

Purpose

A Business Partner Customer Record includes basic information that can be edited: name, main address, primary communication data, and notes. The Detailed Address, Communication, and Notes are also contained in their own separate assignment block, but referenced in the Details assignment block as well.

Trigger

Perform this procedure to edit an existing Business Partner Customer Record.

Prerequisites

- The following business rules must be followed when a user creates or maintains a BP record:
 - The accepted formats are: <name>@<domain> for E-Mail in the E-Mail assignment block.
 - Only numeric / alpha characters are accepted in the address line.
 - Phone Number and Extension are numeric values only.
 - A valid address includes the following mandatory fields: Address Line, City, State, Zip Code, and Country.
 - $\circ~$ An active customer must have an active address.
 - A customer's address must have a mailing address.
 - A customer's address must be a current address.
 - An individual customer's address must have only one current address.
 - An individual customer must have only one primary E-Mail address.
 - If an individual customer has one or more E-Mail addresses, one of them must be defined as the primary.
 - If a customer has duplicate phone numbers, both numbers can't be used for the same phone number type.

Helpful Hints

• The SSN Family tab, found under the Representative Capacity assignment block isn't available if a SSN hasn't been defined in the BP record. If the Tax ID field is set to "No Tax ID" and the Tax ID Number is also set to "No Tax ID Number," the SSN Family will not be displayed.



- The **Receive Sensitive materials** checkbox indicates if the customer wants to receive sensitive E-Mail per the AD-2047.
- "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	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 location. You may reference SOPs, another system, or document.



Procedure

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

Home

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Farm Records	EDI: Partner profile not available	Q Search	🗆 × 🗏
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	My Favorites	Create Farm/Bin Create New Product Request	×
		Reports	= ×
		Key Field Change Requests Potential Duplicates	

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



In this procedure, customer maintenance can be triggered from the following:

- Direct Requests from the customer to update contact or address information.
- Regularly scheduled maintenance or updates.
- Application processing requiring updates to common eligibility data.



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KRIS KYLE JOHN FLACCO CREOLA A SNEED JOHN DO JOHN DO ERNST WILLIAMS			

Accounts

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



In this document, we will search for an existing customer and modify his customer record.



Search: Customers

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JOHN DO JOHN DO	Tax ID Type	-	is	•		•	00	
ERNST WILLIAMS	Archived Flag	-	is	•		•	00	
	Inactive Flag	-	is	•		•	00	
	IRS Response Code	-	is	•		•	00	
	IRS Attempts	-	equals	•			00	
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4. As required, complete/review the following fields:

Field	R/O/C	Description
First Name	0	Business Partner's First Name
		Example: Kris
Last Name	Ο	Business Partner's Last Name
		Example: Kyle

5. Click the **Search** button to display the search results based on the search criteria entered.



Search: Customers

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6. Scroll down to the **Result List** to select your BP record based on the search criteria entered.



Search: Customers

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KRIS KYLE	Tax ID Number	▼ is	-		00	
JOHN FLACCO CREOLA A SNEED	Tax ID Type	▼ is	-		• 0 0	
JOHN DO JOHN DO	Archived Flag	▼ is	-		- 0 0	
ERNST WILLIAMS	Inactive Flag	▼ is	-		- 0 0	
	IRS Response Code	▼ is	-		- 0 0	
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	State Prog Participation	▼ is	- 4	ALL STATES	- 0 0	
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7. Click the **KRIS KYLE** krisk to go to the Customer: page.



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	Prefix:				Example: Stre	et address, PO BOX XXX, RR	
Recent Items	First Name:	KRIS	Addre	ess Lin			
KRIS KYLE	Middle Name:				Example: Apar	rtment, Suite, Unit, Building, Fl	
JOHN FLACCO CREOLA A SNEED	Last Name:	KYLE		City:	OWINGS MILL	.S	
JOHN DO JOHN DO	Suffix:			State:	MD	MARYLAND	
ERNST WILLIAMS	Common Customer.	KRIS KYLE	Z	IP Code:	21117-4776		
	Legal Name:	No		Country:	US	USA	
	Language Preference:	English	Tele	ephone.			
	Data Origin:	CRM	Mobil	e Num			
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8. Click the Edit Edit button to open the fields that can be changed without a KFC form.



FSA users are only allowed to modify data permitted by their security roles, so some assignment blocks and fields may be display only.

To change the TIN and TIN Type, Program Participation, Associated County and set the Inactive flag changes the user must submit a Key Field Change (KFC) request.

Fields that require a KFC request for modification are identified with a green question mark icon.



