

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:

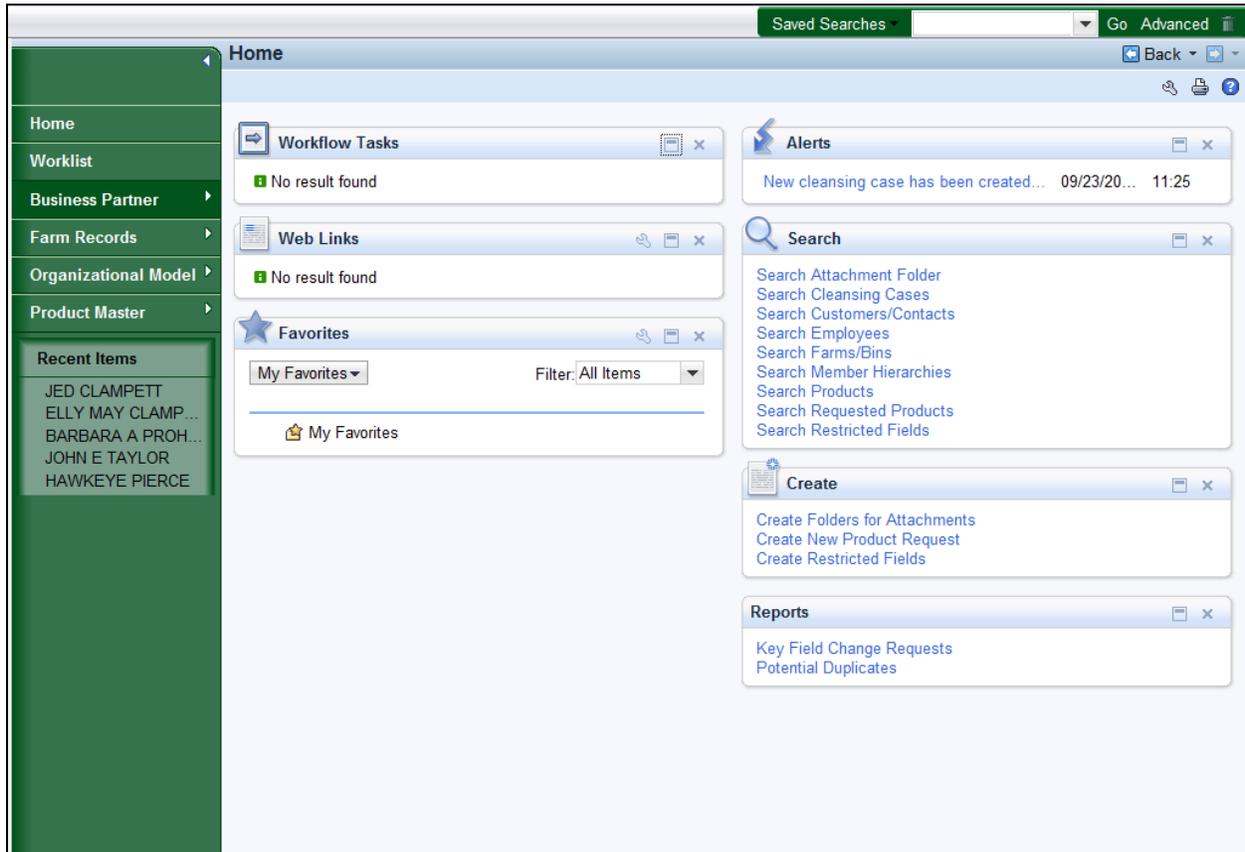
Note type	Icon	Description
A general note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other

		icons.
A cautionary note		Use this note to communicate to the end-user of something that MUST be completed or another trigger that should be started and is related to the procedure.
A critical note		Use this note to specify something that MUST NOT be done during the procedure.
Contact someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.
A reference is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.

Procedure

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

Home



2. Click the **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.

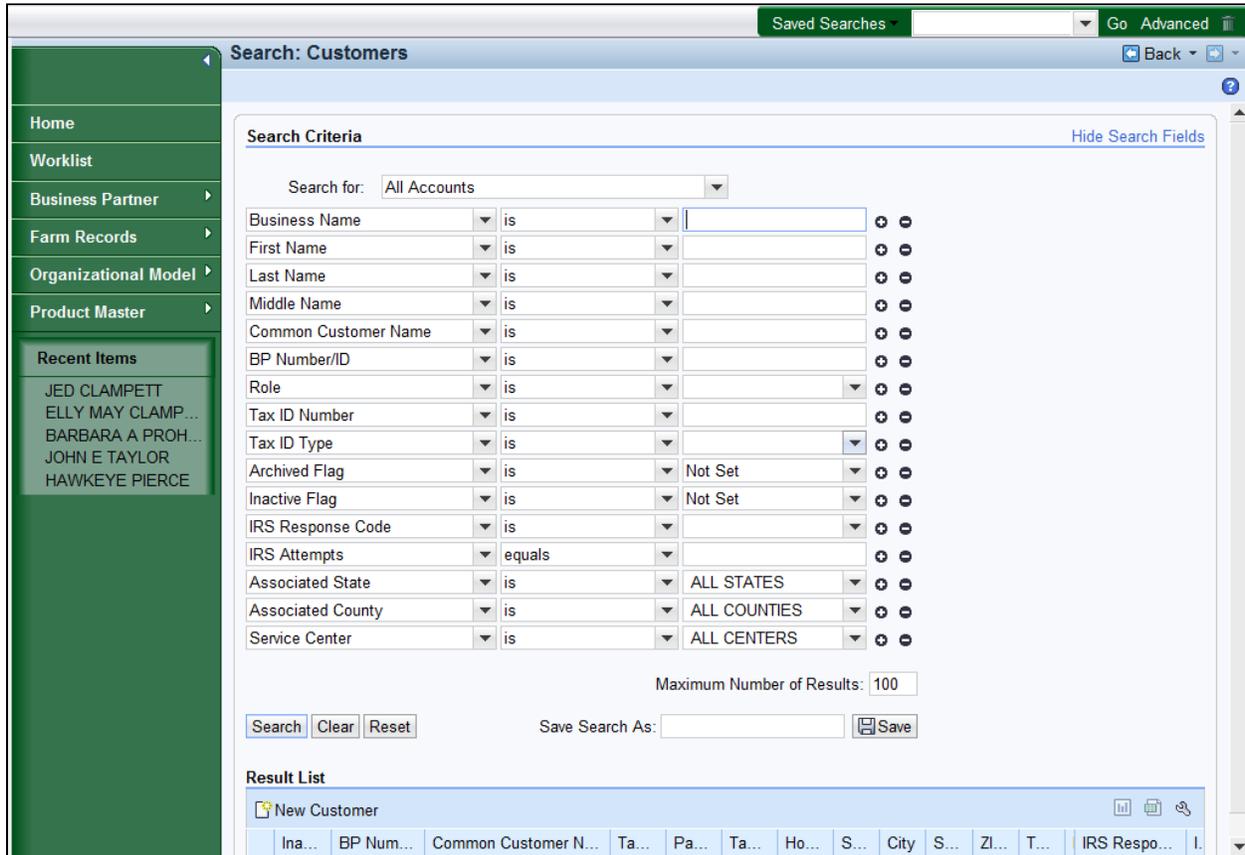


Accounts

A screenshot of a web application interface titled "Accounts". The interface has a dark green sidebar on the left with navigation options: Home, Worklist, Business Partner, Farm Records, Organizational Model, and Product Master. Below these is a "Recent Items" section listing names: JED CLAMPETT, ELLY MAY CLAMP..., BARBARA A PROH..., JOHN E TAYLOR, and HAWKEYE PIERCE. The main content area is light blue and contains a "Search" panel with a list of search options: Search Cleansing Cases, Search Customers/Contacts (highlighted in blue), Search Documents, Search Employees, Search Folder for Attachments, Search Member Hierarchies, Search Restricted Fields, and Search Service Center Changes. To the right of the search panel is a "Reports" panel with two report links: Key Field Change Requests and Potential Duplicates. At the top of the main area, there is a "Saved Searches" dropdown, a "Go" button, and an "Advanced" link. A "Back" button is also visible in the top right corner of the main area.

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

Search: Customers



Search: Customers

Search for: All Accounts

Business Name	is	
First Name	is	
Last Name	is	
Middle Name	is	
Common Customer Name	is	
BP Number/ID	is	
Role	is	
Tax ID Number	is	
Tax ID Type	is	
Archived Flag	is	Not Set
Inactive Flag	is	Not Set
IRS Response Code	is	
IRS Attempts	equals	
Associated State	is	ALL STATES
Associated County	is	ALL COUNTIES
Service Center	is	ALL CENTERS

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer												
Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	Zl...	T...	IRS Respo... I.

- 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.



Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is	
First Name	is	
Last Name	is	
Middle Name	is	
Common Customer Name	is	
BP Number/ID	is	
Role	is	
Tax ID Number	is	
Tax ID Type	is	<ul style="list-style-type: none"> Employer ID Number Federal Government Agency IRS Number No Tax ID Type Social Security Number
Archived Flag	is	
Inactive Flag	is	
IRS Response Code	is	
IRS Attempts	equals	
Associated State	is	
Associated County	is	ALL COUNTIES
Service Center	is	ALL CENTERS

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

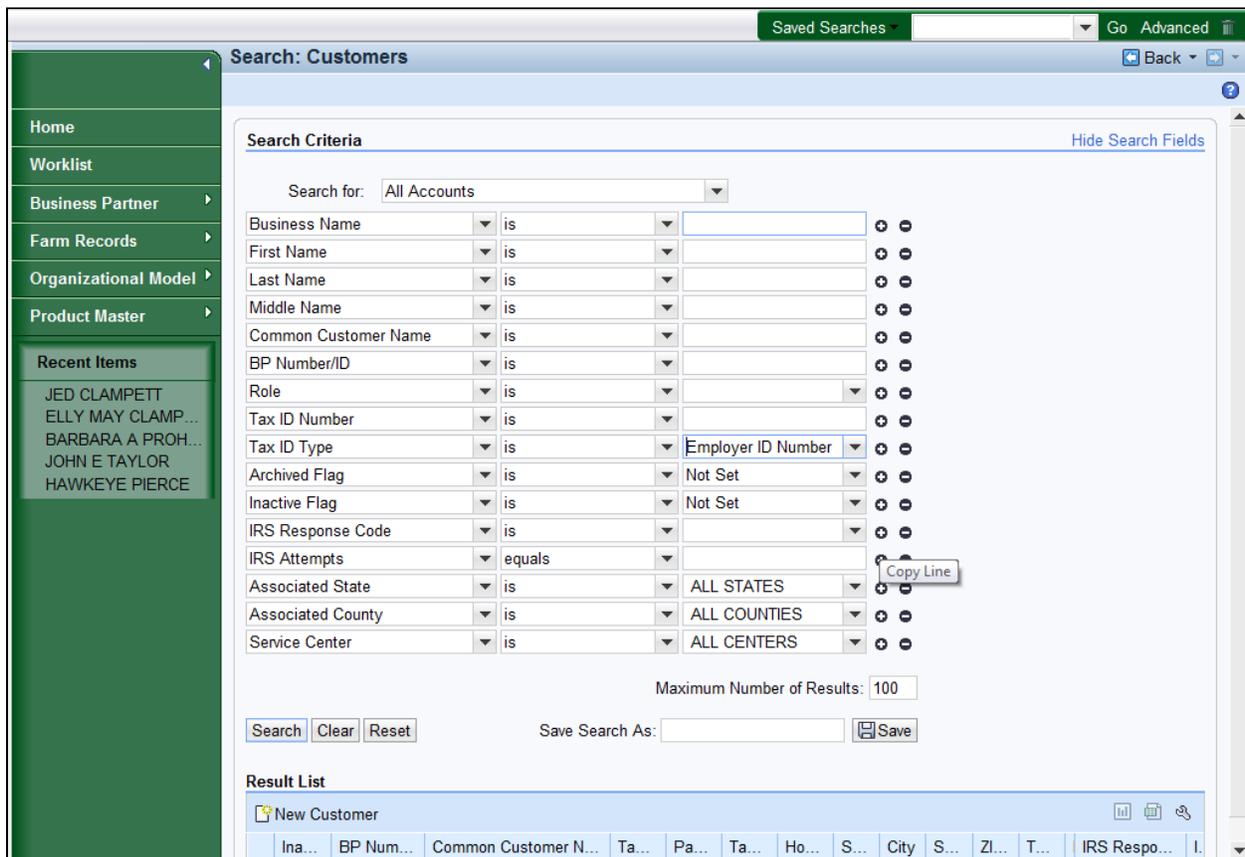
Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	Zl...	T...	IRS Respo...	I.
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5. Select **Employer ID Number** **Employer ID Number** from the **Tax ID Type** list.

Search: Customers



Search: Customers

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is		⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is		⊕ ⊖
Tax ID Number	is		⊕ ⊖
Tax ID Type	is	Employer ID Number	⊕ ⊖
Archived Flag	is	Not Set	⊕ ⊖
Inactive Flag	is	Not Set	⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Attempts	equals		⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖
Associated County	is	ALL COUNTIES	⊕ ⊖
Service Center	is	ALL CENTERS	⊕ ⊖

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer													
Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	Zl...	T...	IRS Respo...	I.

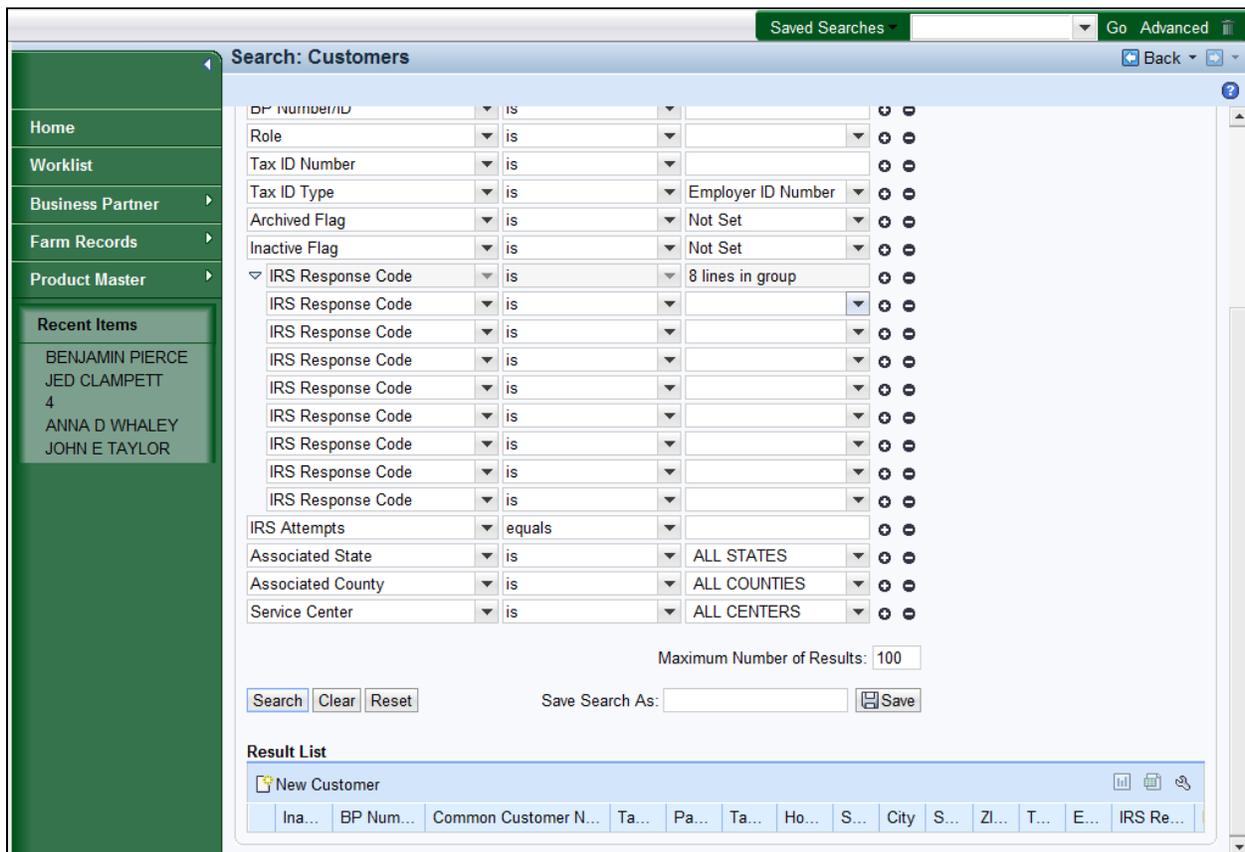
- Click the **IRS Response Code Copy Line** button to create another **IRS Response Code** search criteria line.

 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** button is used to add the selected search criteria line to be included in the search.

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

Search: Customers



The screenshot displays the 'Search: Customers' interface. On the left is a navigation menu with options: Home, Worklist, Business Partner, Farm Records, Product Master, and Recent Items (listing BENJAMIN PIERCE, JED CLAMPETT, ANNA D WHALEY, and JOHN E TAYLOR). The main search area contains several dropdown menus for filtering: BP Number/ID, Role, Tax ID Number, Tax ID Type, Archived Flag, Inactive Flag, IRS Response Code (expanded to 8 lines), IRS Attempts, Associated State, Associated County, and Service Center. Below the search fields are buttons for Search, Clear, and Reset, along with a 'Save Search As:' field and a Save button. The 'Result List' section at the bottom shows a table with columns: Ina..., BP Num..., Common Customer N..., Ta..., Pa..., Ta..., Ho..., S..., City, S..., ZI..., T..., E..., and IRS Re... The table currently shows one entry: 'New Customer'.

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.

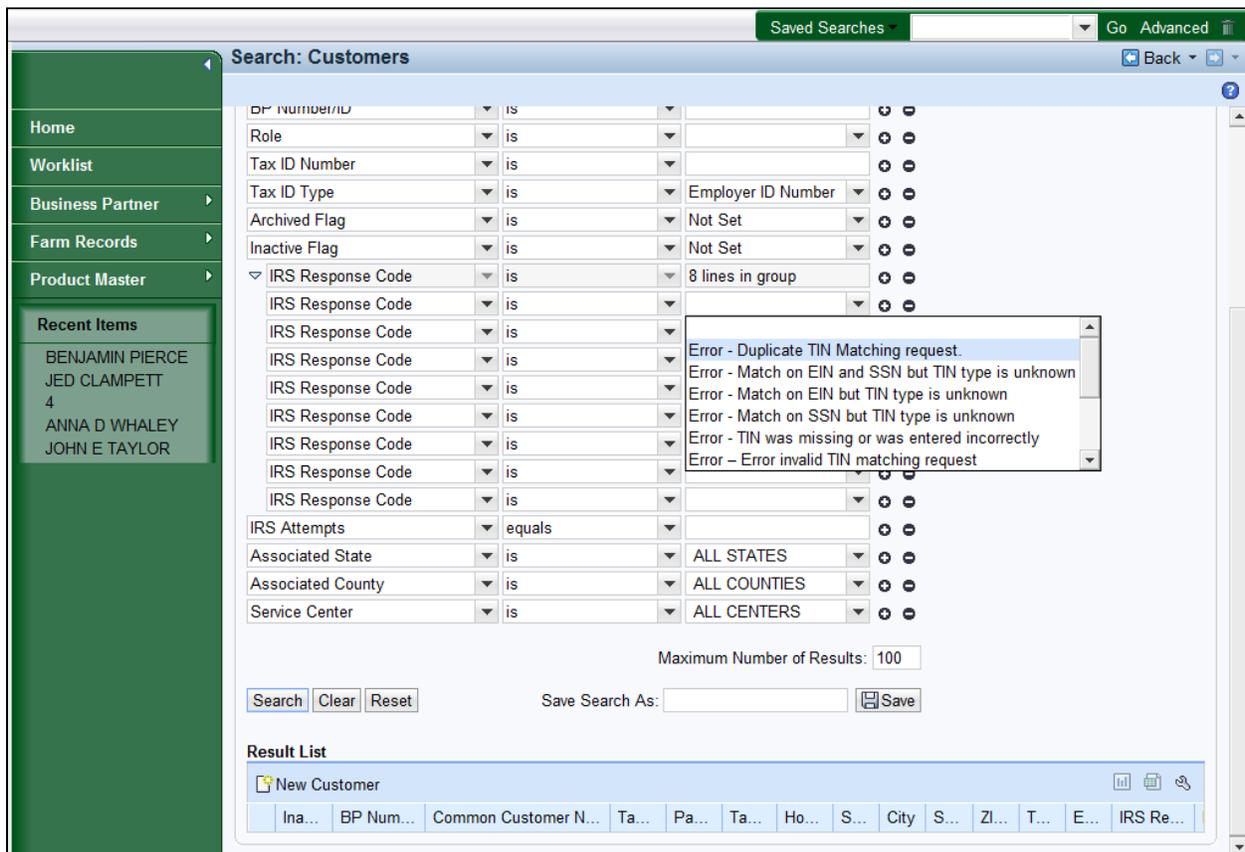
The following IRC codes require no action:

00 - TIN and Name match

09 - Waiting for IRS Response

10 - Manually Validated

Search: Customers



Search: Customers

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	Zl...	T...	E...	IRS Re...

8. Select **Error - Duplicate TIN Matching**

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



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

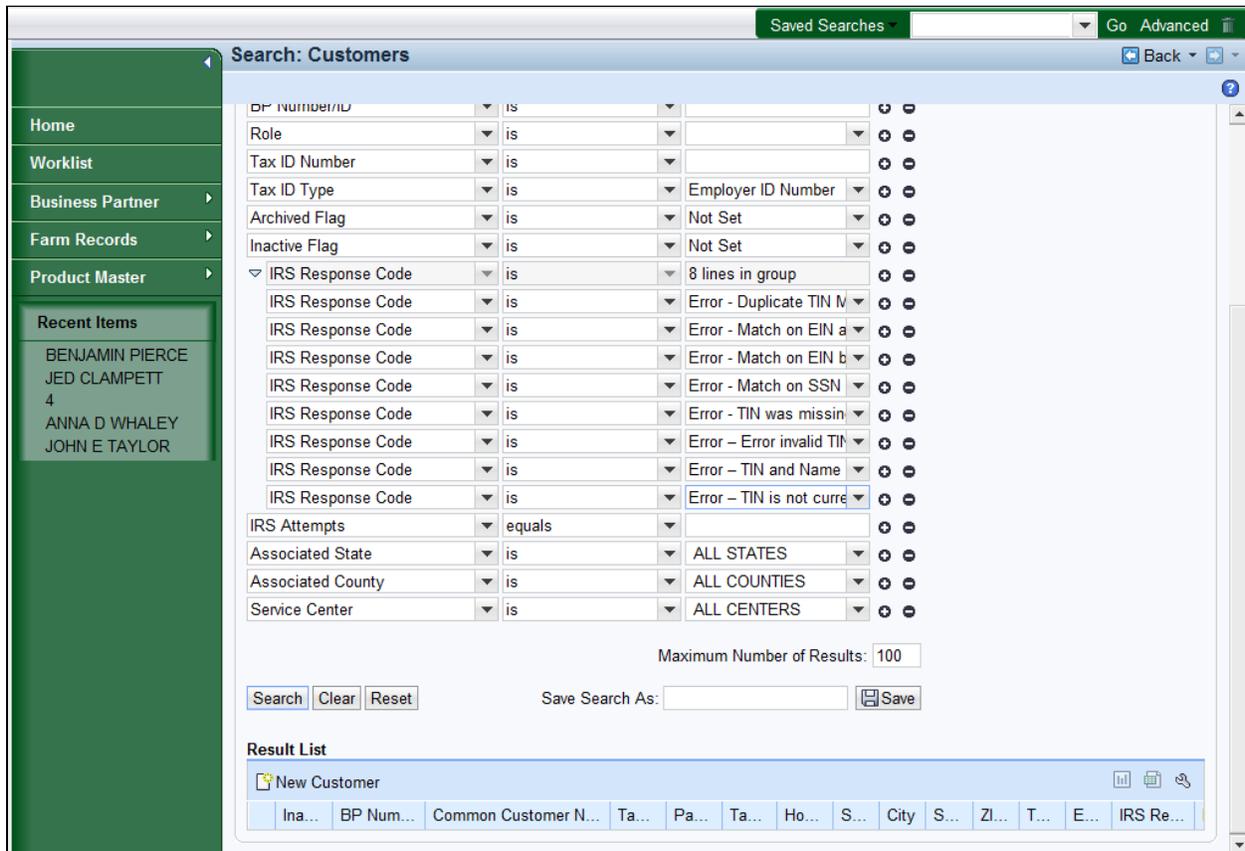
- 01 - TIN is missing or entered incorrectly.
- 02 - TIN is not currently issued, IRS not validated.
- 03 - TIN and Name do not match.
- 04 - Error Invalid TIN matching request.
- 05 - Duplicate TIN matching request.

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



Search: Customers

BP Number/ID is []

Role is []

Tax ID Number is []

Tax ID Type is [] Employer ID Number []

Archived Flag is [] Not Set []

Inactive Flag is [] Not Set []

IRS Response Code is [] 8 lines in group []

IRS Response Code is [] Error - Duplicate TIN []

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 []

Associated State is [] ALL STATES []

Associated County is [] ALL COUNTIES []

Service Center is [] ALL CENTERS []

Maximum Number of Results: 100

Search Clear Reset Save Search As: [] Save

Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	Zl...	T...	E...	IRS Re...
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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.



Search: Customers

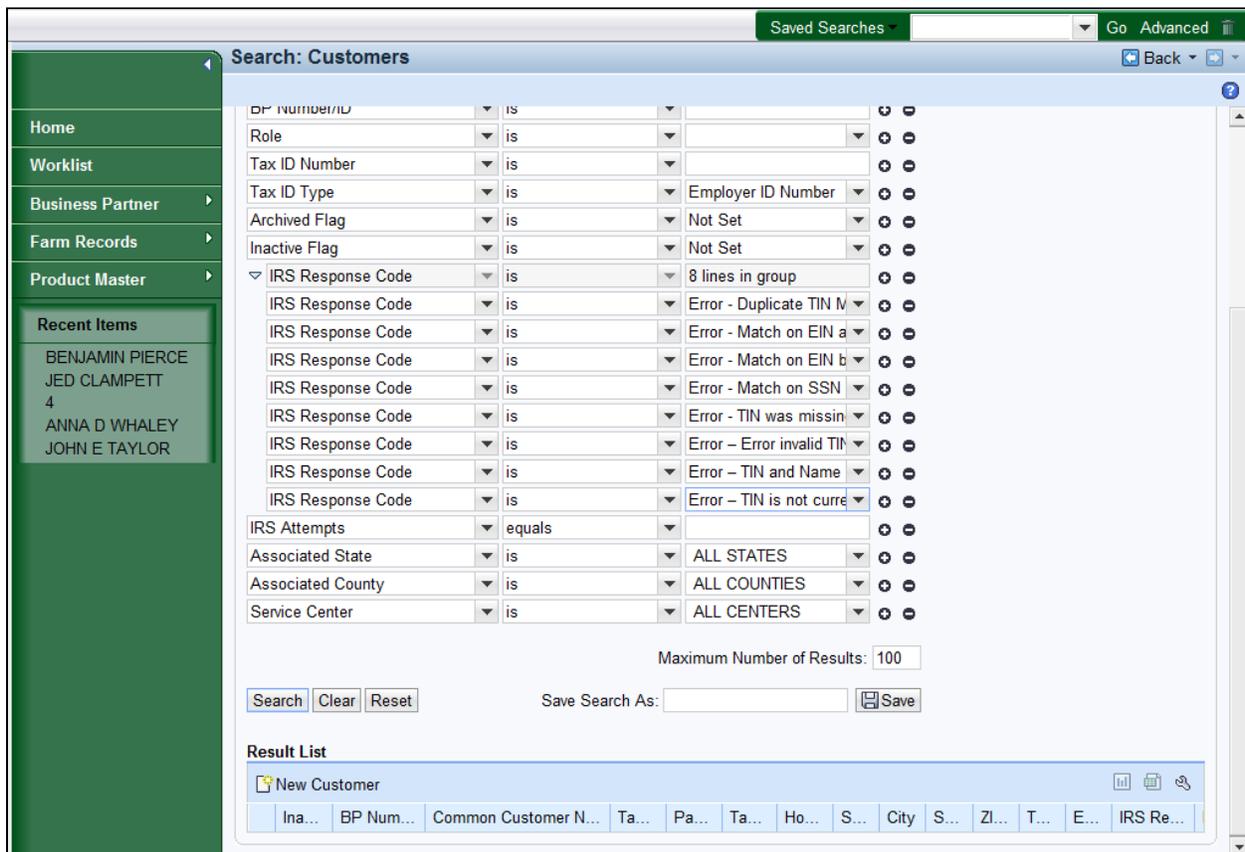
10. As required, complete/review the following fields:

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.

