

Purpose

The purpose of the TIN/Name Query is to verify the Name, TIN Type, and TIN combination with the IRS Response Codes (IRC) of every active BP record with an Employee ID Number (EIN) or Social Security Number (SSN). The IRS Response Codes (IRC) provides the validation or errors that must be corrected to unblock the EIN/SSN so the information can move to downstream systems.

This work instruction will describe how to create two Saved Search Query variants. The variants are saved and can be used for future use, to view and open TIN/Name validations.

Saved Search variants allow the user to save the Search selection parameters from the Search input screen. This is a one-time setup, and can be executed multiple times based on the selection criteria saved.

Trigger

Perform this procedure when you need to create saved searches to solve IRS Response Codes for EIN and SSN BP records.

Prerequisites

• None

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	G	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	,	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

	Saved Searches -	Go Advanced 🗊
Home		🖸 Back 👻 💽 👻
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Home		
Worklist	Alerts	
Business Partner	New cleansing case has been created	09/23/20 11:25
Farm Records Veb Links 🍕 🖻 🗙	Q Search	= ×
Organizational Model Product Master Recent Items JED CLAMPETT ELLY MAY CLAMP BARBARA A PROH JOHN E TAYLOR HAWKEYE PIERCE	Search Attachment Folder Search Cleansing Cases Search Customers/Contacts Search Farms/Bins Search Member Hierarchies Search Requested Products Search Requested Products Search Requested Products Search Restricted Fields Create Create Folders for Attachments Create New Product Request Create Restricted Fields Reports Key Field Change Requests Potential Duplicates	• x

- 2. Click the Business Partner Business Partner button to go to the Accounts page.
 - The first Saved Search query variant described in this document will be used to search for BP records with the tax type EIN (Employer Identification Number) and where the IRS Response Codes are 01 through 08.



Accounts

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Home				
Worklist	Search	= ×	Reports	X
Business Partner	Search Cleansing Cases Search Customers/Contacts Search Documents		Key Field Change Requests Potential Duplicates	
Farm Records	Search Employees			
Organizational Model 🕨	Search Folder for Attachments Search Member Hierarchies Search Pastricted Fields			
Product Master	Search Service Center Changes			
Recent Items				
JED CLAMPETT ELLY MAY CLAMP BARBARA A PROH JOHN E TAYLOR HAWKEYE PIERCE				

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



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Home	Search Criteria								Hide Search Fields
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Business Partner	Search for: All Account	nts			•		_		
Earm Docords	Business Name	-	is	•			00		
	First Name	-	is	•			00		
Organizational Model	Last Name	-	is	٠			00		
Product Master	Middle Name	-	is	•			00		
	Common Customer Name	-	is	•			00		
Recent Items	BP Number/ID	-	is	•			00		
JED CLAMPETT	Role	-	is	•		-	00		
ELLY MAY CLAMP	Tax ID Number	-	is	•			00		
BARBARA A PROH	Tax ID Type	-	is	•		-	00		
HAWKEYE PIERCE	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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4. Click the Tax ID Type dropdown list button to view the available options.
The TIN Type EIN is the first search parameter for the query.



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Business Partner	Search for: All Accourt	nts			•						
Earm Dooorda	Business Name	•	is	•		0	•				
	First Name	-	is	•		0	•				
Organizational Model 🕨	Last Name	-	is	•		0	•				
Product Master	Middle Name	-	is	•		0	•				
	Common Customer Name	-	is	•		0	•				
Recent Items	BP Number/ID	-	is	•		0	•				
JED CLAMPETT	Role	-	is	•	-	0	•				
ELLY MAY CLAMP	Tax ID Number	-	is	•		0	•				
BARBARA A PROH	Tax ID Type	-	is	•	-	0	•				
	Archived Flag	-	is	•			•				
HAWKETETIEKOE	Inactive Flag	-	is	•	Employer ID Number		•				
	IRS Response Code	-	is	•	IRS Number	су	•				
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	Associated State	-	is	•	Social Security Number	_	•				
	Associated County	-	is	•	ALL COUNTIES -	0	•				
	Service Center	-	is	•	ALL CENTERS -	0	•				
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5. Select Employer ID Number Employer ID Number from the Tax ID Type list.



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Home	Search Criteria							Hide Search Fields
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Business Partner	Search for: All Accour	nts			•			
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	First Name	•	is	•			0 0	
Organizational Model	Last Name	•	is	•			0 0	
Product Master	Middle Name	•	is	•			0 0	
	Common Customer Name	-	is	•			0 0	
Recent Items	BP Number/ID	-	is	•			0 0	
JED CLAMPETT	Role	•	is	•		•	0 0	
ELLY MAY CLAMP	Tax ID Number	-	is	•			0 0	
BARBARA A PROH	Tax ID Type	-	is	•	Employer ID Number	•	0 0	
	Archived Flag	-	is	•	Not Set	•	0 0	
TRANKETE HIEROE	Inactive Flag	-	is	•	Not Set	•	0 0	
	IRS Response Code	-	is	•		-	0 0	
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	Ina BP Num Cor	nmon	Customer N Ta	F	'a Ta Ho	S	. City S Zl T	IRS Respo I.

- 6. Click the IRS Response Code Copy Line[®] button to create another IRS Response Code search criteria line.
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The **IRS Response Code** search line is only listed once, however the variant can include multiple IRS Response Codes (IRC) search lines.

The **Copy Line** • is used to add the selected search criteria line to be included in the search.

The **Remove Line** • is used to remove the selected search criteria line from being included in the search.



