



Purpose

The purpose of Signature Authority record is when a customer grants legal Signature Authority delegated by an authoritative body (such as a board of directors) to organizational positions (such as president, managing director, or manager) appointing them as agents of the organization.

Trigger



Perform this procedure when the customer grants signature authority to another member.




Prerequisites

- Only An Organization can have more than one individual with signature authority.
- All Business Partner customer records must exist in CRM prior to creating the Representative Capacity.

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.
- 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

The screenshot shows the MIDAS CRM Home Page. On the left is a green navigation sidebar with the following items: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The Recent Items list includes: HAWKEYE PIERCE, MYLON FARMS INC, ABERNATHY FARM, FARMER FARMS L..., and MARGARET HOULI... The main content area is titled 'Home' and contains several panels:

- Workflow Tasks:** State Office Approval on Key Field Change for business part... EDI: Partner profile not available. EDI: Partner profile not available. The IDoc interface is not complete for message type.
- Alerts:** No result found.
- Web Links:** No result found.
- Favorites:** My Favorites (Filter: All Items). My Favorites.
- Search:** Search Cleansing Cases, Search Customers/Contacts, Search Employees, Search Farms/Bins, Search Member Hierarchies, Search Products, Search Requested Products, Search Restricted Fields.
- Create:** Create Farm/Bin, Create New Product Request.
- Reports:** Potential Duplicates.

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



Accounts

A screenshot of a web application interface for "Accounts". The page has a dark green sidebar on the left with navigation links: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items. The "Recent Items" section lists: HAWKEYE PIERCE, MYLON FARMS INC, ABERNATHY FARM, FARMER FARMS L..., and MARGARET HOULI... The main content area is titled "Accounts" and contains two panels: "Search" and "Reports". The "Search" panel lists: 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 buttons for "Saved Searches", "Go", "Advanced", and "Back".

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



Search: Customers

- Click in the **First Name** field.



To perform a thorough search for customer record the user must include a nationwide search, a search that includes inactive records, a search of common name, a search for first and last name or business name and TIN. Refer to ***BP Search Customer Business Partner Record*** for additional information on Search.

- As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------|-------|---|
| First Name | O | Business Partner's First Name Example: Hawkeye |



Search: Customers

Search: Customers

Search Criteria Hide Search Fields

Search for: All Accounts Regular Search Fuzzy Search

| | | | |
|----------------------|--------|--------------|-----|
| 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 | 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 Save Search As: Save

Result List

New Customer

| Ina... | BP Num... | Common Customer N... | Ta... | Pa... | Ta... | Ho... | S... | City | S... | ZI... | T... | E... | IR... | IR... |
|--------|-----------|----------------------|-------|-------|-------|-------|------|------|------|-------|------|------|-------|-------|
|--------|-----------|----------------------|-------|-------|-------|-------|------|------|------|-------|------|------|-------|-------|

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



Search: Customers

Search: Customers

Search for: All Accounts Regular Search Fuzzy Search

Business Name is

First Name is

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

Associated County is

Service Center is

Maximum Number of Results: 100

Search Search CRM Clear Reset Save Search As: Save

Result List: 1 Customer Found

[New Customer](#) [Determined acres](#) [Certification](#)

| Ina... | BP Num... | Common Customer Name | T.. | P.. | T... | H... | S.. | C.. | S.. | Z.. | T.. | E.. | I... | I... |
|--------------------------|------------|--------------------------------|-----|-------------------------------------|------|------|-----|-----|-----|------|-----|-----|------|------|
| <input type="checkbox"/> | 8000109... | HAWKEYE PIERCE | 9.. | <input checked="" type="checkbox"/> | S... | 6... | W.. | S.. | V.. | 2... | | | W.. | 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 | New | Show Duplicates | Key Field Change | Copy | More

