

#### Purpose

The purpose of this process is to view a report listing potential duplicate Business Partner Customer Records.

#### Trigger

Perform this procedure when a scan of the system for potential duplicates is needed.

#### 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	<b>f</b>	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 <b>MUST</b> be completed or another trigger that should be started and is related to the procedure.
Acritical note	$\bigotimes$	Use this note to specify something that <b>MUST NOT</b> be done during the procedure.



Contact someone	C	Use this icon to specify to the end- user the need to initiate a communication within the organization due to an event in the procedure.
A <b>reference</b> is available		Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.



#### Procedure

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

#### Home

			Saved Searches -	Go Advanced 💼
	Home			🖸 Back 👻 🖸 👻
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Home	Workflow Tasks		δ Alerts	
Worklist	No result found		No result found	
Business Partner 👌				
Farm Records	Web Links	I 🔿 🗖 🗙	Search	■ ×
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Descriptions	Favorites	् <b>म</b> ×	Search Employees Search Earms/Bins	
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BRADY BUNCH	Ny ravones*	T ILET. Millionia	Search Products Search Requested Products	
MIKE BRADY	My Favorites		Search Restricted Fields	
MIKE BRADY	, ·		Create	<b>□</b> ×
			Create Farm/Bin	
			Create New Product Request	
			Reports	⊟ ×
			Key Field Change Requests Potential Duplicates	

2. Click the **Reports** Assignment Block heading.

Potential Duplicates report can be opened from the Reports Assignment Block on the CRM Home page or the Business Partner Accounts page.



Home Worklist Business Partner Farm ReCuruss Web Links W		Saved Searches -	Go Advanced
Home Worklist Business Partner Farm Records Product Master MKE & BRADY. MKE & BR	Home		🖸 Back 👻 💽
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BRADY BUNCH MIKE BRADY MIKE BRADY M	MIKE M BRADY My Favorites-	Filter: All Items	
MIKE & G BADY MIKE & BRADY MIKE BRADY	BRADY BUNCH	Search Requested Products	
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Create Farm/Bin Create New Product Request  Reports  Key Field Change Requests Potential Duplicates	MIKE BRADY	Create	⊟ ×
Create New Product Request  Reports  Key Field Change Requests Potential Duplicates		Create Farm/Bin	
Reports     ×       Key Field Change Requests Potential Duplicates     ×		Create New Product Request	
Key Field Change Requests Potential Duplicates		Reports	⊟ ×
Potential Duplicates		Key Field Change Requests	
		Potential Duplicates	

button.

3. Click the Business Partner Business Partner

#### Accounts





- 4. Click the **Potential Duplicates** link.
  - Initially, the Potential Duplicates report will be used to confirm and merge the existing accounts that have been identified as potential duplicates.

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	Potential Duplicate Re	eport					🖸 Back 👻 🖸 👻
Home	Search Parameters						
Worklist	Service Cente	r.		٥			
Business Partner	Individual/Busines	5:		Open Input Help	P		
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Farm Records		S	Search Clear				
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BRADY BUNCH MIKE BRADY	Potential Duplicate Re	cords					
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	Group ib	Dusinessi artilei	T di Ivallie	Ominanty in 70	Address	Date of Diffi	Changed on

5. Click the Service Center field Open Input Help 🗇 button.



You can search by State, County, Service Center, Business Partner role or Creation date.

#### Service Center Search

State:		•	
County:		•	
	Search		
Service	Center Short Name	Service Center Long Name	
No result	found		



6. Click the **State:** dropdown list icon button.

#### **Service Center Search**

	State:	TEXAS	•	
	County:	PENNSYLVANIA PUERTO RICO RHODE ISLAND SOUTH CAROLINA		
	Service	SOUTH DAKOTA		Name
8	No result	TEXAS		<b>•</b>

7. Select **TEXAS** from the **State** list.

## Service Center Search

State: County:	TEXAS Search	
Service	Center Short Name	Service Center Long Name
No result	found	

**8.** Click the **County:** dropdown list icon button.

## Service Center Search

State: County:	JOHNSON JONES KARNES KAUFMAN KAUFMAN Search	▼
Service	Center Short Name	Service Center Long Name
No result	found	



Select **KAUFMAN** from the dropdown list. 9.