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nome	Role	-	is	•		•	0	•	
Worklist	Tax ID Number	-	is	•			0	•	
Business Partner	Tax ID Type	-	is	•	Employer ID Number	•	0	•	
	Archived Flag	-	is	•	Not Set	•	0	•	
Farm Records	Inactive Flag	-	is	•	Not Set	•	0	•	
Product Master		-	is	-	8 lines in group		0	•	
	IRS Response Code	-	is	-		•	0	•	
Recent Items	IRS Response Code	-	is	-		•	0	•	
BENJAMIN PIERCE	IRS Response Code	-	is	-		•	0	0	
	IRS Response Code	-	is	•		•	0	•	
ANNA D WHALEY	IRS Response Code	-	is	•		•	0	•	
JOHN E TAYLOR	IRS Response Code	-	is	•		•	0	•	
	IRS Response Code	-	is	•		•	0	•	
	IRS Response Code	-	is	•		•	0	•	
	IRS Attempts	-	equals	-			0	0	
	Associated State	-	is	-	ALL STATES	•	0	0	
	Associated County	-	is	-	ALL COUNTIES	•	0	0	
	Service Center	-	is	-	ALL CENTERS	•	0	0	
Maximum Number of Results: 100 Search Clear Reset Save Search As: Save Result List									
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- 7. Click the **IRS Response Code** dropdown 🔽 list to view the available options.
 - In this example, the **Copy Line** button was selected eight (8) times to add eight lines to the Saved Search Query.

The **IRS Response Code** has eight lines allocated to the search query, which are used to search for the IRS Response codes 01 through 08.

The following IRC codes require no action:

- 00 TIN and Name match
- 09 Waiting for IRS Response
- 10 Manually Validated



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Business Partner	Tax ID Type	-	is	•	Employer ID Number	•	0 0				
	Archived Flag	-	is	•	Not Set	•	0 0				
Farm Records	Inactive Flag	-	is	•	Not Set	•	0 0				
Product Master	IRS Response Code		is		8 lines in group		0 0				
	IRS Response Code	-	is	-		•	0 0				
Recent Items	IRS Response Code	-	is	•			A				
BENJAMIN PIERCE	IRS Response Code	-	is	•	Error - Duplicate TIN N	Matching request. and SSN but TIN type is unknown but TIN type is unknown					
JED CLAMPETT	IRS Response Code	-	is	•	Error - Match on EIN t						
4 ANNA D WHALEY	IRS Response Code	-	is	•	Error - Match on SSN	but '	TIN type is unknown				
JOHN E TAYLOR	IRS Response Code	-	is	-	Error - TIN was missin	ig or	was entered incorrectly				
	IRS Response Code	-	is	-	Error – Error invalid 11	N ma	atching request				
	IRS Response Code	-	is	-		-	0 0				
	IRS Attempts	-	equals	•			0 0				
	Associated State	-	is	•	ALL STATES	•	0 0				
	Associated County	-	is	•	ALL COUNTIES	•	0 0				
	Service Center	-	is	-	ALL CENTERS	•	0 0				
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8. Select Error - Duplicate TIN Matching

request Error - Duplicate TIN Matching request. from the list of available items.

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The following IRS Response Codes require that the user take action to solve the error so it doesn't affect downstream systems:

- 01 TIN is missing or entered incorrectly.
- 02 TIN is not currently issued, IRS not validated.
- 03 TIN and Name do not match.
- 04 Error Invalid TIN matching request.
- 05 Duplicate TIN matching request.



06 - Match on SSN but TIN type is unknown.

07 - Match on EIN but TIN type is unknown.

08 - Match on SSN and EIN but TIN type is unknown.

Search: Customers

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Worklist	Tax ID Number	•	is	•		0 0
Business Partner	Tax ID Type	•	is	•	Employer ID Number 💌	0 0
	Archived Flag	•	is	•	Not Set 💌	0 0
Farm Records	Inactive Flag	-	is	•	Not Set 💌	0 0
Product Master		-	is	-	8 lines in group	0 0
	IRS Response Code	-	is	•	Error - Duplicate TIN N 🔻	00
Recent Items	IRS Response Code	-	is	-	Error - Match on EIN a 🔻	0 0
BENJAMIN PIERCE	IRS Response Code	-	is	-	Error - Match on EIN b 🔻	0 0
	IRS Response Code	•	is	-	Error - Match on SSN 💌	0 0
ANNA D WHALEY	IRS Response Code	-	is	-	Error - TIN was missin 💌	0 0
JOHN E TAYLOR	IRS Response Code	•	is	•	Error – Error invalid TIN 🔻	0 0
	IRS Response Code	-	is	•	Error – TIN and Name 🔻	0 0
	IRS Response Code	-	is	•	Error – TIN is not curre 🔻	0 0
	IRS Attempts	-	equals	-		0 0
	Associated State	-	is	•	ALL STATES 🔹	0 0
	Associated County	-	is	•	ALL COUNTIES -	0 0
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	Search Clear Reset Result List New Customer Ina BP Num Co	mmon	Save Sear Customer N	Ma: ch As:	kimum Number of Results:	100 글 Save City S Zl T E IRS Re 1

9. Click in the Save Search As: field.

In this example, the remaining IRS Response codes were added to the search criteria screen. The user will need to repeat Step 6, 7, and 8 until the search parameters have been defined as necessary.

