



## 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.
  - 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.

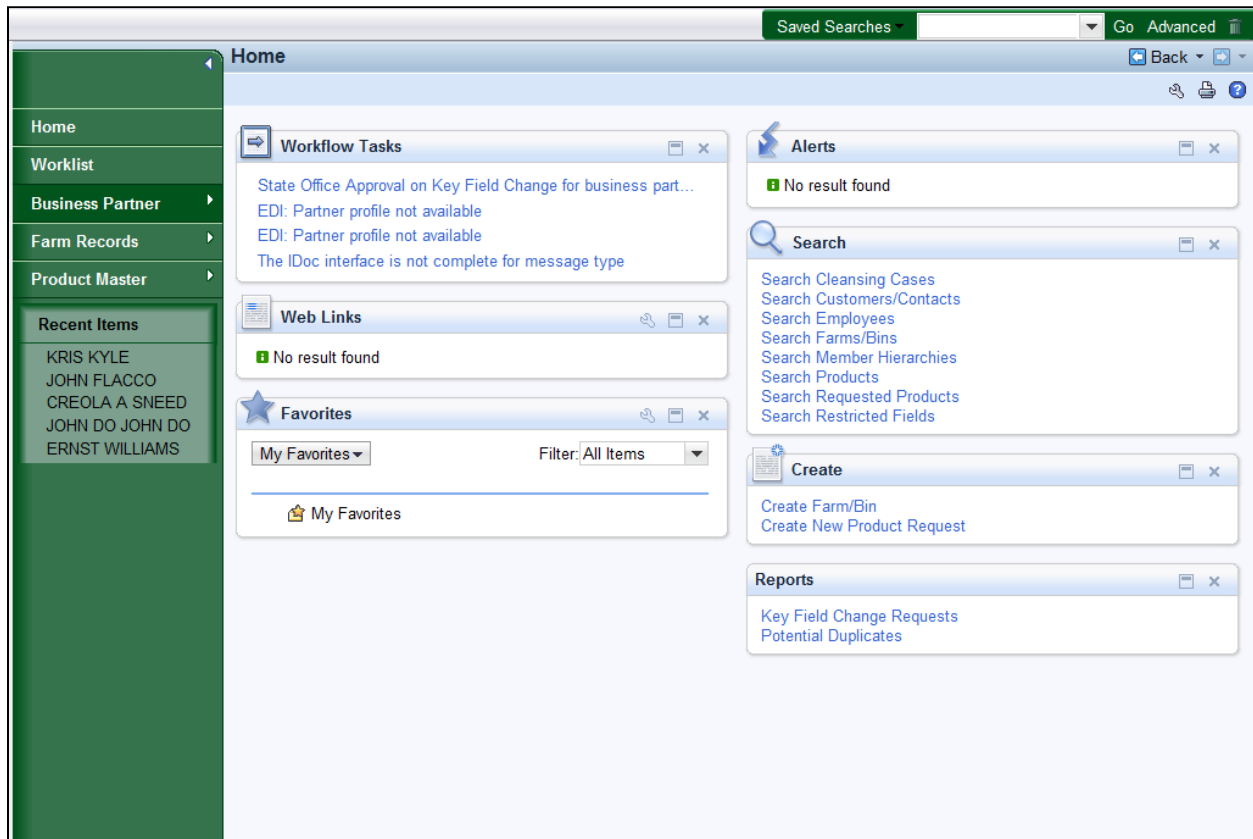
- The **Receive Sensitive materials** checkbox indicates if the customer wants to receive sensitive E-Mail per the AD-2047.
- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates 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 <b>general</b> 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 <b>cautionary</b> note		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.
A <b>critical</b> note		Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
<b>Contact</b> 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 <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