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Business Partner		General Data			Main Address	and Communi	cation Data	
Farm Records	•	Current Role:	Individual	-	Information.			
Product Master	►	BP Number / ID:	8000127055		Address Lin	1 WINNING DF	२	
Recent Items		Prefix:	•			Example: Stree	et address, PO BOX XXX, RR	
	_	First Name:*	KRIS		Address Lin			
KRIS KYLE JOHN FLACCO		Middle Name:				Example: Apar	tment, Suite, Unit, Building, Fl	
CREOLA A SNEED		Last Name:*	KYLE		City:*	OWINGS MILL	.S	
JOHN DO JOHN DO		Suffix:	•		State:*	MD 🗇	MARYLAND	
ERNST WILLIAMS		Common Customer	KRIS KYLE		ZIP Code:*	21117-4776		
		Legal Name:*	Ne 🖛		Country:*	US 🗇	USA	
		Language Preference:	English 🔹		Telephone.			
		Data Origin:	CRM	-	Mobile Num			
		Employee Type:	Not an employe	ee 🔻	E-Mail Addr			
		Tax ID Type:*	No Tax Ide 🔻	0	Preferred C	Post (lette 🔻		
		Tax ID Number:	No Tax ID Nu	0	Carrier Route:	R002		
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9. Scroll down to the Address assignment block.

A Business Partner has basic information that may need to be regularly updated or modified, including name, address, phone number, E-Mail, and notes.

Minor edits to the customer address can be performed in the **Customer Details** assignment block, as shown above, however removal or addition of addresses must be performed in the **Address** tab in the lower part of the record.

Similarly, phone numbers and E-Mail accounts can be added or removed in the **Communication** Assignment block, which is also in the lower part of the record.



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Home			
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	Name Description Created By	Created On	File Name

10. Click the **New Solution** button to update the current address.



In this situation, the user has received a customer request to update the Standard address.

You can maintain any number of addresses for each Business Partner. One address per Business Partner is always flagged as being the Standard address.



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Home	Address			
Worklist				
Business Partner	Information Line: Address Line1:*			1
	Address Line I:"	Example: Street address, PO BC		
Farm Records	Address Line 2:	Example. Street address, PO BC	ллл, RR л DUA ллл, ПС л D…	
Product Master	Address Line 2.	Example: Apartment, Suite, Unit,	Building Floor	
Recent Items	City:*	Example: Apartment, Suite, Onit,	Duliulity, 1 loor	
KRIS KYLE	State:*			
JOHN FLACCO	ZIP Code:*			
CREOLA A SNEED	Country:*	US 🗇	USA	
JOHN DO JOHN DO	Carrier Route:			
ERNST WILLIAMS	Delivery Bar Code:			
	Congressional Voting District:	•		
	Valid From:	01/19/2015	Valid To: 12/31/9999	
	Address Types			
	Insert 🗊			Z
	沿 Address Type			Valid From Valid To
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11. As required, complete/review the following fields:

Field	R/O/C	Description
Address Line1:	R	An alpha/numeric field in which the number and street name of location is entered.
		Example: 12310 Dover Rd
City:	R	Incorporated municipality, usually governed by a mayor and a board of alderman or councilman
		Example: Reistertown



Field	R/O/C	Description
State:	R	Field for entry of the two character State abbreviation. Example: Maryland - MD.
		Example: MD
ZIP Code:	R	5 digit code indicating the state and post office or postal zone
		Example: 21136

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	Customer: KRIS KYLE			🖸 Back 👻 💟 👻
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Home				
Worklist	Address			
Business Partner	Information Line:			
	Address Line1:*	12310 Dover Rd		
Farm Records		Example: Street address, PO BC	DX XXX, RR X BOX XXX, HC X B…	
Product Master	Address Line 2:	Example: Apartment, Suite, Unit,	Building Floor	
Recent Items	City:*	Reistertown	, Duliding, 11001	
	State:*	MD 🗇		
KRIS KYLE JOHN FLACCO	ZIP Code:*	21136		
CREOLA A SNEED	Country:*	US D	USA	
JOHN DO JOHN DO	Carrier Route:		UUN	
ERNST WILLIAMS	Delivery Bar Code:			
	Congressional Voting District:	•		
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12. Click the **Address Type** drop-down icon to view the available options.