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Worklist	Tax ID Number	-	is	-		00				
Business Partner	Tax ID Type	-	is	-	Employer ID Number	00				
	Archived Flag	-	is	-	Not Set	00				
Farm Records	Inactive Flag	-	is	-	Not Set	00				
Product Master			is		8 lines in group	00				
	IRS Response Code	-	is	•	Error - Duplicate TIN N	00				
Recent Items	IRS Response Code	-	is	-	Error - Match on EIN a	00				
BENJAMIN PIERCE	IRS Response Code	-	is	-	Error - Match on EIN b	00				
JED CLAMPETT	IRS Response Code	-	is	•	Error - Match on SSN	00				
4 ANNA D WHALEY	IRS Response Code	-	is	-	Error - TIN was missin	00				
JOHN E TAYLOR	IRS Response Code	-	is	-	Error – Error invalid TIN	00				
	IRS Response Code	-	is	•	Error – TIN and Name	00				
	IRS Response Code	-	is	-	Error – TIN is not curre	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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10. As required, complete/review the following fields:

Field	R/O/C	Description
Save Search As:	R	Free text field that allows a user to create a title for a saved search with established search criteria.
		Example:
		[TIN_Name_EIN_Errors



The Save Search As: field is a free text field that allows a user to create a title for a saved search with established search criteria.



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Worklist	Tax ID Number	-	is	•		0 0	
Business Partner	Tax ID Type	-	is	-	Employer ID Number	- 0 0	
	Archived Flag	-	is	-	Not Set	- 0 0	
Farm Records	Inactive Flag	-	is	-	Not Set	• 0 0	
Product Master		-	is	-	8 lines in group	0 0	
Description of the	IRS Response Code	-	is	-	Error - Duplicate TIN N	• 0 0	
Recent Items	IRS Response Code	-	is	-	Error - Match on EIN a	• 0 0	
BENJAMIN PIERCE	IRS Response Code	-	is	-	Error - Match on EIN b	• 0 0	
	IRS Response Code	-	is	-	Error - Match on SSN	• 0 0	
ANNA D WHALEY	IRS Response Code	-	is	-	Error - TIN was missing	• 0 0	
JOHN E TAYLOR	IRS Response Code	-	is	-	Error – Error invalid TIN	• 0 0	
	IRS Response Code	-	is	-	Error – TIN and Name	• 0 0	
	IRS Response Code	-	is	-	Error – TIN is not curre	- 0 0	
	IRS Attempts	-	equals	-		0 0	
	Associated State	-	is	-	ALL STATES	• 0 0	
	Associated County	-	is	-	ALL COUNTIES	• 0 0	
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- 11. Click the Save Bave button to save the entries on the Search criteria screen.
 - If the user leaves a search field empty, then the search field is not part of the Saved Search variant. For example, if the user leaves the **First Name** search field empty (no value), then the search field is not saved and not part of the Saved Search variant.

If all search fields are left empty, the user cannot save the search criteria. In the message bar in the header area, a message appears informing the user to fill in at least one search field.



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Home		•	IS	•					00							
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Worklist	Tax ID Number	•	is	-					00							
Business Partner	Tax ID Type	-	is	-	Emplo	oyer ID	Numbe	r 🔻	00							
	Archived Flag	•	is	-	Not Se	et		-	00							
Farm Records	Inactive Flag	-	is	-	Not Se	et		•	00							
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- **12.** Click the **Home** button to return to the MIDAS CRM Home page.
 - The search parameters were saved. In the message bar in the header area, the user will get a message stating that Saved Search parameters were saved.

In this example, the user created a Query which can be executed to view error messages based on the search criteria entered: TIN Type (EIN), and IRS Response Codes 01 through 08.



Home Worklist Business Partner Workflow Tasks No result found Farm Records Business Partner Web Links Recent Items JED CLAMPETT ELLY MAY CLAMP JOHN E TAYLOR HAWKEYE PIERCE		Saved Searches TIN_Name_EIN_Errors Go A	dvanc	ed
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Reports		Reports		×
Key Field Change Requests Potential Duplicates		Key Field Change Requests Potential Duplicates		

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



Your saved search is displayed in the search menu under **Saved Searches** in the header area located in the upper right corner.

The next step is to define how to create a Query based on the TIN type: SSN, Business Role: Individual, and IRS Response Codes 01 through 08.

Later in the simulation, the steps on how to retrieve the **Saved Search** are defined.



Accounts

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Home	G	,	G	
Worklist	Search	— ×	Reports	= ×
Business Partner	Search Cleansing Cases Search Customers/Contacts Search Documents		Key Field Change Requests Potential Duplicates	
Farm Records	Search Employees			
Organizational Model 🕨	Search Member Hierarchies			
Product Master	Search Restricted Fields Search Service Center Changes			
Recent Items				
JED CLAMPETT ELLY MAY CLAMP BARBARA A PROH JOHN E TAYLOR HAWKEYE PIERCE				