#### **Service Center Search**

State:	TEXAS	<b>•</b>	
County:	KAUFMAN		
	Search		
Service	Center Short Name	Service Center Long Name	
No result	found		

10. Click the Search Search button.

## **Service Center Search**

State: County:	TEXAS KAUFMAN Search	•	
Service	e Center Short Name	Service Center Long Name	
		66018	

11. Double-click the Service Center Short Name field.



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Potential Duplicate Re	port					🖸 Back 👻 🖸 👻
Search Parameters						
Service Center	66018		٥			
Individual/Business	:		•			
Creation Date						
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Potential Duplicate Rec	ords					
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Group ID E	BusinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
						)
	Potential Duplicate Re Search Parameters Service Center Individual/Business Creation Date	Potential Duplicate Report          Search Parameters         Service Center:       66018         Individual/Business:	Search Parameters         Service Center:         66018         Individual/Business:         Creation Date:         Search Clear    Potential Duplicate Records          Potential Duplicate Records    Potential Duplicate Records          MERGE         Group ID       BusinessPartner    Full Name	Search Parameters   Service Center:   66018   Individual/Business:   Creation Date:     Search Clear   Potential Duplicate Records   MERGE   Group ID   BusinessPartner   Full Name   Similarity in %	Search Parameters         Service Center:         Individual/Business:         Creation Date:         Search Clear	Search Parameters         Service Center:         Service Center:         Gearch Date:         Creation Date:         Search Clear

**12.** Click the **Individual/Business:** dropdown icon button.

# **Potential Duplicate Report**

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Users							
Home	Search Parameters						
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Business Partner 📍	Individual/Business:	la di e e Trib e D (ee		<b>~</b>			
Farm Records	Creation Date:	Indians Rep by E	nture BIA				
Product Master		Individual Indv. Operating I	Business				
Recent Items		Limited Liability	Company	-			
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MIKE G BRADY MIKE BRADY	會 MERGE						u 🖷 a
	Group ID B	usinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on



from the

**13.** Select Individual Individual Individual/Business: list.

# Potential Duplicate Report

					Saved Searches	•	Go Advanced 👔
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MIKE G BRADY	Potential Duplicate Reco	ras					
MIKE BRADY	<sup>●</sup> MERGE						U # 4
	Group ID B	usinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on

14. Click the Search Search button.



					Saved Searches	•	🔻 Go Advanced 📋
	Potential Duplicate Rep	oort					🖸 Back 👻 🖸 👻
Home	Secret Perometers						
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	Individual/Business	Individual					
Business Partner '	Creation Date:	individual		( <b>7</b> )			
Farm Records							
Product Master		S	earch Clear				
Recent Items							
MIKE M BRADY BRADY BUNCH MIKE BRADY MIKE G BRADY	Potential Duplicate Reco	ords					
MIKE BRADY	MERGE						
	Group ID B	usinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
	0000007115 80	000028399	BENJAMIN PIE	95.0	BENJAMIN / 1	01/28/1968	09/12/2014
	0000007115 80	000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968	09/10/2014
	0000007121 80	000028484	WOODY WOODE.	94.0	WOODY / 17604	01/02/1950	09/04/2014
	0000007121 80	000028486	WOODROW W	94.0	WOODROW / 1	01/02/1950	
	0000007122 80	000028479	MR ERNEST R	94.0	ERNEST / 711 H	07/11/1958	09/04/2014
	0000007122 80	000028483	MR ROBERT E	94.0	ROBERT / 711	07/11/1958	
	0000007123 80	000028488	WILL GIBBONS	94.0	WILL / 9841 CO	09/02/1969	09/08/2014
	0000007123 80	000028503	WILLIAM GIBBO	94.0	WILLIAM / 1201	09/02/1969	

**15.** Click the **Full Name** BEN PIERCE <u>BEN PIERCE</u> link to review the BP Record.

## **Customer: BEN PIERCE**

					Saved Searches	•	Go Advanced 👔
	Customer: BEN PIERCE					_	🖸 Back 💌 🖸 👻
	🖫 Save   🗙 Cancel   🖺 New	Show Duplicates	Key Field Change Co	py∣More∍			Back to Previous Page
Home							<b>_</b>
Worklist	Customer Details Custo	mer Profile Roles	s Identification Numbers	SCIMS Replication	n Status		
	Edit S lax ID History						
Business Partner	General Data			Main Address	and Communica	ation Data	
Farm Records	Current Role:	Individual		Information Li			
	BP Number / ID:	8000028423		Address Line1:	WINNING DR		
Product Master	Prefix:				Street address,	, PO BOX XXX, RR X E	JOX XXX, H
Recent Items	First Name:	BENNIE		Address Line 2:			
	Middle Name:	Н			Apartment, Suit	te, Unit, Building, Floor	
BRADY BUNCH	Last Name:	PIERCE		City:	OWINGS MILLS	S	
MIKE BRADY	Suffix:			State:	MD	MARYLAND	
MIKE G BRADY	Common Customer Na	BEN PIERCE		ZIP Code:	21117-4776		
MIKE BRADY	Legal Name:	No		Country:	US	USA	
	Language Preference:	English		Communicati	Post (letter)		
	Data Origin:	CRM		Carrier Route:	R002		
	Employee Type:	Not an employee		Delivery Bar.	013		
	Tax ID Type:	No Tax ID Type	0	Congression.	MARYLAND	07	
	Tax ID Number:	No Tax ID Nu	0				
	Date of Death:						
	Death Confirmed:						
	Notes						



