

### 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	<b></b>	Use this note to communicate to the end-user of something that <b>MUST</b> be completed or another trigger that should be started and is related to the



		procedure.
Acritical note	$\bigotimes$	Use this note to specify something that <b>MUST NOT</b> 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 <b>reference</b> 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

Home         Worklist         Business Partner         Farm Records         Product Master         Product Master         HAWKEYE PIERCE         MYLON FARMS INC         ABERNATHY FARM         FARMER FARMS L         MARGARET HOULI    Home          Image: My Favorites    Business Partner          Image: Product Master                Image: Product Master             Image: Product Master             Image: Product Master			Saved Searches	Go Advanced iii
Home   Worklist   Business Partner   Farm Records   Product Master   Business Partner   Product Master   Recent Items   HAWKEYE PIERCE   MYLON FARMS INC   ABERNATHY FARM   FARMER FARMS L   MARGARET HOULI     Wy Favorites   Filter. All Items   My Favorites   Filter. All Items Create Create Create Create Create Create No result Request		Home		🖸 Back 👻 💽
Home   Workflow Tasks   Business Partner   Farm Records   Product Master   Product Master   HAWKEYE PIERCE   MYLON FARMS INC   ABERNATHY FARM   FARMER FARMS L   MARGARET HOULI     Wy Favorites     Wy Favorites     Alerts   A lerts     B No result found     Image: A lerts     A lerts     A lerts     A lerts     B No result found     Image: A lerts     Image: A lerts   Image: A lerts   Image: A lerts   Image: A lerts   Image: A lerts   Image: A lerts   Image: A lerts			-	《 븝 (
Worklist   Business Partner   Farm Records   Product Master   Product Master   HAWKEYE PIERCE   MYLON FARMS INC   ABERNATHY FARM   FARMER FARMS L   MARGARET HOULI   My Favorites   My Favorites   My Favorites   Image: My Favorites Image: My Favori	Home	Workflow Tasks	Alerts	<b>□</b> ×
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Farm Records       ED. Partner profile not available         Product Master       The IDoc interface is not complete for message type         Recent Items       Web Links         HAWKEYE PIERCE       No result found         MYLON FARMS INC       ABERNATHY FARM         FARMER FARMS L       My Favorites         MARGARET HOULI       My Favorites         My Favorites       Filter: All Items         My Favorites       Create         Create New Product Request	Business Partner	EDI: Partner profile not available		
Product Master       Image: Constraint of the second	Farm Records	The IDoc interface is not complete for message type	Search	⊟ ×
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HAWKEYE PIERCE MYLON FARMS INC ABERNATHY FARM FARMER FARMS L MARGARET HOULI My Favorites Filter. All Items Create Activity for the fields My Favorites Create Create Farm/Bin Create New Product Request	Recent Items	Web Links 🔍 🖻 🗙	Search Employees Search Farms/Bins	
ABERNATHY FARMS FARMER FARMS L MARGARET HOULI My Favorites Filter: All Items My Favorites Create Farm/Bin Create New Product Request	HAWKEYE PIERCE	No result found	Search Member Hierarchies Search Products	
FARMER FARMS L     My Favorites     Filter: All Items     Create       My Favorites     Filter: All Items     Create	ABERNATHY FARM	Favorites	Search Requested Products	
My Favorites  Create Farm/Bin Create New Product Request	FARMER FARMS L MARGARET HOULI		Search Restricted Fields	
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Reports			Reports	<b>□</b> ×
Potential Duplicates			Potential Duplicates	

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



#### Saved Searches ▼ Go Advanced 前 Accounts 🖸 Back 🝷 💟 🝷 ی 🖨 📀 Home **—** × Reports Search **—** × Worklist Search Cleansing Cases Potential Duplicates **Business Partner** Search Customers/Contacts Search Documents Search Employees Search Member Hierarchies Search Restricted Fields Farm Records Product Master **Recent Items** HAWKEYE PIERCE MYLON FARMS INC ABERNATHY FARM FARMER FARMS L.. MARGARET HOULI ...

**3.** Click the **Search Customers/Contacts** <u>Search Customers/Contacts</u> link to go to the Search: Customers page.

### Accounts



### Search: Customers

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	Role	-	is	-		- O O	
BENJIMAN H PIER	Tax ID Number	-	is	-		0 0	
BENJAMIN PIERCE	Tax ID Type	-	is	-		- O O	
	Archived Flag	-	is	-	Not Set	- O O	
	Inactive Flag	-	is	-	Not Set	- O O	
	IRS Response Code	-	is	-		- O O	
	IRS Attempts	-	equals	-		0 0	
	Associated State	-	is	-	ALL STATES	- O O	
	Associated County	-	is	-	ALL COUNTIES	- O O	
	Service Center	-	is	-	ALL CENTERS	- O O	
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4. 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.