14. Click the Search Customers/ContactsSearch Customers/Contacts link to go to the Search: Customers page.



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	Search: Customers											🖸 Back	•
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Home	Search Criteria										Hide Se	earch Field	is 🔺
Worklist	Search for: All Accounts	s			•		_						
Business Partner	Business Name	•	is	-			0	•					
Farm Records	First Name	•	is	-			0	•					
· unin Records	Last Name	•	is	-			0	•					
Organizational Model	Middle Name	-	is	-			0	•					
Product Master	Common Customer Name	-	is	-			0	•					
	BP Number/ID	•	is	-			0	•					
Recent Items	Role	-	is	-			• 0	•					
JED CLAMPETT	Tax ID Number	•	is	-			ChO	sothe valu	ue of this	criterion			
ELLY MAY CLAMP	Tax ID Type	•	is	-		•	0	0			_		
BARBARA A PROH	Archived Flag	•	is	-	Not Set	•	0	•					
HAWKEYE PIERCE	Inactive Flag	•	is	-	Not Set	•	0	•					
	IRS Response Code	•	is	-			0	•					
	IRS Attempts	•	equals	-			0	•					
	Associated State	•	is	-	ALL STATE	ES 1	0	•					
	Associated County	•	is	-	ALL COUN	ITIES	0	•					
	Service Center	•	is	-	ALL CENT	ERS	0	•					
	Search Clear Reset		Save Search	Ma:	ximum Numl	ber of Result	s: 10	Dave					
	Result List										_		
	PNew Customer										l	1 1 3	
	Ina BP Num Comr	mon	Customer N T	'a F	Pa Ta	Ho S	(City S	ZI	T	IRS R	lespo	Ι.

- **15.** Click the **Role** dropdown list icon button to view the available options.
 - Enter a Saved Search variant to search for TIN/Name IRS Response validation errors based on the following selection parameters: Business Role: Individual, TIN Type: SSN and IRS Response Codes 01 through 08.



					Saved Sear	ırches ▼ TIN_Name_EIN_Errors ▼ Go Advanced 👔	Ì
	Search: Customers					Back 🔻 🖸	Ŧ
						(5
Home	Search Criteria					Hide Search Fields	•
Worklist	Search for: All Account	nts			-		
Business Dartner	Business Name	-	is	-		0.0	
	First Name	-	is	-		0.0	
Farm Records	Last Name	-	is	-		0 0	
Organizational Model 🕨	Middle Name	-	is	-		00	
Product Master	Common Customer Name	-	is	-		00	
	BP Number/ID	-	is	-		00	
Recent Items	Role	-	is	Ŧ		- o o	
JED CLAMPETT	Tax ID Number	-	is	-		^ o	
ELLY MAY CLAMP	Tax ID Type	-	is	-	Bureau of Indian Affairs	• •	
BARBARA A PROH	Archived Flag	-	is	Ŧ	Corp with No Stockhold	ders	
HAWKEYE PIERCE	Inactive Flag	-	is	-	Corporation	0	
	IRS Response Code	-	is	•	County Owned	0	
	IRS Attempts	-	equals	•	Estate		
	Associated State	-	is	-	ALL STATES	- 0 0	
	Associated County	-	is	•	ALL COUNTIES	- 0 0	
	Service Center	-	is	-	ALL CENTERS	- 0 0	
	Search Clear Reset Result List New Customer Ina BP Num Con	mmon	Save Search A Customer N Ta	Ma As:	ximum Number of Result	Its: 100 Save	•

16. Scroll through the list of available options.



					Saved Searc	hes 🚽 1	TIN_Name_EIN_Errors Go Advanced	Î
	Search: Customers						🖸 Back 👻 🗐	- 1
								()
Home	Search Criteria						Hide Search Fields	
Worklist	Search for: All Account	nts			•			
Business Partner	Business Name	•	is	-		00		
	First Name	•	is	-		00		
Famil Records	Last Name	-	is	•		00		
Organizational Model 🕨	Middle Name	-	is	•		00		
Product Master	Common Customer Name	-	is	-		00		
	BP Number/ID	-	is	•		00		
Recent Items	Role	-	is	•	•	00		
JED CLAMPETT	Tax ID Number	-	is	•	Financial Institution	^ o		
ELLY MAY CLAMP	Tax ID Type	-	is	•	General Entity Member	0		
BARBARA A PROH	Archived Flag	-	is	-	Group of Individuals	0		
HAWKEYE PIERCE	Inactive Flag	-	is	•	Indian Tribal Venture	0		
	IRS Response Code	-	is	-	Indians Rep by BIA	0		
	IRS Attempts	-	equals	•	Individual	00		
	Associated State	-	is	•	ALL STATES	00		
	Associated County	-	is	•	ALL COUNTIES	00		
	Service Center	-	is	•	ALL CENTERS	00		
	Search Clear Reset Result List New Customer Ina BP Num Cor	nmon	Save Search A Customer N Ta.	Ma (s:	ximum Number of Results	: 100	II	

17. Select **Individual** Individual from the available list.



						Saved Searc	hes -	▼ TIN_Name_EIN_Errors ▼ Go Advanced	ĩ
	Search: Customers							🔄 Back 👻 🖸	÷
									0
Home	Search Criteria							Hide Search Fields	
Worklist	Search for: All Accourt	nts			•				
Business Partner	Business Name	•	is	Ŧ			0	•	
	First Name	•	is	•			0	•	
Farm Records	Last Name	-	is	Ŧ			0	•	
Organizational Model 🕨	Middle Name	-	is	Ŧ			0	•	
Product Master	Common Customer Name	-	is	Ŧ			0	•	
	BP Number/ID	-	is	Ŧ			0	•	
Recent Items	Role	-	is	Ŧ	Individual		0	•	
JED CLAMPETT	Tax ID Number	-	is	Ŧ			0	•	
ELLY MAY CLAMP	Tax ID Type	•	is	•			0	0	
BARBARA A PROH	Archived Flag	-	is	Ŧ	Not Set		0	•	
HAWKEYE PIERCE	Inactive Flag	•	is	•	Not Set		0	0	
	IRS Response Code	•	is	•			0	0	
	IRS Attempts	•	equals	•			0	•	
	Associated State	•	is	•	ALL STATE	S 🔻	0	•	
	Associated County	•	is	•	ALL COUNT	ries 🔹	0	•	
	Service Center	-	is	•	ALL CENTE	RS	0	•	
	Search Clear Reset Result List New Customer Ina BP Num Cor	nmon	Save Search As Customer N Ta	Ma s:	ximum Numbe Pa Ta	er of Results	: 100 🗐 Sa	0 ave City S Zl T IRS Respo I.	

