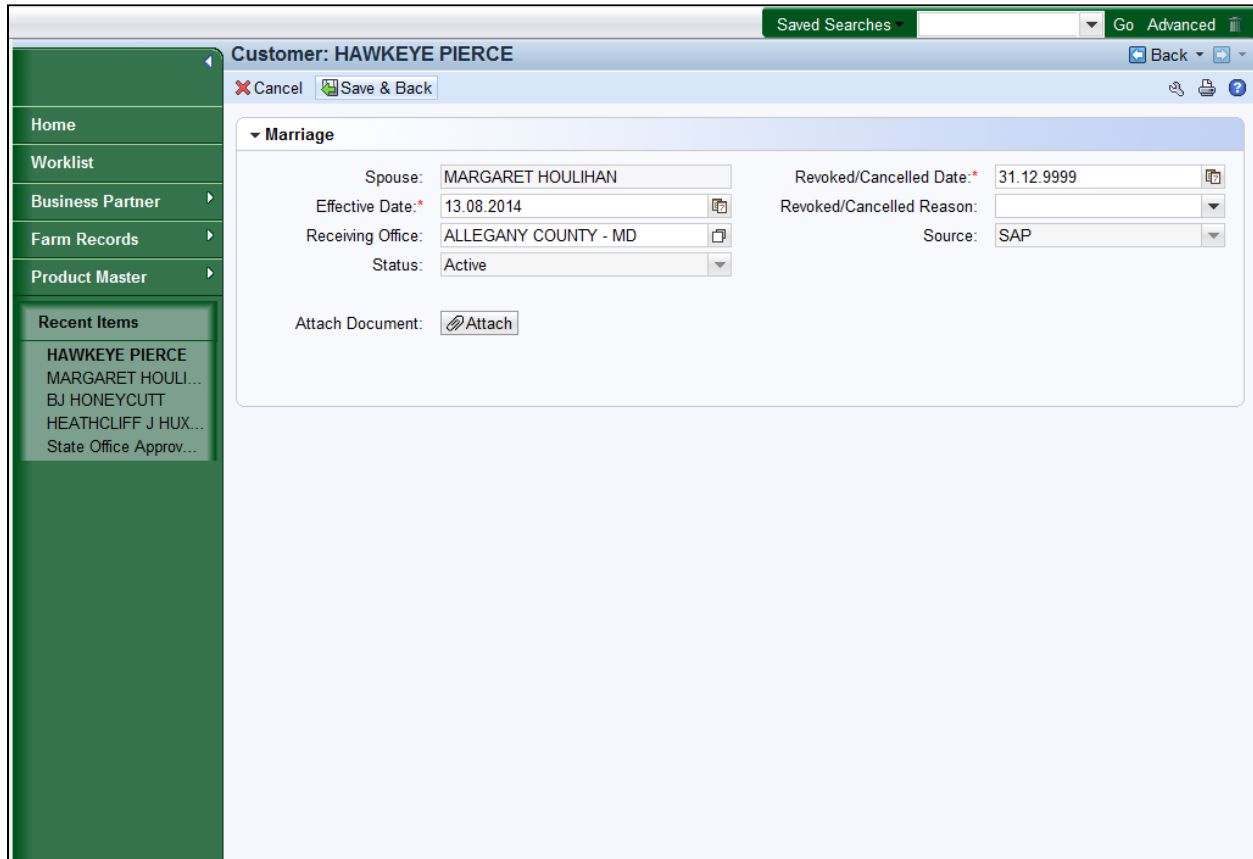
Result List: 1 Customer Found

New Customer

Ina...	BP Num...	Common Customer N...	Tax I...	Tax I...	Hou...	Street	City	State	ZIP...	Tele...	E-Mail
<input type="checkbox"/>	8000109...	MARGARET HOULIHAN	98712...	IRS...	6420	WAI...	SPR...	Virgi...	2215...		

16. Click the **Common Customer Name** from the **Result List** (MARGARET HOULIHAN) [MARGARET HOULIHAN](#) to go to the Customer page.

Customer: HAWKEYE PIERCE



Customer: HAWKEYE PIERCE

Cancel Save & Back

Marriage

Spouse: MARGARET HOULIHAN

Effective Date:* 13.08.2014

Receiving Office: ALLEGANY COUNTY - MD

Status: Active

Revoked/Cancelled Date:* 31.12.9999

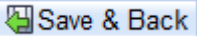
Revoked/Cancelled Reason:


Source: SAP

Attach Document: Attach

Recent Items

- HAWKEYE PIERCE
- MARGARET HOULI...
- BJ HONEYCUTT
- HEATHCLIFF J HUX...
- State Office Approv...

17. Click the **Save & Back**  button to create the Married To relationship.

 The **Effective Date** defaults to current date, while the **Revoked/Cancelled Date** defaults to a future date. Both fields can be changed.


If the receiving office does not default, use the Open Input Help button to select a receiving office.