Search: Customers

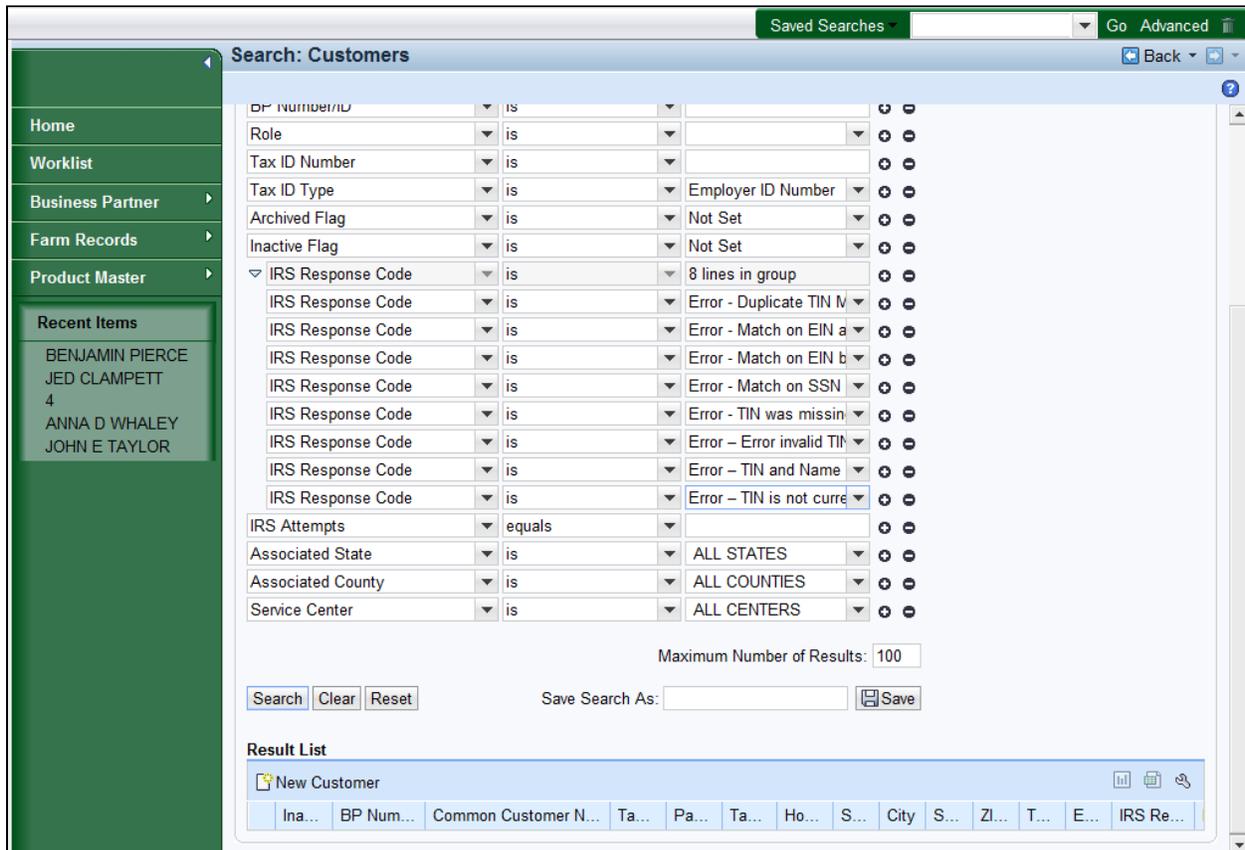


11. Click the **Save**  button to save the entries on the Search criteria screen.

 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.

Search: Customers



Search: Customers

BP Number/ID is []

Role is []

Tax ID Number is []

Tax ID Type is []

Employer ID Number []

Archived Flag is []

Not Set []

Inactive Flag is []

Not Set []

IRS Response Code is []

8 lines in group []

IRS Response Code is []

Error - Duplicate TIN []

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 []

Associated State is []

ALL STATES []

Associated County is []

ALL COUNTIES []

Service Center is []

ALL CENTERS []

Maximum Number of Results: 100

Search Clear Reset Save Search As: [] Save

Result List

New Customer

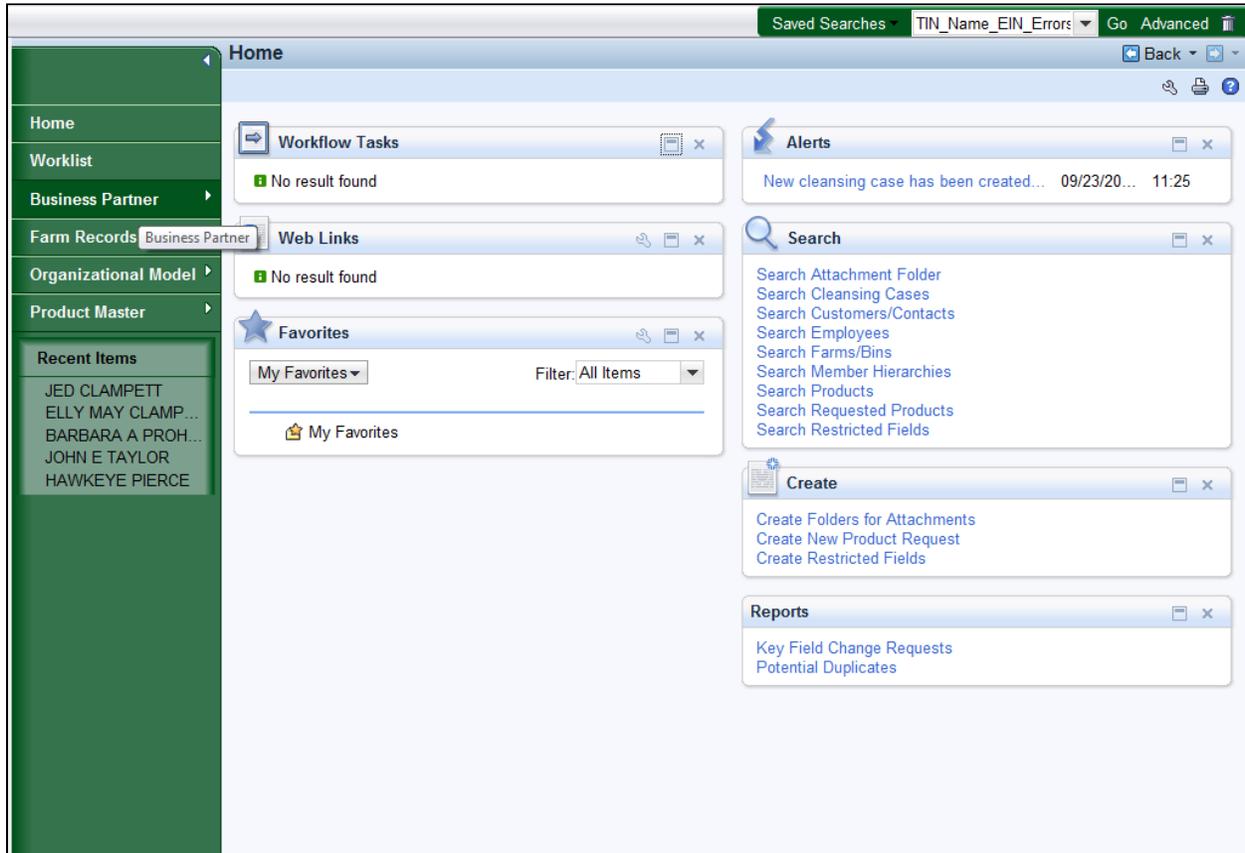
Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	ZI...	T...	E...	IRS Re...
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12. Click the **Home**  button to return to the MIDAS CRM Home page.

 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



13. Click the **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.

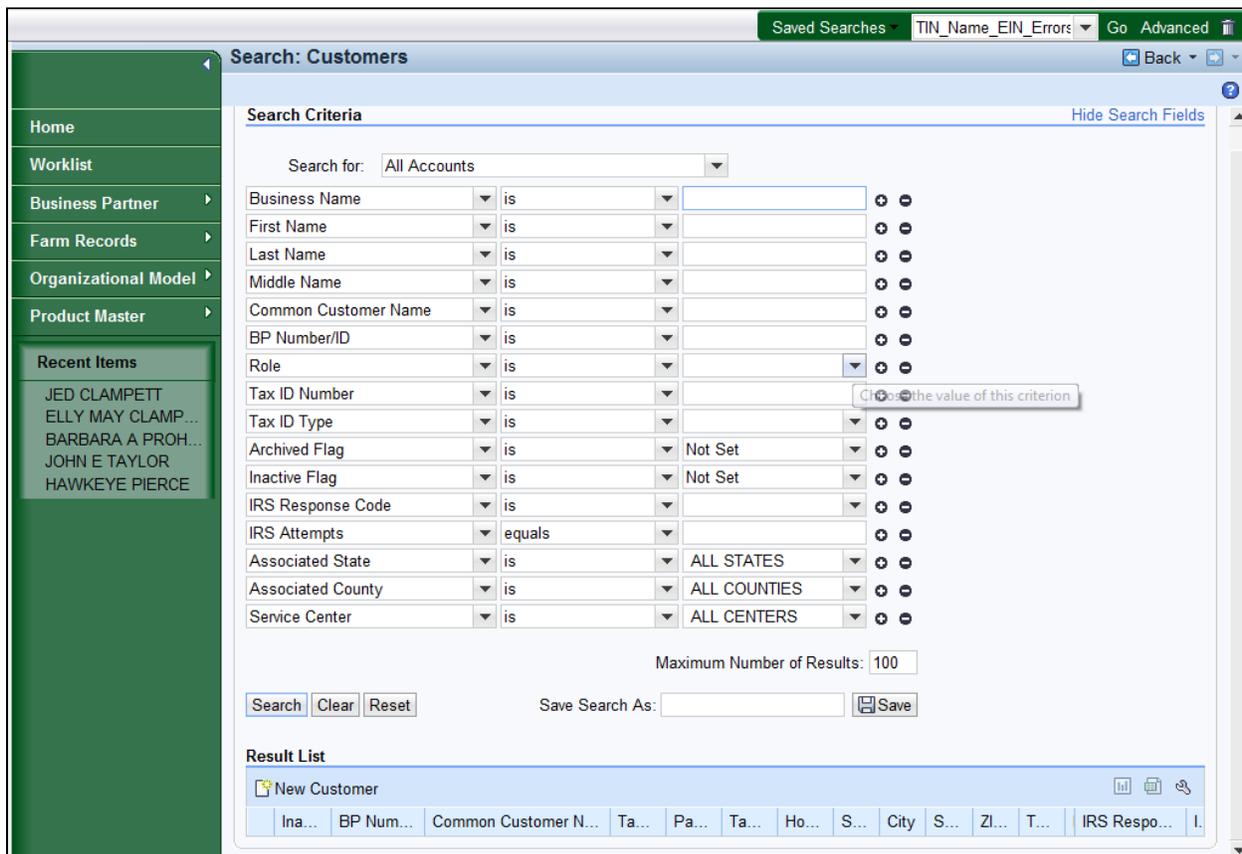


Accounts

A screenshot of a web application interface titled "Accounts". The interface has a dark green sidebar on the left with navigation links: Home, Worklist, Business Partner, Farm Records, Organizational Model, and Product Master. Below these is a "Recent Items" section listing names: JED CLAMPETT, ELLY MAY CLAMP..., BARBARA A PROH..., JOHN E TAYLOR, and HAWKEYE PIERCE. The main content area has a top bar with "Saved Searches" and a dropdown menu showing "TIN_Name_EIN_Errors". Below this are two panels: "Search" and "Reports". The "Search" panel contains a list of search options: Search Cleansing Cases, Search Customers/Contacts (highlighted in blue), Search Documents, Search Employees, Search Folder for Attachments, Search Member Hierarchies, Search Restricted Fields, and Search Service Center Changes. The "Reports" panel contains two report links: Key Field Change Requests and Potential Duplicates. The interface also includes a "Back" button and a "Go" button with a "Advanced" dropdown.