18. Click the **Tax ID Type** dropdown list icon button to view the available list of options.



					Saved Searches -	TIN_Name_EIN_Errors Go Advanced	ĩ
	Search: Customers					Back 👻 🖸	-
							8
Home	Search Criteria					Hide Search Fields	
Worklist	Search for: All Account	nts			•		
Business Partner	Business Name	-	is	-	0	•	
E	First Name	-	is	-	0	•	
Farm Records	Last Name	-	is	-	0	•	
Organizational Model 🕨	Middle Name	-	is	-	0	•	
Product Master	Common Customer Name	-	is	-	0	•	
	BP Number/ID	-	is	-	0	•	
Recent Items	Role	-	is	-	Individual 🔻 o	0	
JED CLAMPETT	Tax ID Number	-	is	-	0	0	
ELLY MAY CLAMP	Tax ID Type	-	is	-	- O -	•	
BARBARA A PROH	Archived Flag	-	is	-		•	
HAWKEYE PIERCE	Inactive Flag	-	is	-	Employer ID Number	•	
	IRS Response Code	-	is	-	IRS Number	•	
	IRS Attempts	-	equals	-	No Tax ID Type	•	
	Associated State	-	is	-	Social Security Number	0	
	Associated County	-	is	-	ALL COUNTIES 🔹 o	0	
	Service Center	-	is	-	ALL CENTERS 🔹 o	0	
	Search Clear Reset Result List Prev Customer Ina BP Num Con	mmon	Save Search A: Customer N Ta	Ma s:	Diximum Number of Results: 100	ve ity S Zl T IRS Respo I.	

19. Select **Social Security Number Social Security Number** from the list of available options.



						Saved Searc	hes -	TIN_N	ame_EIN	Errors	G₀ A	dvanced	Ĩ
	Search: Customers											Back 🝷 🕻	
													0
Home	Search Criteria									Н	lide Search	h Fields	
Worklist	Search for: All Account	nts			•								
Business Partner	Business Name	-	is	•			0	•					
	First Name	-	is	-			0	•					
Farm Records	Last Name	-	is	-			0	•					
Organizational Model 🕨	Middle Name	-	is	-			0	•					
Product Master	Common Customer Name	-	is	-			0	•					
	BP Number/ID	-	is	-			0	•					
Recent Items	Role	-	is	-	Individual		0	•					
JED CLAMPETT	Tax ID Number	-	is	-			0	•					
ELLY MAY CLAMP	Tax ID Type	-	is	-	Social Secur	rity Numbe 🔻	0	•					
BARBARA A PROH	Archived Flag	-	is	-	Not Set		0	•					
HAWKEYE PIERCE	Inactive Flag	-	is	-	Not Set		0	•					
	IRS Response Code	-	is	-			0	•					
	IRS Attempts	-	equals	-			9						
	Associated State	-	is	-	ALL STATE	S 🔹	0	by time					
	Associated County	-	is	-	ALL COUNT	TIES 🔹	0	•					
	Service Center	-	is	-	ALL CENTE	RS	0	•					
	Search Clear Reset Result List New Customer Ina BP Num Cor	mmon	Save Search At	Ma s:	ximum Numbe	er of Results	: 100 	ty S	Zl	T	IRS Respo	ो थु o I.	

20. Click the IRS Response Code Copy Lineo button.

The **IRS Response Code** search line is only listed once, however the user needs to search by multiple IRS Response Codes (IRC).

The **Copy Line** • is used to add the selected search criteria line to be included in the search.

The **Remove Line** • is used to remove the selected search criteria line from being included in the search.



					Sav	ed Search	es ▼ TIN_Name_EIN_Errors ▼ Go Advanced 🗂
	Search: Customers						🖸 🖸 Back 👻 🖾
							0
Homo	Search Chiena						
nome	Consult for All Announ						
Worklist	Search for: All Account	nts			•		
Business Partner	Business Name	-	is	•			00
	First Name	•	is	•			00
	Last Name	•	is	•			00
Product Master	Middle Name	•	is	•			0 0
Descent Items	Common Customer Name	-	is	•			00
Recent items	BP Number/ID	-	is	-			0 0
BENJAMIN PIERCE	Role	-	is	-	Individual	-	0 0
	Tax ID Number	-	is	-			0 0
ANNA D WHALEY	Tax ID Type	-	is	-	Social Security	Numbe 🕶	0 0
JOHN E TAYLOR	Archived Flag	-	is	-	Not Set	-	0 0
	Inactive Flag	-	is	-	Not Set	-	0 0
		-	is	-	8 lines in group		0 0
	IRS Response Code	-	is	-		-	00
	IRS Response Code	-	is	-		1	Choose the value of this criterion
	IRS Response Code	-	is	-		-	0 0
	IRS Response Code	-	is	-		-	0 0
	IRS Response Code	-	is	-		-	0 0
	IRS Response Code	-	is	-		-	0 0
	IRS Response Code	-	is	-		-	0 0
	IRS Response Code	-	is	-		-	0 0
	IRS Attempts	-	equals	-			00
	Associated State	-	is	-	ALL STATES	-	0 0
	Associated County	-	is	-	ALL COUNTIES	s 👻	0 0
	Service Center	-	is	-	ALL CENTERS	s 🔻	0 0

21. Click the IRS Response Code dropdown list icon button to view the available options.



In this example, the remaining IRS Response Codes were added to the search criteria screen by using the **Copy Line** button.