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Worklist	Information Line:			
Business Partner	Address Line1:*	12310 Dover Rd		
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Farm Records	Address Line 2:	Example: Offeet address, 1 0 DO	X XXX, NX X DOX XXX, NO X D	
Product Master		Example: Apartment, Suite, Unit,	Building, Floor	
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KRIS KYLE	State:*	MD 🗇		
JOHN FLACCO	ZIP Code:*	21136		
CREOLA A SNEED	Country:*	US 🗇	USA	
JOHN DO JOHN DO ERNST WILLIAMS	Carrier Route:			
	Delivery Bar Code:			
	Congressional Voting District:	▼		
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	Billing Address Mailing Address Add Primary Address			
	Shipping Address			e,
	Standard Address			Valid From Valid To
	Street Address			

13. Select the Standard Address Standard Address from the Address Type list.

The **Billing Address** indicates that this address is a location where billing and invoices can be received (rarely used by FSA).

The **Mailing Address** indicates that is address is a valid delivery point where the customer receive mail, including Post Office Box.

The **Primary Address** indicates the BPs primary address. It is no longer used to identify the customer's preferred address. Standard Address is used as the preferred address type.

The **Shipping Address** indicates that this address is a location where shipments can be received (Non-PO Box addresses).

The **Standard Address** indicates that this address is the main address used to determine Congressional Voting District. The Standard address is



also displayed in the Main Address & Communication Data section of the Customer Details assignment block.

The **Street Address** indicates a physical location associated to the customer, but not necessarily a mailing address (ie: Farm Address).

Customer: KRIS KYLE

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Home	Address			
Worklist	Information Line:			
Business Partner	Address Line1:*	12310 Dover Rd		
Farm Records		Example: Street address, PO BO	DX XXX, RR X BOX XXX, HC X B	
Product Master	Address Line 2:			
		Example: Apartment, Suite, Unit	, Building, Floor	
Recent Items	City:*	Reistertown		
KRIS KYLE	State.*	MD 🗇	MARYLAND	
JOHN FLACCO CREOLA A SNEED	ZIP Code:*	21136		
JOHN DO JOHN DO	Country:* Carrier Route:	US 🗇	USA	
ERNST WILLIAMS	Delivery Bar Code:			
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14. Click the **Back** Back button to begin the address validation.

The address assigned with an address type of Standard cannot be deleted from the BP record until a replacement address with the address type of Standard is loaded.

More than one Address type is allowed per address. If another address is needed, the user would click the dropdown to add it.

For any mailings, including bulk mailing, always use the address with the address type of Standard.



Error at address check

Address Component	Original Address	Validated Address
Address Line 1	12310 DOVER RD	12310 DOVER RD
Secondary Number		
Street 2		
Address Line 2		
DPV/Carr./Cong.dist		109 R007 2402
Building Code		
Room Number		
Floor		
City	REISTERTOWN	REISTERSTOWN
ZIP Code	21136	21136-5606
State	MD	MD
Country	US	US

- **15.** Click the Accept Accept button to accept the validated Address. The validated Address will automatically populated with the Zip+4, Congressional Voting District, Carrier Route and Barcode.
 - If the user selects the Accept button, the validated address is saved in the Address tab. If the Address Type was defined as "Standard", then the Address also appears in the Mail and Communications section of the Customer Details tab. The Carrier Route, Bar Code, and Congressional Voting District are autopopulated.
 - If the user selects the Use Original Address button, the original (user entered) Address is saved in the Address tab. The Carrier Route, Bar Code and Congressional Voting District are not automatically populated. Those fields will require manual entry.
 - If the user selects the **Cancel** button, the address validation is cancelled. However, when the user selects the **Save** button again from the customer record, the address validation is performed again.



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CREOLA A SNEED JOHN DO JOHN DO		New							a	
ERNST WILLIAMS	A	ctions Addr	ess			Current	Valid From	Vali	d To	
		1.000	NNING DR /	OWINGS MILLS N	ID 21117-4776		01/19/2015	12/3	1/9999	
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16. Scroll up to the **Customer Details** tab to verify that the address entry in the **Main Address** and **CommunicationData** block match the Address tab.



Verify the address entered is correct in the **Address** column and that the checkbox is selected in the **Current** column.