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

Search: Customers



Search: Customers

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is		
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
Associated State	is	ALL STATES	
Associated County	is	ALL COUNTIES	
Service Center	is	ALL CENTERS	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	ZI...	T...	IRS Respo...	I...
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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.



Search: Customers

Search: Customers

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is		
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is	Bureau of Indian Affairs	
Archived Flag	is	City Owned	
Inactive Flag	is	Corp with No Stockholders	
IRS Response Code	is	Corporation	
IRS Attempts	equals	County Owned	
Associated State	is	Estate	
Associated County	is	ALL STATES	
Service Center	is	ALL COUNTIES	
		ALL CENTERS	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	ZI...	T...	IRS Respo...	I.
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16. Scroll through the list of available options.



Search: Customers

Search: Customers

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is		
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		<ul style="list-style-type: none"> Financial Institution General Entity Member General Partnership Group of Individuals Indian Tribal Venture Indians Rep by BIA Individual
Archived Flag	is		
Inactive Flag	is		
IRS Response Code	is		
IRS Attempts	equals		
Associated State	is	ALL STATES	
Associated County	is	ALL COUNTIES	
Service Center	is	ALL CENTERS	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	ZI...	T...	IRS Respo...	I.
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17. Select **Individual** Individual from the available list.

Search: Customers

Search: Customers Saved Searches TIN_Name_EIN_Errors Go Advanced Back

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is		
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is	Individual	
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is		
IRS Attempts	equals		
Associated State	is	ALL STATES	
Associated County	is	ALL COUNTIES	
Service Center	is	ALL CENTERS	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	ZI...	T...	IRS Respo...	I.
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18. Click the **Tax ID Type** dropdown list icon button to view the available list of options.



Search: Customers

Search: Customers

Search Criteria Hide Search Fields

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is		
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is	Individual	
Tax ID Number	is		
Tax ID Type	is		
Archived Flag	is		
Inactive Flag	is		
IRS Response Code	is		
IRS Attempts	equals		
Associated State	is		
Associated County	is	ALL COUNTIES	
Service Center	is	ALL CENTERS	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

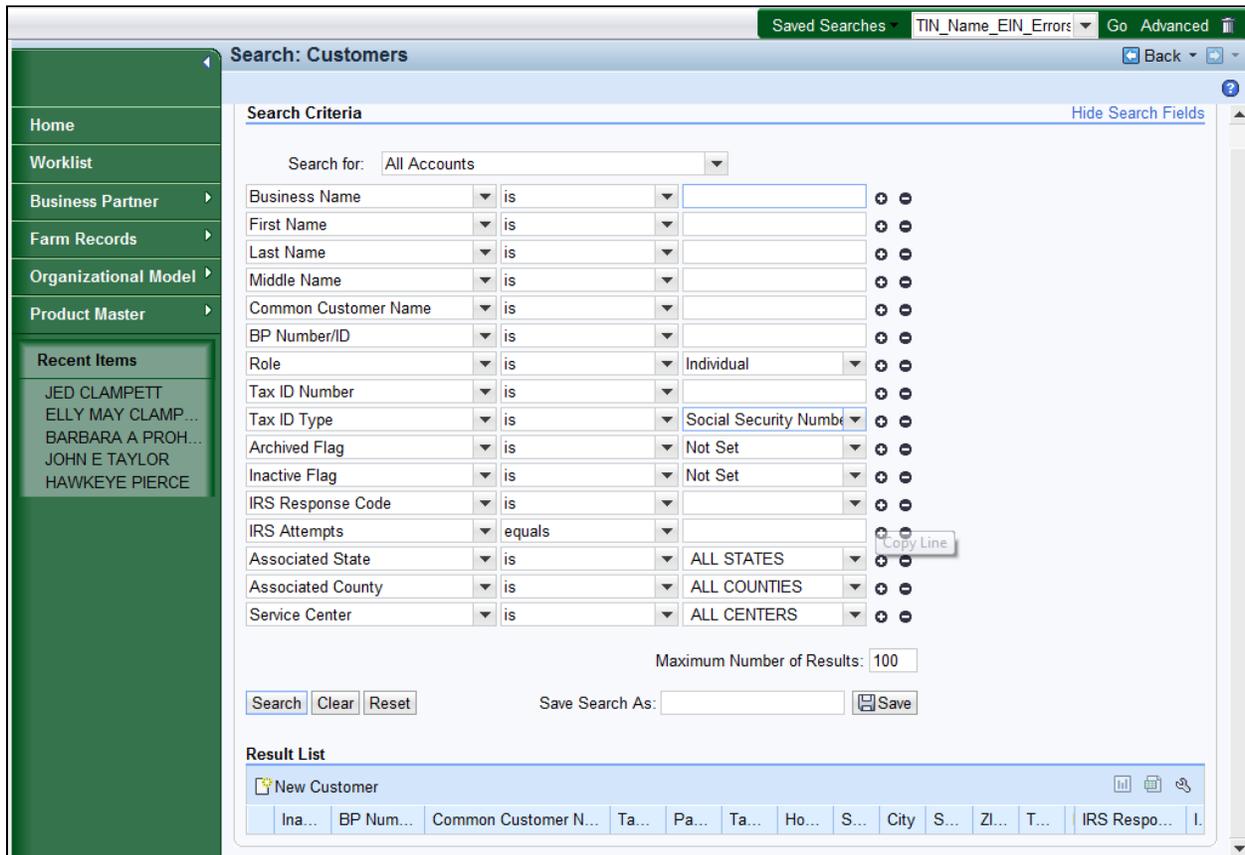
Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	ZI...	T...	IRS Respo...	I...
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19. Select **Social Security Number** from the list of available options.

Search: Customers



Search: Customers

Search for: All Accounts

Field	Operator	Value	Copy Line	Remove Line
Business Name	is			
First Name	is			
Last Name	is			
Middle Name	is			
Common Customer Name	is			
BP Number/ID	is			
Role	is	Individual		
Tax ID Number	is			
Tax ID Type	is	Social Security Number		
Archived Flag	is	Not Set		
Inactive Flag	is	Not Set		
IRS Response Code	is		Copy Line	
IRS Attempts	equals			
Associated State	is	ALL STATES		
Associated County	is	ALL COUNTIES		
Service Center	is	ALL CENTERS		

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

New Customer

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	S...	City	S...	ZI...	T...	IRS Respo...	I...
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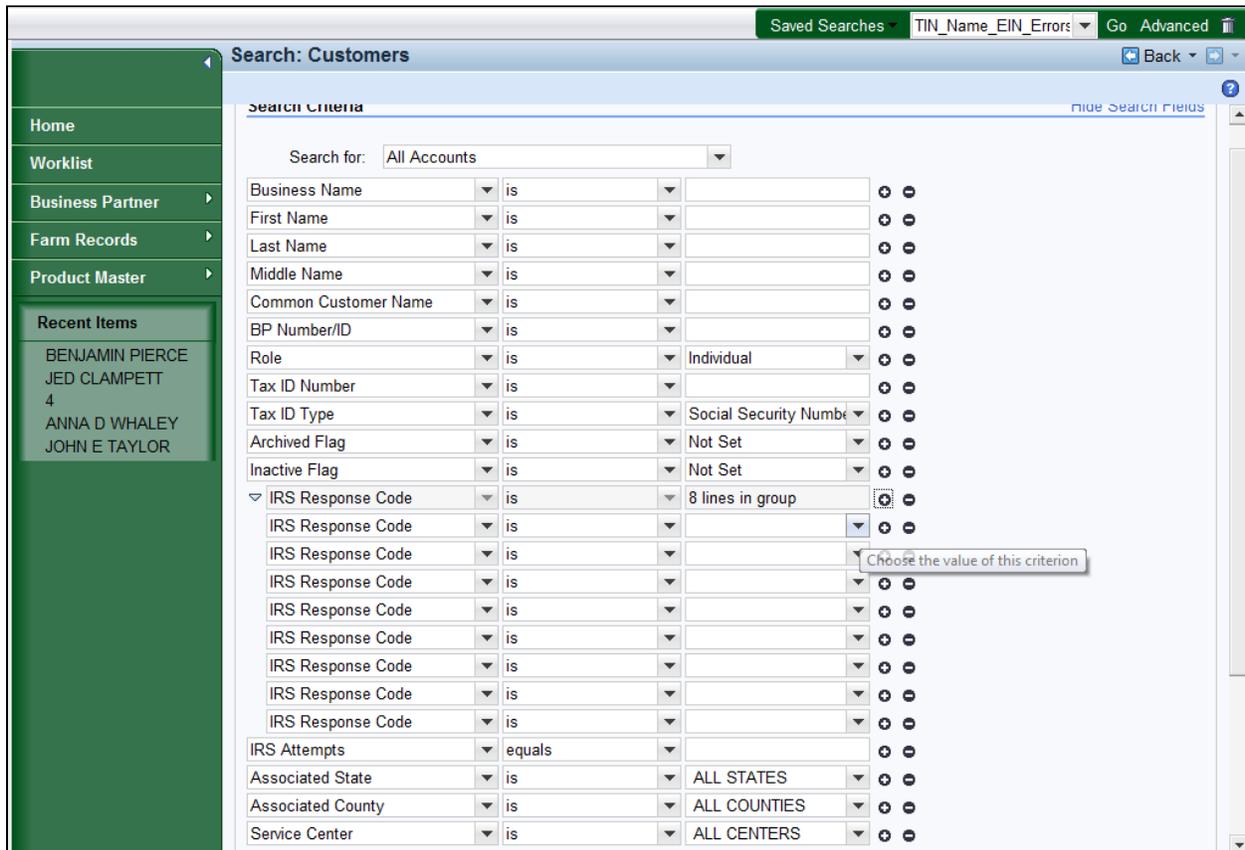
20. Click the **IRS Response Code Copy Line** button.