# **16.** Click the **Back** Back button.

## **Potential Duplicate Report**

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Home							
	Search Parameters						
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usiness Partner 📍	Individual/Business:	Individual		•			
	Creation Date:			1			
arm Records		C	oarch Cloar				
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Recent Items							
BEN PIERCE MIKE M BRADY BRADY BUNCH	Potential Duplicate Reco	ords					
MIKE BRADY MIKE G BRADY	₿MERGE						u 🖬 d
	Group ID B	usinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
	0000007115 80	00028399	BENJAMIN PIE	95.0	BENJAMIN / 1	01/28/1968	09/12/2014
	0000007115 80	000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968	09/10/2014
	000007404 00	00028484		94.0	MOODY / 17604	01/02/1050	09/04/2014
	000007121 80	000020404	WOOD1 WOOD	54.0	WOOD1/1/004	01102/1550	
	0000007121 80	)00028486	WOODROW W	94.0	WOODROW / 1	01/02/1950	
	0000007121 80 0000007121 80 0000007122 80	)00028486 )00028479	WOODROW W MR ERNEST R	94.0 94.0	WOODROW / 1 ERNEST / 711 H	01/02/1950 01/02/1950 07/11/1958	09/04/2014
	0000007121 80 0000007121 80 0000007122 80 0000007122 80	000028486 000028479 000028483	WOODROW W MR ERNEST R MR ROBERT E	94.0 94.0 94.0 94.0	WOODROW / 1 ERNEST / 711 H ROBERT / 711	01/02/1950 07/11/1958 07/11/1958	09/04/2014
	0000007121 80 0000007121 80 0000007122 80 0000007122 80 0000007123 80	000028486 000028479 000028483 000028488	WOODROW W MR ERNEST R MR ROBERT E WILL GIBBONS	94.0 94.0 94.0 94.0 94.0	WOODROW / 1 ERNEST / 711 H ROBERT / 711 WILL / 9841 CO	01/02/1950 07/11/1958 07/11/1958 09/02/1969	09/04/2014

**17.** Select a Business Partner to merge.



					Saved Searches	•	Go Advanced 📋
	Potential Duplicate Rep	port					🖸 Back 🝷 🖸 🍷
Home	Search Parameters						
Worklist	Service Center	66018		n			
Business Partner	Individual/Business:	Individual		•			
Dusiliess Faitilei	Creation Date:			( <sup>1</sup> )			
Farm Records							
Product Master		S	Search Clear				
Recent Items							
BEN PIERCE							
MIKE M BRADY							
BRADY BUNCH	Potential Duplicate Reco	ords					
MIKE BRADY MIKE G BRADY	<sup>●</sup> MERGE						H 🗐 🍕
	Task MERGE B	usinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on
	0000007115 80	000028399	BENJAMIN PIE	95.0	BENJAMIN / 1	01/28/1968	09/12/2014
	0000007115 80	000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968	09/10/2014
	0000007121 80	000028484	WOODY WOOD	94.0	WOODY / 17604	01/02/1950	09/04/2014
	0000007121 80	000028486	WOODROW W	94.0	WOODROW / 1	01/02/1950	
	0000007122 80	000028479	MR ERNEST R	94.0	ERNEST / 711 H	07/11/1958	09/04/2014
	0000007122 80	000028483	MR ROBERT E	94.0	ROBERT / 711	07/11/1958	
	0000007123 8	000028488	WILL GIBBONS	94.0	WILL / 9841 CO	09/02/1969	09/08/2014
	0000007123 8	000028503	WILLIAM GIBBO	94.0	WILLIAM / 1201	09/02/1969	

# **18.** Click the **MERGE** BMERGE button.



Select one BP record to merge. Every potential duplicate record will be available to select in the merge.