						Saved	Search	nes ▼ TIN_Name_EIN_Errors ▼ Go Advanced 🗂
		Search: Customers						🖸 Back 👻 💟 👻
								0
Homo	_	search Chiena						
nome								
Worklist		Search for: All Accour	nts			•		
Business Partner	►	Business Name	•	is	•			00
		First Name	-	is	•			00
Farm Records		Last Name	-	is	-			00
Product Master		Middle Name	-	is	-			0 0
	-1	Common Customer Name	-	is	-			0 0
Recent Items		BP Number/ID	-	is	-			0 0
BENJAMIN PIERCE		Role	-	is	•	Individual	-	0 0
JED CLAMPETT		Tax ID Number	-	is	•			0 0
4 ANNA D WHAI FY		Tax ID Type	-	is	-	Social Security Nu	mbe 🔻	00
JOHN E TAYLOR		Archived Flag	-	is	-	Not Set	-	0 0
		Inactive Flag	-	is	-	Not Set	-	00
				is	-	8 lines in group		00
		IRS Response Code	•	is	-		-	0 0
		IRS Response Code	-	is	•			A
		IRS Response Code	-	is	•	Error - Duplicate TI	N Mate	ching request.
		IRS Response Code	-	is	•	Error - Match on El	IN and IN but	TIN type is unknown
		IRS Response Code	-	is	-	Error - Match on S	SN but	t TIN type is unknown
		IRS Response Code	-	is	-	Error - TIN was mis	sing o	r was entered incorrectly
		IRS Response Code	-	is	-	Error – Error invalid	I TIN m	The second
		IRS Response Code	-	is	-		-	0 0
		IRS Attempts	-	equals	-			0 0
		Associated State	-	is	-	ALL STATES	-	0 0
		Associated County	-	is	-	ALL COUNTIES	-	0 0
		Service Center	-	is	-	ALL CENTERS	-	00
								· · · · · · · · · · · · · · · · · · ·

22. Select Error - Duplicate TIN Matching request Error - Duplicate TIN Matching request. from the available list.



					Saved Searc	hes ▼ TIN_Name_EIN_Errors ▼ Go Advanced 👔
	Search: Customers					🖸 Back 🔻 💟 👻
						8
Ноте	Search Chiena					
	Controls for: All Account	ata			-	
Worklist	Search for. All Account	111.5				
Business Partner	Business Name	•	IS	•		00
Farm Records	First Name	-	IS	•		00
	Last Name	•	IS	•		00
Product Master	Middle Name	•	IS	•		00
Pocont Itoms	Common Customer Name	-	IS	•		00
	BP Number/ID	•	is	•		00
BENJAMIN PIERCE	Role	•	is	-	Individual	
4	Tax ID Number	•	is	-		00
ANNA D WHALEY	Tax ID Type	•	is	-	Social Security Number	
JOHN E TAYLOR	Archived Flag	•	is	-	Not Set	00
	Inactive Flag	•	is	-	Not Set	00
	IRS Response Code	-	is	-	8 lines in group	0 0
	IRS Response Code	-	is	•	Error - Duplicate TIN N	
	IRS Response Code	-	is	•	Error - Match on EIN a	
	IRS Response Code	-	is	-	Error - Match on EIN b	
	IRS Response Code	-	is	-	Error - Match on SSN	
	IRS Response Code	-	is	•	Error - TIN was missin	
	IRS Response Code	-	is	-	Error – Error invalid TIN	
	IRS Response Code	-	is	•	Error – TIN and Name	
	IRS Response Code	-	is	•	Error - TIN is not curre	
	IRS Attempts	-	equals	•		0 0
	Associated State	-	is	-	ALL STATES	
	Associated County	-	is	-	ALL COUNTIES	
	Service Center	-	is	-	ALL CENTERS	

23. Scroll down to the Save Search As: field.



In this example, the remaining IRS Response Codes were selected for the Saved Search criteria.



					5	Saved Searche	s TIN	Name_EIN_Errors 🔻	Go Advanced 🛍	ł
	Search: Customers								🔄 Back 👻 💽 🖞	÷
									6	5
Home	Common Customer Name	-	is	-			0 0		1	*
Workligt	BP Number/ID	-	is	-			0 0			
VVOIKIISL	Role	-	is	-	Individual	•	00			
Business Partner	Tax ID Number	-	is	-			00			
Farm Records	Tax ID Type	-	is	-	Social Secu	rity Numbe 🔻	00			
Droduct Montor	Archived Flag	-	is	-	Not Set	-	00			
Product master	Inactive Flag	-	is	-	Not Set	•	00			
Recent Items		-	is	-	8 lines in gro	oup	0 0			
BENJAMIN PIERCE	IRS Response Code	-	is	-	Error - Duplic	cate TIN N 🔻	0 0			
JED CLAMPETT	IRS Response Code	-	is	-	Error - Match	h on EIN a 🔻	0 0			
4	IRS Response Code	-	is	-	Error - Match	h on EIN b 🔻	0 0			
	IRS Response Code	-	is	-	Error - Match	h on SSN 🔻	0 0			
JOHNETATLOR	IRS Response Code	-	is	•	Error - TIN w	as missin 💌	00			
	IRS Response Code	-	is	-	Error – Error	invalid TIN 🔻	00			
	IRS Response Code	-	is	-	Error – TIN a	and Name 💌	00			
	IRS Response Code	-	is	-	Error – TIN is	s not curre 🔻	00			
	IRS Attempts	-	equals	-			00			
	Associated State	-	is	-	ALL STATE	S 🔻	00			
	Associated County	-	is	-	ALL COUNT	TIES 🔻	00			
	Service Center	-	is	-	ALL CENTE	RS 🔻	00			
	Search Clear Reset		Save Sear	Ma: rch As:	ximum Numb	er of Results:	100 Save			
	Rew Customer								U 🗐 🌒	
										-