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

Field	R/O/C	Description
First Name	0	Business Partner's First Name
		Example:
		Hawkeye



## Search: Customers

					Saved S	earches -	🔻 Go Advanced 🗎
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Home	Search Criteria						Hide Search Fields
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Farm Records	First Name	-	is	-	Hawkeye	0 0	
Product Master	Last Name	-	is	•		0 0	
Descent Items	Middle Name	-	is	•		0 0	
Recent items	Common Customer Name	-	is	•		0 0	
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BENJIMAN H PIER	Tax ID Number	-	is	•		0 0	
BENJAMIN PIERCE	Tax ID Type	-	is	-		- O O	
	Archived Flag	-	is	•	Not Set	- 0 0	
	Inactive Flag	-	is	•	Not Set	- O O	
	IRS Response Code	-	is	•		- 0 0	
	IRS Attempts	-	equals	•		0 0	
	Associated State	-	is	•	ALL STATES	- o o	
	Associated County	-	is	•	ALL COUNTIES	- 0 0	
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	PNew Customer						u 🗉 🍕
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Recent Items WYLON FARMS, I TOMMY TAYLOR JOHN E TAYLOR BENJIMAN H PIER BENJAMIN PIERCE	Middle Name Common Customer Name BP Number/ID Role Tax ID Number Tax ID Type Archived Flag Inactive Flag IRS Response Code IRS Attempts Associated State Associated County Service Center Search Clear Reset Result List P New Customer Ina BP Num Con		is is is is is is is equals is is Save Search A	• • • • • • • • • • • • • • • • • • •	Not Set Not Set ALL STATES ALL COUNTIES ALL CENTERS ximum Number of Re	○       ○         ○       ○         ○       ○         ○       ○         ▼       ○         ▼       ○         ▼       ○         ▼       ○         ▼       ○         ▼       ○         ▼       ○         ▼       ○         ■       ○         ■       ○         ■       ○         ■       ○         ■       ○         ■       ○         ■       ○         ■       ○         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □         ■       □	

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



## Search: Customers

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Business Partner	First Name	-	is	-	HAWKEYE		0 0	
	Last Name	-	is	-			0 0	
Farm Records	Middle Name	-	is	•			0 0	
Product Master	Common Customer Name	-	is	•			0 0	
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HAWKEYE PIERCE	Tax ID Number	-	is	•			0 0	
ABERNATHY FARM	Tax ID Type	-	is	•		-	00	
FARMER FARMS L	Archived Flag	-	is	•	Not Set	-	00	
MARGARET HOULI	Inactive Flag	-	is	•	Not Set	-	00	
	IRS Response Code	•	is	•		-	0 0	
	IRS Attempts	-	equals	•			0 0	
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7. Select the **Common Customer Name** from the Results List (HAWKEYE PIERCE) HAWKEYE PIERCE to go to the Customer page.



## **Customer: HAWKEYE PIERCE**

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Business Partner	General Data		Ma	in Address	and Communi	ication Data	
Farm Records	Current Role:	Individual	Info	ormation.			
Product Master	BP Number / ID:	8000109939	Add	ress Lin	6420	WAINFLEET CT	
	Prefix:				Street #, Stree	et Name	
Recent Items	First Name:	HAWKEYE	Add	ress Lin			
HAWKEYE PIERCE	Middle Name:				Apartment, Su	ite, Unit, Building, Floor	
ABERNATHY FARM	Last Name:	PIERCE		City:	SPRINGFIELD	)	
FARMER FARMS L	Suffix:			State:	VA	VIRGINIA	
MARGARET HOULI	Common Customer	HAWKEYE PIERCE		ZIP Code:	22152-2432		
	Legal Name:	No		Country:	US	USA	
	Language Preference:	English	Con	nmunica	Post (letter)		
	Data Origin:	CRM	Car	rier Route:	C011		
	Employee Type:	Not an employee	Deli	very Bar	205		
	Tax ID Type:	Social Sec 🔞	Cor	ngressio	VIRGINIA	11	
	Tax ID Number:	918273645 🕜					
	IRS Response Code:	Waiting for IRS respon	ise				
	IRS Attempts:	0					
	Date of Death:						
	Death Confirmed:						
	Notes						
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8. Scroll to display the **Representative Capacity** assignment block.