Submit Relationship

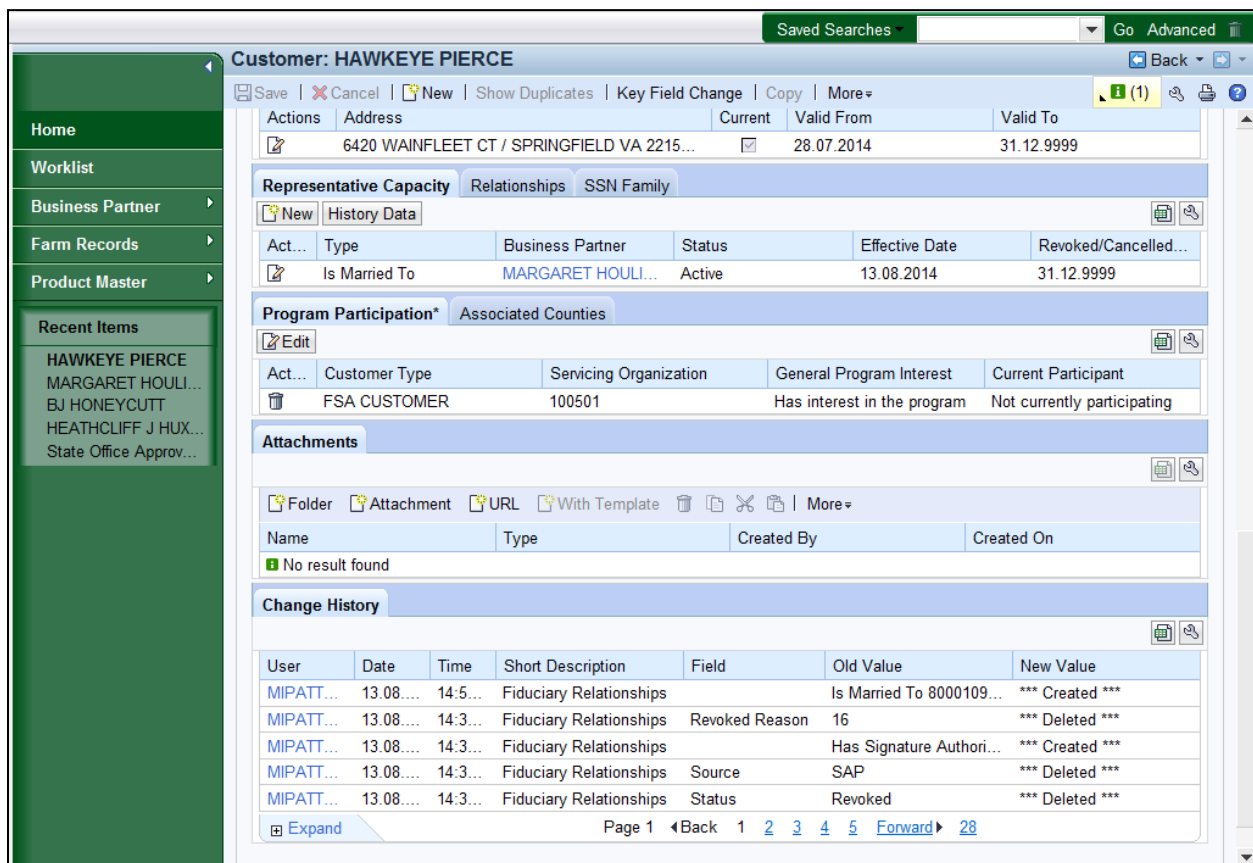
By recording this Marriage in the system, signature authority will be automatically granted between spouses. If one or both spouses is either incompetent or wishes to deauthorize signature authority for the other, please also create a new representative capacity relationship for Spousal Signature Deauthorization.

Yes No

18. Click the **Yes**  button to validate the relationship.

 After the **Yes** button is selected, you are returned to the Customer BP record and a line item is added to the **Representative Capacity** assignment block. In this example, the customer was being granted (Is) the married to relationship. To deauthorize a Spousal Signature Authority, please refer to *Revoke Spousal Authority* work instruction.

Customer: HAWKEYE PIERCE



Customer: HAWKEYE PIERCE

6420 WAINFLEET CT / SPRINGFIELD VA 2215... 28.07.2014 31.12.9999

Representative Capacity Relationships SSN Family

Act...	Type	Business Partner	Status	Effective Date	Revoked/Cancelled...
	Is Married To	MARGARET HOULI...	Active	13.08.2014	31.12.9999

Program Participation* Associated Counties

Act...	Customer Type	Servicing Organization	General Program Interest	Current Participant
	FSA CUSTOMER	100501	Has interest in the program	Not currently participating

Attachments

No result found

Change History

User	Date	Time	Short Description	Field	Old Value	New Value
MIPATT...	13.08....	14:5...	Fiduciary Relationships		Is Married To 8000109...	*** Created ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships	Revoked Reason	16	*** Deleted ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships		Has Signature Authori...	*** Created ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships	Source	SAP	*** Deleted ***
MIPATT...	13.08....	14:3...	Fiduciary Relationships	Status	Revoked	*** Deleted ***

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19. Click the **Home**  button to return to the CRM Home page. You have completed the transaction.

 Under the **Representative Capacity** assignment block, a **Is Married to** Representative Capacity has been created.



Result

You have created a Marriage Representative Capacity relationship.