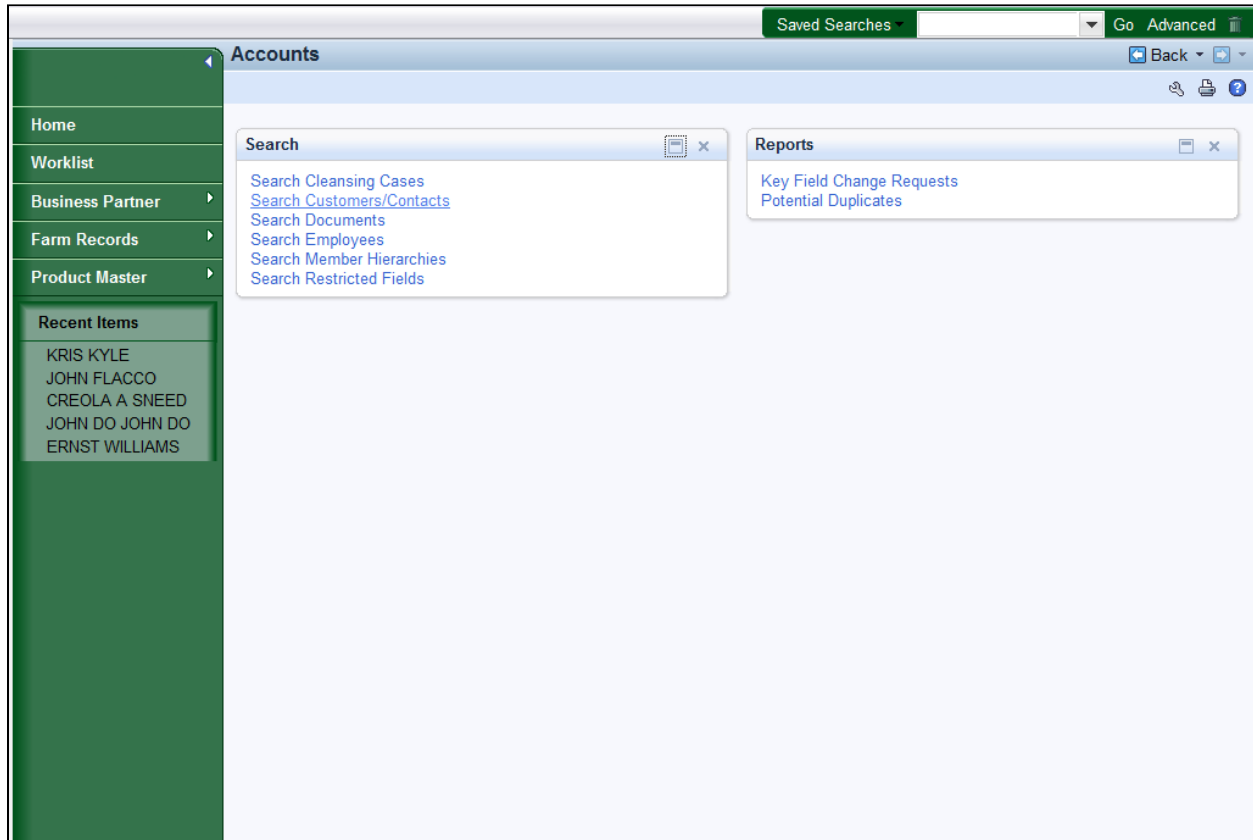


2. Click the **Business Partner**  button to go to the Accounts page.

 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.

## 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

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

Field	R/O/C	Description
First Name	O	Business Partner's First Name <b>Example:</b> Kris
Last Name	O	Business Partner's Last Name <b>Example:</b> Kyle

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

## Search: Customers

Search: Customers
Go Advanced

Home

Worklist

Business Partner

Farm Records

Product Master

**Recent Items**

KRIS KYLE

JOHN FLACCO

CREOLA A SNEED

JOHN DO JOHN DO

ERNST WILLIAMS

Search for: All Accounts

Business Name	is		
First Name	is	KRIS	
Last Name	is	KYLE	
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

Save Search As:

**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...

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



## Search: Customers

Search: Customers
Saved Searches 
Go Advanced

Home

Worklist

Business Partner

Farm Records

Product Master

**Recent Items**

KRIS KYLE

JOHN FLACCO

CREOLA A SNEED

JOHN DO JOHN DO

ERNST WILLIAMS

Search for:

Business Name	is	<input type="text"/>		
First Name	is	KRIS		
Last Name	is	KYLE		
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 Number	is	<input type="text"/>		
Tax ID Type	is	<input type="text"/>		
Archived Flag	is	<input type="text"/>		
Inactive Flag	is	<input type="text"/>		
IRS Response Code	is	<input type="text"/>		
IRS Attempts	equals	<input type="text"/>		
State Prog Participation	is	ALL STATES		
County Prog Participation	is	<-ALL COUNTIES-->		
Service Center	is	<-ALL CENTERS-->		

Maximum Number of Results:

Save Search As:

**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"/>	8000127...	<a href="#">KRIS KYLE</a>	N..	<input type="checkbox"/>	N..	1..	O..	M..	2..					0

7. Click the **KRIS KYLE** [KRIS KYLE](#) link to go to the Customer: page.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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: 8000127055	Address Lin... 1 WINNING DR
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: KRIS	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: KYLE	City: OWINGS MILLS
Suffix:	State: MD MARYLAND
Common Customer.. KRIS KYLE	ZIP Code: 21117-4776
Legal Name: No	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 Iden...	Preferred C.. Post (letter)
Tax ID Number: No Tax ID...	Carrier Route: R002
Date of Death:	Delivery Bar... 013
Death Confirmed: <input type="checkbox"/>	Congressio.. MARYLAND 07