## **Duplicate Check**

	o Duplicates	3			<b>a</b> 4
ጜ BP	Number/ID	Address	Similarity in %	Archived	Case Exists
800	0028484	WOODY / 17604 FM 548 / FORNEY TX 75126-5639	94.0		
800	0028486	WOODROW / 17605 17605 FM 548 / FORNEY TX 75126-5644	94.0		

**19.** Select the identified duplicates to merge.



## **Duplicate Check**

				<b>a</b>
BP Number/ID	Address	Similarity in %	Archived	Case Exists
8000028484	WOODY / 17604 FM 548 / FORNEY TX 75126-5639	94.0		
8000028486	WOODROW / 17605 17605 FM 548 / FORNEY TX 75126-5644	94.0		

## 20. Click the Merge Merge button.

The Initia

The Identified Duplicates screen is presented and you will follow the Initiate Customer Merge steps. To review:

**Percentage** is based on a combination of Name (business, first, middle and last), Suffix, zip code and date of birth.

Archived indicates that the record is in Archived status.

**Case Exists** field indicates that a merge has been initiated and a Cleansing case has been created.

#### **Duplicate Check**

Cleansing Case ID:	7	Proc	essor (User):	MITRAI	NIN014	
Note for Processor:			Created On:	09/18/2	014	
			Status:	New		
BP Number/ID	Common Customer Name	Master	Created C	Dn	Created By	Archive
8000028484	WOODY WOODPECKER		09/04/201	4	MITRAININ007	
8000028486	WOODROW W WOODPECKER		09/04/201	4	MITRAININ007	

**21.** Click the **Master**  $\Box$  check box to identify the Master or Winning record.



## **Duplicate Check**

Cleansing Case ID:	7	Proc	essor (User):	MITRAI	NIN014	[
Note for Processor:			Created On:	09/18/2	014	
			Status:	New		
						c
BP Number/ID	Common Customer Name	Master	Created C	)n	Created By	Archived
8000028484	WOODY WOODPECKER		09/04/201	4	MITRAININ007	
8000028486	WOODROW W WOODPECKER		09/04/201	4	MITRAININ007	

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

Field	R/O/C	Description
Note for Processor:	R	Notes to the State Specialist regarding merge
		Example: Woodrow Woodpecker is the Master record

## **Duplicate Check**

Note for Processor:	lote for Processor: odrow Woodpecker is the Master record Created On: 09/18/2014		1014			
	-		Status:	New		
BP Number/ID	Common Customer Name	Master	Created C	)n	Created By	Archive
8000028484	WOODY WOODPECKER		09/04/201	4	MITRAININ007	
8000028486	WOODROW W WOODPECKER	~	09/04/201	4	MITRAININ007	

# 23. Click the Merge Now Merge Now button.



# **Cleansing Case**

				Saved Searches -			Go Advanced 👔			
	Cleansing Case								🖸 Back	• 🖸 •
	🖫 Save   🗙 Cancel   Rejec	t								8 (1)
Home	Cleansing Case Details									
Worklist	Case ID	. 7				Statu	IS: New		-	ā II.
Business Partner	Source: UIU				Created On: 09/18/2014			014		
	Processor ID: MITRAININ014			٥		Created By: MITEST14 TRAIN14				
Farm Records	Processor Name	Name: MITEST14 TRAIN14				Descriptio	ion: Woodrow Woodpecker is the Master record			
Product Master	Accounts									
Recent Items									<u>ب</u> ا	
BEN PIERCE	BP Numb Common Customer Name		Status		Created On		Created By	Archived		
MIKE M BRADY	80000284 WOOE	80000284 WOODROW W WOODPECKER			▼ 09/04/2014			MITEST07 TRAIN07		
MIKE BRADY	80000284 WOOE	80000284 WOODY WOODPECKER			•	09/04/2014		MITEST07 TRAIN07		
MIKE G BRADY										
	Compare Accounts									_
	Master Account: 8000028486 Source Account: 8000028484 💌									
		Cart								
	Conline Your Changes.	Comm								
	General Data									_
	Data	Se	Master			Se	Source			
	External number 166					64				
	First Name 🛛 WOODROW						WOODY	·		
	Middle Name 🛛 🕅						1			
	Gender Determination Customer Declared						Not Veri	fied		-