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

Field	R/O/C	Description
Save Search As:	R	Free text field that allows a user to create a title for a saved search with established search criteria.
		Example: TIN_Name_SSN_Errors



					Saved Sear	ches ▼ TIN_Name_EIN_Errors ▼ Go Advanced 👔
	Search: Customers					🖸 Back 👻 🗔 👻
						0
Home	Common Customer Name	-	is	-		00
Worklist	BP Number/ID	-	is	-		00
Workiist	Role	-	is	•	Individual	• • •
Business Partner	Tax ID Number	-	is	•		00
Farm Records	Tax ID Type	-	is	•	Social Security Numbe	• • •
Product Master	Archived Flag	-	is	•	Not Set	• • • •
	Inactive Flag	-	is	•	Not Set	- 0 0
Recent Items		-	is	-	8 lines in group	00
BENJAMIN PIERCE	IRS Response Code	-	is	•	Error - Duplicate TIN N	- 0 0
JED CLAMPETT	IRS Response Code	-	is	•	Error - Match on EIN a	- 0 0
4	IRS Response Code	-	is	•	Error - Match on EIN b	- 0 0
	IRS Response Code	-	is	•	Error - Match on SSN	- 0 0
JOHNE TATEOR	IRS Response Code	-	is	•	Error - TIN was missin	- 0 0
	IRS Response Code	-	is	-	Error – Error invalid TIN	- 0 0
	IRS Response Code	-	is	-	Error – TIN and Name	- 0 0
	IRS Response Code	-	is	•	Error – TIN is not curre	- 0 0
	IRS Attempts	-	equals	•		00
	Associated State	-	is	•	ALL STATES	- 0 0
	Associated County	-	is	•	ALL COUNTIES	- 0 0
	Service Center	-	is	•	ALL CENTERS	- 0 0
	Search Clear Reset Result List Prove Customer		Save Searcl	Max h As: Til	kimum Number of Result	s: 100 🛛 Save

25. Click the Save Bave button.

The Saved Search criteria was saved with the following selection parameters: Business Role: Individual, TIN type: SSN and IRS Response Codes 01 through 08.



	Search: Customers							🖸 Br	ack 👻
									(1)
ome	Common Customer Name	-	is	-		00			
Home	BP Number/ID	-	is	-		00			
	Role	-	is	-	Individual	- 0 0			
siness Partner	Tax ID Number	-	is	-		00			
rm Records	Tax ID Type	-	is	-	Social Security Numbe	- 0 0			
duct Mostor	Archived Flag	-	is	-	Not Set	- 0 0			
duct master	Inactive Flag	-	is	-	Not Set	- 0 0			
ecent Items	IRS Response Code	-	is	-	8 lines in group	00			
	IRS Response Code	-	is	-	Error - Duplicate TIN N	• • •			
ED CLAMPETT	IRS Response Code	-	is	-	Error - Match on EIN a	• • •			
	IRS Response Code	-	is	-	Error - Match on EIN b	- 0 0			
ANNA D WHALEY	IRS Response Code	-	is	-	Error - Match on SSN	- 0 0			
OHN E TAYLOR	IRS Response Code	-	is	-	Error - TIN was missin	- 0 0			
	IRS Response Code	-	is	-	Error – Error invalid TIN	• • •			
	IRS Response Code	-	is	-	Error – TIN and Name	• • •			
	IRS Response Code	-	is	-	Error – TIN is not curre	• • •			
	IRS Attempts	-	equals	-		00			
	Associated State	-	is	-	ALL STATES	- 0 0			
	Associated County	-	is	-	ALL COUNTIES	- 0 0			
	Service Center	-	is	-	ALL CENTERS	- 0 0			
	Search Clear Reset		Save Search	Ma As:	ximum Number of Result	s: 100			
	New Customer							回重	9

26. Click the **Home**

Home button to return to the MIDAS CRM Home page.



Home		
		Saved Searches 🗧 TIN_Name_SSN_Errol 💌 Go Advanced 🗂
Hon	ne	🖸 Back 👻 🖸 👻
		ې 🖨 🕲
Home	Workflow Tasks	Alerts
Worklist	No result found	New cleansing case has been created 09/23/20 11:25
Business Partner	- · · · · · · · · · · · · · · · · · · ·	
Farm Records	Web Links 🙁 🖻 🗙	Search 🗆 🗙
Organizational Model > Product Master > Recent Items JED CLAMPETT ELLY MAY CLAMP BARBARA A PROH JOHN E TAYLOR HAWKEYE PIERCE	I No result found Favorites	Search Attachment Folder Search Cleansing Cases Search Customers/Contacts Search Employees Search Farms/Bins Search Products Search Requested Products Search Requested Products Search Restricted Fields Create × Create Folders for Attachments Create Restricted Fields Image: Create Restricted Fields
		Reports 📼 🗙
		Key Field Change Requests Potential Duplicates

27. Click the **Saved Searches** dropdown list icon button to view the available options.



To retrieve the Saved Search, the query is displayed in the search menu under *Saved Searches* in the header area. The user will select the EIN or SSN query and click Go to execute the query.