Notes

8. Click the **Edit** button to open the fields that can be changed without a KFC form.

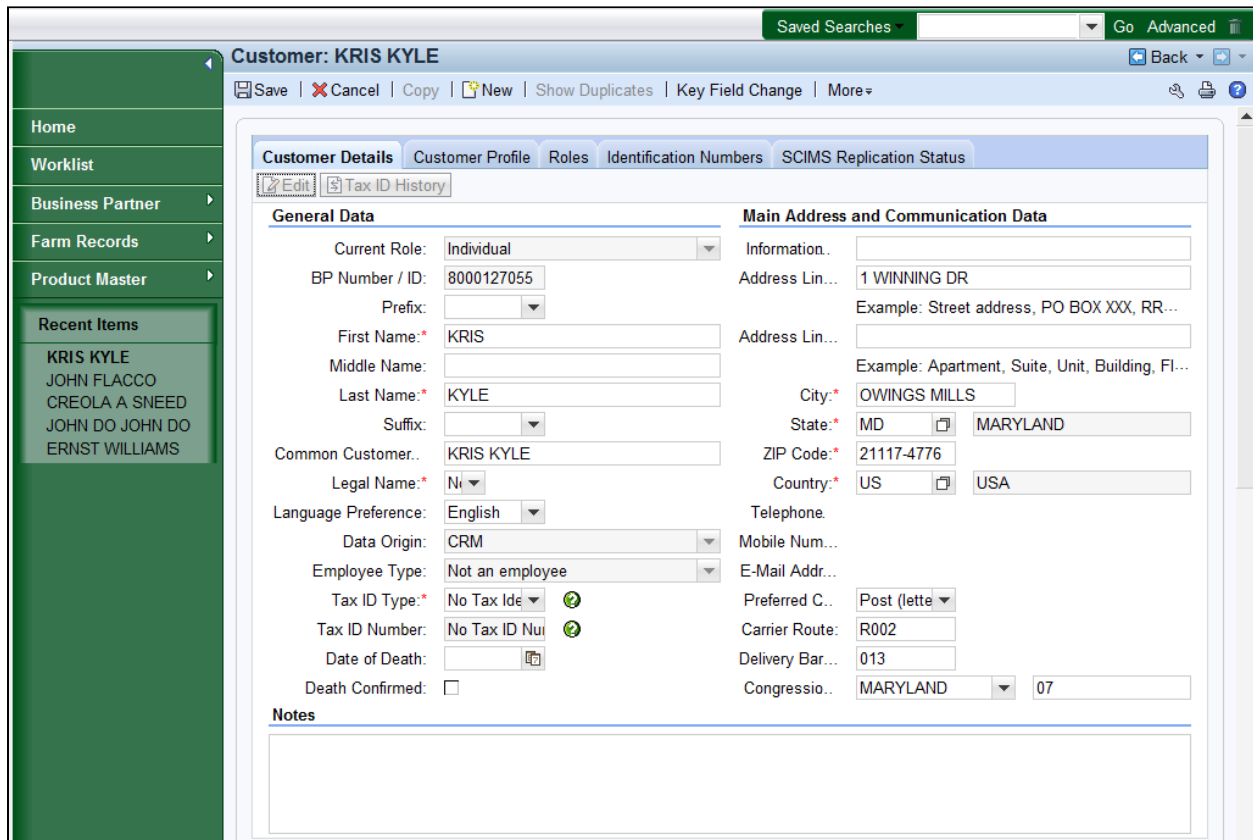
FSA users are only allowed to modify data permitted by their security roles, so some assignment blocks and fields may be display only.

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.



## Customer: KRIS KYLE



### 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.

## Customer: KRIS KYLE

Customer: KRIS KYLE

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | 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
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input checked="" type="checkbox"/>	01/19/2015	12/31/9999

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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10. Click the **New**  **New** 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.



**Customer: KRIS KYLE**

Customer: KRIS KYLE

Address

Information Line:

Address Line1:\*

Example: Street address, PO BOX XXX, RR X BOX XXX, HC X B...

Address Line 2:

Example: Apartment, Suite, Unit, Building, Floor

City:\*

State:\*

ZIP Code:\*

Country:\* US USA

Carrier Route:

Delivery Bar Code:

Congressional Voting District:

Valid From: 01/19/2015 Valid To: 12/31/9999

Address Types

Address Type	Valid From	Valid To

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. <b>Example:</b> 12310 Dover Rd
City:	R	Incorporated municipality, usually governed by a mayor and a board of alderman or councilman <b>Example:</b> Reistertown



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

**Customer: KRIS KYLE**

Customer: KRIS KYLE

Address

Information Line:

Address Line1:\*   
Example: Street address, PO BOX XXX, RR X BOX XXX, HC X B...

Address Line 2:   
Example: Apartment, Suite, Unit, Building, Floor

City:\*

State:\*

ZIP Code:\*

Country:\*   USA

Carrier Route:

Delivery Bar Code:

Congressional Voting District:

Valid From:  Valid To:

Address Types

Address Type	Valid From	Valid To
<input type="button" value="📄"/> Address Type		

12. Click the **Address Type**  drop-down icon to view the available options.



## Customer: KRIS KYLE

Customer: KRIS KYLE

Address

Information Line:

Address Line1:\*    
Example: Street address, PO BOX XXX, RR X BOX XXX, HC X B...