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Business Partner	Edit STax ID Histor	Y .						
	General Data			Main Address	and Communi	cation Data		
Farm Records	Current Role:	Individual	*	Information.				
Product Master	BP Number / ID:	8000127055		Address Lin	12310 DOVER	RD		
Descriptions	Prefix:	•			Example: Stree	et address, PO I	BOX XXX, RR	
Recent Items	First Name:*	KRIS		Address Lin				
KRIS KYLE JOHN FLACCO	Middle Name:				Example: Apart	tment, Suite, Ur	nit, Building, Fl	
CREOLA A SNEED	Last Name:*	KYLE		City:*	REISTERSTO	WN		
JOHN DO JOHN DO	Suffix:	•		State:*	MD 🗇	MARYLAND		
ERNST WILLIAMS	Common Customer	KRIS KYLE		ZIP Code:*	21136-5606			
	Legal Name:*	Ni 🕶		Country:*	US 🗇	USA		
	Language Preference:	English 💌		Telephone.				
	Data Origin:	CRM	•	Mobile Num				
	Employee Type:	Not an employee	•	E-Mail Addr				
	Tax ID Type:*	No Tax Ide 🔻 🔞		Preferred C	Post (lette 🔻			
	Tax ID Number:	No Tax ID Nui 🔞		Carrier Route:	R007			
	Date of Death:	62		Delivery Bar	109			
	Death Confirmed:			Congressio	MARYLAND	▼ 02		
	Notes							

- 17. Now, that the address has been verified, scroll down to return to the Address tab. The **Preferred Communication Method** is currently set to Post Letter.
 - In the Main Address and Communication Data assignment block, notice that the E-Mail Address and Telephone Number fields are blank. In next several steps, you will add a Telephone number and E-Mail address.



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18. Select the **Communication Numbers** Communication Numbers tab.



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19. Click the Edit List button to edit the Communication Numbers tab.



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20. Click the Insert button Insert button to add a new line to the Communication Numbers tab for the selected BP record.



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- **21.** Click the **Type** dropdown list icon to view the available options.
 - The Country is defaulted to US, but can be changed. If the Country is updated to other than US, then the State and County fields will be grayed out.



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22. Select Business Business from the Type list items.



The **Type** field allows the user to determine the function of the defined telephone number.



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23. Click in the Number field.

A user can enter a domestic or foreign phone number. The **Number** field is a numeric free-form field.



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

Field	R/O/C	Description
Number		A number assigned to a particular telephone and used in making connections to it.
		Example: 6674343644



Phone Number and Extension fields will accept numeric values only.



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25. Select the Standard \Box checkbox to indicate this is the standard telephone to be used.



Only the telephone designated as Standard will be displayed in the **Main Address** and **Communicate Data** assignment block.



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26. Click the **State** - dropdown list to view the available options.

The State where the phone number is assigned. This field is optional.



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27. Scroll through the **State** list.



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28. Select **MARYLAND** MARYLAND from the **State** list.



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29. Click the **County** dropdown list icon button to view the available list of options.



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

The County is where the phone number is assigned and this field is optional.

At the conclusion of this step the telephone number populates the **Telephone Number** field in the **Main Address and Communication Data** block.

Next, we will add a E-Mail address to the customer's record.



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31. Click the **E-Mails E-Mails** tab to add an E-Mail address that can be used to send communication and business documentation.



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32. Click Insert button Insert button to add a new line to the **E-Mail** tab for the selected BP record.



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

Field	R/O/C	Description
E-Mail	R	The e-mail address for an individual or business Example: gmail@gmail.com



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34. Select the **Standard** check box to define the E-Mail address.



E-Mail Address are optional. If an E-Mail Address is entered one must be selected as Standard.

By selecting the **Standard** checkbox it will be reflected in the **E-Mail** Address field which is found in the **Main** Address and Communication Data assignment block. If this is also the preferred method of communication, the user can set the **Preferred** Communication Method field in the Main Address and Communication Data block to E-Mail.



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35. Select the **Receive Sensitive E-Mail** check box to indicate that this E-Mail address is used to receive sensitive documentation.



The **Receive Sensitive E-Mail** checkbox indicates if the customer wants to receive sensitive E-Mail per the AD-2047.



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36. Click the **Save** button BP record changes.

You have updated a Business Partner record by changing the address, and adding communication (phone and E-Mail) data to the existing BP record.



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37. Scroll up to the top of the Customer Detail tab to verify entries.



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KAIN KYLE	Suffix:			State:	MD	MARYLAND		
JOHN DO JOHN DO	Common Customer	KRIS KYLE	Z	IP Code:	21136-5606			
	Legal Name:	No		Country:	US	USA		
	Language Preference:	English	Tele	phone.	(667) 434-364	4		
	Data Origin:	CRM	Mobil	e Num				
	Employee Type:	Not an employee	E-Ma	il Addr	gmail@gmail.	com		
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38.

Click the **Home** Home

button to return to the Main page. You

have completed the transaction.

Notice that the **E-Mail Address** and **Telephone Number** fields are now populated with the E-Mail and Telephone Number that were entered. The **Preferred Communication Method** is still set to Post Letter as the main form of communication. However, this field can be changed by selecting a different option in the dropdown box.



Result

You have now updated a customer's Business Partner record.