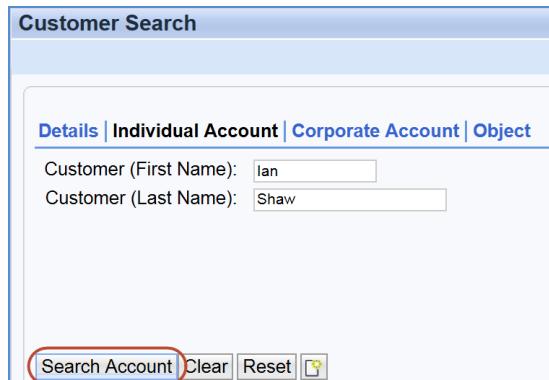


**Introduction** This quick help guide provides details to record a Customer Interaction where the issue has been reported by a third party.

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

**Interaction reported by a third party process**

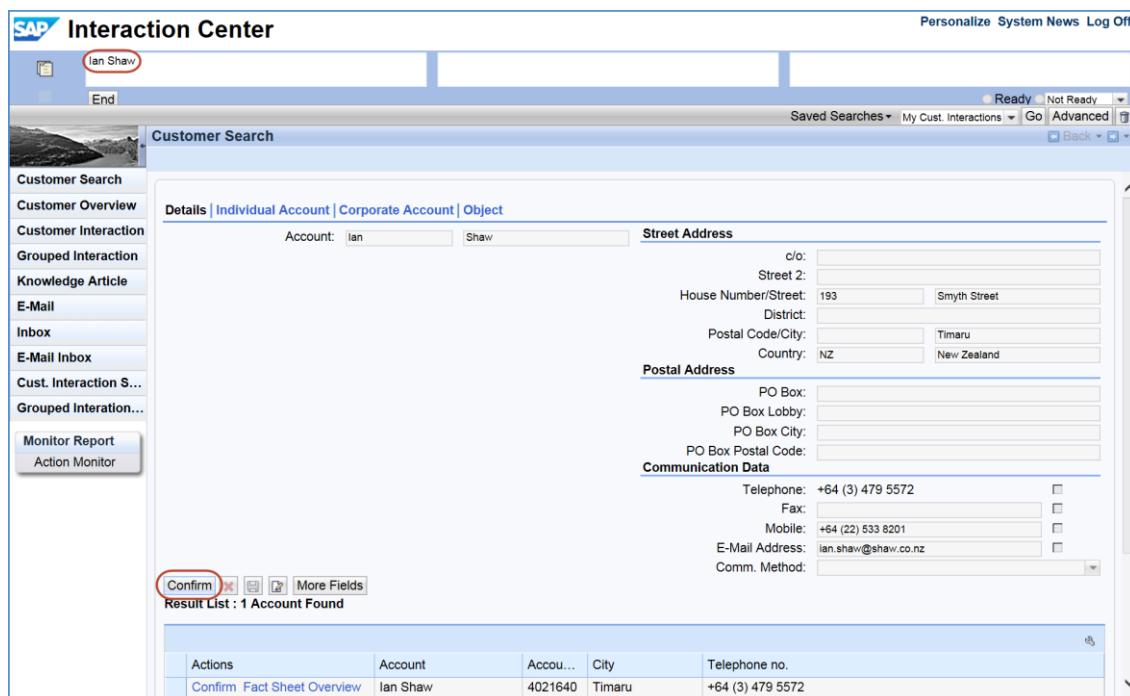
**Step 1:** Search for the person affected by the Interaction (this is NOT the person that initiated the contact/Interaction). Create the customer account if required.



The dialog box is titled 'Customer Search'. It has tabs for 'Details', 'Individual Account', 'Corporate Account', and 'Object'. The 'Individual Account' tab is selected. It contains fields for 'Customer (First Name)' (Ian) and 'Customer (Last Name)' (Shaw). At the bottom are buttons for 'Search Account' (which is circled in red), 'Clear', 'Reset', and a help icon.