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

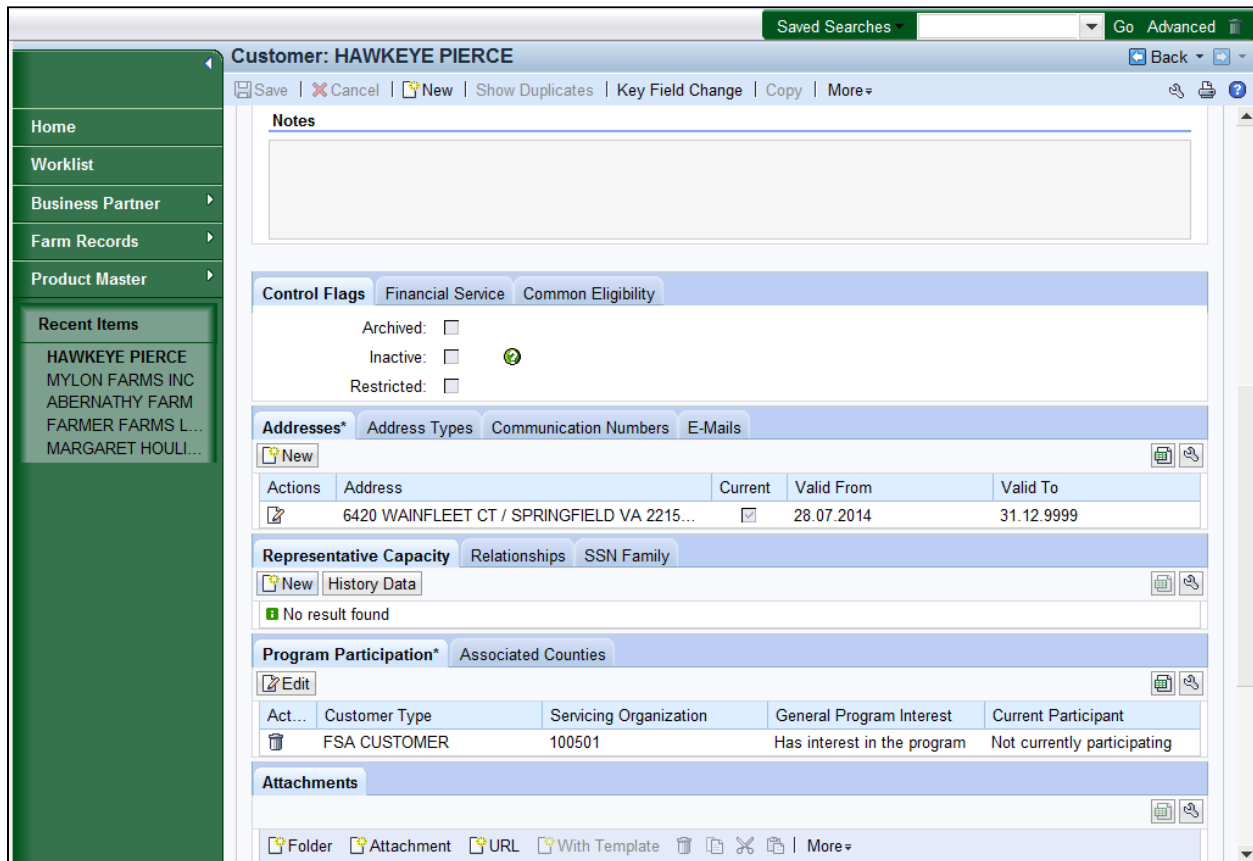
Edit | Tax ID History

| General Data | Main Address and Communication Data |
|---|---|
| Current Role: Individual | Information. |
| BP Number / ID: 8000109939 | Address Lin... 6420 WAINFLEET CT |
| Prefix: | Street #, Street Name |
| First Name: HAWKEYE | Address Lin... |
| Middle Name: | Apartment, Suite, Unit, Building, Floor |
| 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 | Communica... Post (letter) |
| Data Origin: CRM | Carrier Route: C011 |
| Employee Type: Not an employee | Delivery Bar... 205 |
| Tax ID Type: Social Sec... | Congressio.. VIRGINIA 11 |
| Tax ID Number: 918273645 | |
| IRS Response Code: Waiting for IRS response | |
| 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

Notes




Control Flags Financial Service Common Eligibility


Archived:

Inactive: 




Restricted:


Addresses* Address Types Communication Numbers E-Mails

 New  




| 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



 New History Data  









 No result found

Program Participation* Associated Counties

 Edit  

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

Attachments  

 Folder  Attachment  URL  With Template     More

9. Click the **New**  button in the **Representative Capacity** assignment block to create the Signature Authority relationship.

 The **New**  button in the **Representative Capacity** assignment block opens the Representative Capacity Relationship page.