Address Line 2:    
Example: Apartment, Suite, Unit, Building, Floor

City:\*

State:\*

ZIP Code:\*

Country:\*

Carrier Route:

Delivery Bar Code:

Congressional Voting District:

Valid From:  Valid To:

Billing Address  
 Mailing Address  
 Primary Address  
 Shipping Address  
 Standard Address  
 Street Address

Valid From Valid To

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

The screenshot shows the 'Customer: KRIS KYLE' page. The left sidebar contains navigation links: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items (KRIS KYLE, JOHN FLACCO, CREOLA A SNEED, JOHN DO JOHN DO, ERNST WILLIAMS). The main content area is titled 'Address' and contains the following fields:

- Information Line:
- Address Line 1:  (Example: Street address, PO BOX XXX, RR X BOX XXX, HC X B...)
- Address Line 2:  (Example: Apartment, Suite, Unit, Building, Floor)
- City:
- State:  (dropdown) MARYLAND
- ZIP Code:
- Country:  (dropdown) USA
- Carrier Route:
- Delivery Bar Code:
- Congressional Voting District:
- Valid From:  Valid To:

Below the address form is the 'Address Types' section, which includes an 'Insert' button and a table:

Address Type	Valid From	Valid To
Standard Address	01/19/2015	12/31/9999

14. Click the **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

Please review Address validation results.

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**  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.

## Customer: KRIS KYLE

Customer: KRIS KYLE

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | 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
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	01/19/2015	12/31/9999
	12310 DOVER RD / REISTERSTOWN MD 2113...	<input checked="" type="checkbox"/>	01/19/2015	12/31/9999

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

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.





## Customer: KRIS KYLE

Customer: KRIS KYLE

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


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

General Data | Main Address and Communication Data

Current Role:	Individual	Information:	
BP Number / ID:	8000127055	Address Lin...:	12310 DOVER RD
Prefix:		Example:	Street address, PO BOX XXX, RR...
First Name*:	KRIS	Address Lin...:	
Middle Name:		Example:	Apartment, Suite, Unit, Building, Fl...
Last Name*:	KYLE	City*:	REISTERSTOWN
Suffix:		State*:	MD MARYLAND
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 Idé	Preferred C...:	Post (lette
Tax ID Number:	No Tax ID Num	Carrier Route:	R007
Date of Death:		Delivery Bar...:	109
Death Confirmed:	<input type="checkbox"/>	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.



## Customer: KRIS KYLE

Customer: KRIS KYLE

Save | Cancel | Copy | New | Show Duplicates | Key Field Change | 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
	1 WINNING DR / OWINGS MILLS MD 21117-4776	<input type="checkbox"/>	01/19/2015	12/31/9999
	12310 DOVER RD / REISTERSTOWN MD 2113...	<input checked="" type="checkbox"/>	01/19/2015	12/31/9999

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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18. Select the **Communication Numbers** **Communication Numbers** tab.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

No result found

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	62623	BALTIMORE COUNTY FARM SER...	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				

19. Click the **Edit List** [Edit List](#) button to edit the **Communication Numbers** tab.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
No result found								

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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20. Click the **Insert** button  to add a new line to the **Communication Numbers** tab for the selected BP record.

## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:   
 Restricted:

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

Edit List

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Home	US			<input type="checkbox"/>	<input type="checkbox"/>		

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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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.

## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags: Common Eligibility | Financial Service

Archived:   
 Inactive:   
 Restricted:

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

Edit List

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Home	US			<input type="checkbox"/>	<input type="checkbox"/>		