## Customer: HAWKEYE PIERCE

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Home	Notes			
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Business Partner				
Earm Bosords				
Product Master	Control Flags Financial Service Co	mmon Eligibility		
Recent Items	Archived:			
HAWKEYE PIERCE	Inactive: 🔲 🚱			
MYLON FARMS INC	Restricted:			
FARMER FARMS L	Addresses* Address Types Commo	unication Numbers E-Mails		
MARGARET HOULI	Sew .			<b>a</b>
	Actions Address	Curren	t Valid From	Valid To
	6420 WAINFLEET CT / SPR	RINGFIELD VA 2215	28.07.2014	31.12.9999
	Representative Capacity Relationsh	nips SSN Family		
	Prew History Data			
	No result found			
	Program Participation* Associated	Counties		
	Edit			<b>a</b>
	Act Customer Type	Servicing Organization	General Program Interest	Current Participant
	FSA CUSTOMER	100501	Has interest in the program	Not currently participating
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9. Click the New Sew 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.



# Saved Searches ▼ Go Advanced 前 Customer: HAWKEYE PIERCE 🖸 Back 🝷 🔯 👻 ی 🖨 📀 Home Worklist • Relationship Category: **Business Partner** Farm Records Product Master **Recent Items** HAWKEYE PIERCE MYLON FARMS INC ABERNATHY FARM FARMER FARMS L.. MARGARET HOULI ...

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

## **Customer: HAWKEYE PIERCE**



#### **Customer: HAWKEYE PIERCE** Saved Searches ▼ Go Advanced 前 Customer: HAWKEYE PIERCE 🖸 Back 🝷 💽 👻 र 🖨 🕐 Home - Representative Capacity Relationships Worklist Relationship Category: Ŧ **Business Partner** Has Conservator Farm Records Has FSA Attorney in Fact Has Non-FSA Attorney in Fact Product Master Has Parent/Guardian Has Revoked Spousal Signature Authority **Recent Items** Has Signature Authority HAWKEYE PIERCE MYLON FARMS INC ABERNATHY FARM FARMER FARMS L.. MARGARET HOULI ...

**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 highligts are required fields. The required fields need to be populated.



				Saved Searches	-	Go Advanced 🗊
4	Customer: HAWKEYE	PIERCE				🔄 Back 👻 💽 🦄
	🗙 Cancel 🛛 🖓 Save & Back					ی 🖨 🔇
Home	- Signature Authority					
Worklist	Deletionship Members*		-	Develoed/Concelled Dete:*		B
Business Partner	Effective Date:*			Revoked/Cancelled Date:		4Z
Earm Docords	Representative Capa		<b>₩</b>	Source:	SAP	· ·
	Receiving Office:	ALLEGANY COUNTY - MD	đ			
Product Master	- Status:	Active	-			
Recent Items						
HAWKEYE PIERCE MYLON FARMS INC ABERNATHY FARM FARMER FARMS L MARGARET HOULI	Attach Document:	@Attach				

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

## **Customer: HAWKEYE PIERCE**



Search for: Customer				<ul> <li>Regular</li> </ul>	Searc	rch ⊚ Fuzzy Search
usiness Name	-	is	•			00
irst Name	-	is	-			0 0
ast Name	-	is	-			0 0
liddle Name	-	is	-			0 0
common Customer Name	-	is	-			0 0
P Number/ID	-	is	-	Choose th	ne valu	ue of this criterion
ole	-	is	-		-	
ax ID Type	-	is	-		-	
ax ID Number	-	is	-			0 0
rchived Flag	-	is	-	Not Set	-	
active Flag	-	is	-	Not Set	-	
RS Response Code	-	is	-		-	
RS Attempts	-	equals	-			0 0
ssociated State	-	is	-	ALL STATES	-	
ssociated County	-	is	-	ALL COUNTIES	-	
ervice Center	-	is	-	ALL CENTERS	-	
Search Clear Reset			Ma	ximum Number of Re	esults:	s: 100

## Search Criteria

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

field.

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



Search for: Custome	r			<ul> <li>Regular</li> </ul>	Searcl	h 🔘 Fuzzy Search	
usiness Name	-	is	-			0 0	
irst Name	-	is	-			0 0	
ast Name	-	is	-			0 0	
iddle Name	-	is	-			0 0	
ommon Customer Name	-	is	-			0 0	
P Number/ID	-	is	-	Choose th	e valu	e of this criterion	
ole	-	is	-		-	0 0	
ax ID Type	-	is	-		-	0 0	
ax ID Number	-	is	-			00	
rchived Flag	-	is	-	Not Set	-	0 0	
active Flag	-	is	-	Not Set	-	0 0	
S Response Code	-	is	-		-	0 0	
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ervice Center	-	is	-	ALL CENTERS	-	00	
earch Clear Reset			Ma	ximum Number of Re	sults:	: 100	