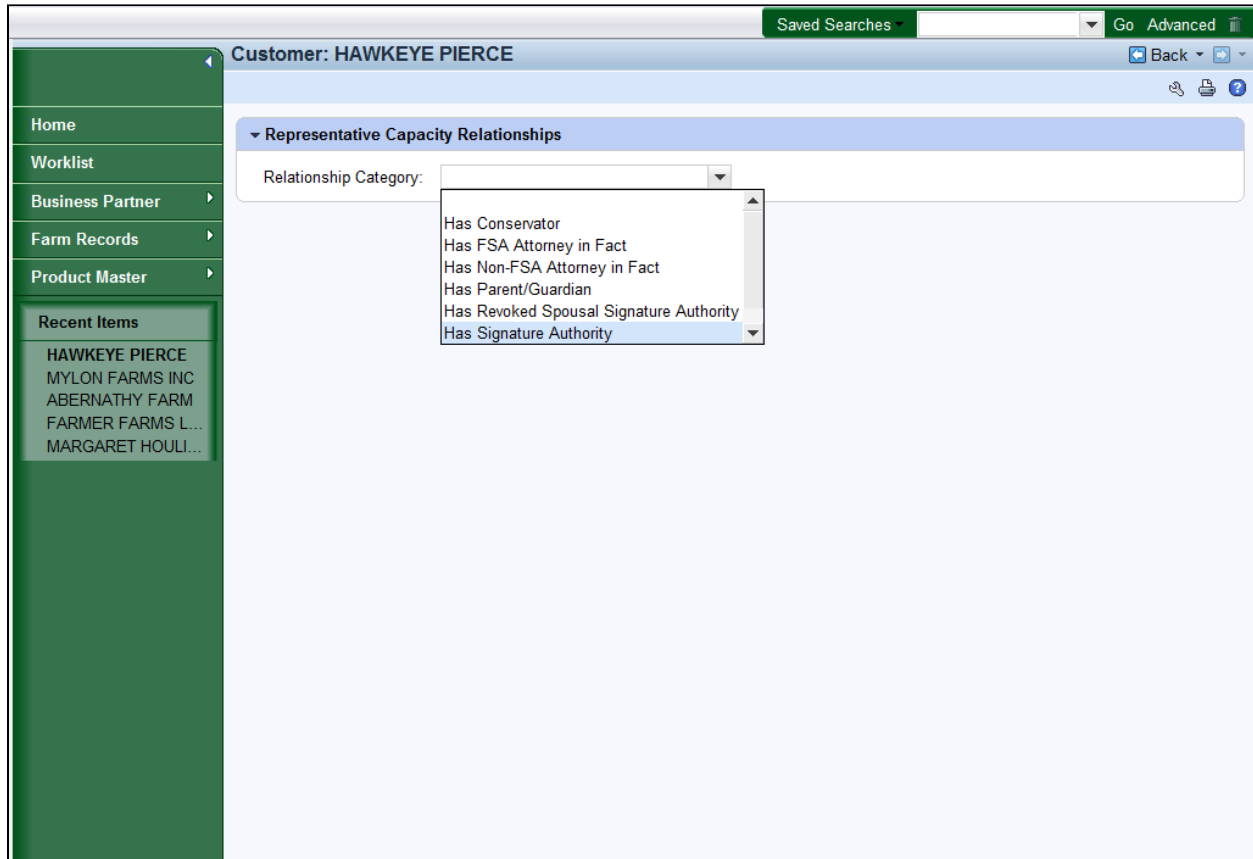


Customer: HAWKEYE PIERCE

A screenshot of a web application interface. At the top, there is a navigation bar with "Saved Searches" and "Go Advanced" buttons. Below this is a header area with "Customer: HAWKEYE PIERCE" and a "Back" button. A left-hand navigation menu is visible, containing links for "Home", "Worklist", "Business Partner", "Farm Records", "Product Master", and "Recent Items". The "Recent Items" section lists "HAWKEYE PIERCE", "MYLON FARMS INC", "ABERNATHY FARM", "FARMER FARMS L...", and "MARGARET HOULI...". The main content area is titled "Representative Capacity Relationships" and contains a "Relationship Category:" label followed by a dropdown menu.

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

Customer: HAWKEYE PIERCE




Customer: HAWKEYE PIERCE

Relationship Category:

- Has Conservator
- Has FSA Attorney in Fact
- Has Non-FSA Attorney in Fact
- Has Parent/Guardian
- Has Revoked Spousal Signature Authority
- Has Signature Authority

11. Select the **Has Signature Authority** **Has Signature Authority** from the dropdown list in the Relationship Category.


 The **Signature Authority** page opens and the red highlights are required fields. The required fields need to be populated.


**Customer: HAWKEYE PIERCE**

Customer: HAWKEYE PIERCE


Cancel Save & Back

Signature Authority


Relationship Member:* 


Effective Date:* 

Representative Capa.

Receiving Office: ALLEGANY COUNTY - MD 

Status: Active

Attach Document: 

Revoked/Cancelled Date:* 

Revoked/Cancelled Reason:

Source: SAP

Recent Items

- HAWKEYE PIERCE
- MYLON FARMS INC
- ABERNATHY FARM
- FARMER FARMS L...
- MARGARET HOULI...