# **24.** Click the **Expand message area** button.

# **Cleansing Case**

						Saved Se	earches -	•	Go Advanced		
1	Cleansing Case								🖸 Back 👻 🖸		
	Bave   ★Cancel   Reject								<mark>0 🚺 (1</mark> )		
Home	Cleansing Case Details				E Acco	ounts merge is a	available o	only for Grantor Speciali	st and Expert roles		
Worklist	Case ID:										
	Source:	UIU				Created On:	09/18/20	14			
Dusiness i aitilei	Processor ID:	MITR	AININ014		Created By:	d By: MITEST14 TRAIN14					
Farm Records	Processor Name:	MITE	ST14 TRAIN14			Description	escription: Woodrow Woodpecker is the Master record				
Product Master	Accounts										
Recent Items									ф <i>2</i>		
BEN PIERCE	원 BP Numb Commo	n Cust	omer Name	Status		Created On		Created By	Archived		
MIKE M BRADY	80000284 WOOD	ROW V	V WOODPECKER	Master	-	09/04/2014		MITEST07 TRAIN07			
MIKE BRADY	80000284 WOOD	r woo	DPECKER	Source	-	09/04/2014		MITEST07 TRAIN07			
MIKE G BRADY											
	Compare Accounts										
	Master Account: 8000028486 Source Account: 8000028484										
	Confirm Your Changes:	Confin	m								
	General Data										
	Data	Se	Master			Se	Source				
	External number	$\checkmark$	66				64				
	First Name	$\checkmark$	WOODROW				WOODY				
	Middle Name	$\checkmark$	W								
	Gender Determination 🖂 Customer Declared						Not Verif	ied			



## **25.** Click the **Collapse message area** button.

### **Cleansing Case**

						Saved Se	arches -	-	Go Advance	ed
1	Cleansing Case								🖸 Back	•
	Save   × Cancel   Reject									
Home	Cleansing Case Details									
Worklist	Case ID	7				Status:	New			,
Business Partner	Source	UIU	UIU			Created On:	i On: 09/18/2014			
	Processor ID	Processor ID: MITRAININ014 D Created By: MITEST14 TRAIN14			14 TRAIN14					
arm Records '	Processor Name	MITE	ST14 TRAIN14			Description:	tion: Woodrow Woodpecker is the Master record			
roduct Master	Accounts									
Recent Items									<b>a</b> <i>4</i>	,
BEN PIERCE	원 BP Numb Comm	BP Numb Common Customer Name				Created On		Created By	Archived	
MIKE M BRADY	80000284 WOOD	V WOODPECKER	Master	•	09/04/2014		MITEST07 TRAIN07			
MIKE BRADY	80000284 WOOD	y woo	DPECKER	Source	•	09/04/2014		MITEST07 TRAIN07		
MIKE G BRADY										
	Compare Accounts									
	Master Account	aster Account: 8000028486 Source Account: 8000028484								
	Confirm Your Changes: Confirm									
	General Data									
	Data	Se	Master			Se	Source			
	External number	$\checkmark$	66				64			
	First Name	$\checkmark$	WOODROW				□ WOODY			
	Middle Name	$\checkmark$	W							
	Gender Determination	$\checkmark$	Customer Declared				Not Verif	ied		

**26.** Click the Save Bave button.

You must click Save to trigger an alert for the State Specialist.



					Saved Searches	5 ×	Go Advanced 📋					
	Potential Duplicate R	Report					🖸 Back 👻 🖸 👻					
Home	Search Parameters											
Worklist	Service Cent	er: 66018		-								
Pusinosa Partner	Individual/Busine	SS: Individual		•								
Business Farmer	Creation Da	ite:		1								
Farm Records												
Product Master			Search Clear									
Descriptions												
Recent Items												
7 BEN PIERCE												
MIKE M BRADY	Potential Duplicate Records											
BRADY BUNCH MIKE BRADY							u 🖬 4					
	Group ID B	usinessPartner	Full Name	Similarity in %	Address	Date Of Birth	Changed on					
	0000007115 80	00028399	BENJAMIN PIER	95.0	BENJAMIN / 1 WI	01/28/1968	09/12/2014					
	0000007115 80	000028423	BEN PIERCE	95.0	BENNIE H	01/28/1968	09/10/2014					
	0000007121 80	000028484	WOODY WOOD	94.0	WOODY / 17604	01/02/1950	09/04/2014					
	0000007121 80	000028486	WOODROW W	94.0	WOODROW / 17	01/02/1950						
	0000007122 80	000028479	MR ERNEST RO	94.0	ERNEST / 711 H	07/11/1958	09/04/2014					
	0000007122 80	000028483	MR ROBERT E	94.0	ROBERT / 711 H	07/11/1958						
	0000007123 80	000028488	WILL GIBBONS	94.0	WILL / 9841 CO	09/02/1969	09/08/2014					
	0000007123 80	000028503	WILLIAM GIBBONS	94.0	WILLIAM / 12011	09/02/1969						

27. Click the Clear Clear button. You have completed the transaction.



Clear the search criteria to begin a new query.



Result

You have successfully run the Potential Duplicate Report.