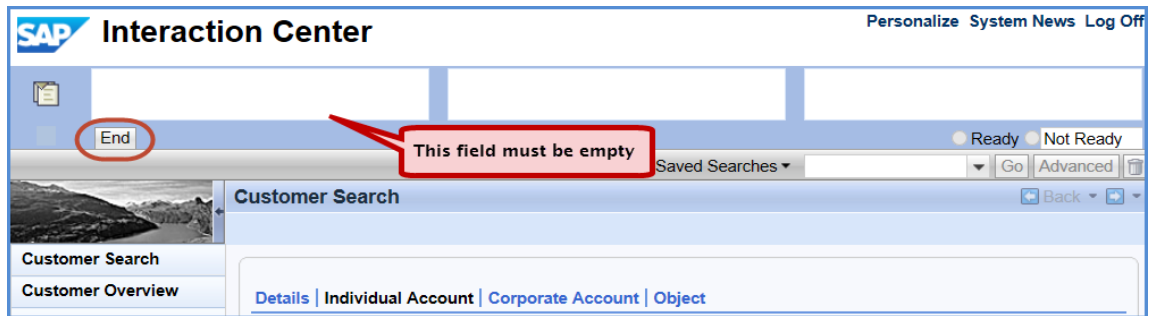


Introduction This quick help guide contains instructions on how to create a new individual customer record in the SAP Customer Relationship Management System (CRMS).

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.

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.

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

Interaction Center Personalize System News Log Off

Mr. John Peters

End Ready Not Ready

Customer Search Saved Searches Calls assigned to me Go Advanced

Customer Search

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

Details | Individual Account | Corporate Account | Object

Account: John Peters **Street Address**

c/o:
Street 2:
House Numbe... 126 Cook Street
District:
Postal Code/C... 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 |
|--------------|-------------|----------|---------|------|--------|------------------|
| Fact Shee... | John Peters | 4021614 | Cook... | | Auc... | Main Partner |

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

Interaction Center

End

Customer Search

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

Details | Individu

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

Search Account

Result List

Actions

See: SAP CRMS Create Customer Interaction Quick Help Guide.



Quick Help Guide

SAP CRMS Create Customer – Individual