# Search Criteria

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

Field	R/O/C	Description
Common Customer Name	Ο	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									Hide Sea	arch Field
Search for: Customer				👻 🖲 Regular	Searc	h 🔘 Fuzzy S	earch			
Business Name	-	is	-			00				
First Name	-	is	-			00				
Last Name	-	is	-			00				
Middle Name	-	is	-			00				
Common Customer Name	-	is	-	WYLON FARMS, IN	VC	00				
BP Number/ID	-	is	-			00				
Role	-	is	-		-	00				
Tax ID Type	-	is	-		-	00				
Tax ID Number	-	is	•			00				
Archived Flag	-	is	•	Not Set	-	00				
Inactive Flag	-	is	-	Not Set	-	00				
IRS Response Code	-	is	-		-	00				
IRS Attempts	-	equals	-			00				
Associated State	-	is	-	ALL STATES	-	00				
Associated County	-	is	-	ALL COUNTIES	-	00				
Service Center	-	is	-	ALL CENTERS	-	00				
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E 0000000 100	1.01		NOTA	N T 4000	4000	14411	-	7544		

## Search Criteria

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



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1	Customer: HAWKEYE	PIERCE			🔄 Ba	ack 👻 🖸
	🗙 Cancel 🛛 🍇 Save & Back					र 🖨 🕻
lome	- Signature Authority					
Worklist	Relationship Member:	MYLON FARMS INC		Revoked/Cancelled Date:*	31.12.9999	<b>E</b> 7
Business Partner 🔹 🕨	Effective Date:*	14.08.2014	17	Revoked/Cancelled Reason:		-
arm Records	Representative Capa.		-	Source:	SAP	-
raduat Mastar	Receiving Office:	ALLEGANY COUNTY - MD	ð			
roduct master	Status:	Active	-			
HAWKEYE PIERCE MYLON FARMS INC ABERNATHY FARM FARMER FARMS I	Attach Document:	@Attach				
FARMER FARMS L MARGARET HOULI						

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

#### Wednesday, October 22, 2014



			Saved Searches 🗸	▼ Go A	Advanced 湔
	Customer: HAWKEYE	PIERCE			Back 🝷 💟 🝷
	XCancel USave & Back				र 🖨 🕐
Home	- Signature Authority				
Worklist	Relationship Member:	MYLON FARMS INC	Revoked/Cancelled Date:*	31,12,9999	67
Business Partner	Effective Date:*	14.08.2014	Revoked/Cancelled Reason:		•
Farm Records	Representative Capa.	•	Source:	SAP	-
Product Master	Receiving Office: Status:	Manager Officer Partner			
Recent Items		President			
MYLON FARMS INC ABERNATHY FARM FARMER FARMS L. MARGARET HOULI.		Trustee Vice President			

# Customer: HAWKEYE PIERCE

18. Select President President from the Representative Capacity list.

Customory HAWKEVE DIEDCE



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	Customer: HAWKEYE	PIERCE				Back 👻 💽 🖥
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Home	- Signature Authority					
Worklist	Palationship Member:	MYLON FARMS INC		Pavaked/Cancelled Date:*	31 12 0000	Ē
Business Partner	Effective Date:*	14.08.2014	<b>(</b> 7)	Revoked/Cancelled Reason:	51.12.5555	4 <u>7</u>
Farm Records	Representative Capa.	President	-	Source:	SAP	-
Product Master	Receiving Office:	ALLEGANY COUNTY - MD	D			
T TOULUL MASLET	Status:	Active	-			
Recent Items						
MYLON FARMS INC ABERNATHY FARM FARMER FARMS L MARGARET HOULI						

19. Click the Save & Back 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**

			Saved Searches -	<ul> <li>Go Advanced</li> </ul>	
•	Customer: HAWKEYE PIERCE		🔄 Back 👻 🗔		
	🖫 Save   🗙 Cancel   🍄 New   Show [	Duplicates   Key Field Change	Copy   More∓	📘 (1) 💐 🖨	
ome	Notes				
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usiness Partner					
arm Records					
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Recent Items	Archived:				
HAWKEYE PIERCE	Inactive: 🔲 🚱				
MYLON FARMS INC	Restricted:				
ABERNATHY FARM	Addresses* Address Types Com	munication Numbers E-Maile			
MARGARET HOULI	New	munication numbers E-mails		<b>A</b>	
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	Representative Capacity Relation	Isnips SSIV Family			
	Ast Turne Pu	cianas Datas Otatus	Effective Date	Paura la ad (Cara a alla d	
	Act Type Bu	SINESS Partner Status	Effective Date	Revoked/Cancelled	
		LONT ARMS INC. Active	14.00.2014	51.12.5555	
	Program Participation* Associate	ed Counties			
	Edit			<b>a</b>	
	Act Customer Type	Servicing Organization	General Program Interest	Current Participant	
	FSA CUSTOMER	100501	Has interest in the program	Not currently participating	
	Attachments				
				<b>a</b>	

**21.** Click the **Home** 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.