Repres: Barn | Relationships

Program: Home | Associated Counties

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

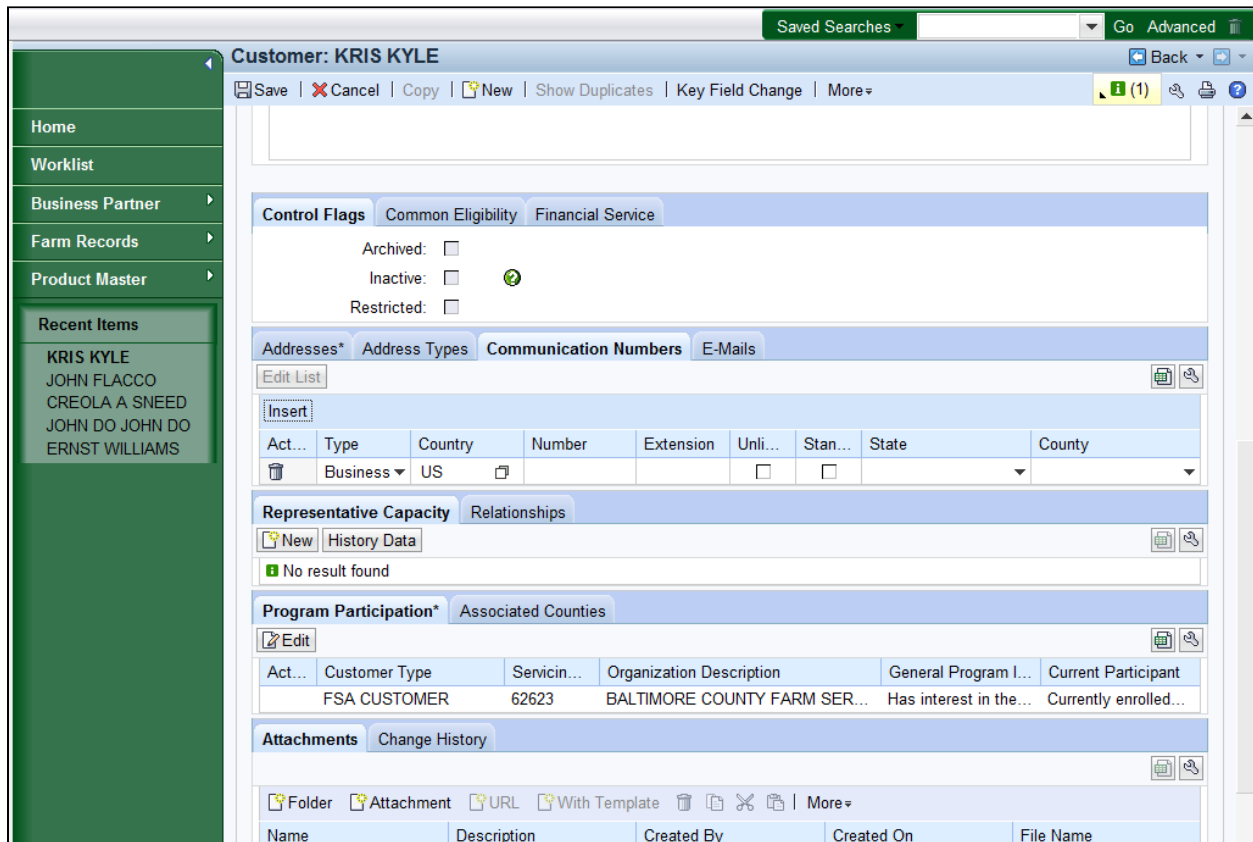
Name	Description	Created By	Created On	File Name
------	-------------	------------	------------	-----------

22. Select **Business** from the **Type** list items.



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

## Customer: KRIS KYLE



Customer: KRIS KYLE

Control Flags: Common Eligibility, Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>		

Representative Capacity | Relationships

New | History Data

No result found

Program Participation\* | Associated Counties

Edit

Act...	Customer Type	Servicin...	Organization Description	General Program l...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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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.



## Customer: KRIS KYLE

Customer: KRIS KYLE

Control Flags: Archived:  Inactive:  Restricted:

Communication Numbers

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US			<input type="checkbox"/>	<input type="checkbox"/>		

Program Participation\*

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

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

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



Phone Number and Extension fields will accept numeric values only.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	6674343644		<input type="checkbox"/>	<input type="checkbox"/>		

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
------	-------------	------------	------------	-----------

25. Select the **Standard**  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.

## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:   
 Restricted:

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

Edit List

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	6674343644		<input type="checkbox"/>	<input checked="" type="checkbox"/>		

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
------	-------------	------------	------------	-----------

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



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



## Customer: KRIS KYLE

Customer: KRIS KYLE

Control Flags   Common Eligibility   Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	6674343644		<input type="checkbox"/>	<input checked="" type="checkbox"/>		

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments   Change History

Folder   Attachment   URL   With Template         More

Name	Description	Created By	Created On	File Name
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27. Scroll through the **State** list.



## Customer: KRIS KYLE

Customer: KRIS KYLE

Control Flags   Common Eligibility   Financial Service

Archived:   
 Inactive:    
 Restricted:

Addresses\*   Address Types   Communication Numbers   E-Mails

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	6674343644		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div style="border: 1px solid black; padding: 2px;">                     KANSAS                      KCCO                      KENTUCKY                      LOUISIANA                      MAINE                      MARSHALL ISLANDS                      MARYLAND                      MASSACHUSETTS                 </div>	

Representative Capacity   Relationships

Program Participation\*   Associated Counties

Act...	Customer Type	Servic...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments   Change History

Name	Description	Created By	Created On	File Name
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28. Select **MARYLAND** from the **State** list.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	6674343644		<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARYLAND	