 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.

Search: Customers



Search: Customers

Search for: All Accounts

Field	Operator	Value	Copy	Delete
Business Name	is		+	-
First Name	is		+	-
Last Name	is		+	-
Middle Name	is		+	-
Common Customer Name	is		+	-
BP Number/ID	is		+	-
Role	is	Individual	+	-
Tax ID Number	is		+	-
Tax ID Type	is	Social Security Number	+	-
Archived Flag	is	Not Set	+	-
Inactive Flag	is	Not Set	+	-
IRS Response Code	is	8 lines in group	+	-
IRS Response Code	is		+	-
IRS Response Code	is		+	-
IRS Response Code	is		+	-
IRS Response Code	is		+	-
IRS Response Code	is		+	-
IRS Response Code	is		+	-
IRS Response Code	is		+	-
IRS Attempts	equals		+	-
Associated State	is	ALL STATES	+	-
Associated County	is	ALL COUNTIES	+	-
Service Center	is	ALL CENTERS	+	-

Choose the value of this criterion

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.



Search: Customers

Search: Customers

Search for: All Accounts

Business Name	is		⊕ ⊖
First Name	is		⊕ ⊖
Last Name	is		⊕ ⊖
Middle Name	is		⊕ ⊖
Common Customer Name	is		⊕ ⊖
BP Number/ID	is		⊕ ⊖
Role	is	Individual	⊕ ⊖
Tax ID Number	is		⊕ ⊖
Tax ID Type	is	Social Security Number	⊕ ⊖
Archived Flag	is	Not Set	⊕ ⊖
Inactive Flag	is	Not Set	⊕ ⊖
IRS Response Code	is	8 lines in group	⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Response Code	is		⊕ ⊖
IRS Attempts	equals		⊕ ⊖
Associated State	is	ALL STATES	⊕ ⊖
Associated County	is	ALL COUNTIES	⊕ ⊖
Service Center	is	ALL CENTERS	⊕ ⊖

Error - Duplicate TIN Matching request.
 Error - Match on EIN and SSN but TIN type is unknown
 Error - Match on EIN but TIN type is unknown
 Error - Match on SSN but TIN type is unknown
 Error - TIN was missing or was entered incorrectly
 Error - Error invalid TIN matching request

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



Search: Customers

Search: Customers

Search Criteria

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is		
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is	Individual	
Tax ID Number	is		
Tax ID Type	is	Social Security Number	
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is	8 lines in group	
IRS Response Code	is	Error - Duplicate TIN M	
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		
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.

Search: Customers

Search: Customers

Saved Searches: TIN_Name_SSN_Error Go Advanced

Back (1)

Common Customer Name	is		
BP Number/ID	is		
Role	is	Individual	
Tax ID Number	is		
Tax ID Type	is	Social Security Number	
Archived Flag	is	Not Set	
Inactive Flag	is	Not Set	
IRS Response Code	is	8 lines in group	
IRS Response Code	is	Error - Duplicate TIN M	
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		
Associated State	is	ALL STATES	
Associated County	is	ALL COUNTIES	
Service Center	is	ALL CENTERS	

Maximum Number of Results: 100

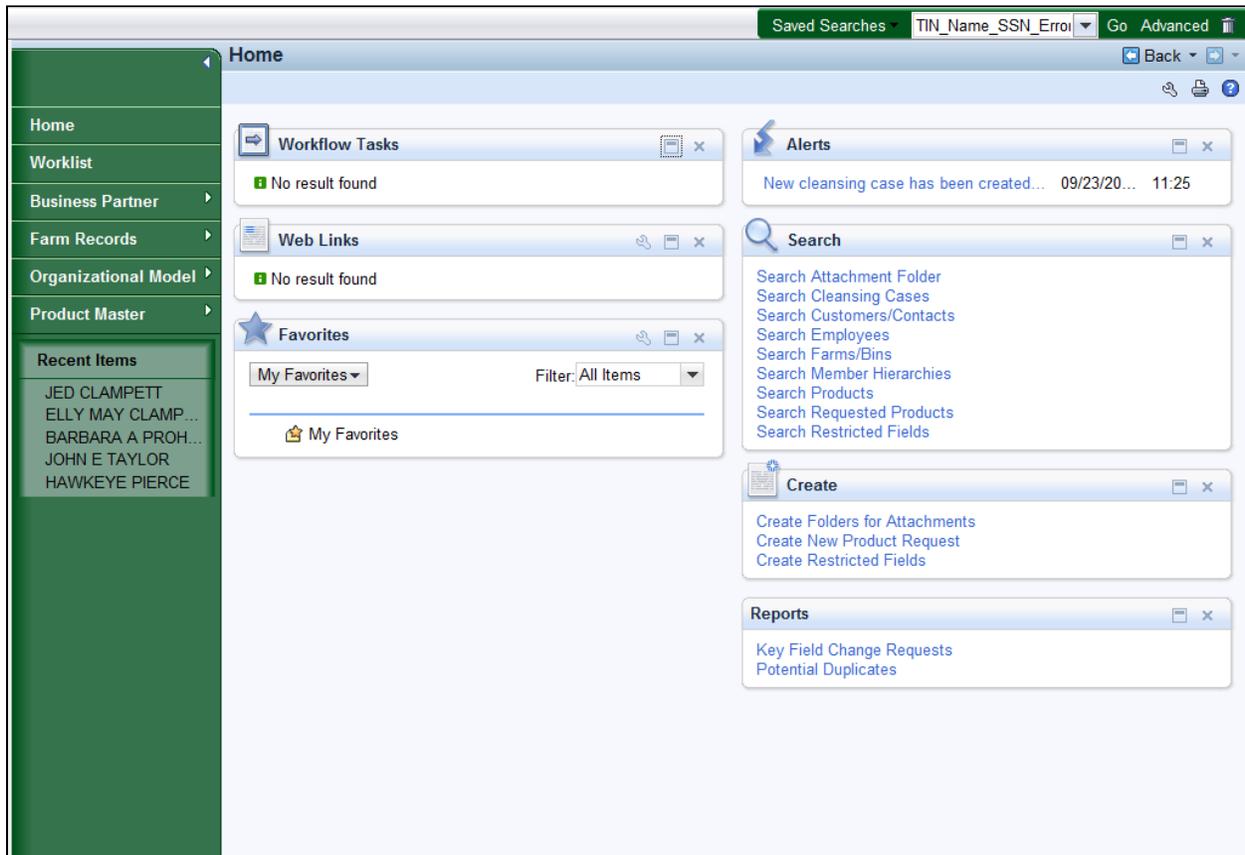
Search Clear Reset Save Search As: Save

Result List

New Customer

26. Click the **Home**  button to return to the MIDAS CRM Home page.

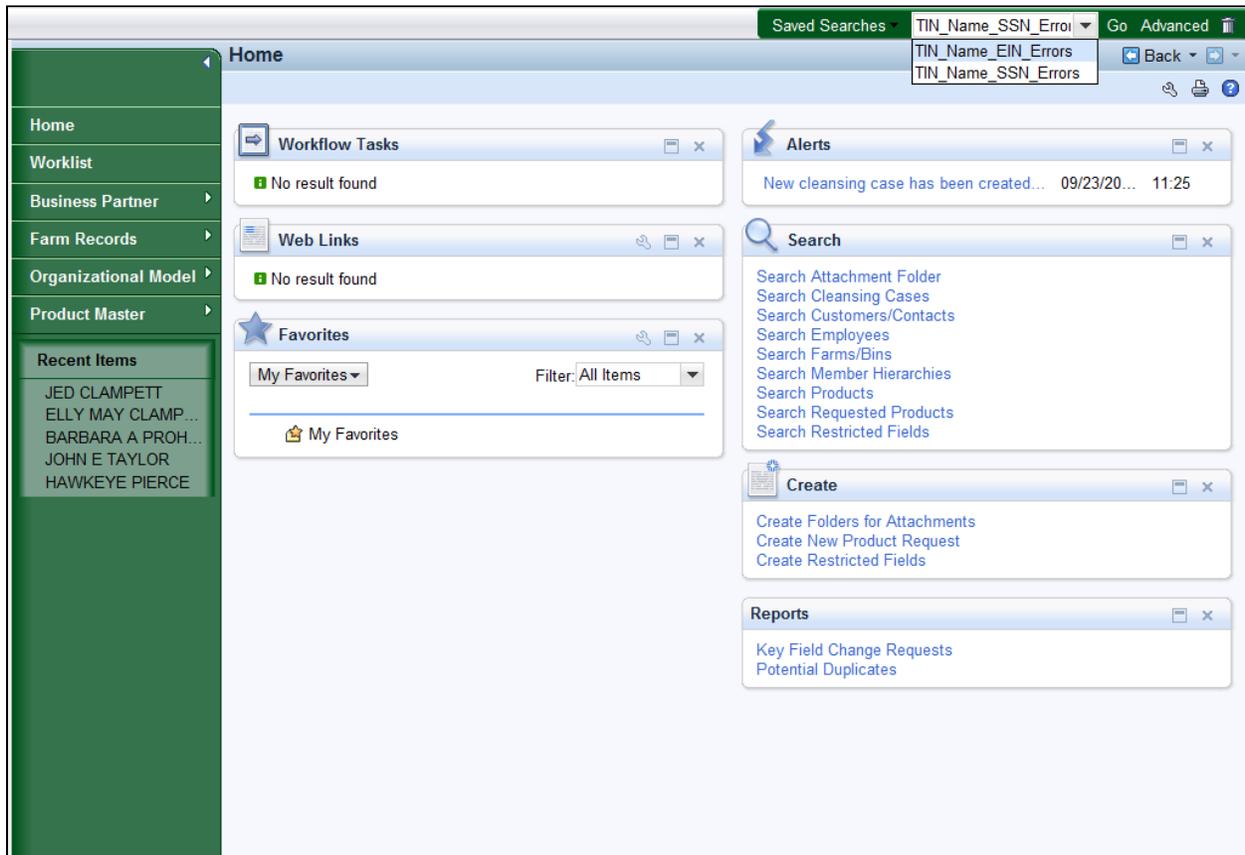
Home



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.