**See:** HNO CRMS Create Customer Individual Quick Help Guide.

**Step 2:** Click **Confirm** so that the affected partner's details are displayed in the top portion of the screen.

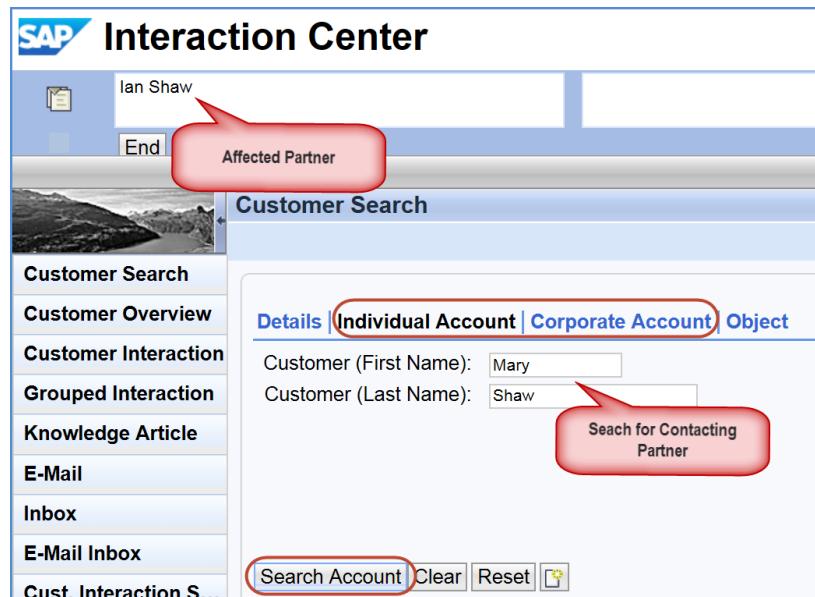


The dialog box is titled 'SAP Interaction Center'. The top navigation bar includes 'Personalize', 'System News', and 'Log Off'. The left sidebar has links for 'Customer Search', 'Customer Overview', 'Customer Interaction', 'Grouped Interaction', 'Knowledge Article', 'E-Mail', 'Inbox', 'E-Mail Inbox', 'Cust. Interaction S...', 'Grouped Interation...', 'Monitor Report', and 'Action Monitor'. The main area is titled 'Customer Search' and shows a 'Details' tab with 'Account: Ian Shaw'. It includes sections for 'Street Address' (c/o: [redacted], Street 2: [redacted], House Number/Street: 193, District: [redacted], Postal Code/City: [redacted], Country: NZ, New Zealand) and 'Postal Address' (PO Box: [redacted], PO Box Lobby: [redacted], PO Box City: [redacted], PO Box Postal Code: [redacted]). The 'Communication Data' section includes fields for Telephone, Fax, Mobile, E-Mail Address (ian.shaw@shaw.co.nz), and Comm. Method. At the bottom, there are buttons for 'Confirm' (circled in red), 'More Fields', and a table showing the result: 'Result List : 1 Account Found' with one row for 'Ian Shaw'.

Continued on next page

Interaction reported by a third party process, continued

**Step 3:** Click either **Individual Account** or **Corporate Account** and search and enter the details of the person making contact.



**SAP Interaction Center**

**Affected Partner**

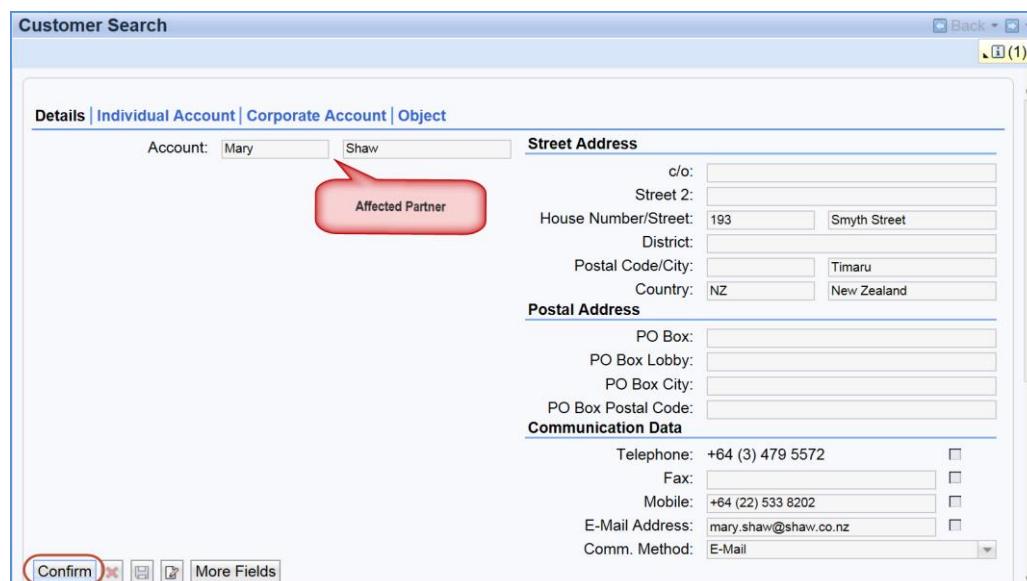
**Customer Search**

**Details | Individual Account | Corporate Account | Object**

Customer (First Name):  Customer (Last Name):  **Search for Contacting Partner**

**Search Account | Clear | Reset | **

**Step 4:** Search and if necessary, create the record. **Confirm** the partner's details.



**Customer Search**

**Details | Individual Account | Corporate Account | Object**

Account:  Shaw **Affected Partner**

**Street Address**

c/o:   
Street 2:   
House Number/Street:  Smyth Street  
District:   
Postal Code/City:  Timaru  
Country:  New Zealand

**Postal Address**

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

**Communication Data**

Telephone: +64 (3) 479 5572   
Fax:    
Mobile: +64 (22) 533 8202   
E-Mail Address:    
Comm. Method:

**Confirm**    

**Result:** The reported by details are shown in the **Confirmed Partners** section.

*Continued on next page*

Interaction  
reported by a  
third party  
process,  
*continued*

**Step 5:** On the **Confirmed Partners** section of the screen, in the **Partner Function** row, select from the drop down list **Reporter (on behalf)**.

Confirmed Partners					
Update				Main Partner	City
	Actions	Account	Account ID	Contact Partner	
▷	 Fact Sheet Overview	Ian Shaw	4021640	<b>Reporter (on behalf)</b>	Timaru
▷	 Fact Sheet Overview	Mary Shaw	4021720		▼ Timaru

**Step 6:** Click **Update**.

Confirmed Partners					
Update					
	Actions	Account	Account ID	Partner Function	City
▷	 Fact Sheet Overview	Ian Shaw	4021640	Main Partner	▼ Timaru
▷	 Fact Sheet Overview	Mary Shaw	4021720		▼ Timaru

**Result:** Details are updated.

**Step 7:** Create the Interaction.

**See:** HNO CRMS Create Customer Interaction Quick Help Guide.