12. Click the **Relationship Member** field Open Input Help  button to go to the Search Criteria window.

Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for: Customer Regular Search Fuzzy Search

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

Maximum Number of Results:

Result List

| | | | | | | | | | | | |
|--------|-----------|----------------------|----------|----------|--------|--------|------|-------|--------|---------|--------|
| Ina... | BP Num... | Common Customer N... | Tax I... | Tax I... | Hou... | Street | City | State | ZIP... | Tele... | E-Mail |
|--------|-----------|----------------------|----------|----------|--------|--------|------|-------|--------|---------|--------|

13. Click in the **Common Customer Name** field.



Refer to ***BP Search Customer Business Partner Record*** for additional information on Search capabilities.



Search Criteria

Search Criteria
[Hide Search Fields](#)

Search for: Customer Regular Search Fuzzy Search

| | | | | |
|----------------------|--------|------------------------------------|---|---|
| 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"/> | | |
| | | Choose the value of this criterion | | |
| 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

New Customer 📄 🔍

| | | | | | | | | | | | |
|--------|-----------|----------------------|----------|----------|--------|--------|------|-------|--------|---------|--------|
| Ina... | BP Num... | Common Customer N... | Tax I... | Tax I... | Hou... | Street | City | State | ZIP... | Tele... | E-Mail |
|--------|-----------|----------------------|----------|----------|--------|--------|------|-------|--------|---------|--------|

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

| Field | R/O/C | Description |
|----------------------|-------|---|
| Common Customer Name | O | May be a common known name of a customer or their legal first and last name. In the case of a business, this will display the business name. Example: Wylon Farms, Inc |

15. Click the **Search** button to list the Customer meeting the search criteria entered.



Search Criteria

Search Criteria Hide Search Fields

Search for: Customer Regular Search Fuzzy Search

| | | | | |
|----------------------|--------|------------------|---|---|
| Business Name | is | | + | - |
| First Name | is | | + | - |
| Last Name | is | | + | - |
| Middle Name | is | | + | - |
| Common Customer Name | is | WYLON FARMS, INC | + | - |
| 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:

Result List: 1 Customer Found

| Ina... | BP Num... | Common Customer N... | Tax I... | Tax I... | Hou... | Street | City | State | ZIP... | Tele... | E-Mail |
|--------------------------|------------|----------------------------------|----------|----------|--------|---------|--------|-------|---------|---------|--------|
| <input type="checkbox"/> | 8000028... | WYLON FARMS, INC | NOTA... | No T... | 1900 | 1900... | KAU... | Texas | 7514... | | |

WYLON FARMS, INC

16. Select the **Common Customer Name** from the Result List (MYLON FARMS INC) [WYLON FARMS, INC](#) to return to the Signature Authority page.

**Customer: HAWKEYE PIERCE**

Customer: HAWKEYE PIERCE

Signature Authority

| | | | |
|-----------------------|----------------------|---------------------------|------------|
| Relationship Member: | MYLON FARMS INC | Revoked/Cancelled Date:* | 31.12.9999 |
| Effective Date:* | 14.08.2014 | Revoked/Cancelled Reason: | |
| Representative Capa.: | | Source: | SAP |
| Receiving Office: | ALLEGANY COUNTY - MD | | |
| Status: | Active | | |

Attach Document:

17. Click the **Representative Capacity:** dropdown icon to view the list of options.

**Customer: HAWKEYE PIERCE**

Customer: HAWKEYE PIERCE

Relationship Member: MYLON FARMS INC

Effective Date:* 14.08.2014

Representative Capa.:

Receiving Office: Manager
Officer
Partner
President
Secretary
Trustee
Vice President

Status:

Attach Document:

Revoked/Cancelled Date:* 31.12.9999

Revoked/Cancelled Reason:

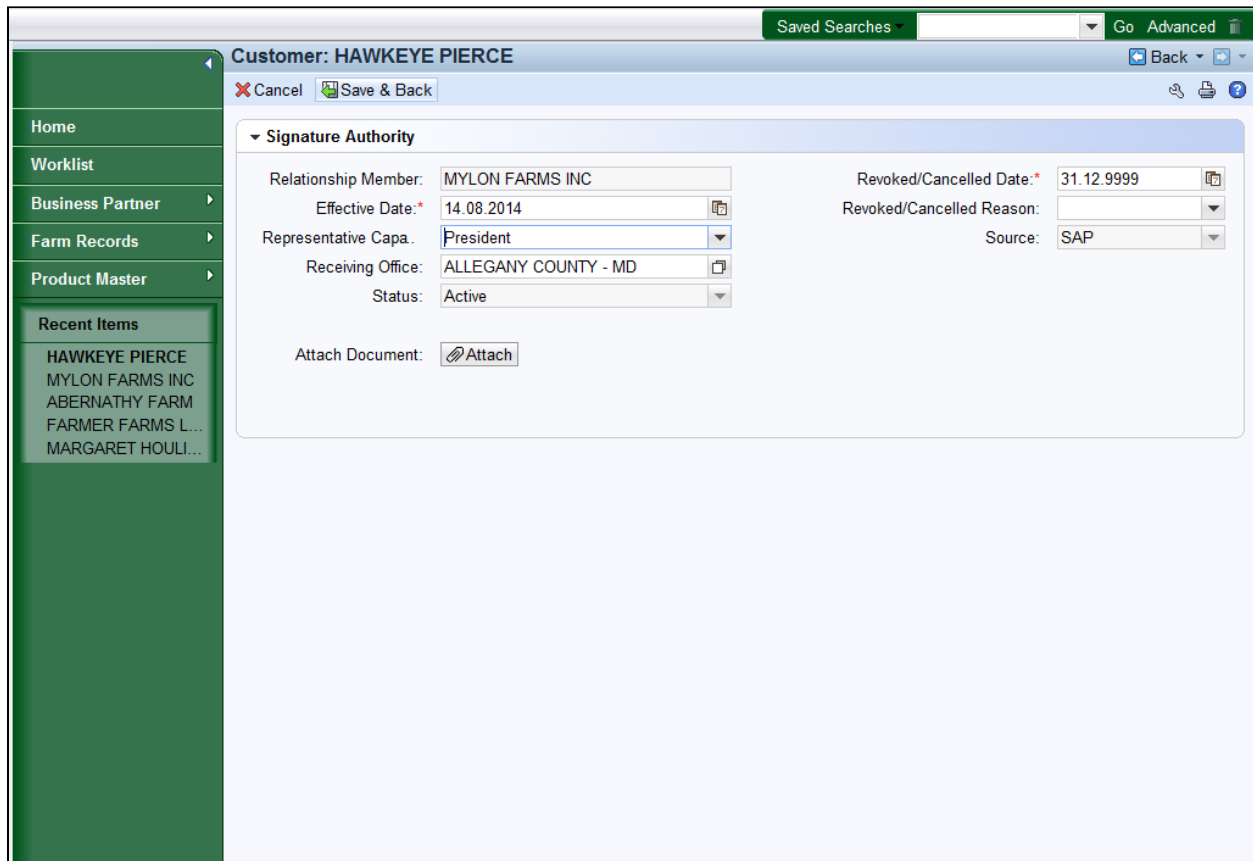
Source: SAP

Recent Items:

- HAWKEYE PIERCE
- MYLON FARMS INC
- ABERNATHY FARM
- FARMER FARMS L...
- MARGARET HOULI...

18. Select **President** from the **Representative Capacity** list.

Customer: HAWKEYE PIERCE



Customer: HAWKEYE PIERCE

Signature Authority

Relationship Member: MYLON FARMS INC

Effective Date: 14.08.2014

Representative Capa.: President

Receiving Office: ALLEGANY COUNTY - MD

Status: Active

Revoked/Cancelled Date: 31.12.9999

Revoked/Cancelled Reason:

Source: SAP

Attach Document:

19. Click the **Save & Back** button.



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

Submit Relationship

Is all the data displayed complete and accurate? Active representative capacity data cannot be modified after it is submitted. It can only be revoked. Are you sure you wish to continue?

20. Click the **Yes** button.



After the **Yes** button is selected, you are returned to the Customer record and line item is added to the Representative Capacity assignment block.



In this example, the customer has granted the **Has Signature Authority** relationship.

Customer: HAWKEYE PIERCE

Customer: HAWKEYE PIERCE

Notes

Control Flags: Financial Service, Common Eligibility

Archived: Inactive: Restricted:

Addresses* Address Types Communication Numbers E-Mails

| 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


| Act... | Type | Business Partner | Status | Effective Date | Revoked/Cancelled... |
|--------|------------------------|------------------|--------|----------------|----------------------|
| | Has Signature Autho... | MYLON FARMS INC | Active | 14.08.2014 | 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

21. Click the **Home**  button.

 Under the **Representative Capacity** assignment block, a **Has Signature Authority** relationship has been created. In this example, Hawkeye Pierce has granted Signature Authority to Mylon Farms, Inc to act on his behalf.



Result

You have created a Representative Capacity Signature Authority relationship.