

**Introduction** This quick help guide contains instructions on how to create a new individual customer record in the SAP Customer Relationship Management System (CRMS).

**Role required** You need to be logged on as an Advisor to perform this task.

**Before you begin** Before creating a new customer record in CRMS, you must:

- Perform a search to ensure that no prior record exists for this customer.
- Ensure you have a clear top portion of your screen. If the previous customer is displayed, click the **End** button.



**Procedure** **Step 1:** In the Customer Search screen, select the **Individual Account** tab and click the **New** button.



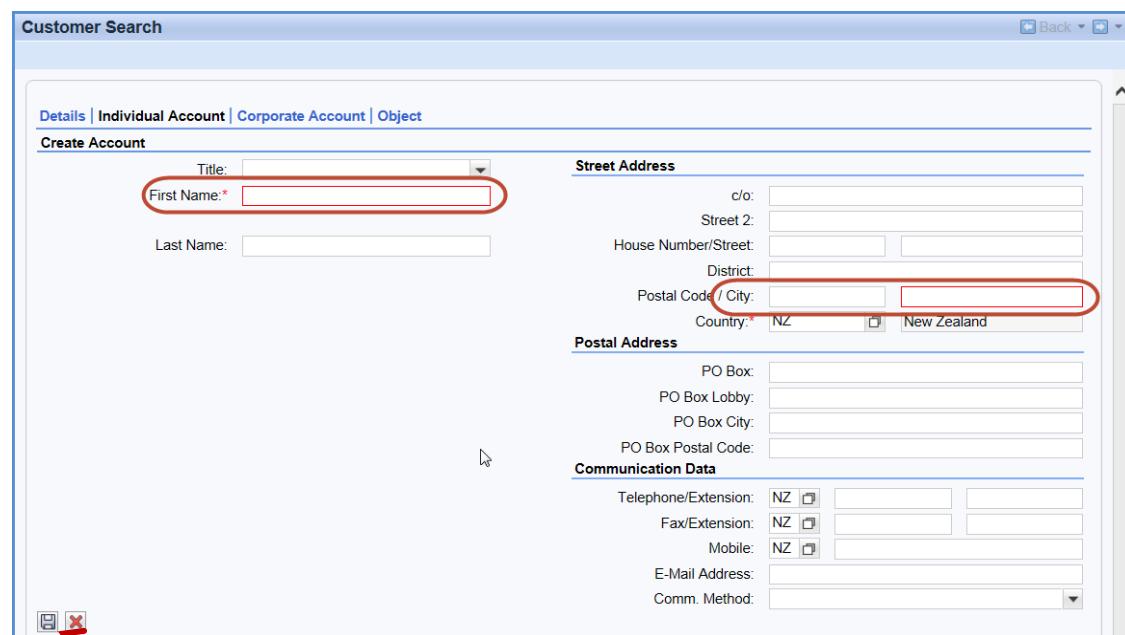
**Result:** The Customer Search screen re-displays with additional fields to be entered.

*Continued on next page*

### Procedure, continued

**Step 2:** Enter as many details as possible into the available fields.

**Note:** **First Name** and **City** are mandatory fields. If the customer wishes to remain anonymous, type “Anonymous” into the first name field.

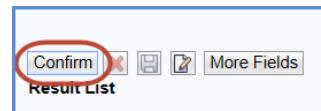


The screenshot shows the SAP Customer Search interface. The 'Create Account' tab is selected. The 'First Name' field is highlighted with a red circle. The 'Postal Code / City' field is also highlighted with a red circle. At the bottom left, there is a 'Save' button (a blue square with a white 'S') and a 'Cancel' button (a red square with a white 'X'). A red arrow points from the 'Save' button towards the 'First Name' field.

**Step 3:** Click the **Save**  button near the bottom left of the Customer Search screen.

**Result:** The record is saved and a customer ID is created.

**Step 4:** Click the **Confirm** button.



The screenshot shows the SAP Result List screen. At the bottom left, there is a 'Confirm' button (circled in red), a 'Cancel' button (a red square with a white 'X'), a 'Print' button (a blue square with a white printer icon), a 'More Fields' button (a blue square with a white checkmark icon), and a 'Result List' button (a blue square with a white list icon).

**Result:** Customer record is selected, the name displays in the header details and in the **Confirmed Partners** assignment block.

*Continued on next page*

**Procedure,  
continued**

**SAP Interaction Center**

Customer Search

Customer Interaction (circled in red)

Customer Search

Customer Overview

Customer Interaction

Grouped Interaction

Knowledge Article

E-Mail

Inbox

E-Mail Inbox

Cust. Interaction S...

Grouped Interaction...

Monitor Report

Action Monitor

Mr. John Peters

End

Customer Search

Details | Individual Account | Corporate Account | Object

Account: John Peters

Street Address

c/o:   
Street 2:   
House Number: 126 Cook Street  
District:   
Postal Code/City: Auckland  
Country: NZ New Zealand

Postal Address

PO Box:   
PO Box Lobby:   
PO Box City:   
PO Box Postal:

Communication Data

Telephone:   
Fax:   
Mobile: +64 (21) 658 9233  
E-Mail Address:   
Comm. Method:

Confirm  More Fields

Result List

Actions							Account	Account ID	St

Confirmed Partners

Update

Actions	Account	Accou...	Street	P...	City	Partner Function
<input type="button"/> Fact Shee...	John Peters	4021614	Cook...	Auc...	Main Partner	<input type="button"/>

**Step 5:** In the navigation bar, select 'Customer Interaction'.

**SAP Interaction Center**

Customer Search

Customer Overview

**Customer Interaction** (circled in red)

Grouped Interaction

Knowledge Article

E-Mail

Inbox

E-Mail Inbox

Cust. Interaction S...

Grouped Interaction...

Monitor Report

Action Monitor

End

Customer Search

Details | Individual Account | Corporate Account | Object

Customer (Firs..)  
Customer (Las..)

Search Account

Result List

Actions	Account	Accou...	Street	P...	City	Partner Function
<input type="button"/> Fact Shee...	John Peters	4021614	Cook...	Auc...	Main Partner	<input type="button"/>

See: SAP CRMS Create Customer Interaction Quick Help Guide.



# Quick Help Guide

## SAP CRMS Create Customer – Individual

---

---

