

Quick Help Guide

SAP CRMS Select a Related Individual to a Corporate Customer

Introduction This quick help guide contains details to create a new corporate (non-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.

Procedure When selecting the corporate account to record a customer interaction against:

Step 1: Search for and confirm the **Corporate Account**.



The screenshot shows the SAP Customer Search interface. The search bar at the top has 'Organisation: Pacific Haulage*' highlighted with a red oval. Below the search bar, there are fields for 'First Name/Last Name' and address details (House Number/Street, City, Postal Code, Country, Telephone, E-Mail Address, Customer Interaction ID). At the bottom of the search bar are buttons for 'Search Account' (highlighted with a red oval), 'Clear', 'Reset', and a magnifying glass icon.

Result: A list of contacts will display in the **Result List** section.



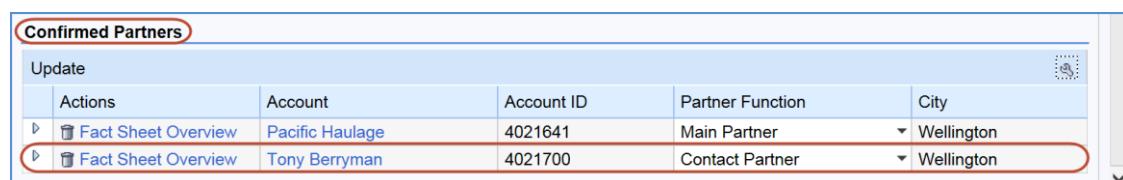
The screenshot shows the SAP Result List interface. The title bar says 'Result List :1 Account Found | 2 Related Partners Found'. The list table has columns for 'Actions', 'Contact Person', 'Function', 'Telephone', and 'E-Mail Address'. Two rows are shown: one for 'Sarah Billington' (Personal Assistant, 022 472 6659, sbillington@pacifichaulage.co.nz) and one for 'Tony Berryman' (Marketing Manager, 027 889 3746, tberryman@pacifichaulage.co.nz). The 'Contact Person' column for both rows is highlighted with a red oval.

Step 2: In the **Result List** section click **Confirm** alongside the contact applicable to the interaction.



The screenshot shows the SAP Result List interface again. The title bar says 'Result List :1 Account Found | 2 Related Partners Found'. The list table has columns for 'Actions', 'Contact Person', 'Function', 'Telephone', and 'E-Mail Address'. Two rows are shown: one for 'Sarah Billington' (Personal Assistant, 022 472 6659, sbillington@pacifichaulage.co.nz) and one for 'Tony Berryman' (Marketing Manager, 027 889 3746, tberryman@pacifichaulage.co.nz). The 'Actions' column for 'Tony Berryman' is highlighted with a red oval, and the 'Confirm' button is highlighted with a red oval.

Result: A new line appears in the **Confirmed Partners** assignment block which contains the selected business partner.



The screenshot shows the SAP Confirmed Partners interface. The title bar says 'Confirmed Partners'. The list table has columns for 'Actions', 'Account', 'Account ID', 'Partner Function', and 'City'. Two rows are shown: one for 'Pacific Haulage' (4021641, Main Partner, Wellington) and one for 'Tony Berryman' (4021700, Contact Partner, Wellington). The 'Actions' column for 'Tony Berryman' is highlighted with a red oval.

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Procedure, continued

Step 3: In the **Confirmed Partners** section select the name of the partner.

Confirmed Partners				
Update				
Actions	Account	Account ID	Partner Function	City
Fact Sheet Overview	Pacific Haulage	4021641	Main Partner	Wellington
Fact Sheet Overview	Tony Berryman	4021700	Contact Partner	Wellington

Result: Their selected partner's details are displayed on the screen.

Customer Search

Details | Individual Account | Corporate Account | Object

First Name / Last Name: Tony Berryman	Street Address
	c/o: <input type="text"/>
	Street 2: <input type="text"/>
	Street/House Number: Stafford Street <input type="text"/> 12
	District: <input type="text"/>
	Postal Code/City: 4475 <input type="text"/> Wellington
	Country: NZ <input type="text"/> New Zealand
	Postal Address
	PO Box: 2526
	PO Box Lobby: <input type="text"/>
	PO Box City: Wellington Central
	PO Box Post Code: 4475
	Communication Data
	Telephone: +64 (22) 982 5744
	Fax number: <input type="text"/>
	E-Mail Address: tberryman@pacifichaulage.co.nz

Confirm Related More Fields

Result List :1 Account Found | 1 Related Partner Found

Actions	Account	Account ID	Street	Postal Code	City	Telephone/Exten...
Confirm Fact She...	Tony Berryman	4021700	Stafford Street	4475	Wellington	022 982 5744

Confirmed Partners

Update

Actions	Account	Account ID	Partner Function	City
Fact Sheet Overview	Pacific Haulage	4021641	Main Partner	Wellington
Fact Sheet Overview	Tony Berryman	4021700	Contact Partner	Wellington

Step 4: In the navigation bar select 'Customer Interaction'.

Customer Search
Customer Overview
Customer Interaction
Grouped Interaction
Knowledge Article
E-Mail
Inbox
E-Mail Inbox
Cust. Interaction S...
Grouped Interation...
Monitor Report
Action Monitor

See: HNO CRMS Create Customer Individual Quick Help Guide.