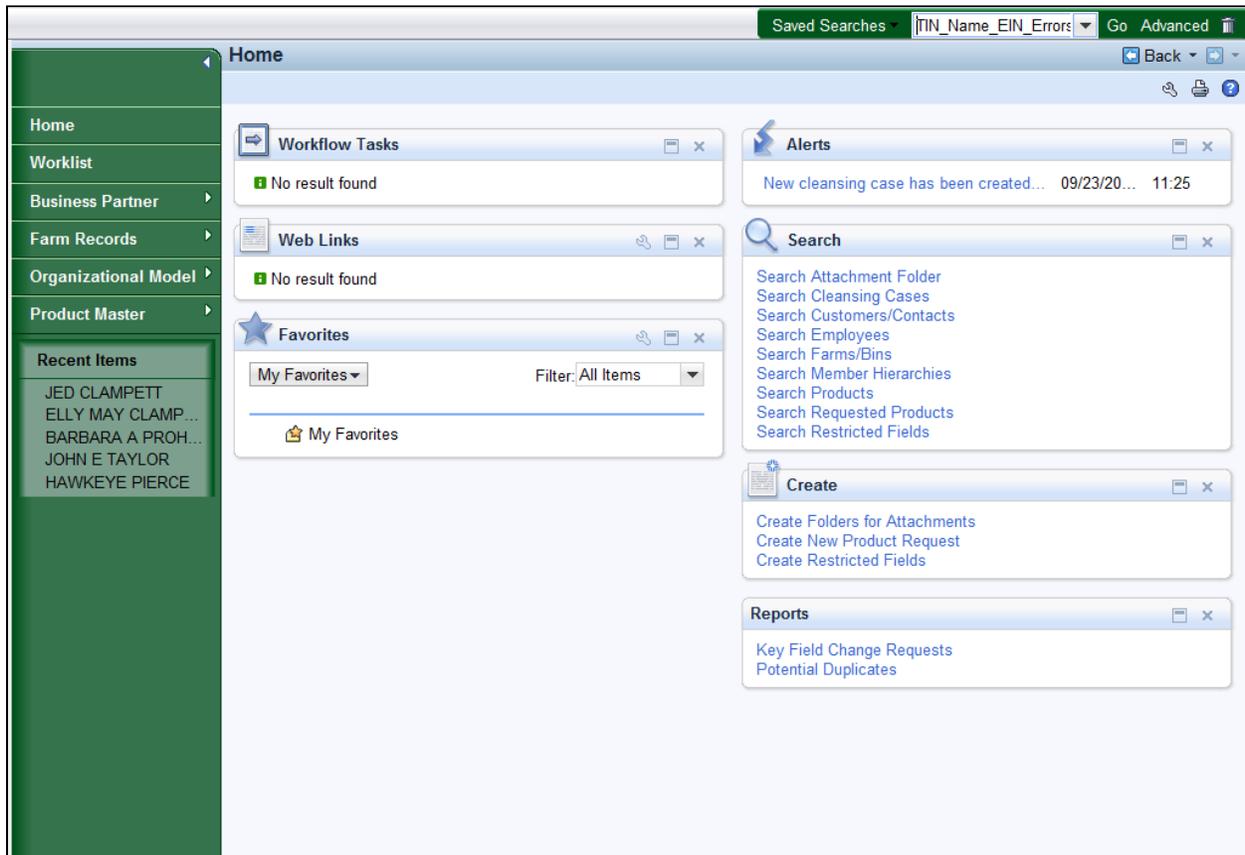
Home



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



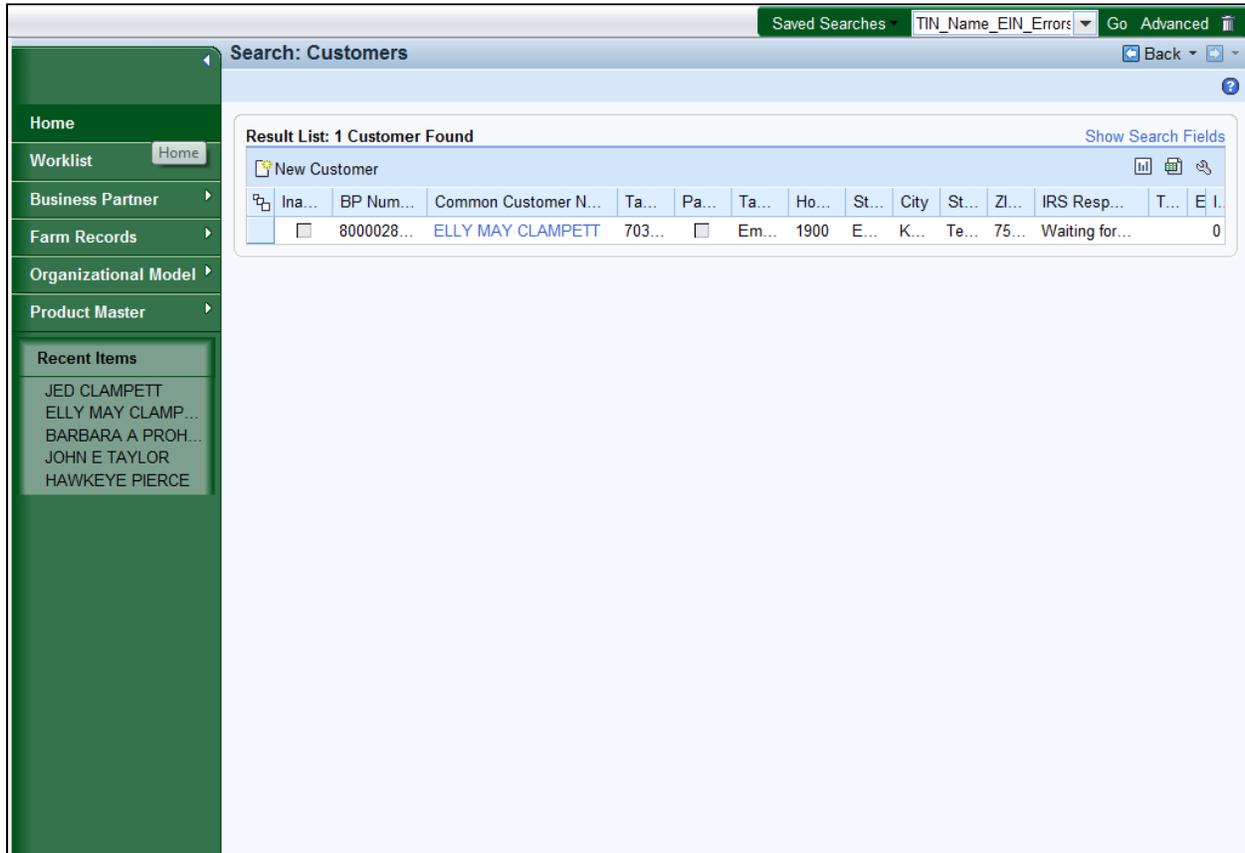
The screenshot shows the MIDAS Home dashboard. At the top right, there is a search bar with the text "TIN_Name_EIN_Errors" and a "Go" button. Below the search bar, the dashboard is divided into several sections:

- Workflow Tasks:** A widget showing "No result found".
- Alerts:** A widget showing a notification: "New cleansing case has been created... 09/23/20... 11:25".
- Web Links:** A widget showing "No result found".
- Favorites:** A widget with a "My Favorites" dropdown and a "Filter: All Items" dropdown. Below it, there is a "My Favorites" section.
- Search:** A widget with a search icon and a list of search options: "Search Attachment Folder", "Search Cleansing Cases", "Search Customers/Contacts", "Search Employees", "Search Farms/Bins", "Search Member Hierarchies", "Search Products", "Search Requested Products", and "Search Restricted Fields".
- Create:** A widget with a plus icon and a list of actions: "Create Folders for Attachments", "Create New Product Request", and "Create Restricted Fields".
- Reports:** A widget with a list of reports: "Key Field Change Requests" and "Potential Duplicates".

On the left side, there is a navigation menu with the following items: Home, Worklist, Business Partner, Farm Records, Organizational Model, Product Master, and Recent Items. The Recent Items list includes: JED CLAMPETT, ELLY MAY CLAMP..., BARBARA A PROH..., JOHN E TAYLOR, and HAWKEYE PIERCE.