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

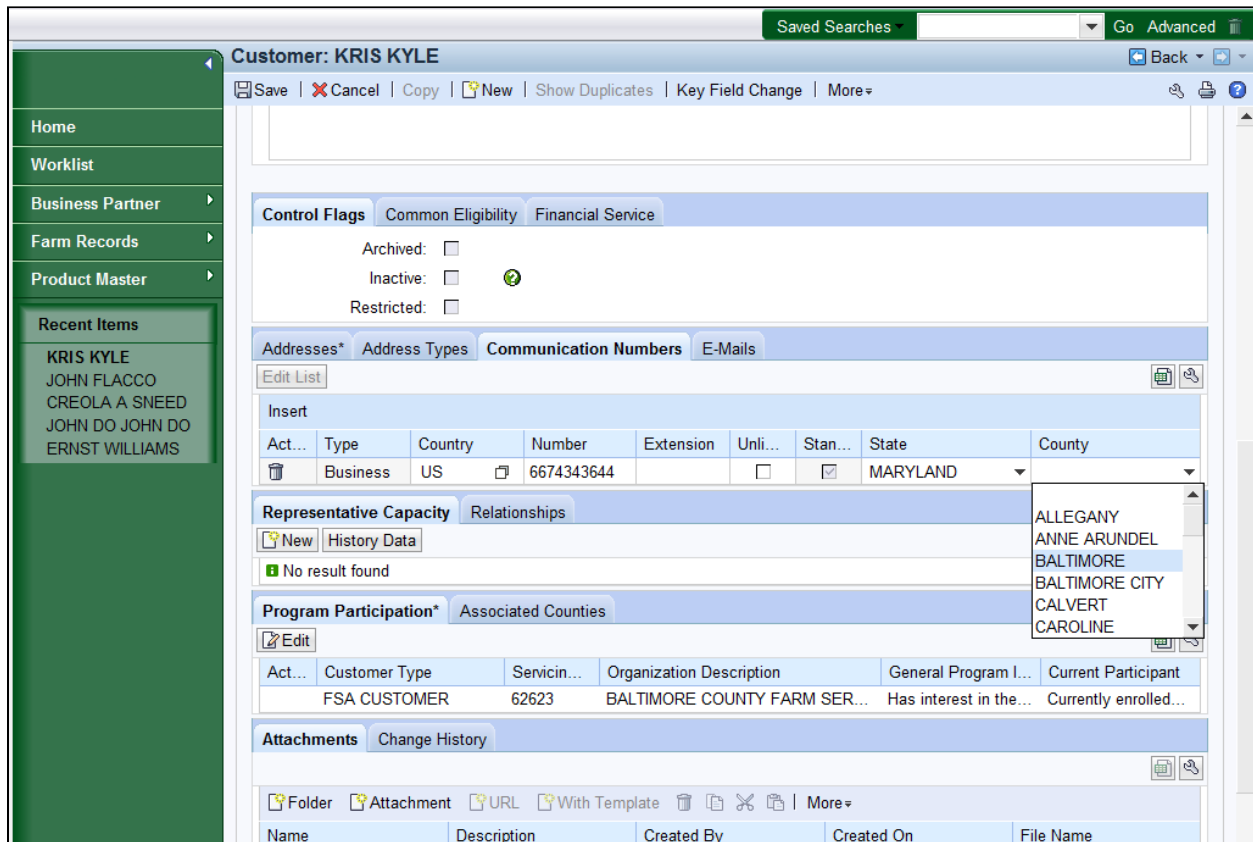
Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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29. Click the **County** dropdown list icon button to view the available list of options.

## Customer: KRIS KYLE



Customer: KRIS KYLE

Control Flags: Common Eligibility, Financial Service

Archived:   
 Inactive:   
 Restricted:

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

Edit List

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	6674343644		<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARYLAND	

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Name	Description	Created By	Created On	File Name
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30. Select **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.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	Type	Country	Number	Extension	Unli...	Stan...	State	County
	Business	US	6674343644		<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARYLAND	BALTIMORE

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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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.



## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	E-Mail	Standard	Receive Sensiti...
No result found			

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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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.