Home	
	Saved Searches - TIN_Name_SSN_Errot - Go Advanced 🗂
Home	TIN_Name_EIN_Errors Back - IN Name_SSN Errors
	<u> </u>
Home Workflow Tasks	🖹 x 🚺 Alerts 📄 x
Worklist	New cleansing case has been created 09/23/20 11:25
Business Partner	
Farm Records Web Links	E x Search E x
Organizational Model	Search Attachment Folder Search Cleansing Cases
Product Master	Search Customers/Contacts Search Employees
Recent Items My Favorites - Filter: All Items	Search Farms/Bins Search Member Hierarchies
JED CLAMPETT ELLY MAY CLAMP	Search Products Search Requested Products
BARBARA A PROH	Search Restricted Fields
HAWKEYE PIERCE	Create 🗖 🗙
	Create Folders for Attachments
	Create Restricted Fields
	Reports E ×
	Key Field Change Requests
	Potential Duplicates

- 28. Select TIN_Name_EIN_Errors TIN_Name_EIN_Errors from the list.
 - The **TIN_Name_EIN_Errors** query will be executed based on: TIN Type (EIN), and IRS Response codes 01 through 08. The query will list all active BP records that meet the criteria based on the Saved Search.



Home				
			Saved Searches TIN_Name_EIN_Errors	🤜 Go Advanced 🗂
↓	Home			🖸 Back 👻 💟 👻
				र 🖶 🕄
Home	Workflow Tasks	E x	Alerts	E ×
Worklist	No result found		New cleansing case has been created 0	9/23/20 11:25
Business Partner				
Farm Records	Web Links	रु 🗉 🗙	Search	= ×
Organizational Model 🕨	No result found		Search Attachment Folder Search Cleansing Cases	
Product Master	Favorites		Search Customers/Contacts	
Recent Items	My Equaritan		Search Parms/Bins	
JED CLAMPETT	iviy Favorites •	Filter: Air items	Search Products	
BARBARA A PROH	🖆 My Favorites		Search Restricted Fields	
JOHN E TAYLOR HAWKEYE PIERCE			Create	
			Create Folders for Attachments	
			Create New Product Request	
			Create Restricted Fields	
			Reports	= ×
			Key Field Change Requests Potential Duplicates	

29. Click the **Go**^{Go} button to execute the TIN_Name_EIN_Errors query.



							S	aved Se	arches	- TIN	I_Name	e_EIN_	Errors 🔻 Go 🛛	Advanc	ed 🗎
	Sear	ch: Cu	stomers											Back 🔹	• 🖸 •
															0
Home	Por	ult Liet	1 Customor	Found									Show St	aarch E	iolde
Worklist Home			stomer	Toulid									51100 51	an ⊡n	এ
Business Partner	5 5	Ina	BP Num	Common Customer N	Та	Pa	Ta	Ho	St	City	St	71	IRS Resp	Т	EL
			8000028	ELLY MAY CLAMPETT	703	- u	Em	1900	E	K	Te	75	Waiting for	••••	0
													0		
Organizational Model															
Product Master															
Recent Items															
JED CLAMPETT															
ELLY MAY CLAMP															
JOHN E TAYLOR															
HAWKEYE PIERCE															
		_													

30. Click the **Home** button to return to the CRM Home page.

The search with the saved selection parameters is performed. The user will see the results in the Result List. In this example, the search was performed based on the IRS Response Codes 01 through 08, and TIN type: EIN.



Home			
		Saved Searches TIN_Name_EIN_Errors Go Ad	lvanced 🗂
•	Home	🖸 B	ack 🕶 💽 👻
			ଣ 🖶 🕄
Home	Workflow Tasks	Alerts	Π×
Worklist	No result found	New cleansing case has been created 09/23/20 1	11:25
Business Partner			
Farm Records	Web Links 🗠 🖻 🗙	Q Search	= ×
Organizational Model Product Master	No result found	Search Attachment Folder Search Cleansing Cases Search Customers/Contacts	
Recent Items	Favorites Image: Second seco	Search Employees Search Farms/Bins Search Member Hierarchies Search Products Search Requested Products	
BARBARA A PROH JOHN E TAYLOR HAWKEYE PIERCE	會 My Favorites	Search Restricted Fields Create	■ ×
		Create Folders for Attachments Create New Product Request Create Restricted Fields	
		Reports	🗆 ×
		Key Field Change Requests Potential Duplicates	

31. Click the **Saved Searches** dropdown list icon button to view the available options.



To retrieve the Saved Search, the query is displayed in the search menu under Saved Searches in the header area. The user will select the SSN query and click the **Go** button to execute the query.



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32. Select **TIN_Name_SSN_Errors** from the Saved Search list of options.



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33. Click the **Go**^{Go} button to execute the TIN_Name_SSN_Errors query.



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- **34.** Click the **Home** button to return to the MIDAS CRM Home page. You have completed the transaction.
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The search with the saved selection parameters is performed. The user will see the search results in the result list. In this example, the search was performed using the Business Role: Individual, IRS Response Codes 01 through 08, and TIN type: SSN.



Result

You have created and executed two Saved Search TIN/Name queries; one for EIN's and one for SSN's.