29. Click the **Go** **Go** button to execute the TIN_Name_EIN_Errors query.

Search: Customers



Search: Customers

Result List: 1 Customer Found

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	St...	City	St...	Zl...	IRS Resp...	T...	E I...
<input type="checkbox"/>	8000028...	ELLY MAY CLAMPETT	703...	<input type="checkbox"/>	Em...	1900	E...	K...	Te...	75...	Waiting for...		0

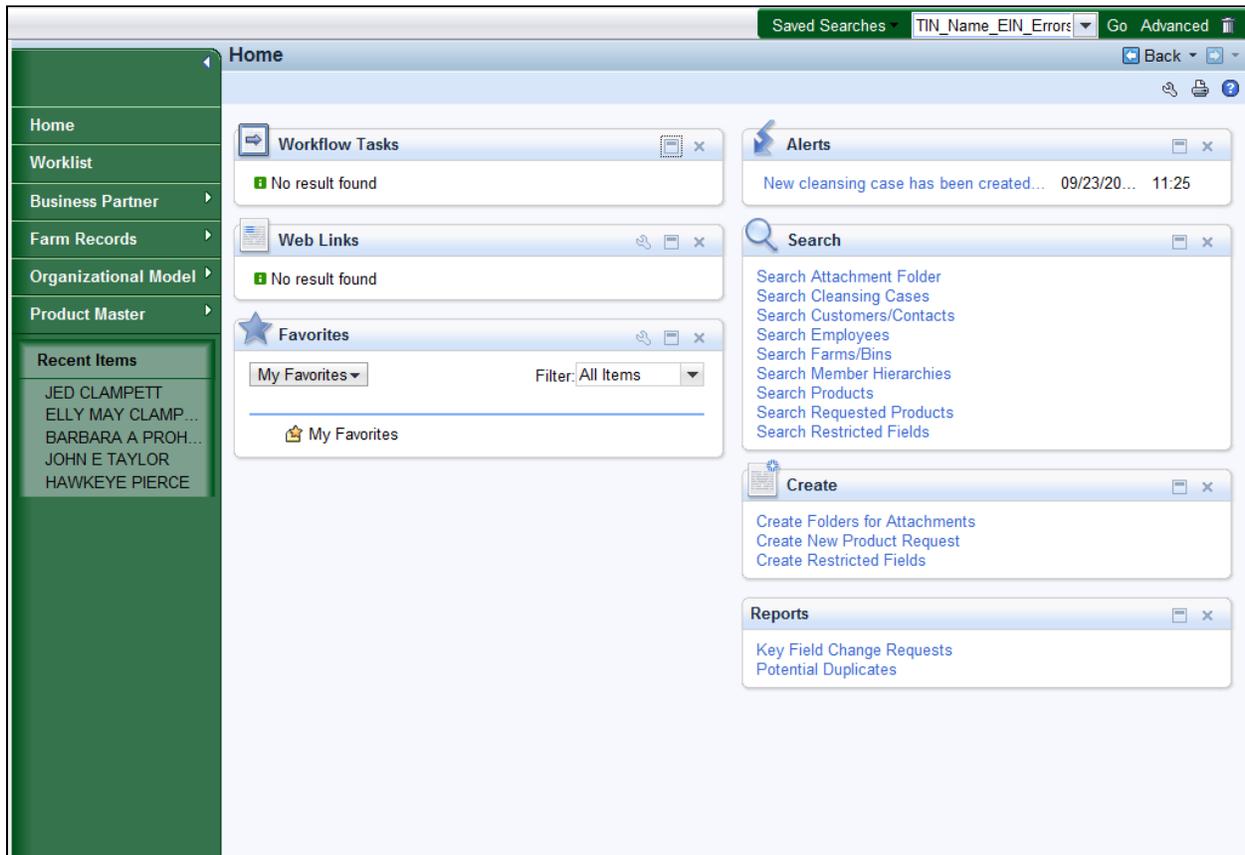
Recent Items:

- JED CLAMPETT
- ELLY MAY CLAMP...
- BARBARA A PROH...
- 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



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.



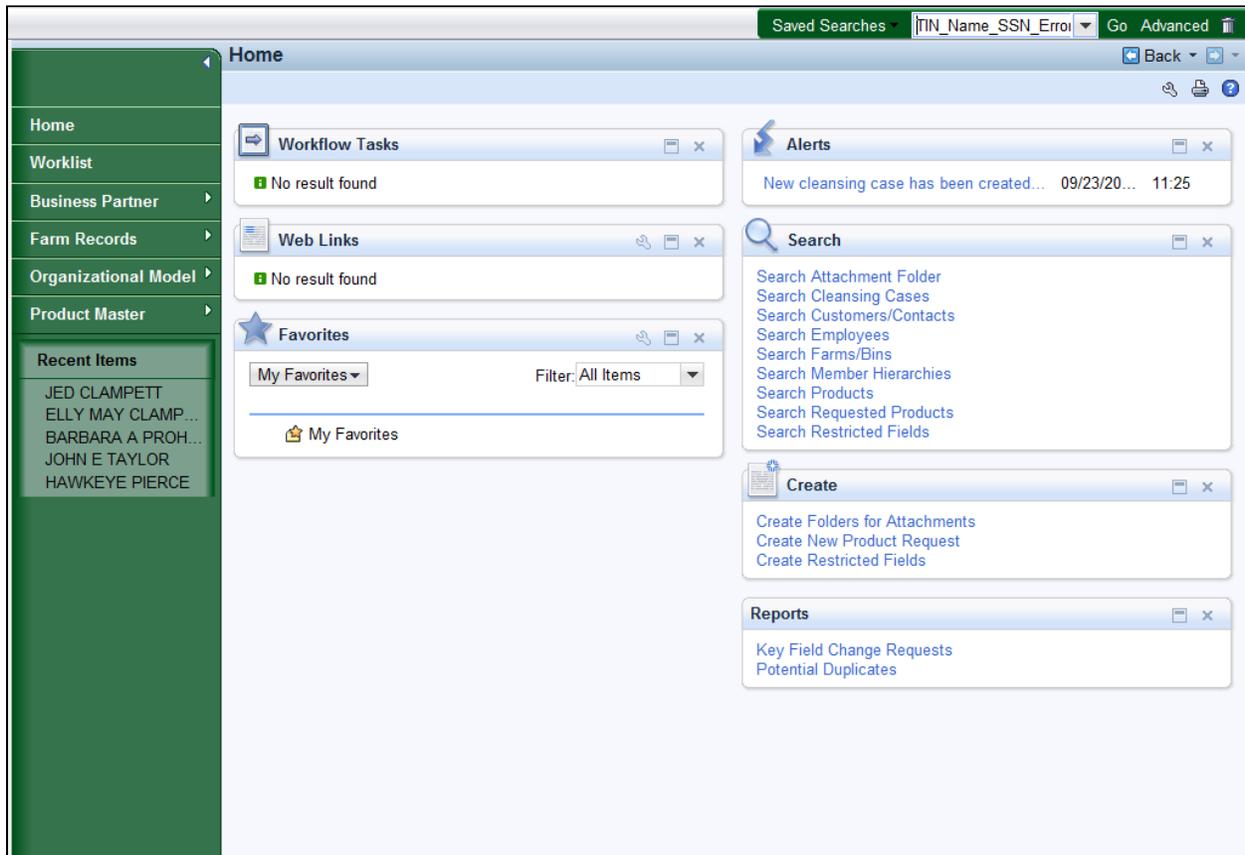
Home

The screenshot shows the MIDAS Home dashboard. At the top right, there is a 'Saved Searches' dropdown menu with the following options: 'TIN_Name_EIN_Errors', 'TIN_Name_SSN_Errors', and 'TIN_Name_SSN_Errors'. The main dashboard area is divided into several sections:

- Workflow Tasks:** No result found.
- Web Links:** No result found.
- Favorites:** My Favorites (Filter: All Items).
- Alerts:** New cleansing case has been created... 09/23/20... 11:25.
- Search:** Search Attachment Folder, Search Cleansing Cases, Search Customers/Contacts, Search Employees, Search Farms/Bins, Search Member Hierarchies, Search 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.

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

Home



33. Click the **Go** **Go** button to execute the TIN_Name_SSN_Errors query.

Search: Customers

Search: Customers

Result List: 14 Customers Found

Ina...	BP Num...	Common Customer N...	Ta...	Pa...	Ta...	Ho...	St...	City	St...	Zl...	IRS Respo...	T...	E I...
<input type="checkbox"/>	8000014...	BARBARA A PROHO...	987...	<input checked="" type="checkbox"/>	So...	1231	M...	F...	Te...	77...	Waiting for...		0
<input type="checkbox"/>	8000028...	BENJAMIN PIERCE	123...	<input checked="" type="checkbox"/>	So...		1...	O...	M...	21...	Waiting for...	+...	0
<input type="checkbox"/>	8000028...	DAVID COBB	371...	<input type="checkbox"/>	So...	8049	12...	F...	M...	21...	Waiting for...		0
<input type="checkbox"/>	8000028...	MR ERNEST ROBER...	615...	<input checked="" type="checkbox"/>	So...	711	H...	S...	Te...	75...	Waiting for...		0
<input type="checkbox"/>	8000028...	HEATHCLIFF J HUXT...	321...	<input checked="" type="checkbox"/>	So...	4400	Pi...	R...	M...	21...	Waiting for...	+...	0
<input type="checkbox"/>	8000028...	JANE HATHAWAY	703...	<input checked="" type="checkbox"/>	So...	1900	E...	K...	Te...	75...	Waiting for...		0
<input type="checkbox"/>	8000028...	JED CLAMPETT	703...	<input checked="" type="checkbox"/>	So...	1900	E...	K...	Te...	75...	Waiting for...		0
<input type="checkbox"/>	8000028...	JETHRO BODINE	345...	<input checked="" type="checkbox"/>	So...	1900	E...	K...	Te...	75...	Waiting for...		0
<input type="checkbox"/>	8000028...	MARGARET HOULIHAN	123...	<input checked="" type="checkbox"/>	So...	1	W...	O...	M...	21...	Waiting for...		0
<input type="checkbox"/>	8000028...	MAX BODINE	703...	<input checked="" type="checkbox"/>	So...	1900	E...	K...	Te...	75...	Waiting for...		0

Navigation: < Back 1 2 Forward >

34. Click the **Home**  button to return to the MIDAS CRM Home page. You have completed the transaction.

 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.