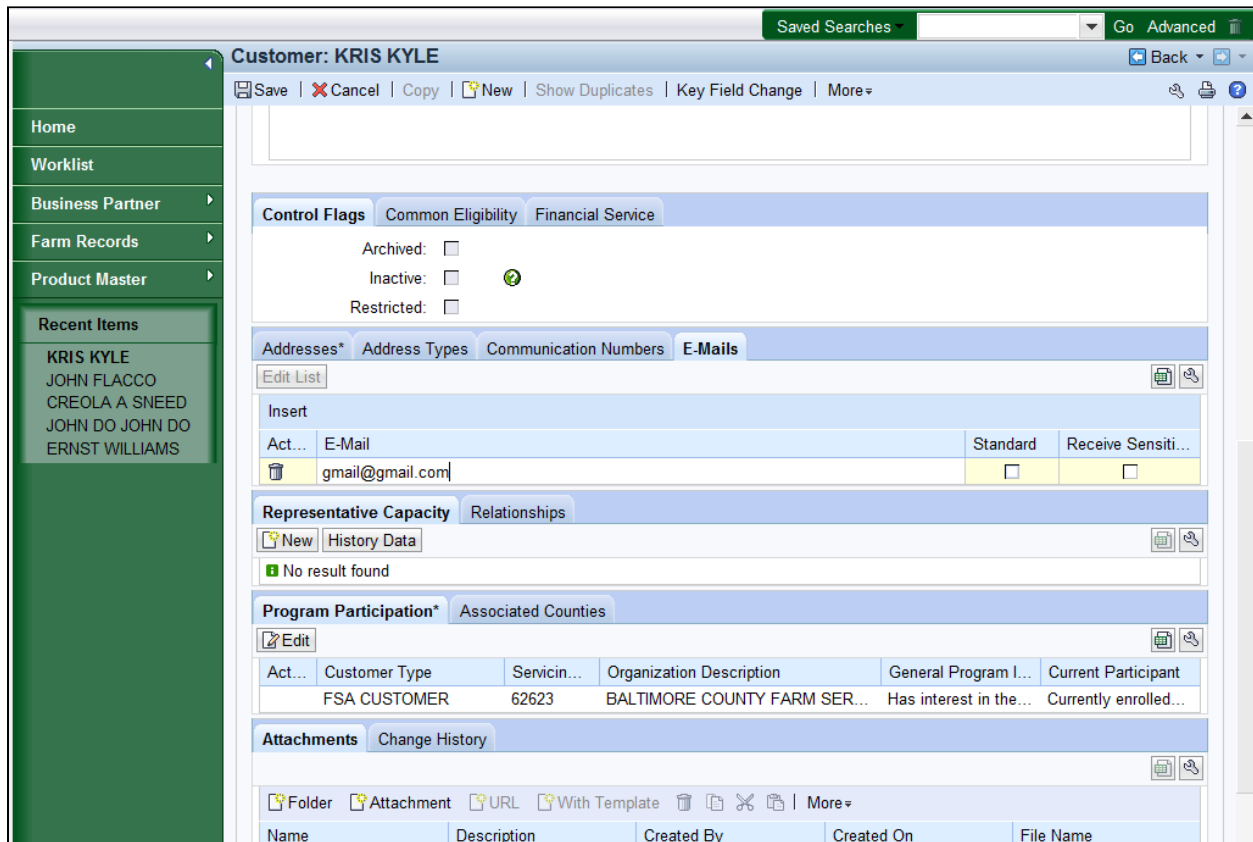
### Customer: KRIS KYLE

The screenshot displays the MIDAS system interface for a customer named KRIS KYLE. The interface includes a navigation menu on the left with options like Home, Worklist, Business Partner, Farm Records, and Product Master. The main content area shows several sections: Control Flags (with checkboxes for Archived, Inactive, and Restricted), Addresses (with an Edit List button), Representative Capacity (with a New button and a 'No result found' message), and Program Participation (with an Edit button and a table showing customer details). The 'E-Mails' tab is currently selected, showing a table with columns for Act..., E-Mail, Standard, and Receive Sensiti....

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  <b>Example:</b> gmail@gmail.com

## Customer: KRIS KYLE



Customer: KRIS KYLE

Control Flags: Common Eligibility, Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input type="checkbox"/>	<input type="checkbox"/>

Representative Capacity | Relationships

New | History Data

No result found

Program Participation\* | Associated Counties



Edit

Act...	Customer Type	Servicin...	Organization Description	General Program l...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

Name	Description	Created By	Created On	File Name
------	-------------	------------	------------	-----------

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.

## Customer: KRIS KYLE

Customer: KRIS KYLE

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

Control Flags | Common Eligibility | Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments | Change History

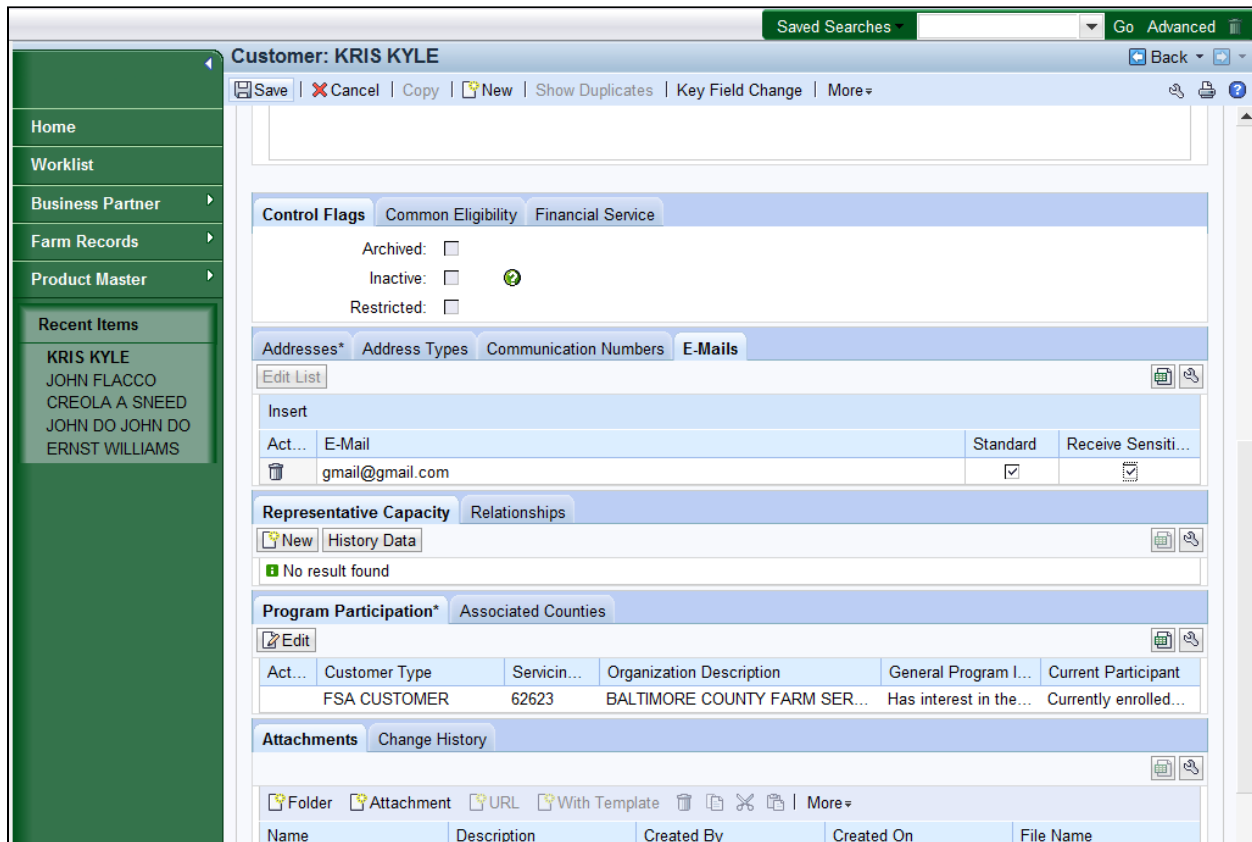
Folder | Attachment | URL | With Template | More

Name	Description	Created By	Created On	File Name
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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.

## Customer: KRIS KYLE



Customer: KRIS KYLE

Control Flags Common Eligibility Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Insert

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity Relationships

New History Data

No result found

Program Participation\* Associated Counties

Edit

Act...	Customer Type	Servicin...	Organization Description	General Program l...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments Change History

Folder Attachment URL With Template More ▾

Name	Description	Created By	Created On	File Name
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36. Click the **Save** button  button to record your 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.



### Customer: KRIS KYLE

Customer: KRIS KYLE

Control Flags   Common Eligibility   Financial Service

Archived:   
 Inactive:    
 Restricted:

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

Edit List

Act...	E-Mail	Standard	Receive Sensiti...
	gmail@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Representative Capacity   Relationships   SSN Family

New   History Data

No result found

Program Participation\*   Associated Counties

Edit

Act...	Customer Type	Servicin...	Organization Description	General Program I...	Current Participant
	FSA CUSTOMER	62623	BALTIMORE COUNTY FARM SER...	Has interest in the...	Currently enrolled...

Attachments   Change History

Folder   Attachment   URL   With Template   | More ▾

Name	Description	Created By	Created On	File Name
------	-------------	------------	------------	-----------

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



## Customer: KRIS KYLE

Customer: KRIS KYLE

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: 8000127055	Address Lin... 12310 DOVER RD
Prefix:	Example: Street address, PO BOX XXX, RR...
First Name: KRIS	Address Lin...
Middle Name:	Example: Apartment, Suite, Unit, Building, Fl...
Last Name: KYLE	City: REISTERSTOWN
Suffix:	State: MD MARYLAND
Common Customer.. KRIS KYLE	ZIP Code: 21136-5606
Legal Name: No	Country: US USA
Language Preference: English	Telephone. (667) 434-3644
Data Origin: CRM	Mobile Num...
Employee Type: Not an employee	E-Mail Addr... gmail@gmail.com
Tax ID Type: Social Sec...	Preferred C.. Post (letter)
Tax ID Number: 667434364	Carrier Route: R007
IRS Response Code: Error – TIN is not currently i...	Delivery Bar... 109
IRS Attempts: 01	Congressio.. MARYLAND 02
Date of Death:	
Death Confirmed: <input type="checkbox"/>	

Notes

38. Click the **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.