Quick Help Guide
SAP CRMS Create Customer – Individual

Introduction

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

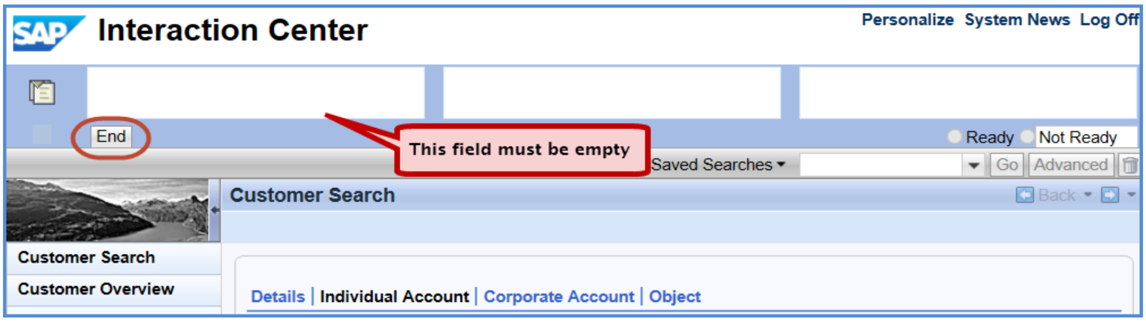
Role required

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

Before you begin

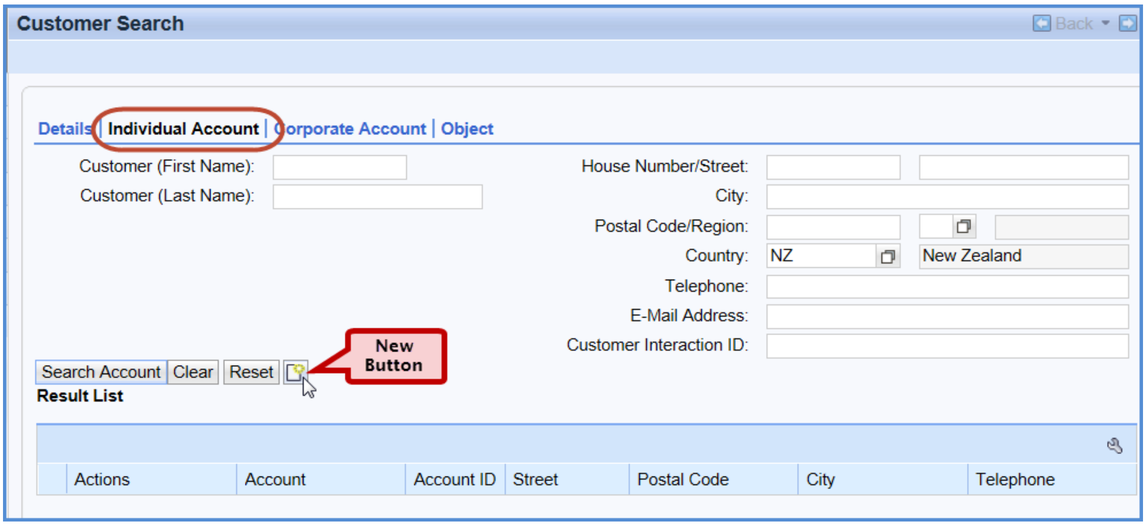
Before creating a new customer record in CRMS, you must:

- 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.



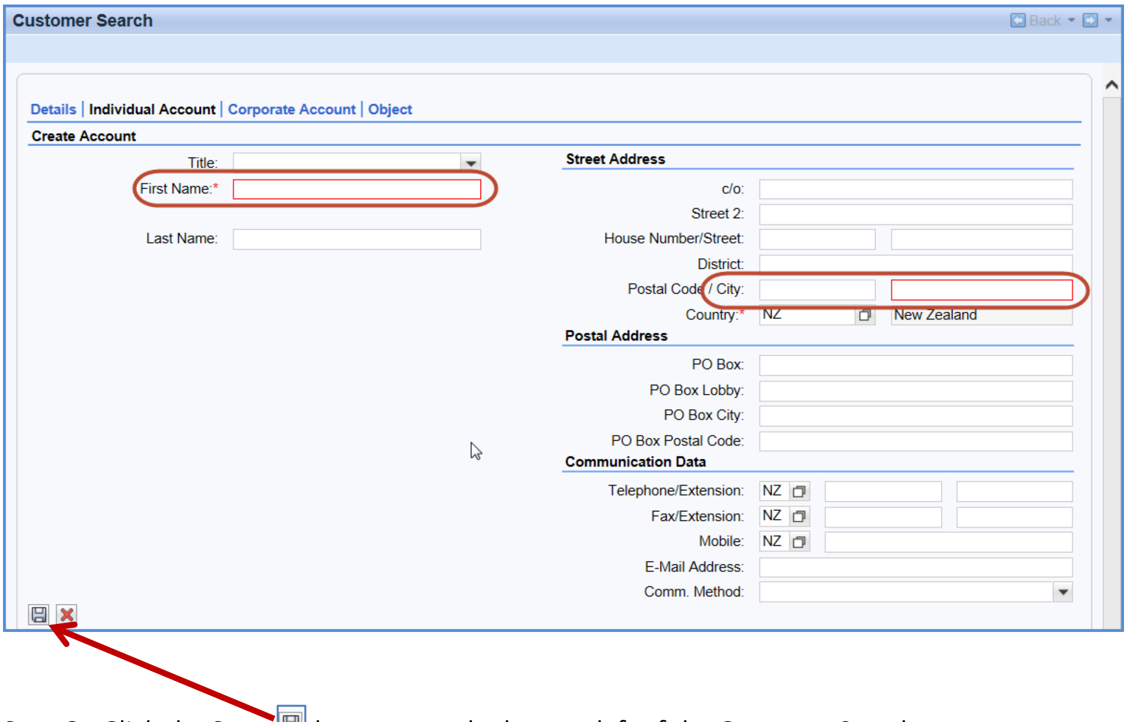
Result: The Customer Search screen re-displays with additional fields to be entered.

Continued on next page

Procedure, *continued*

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

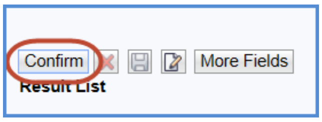
Note: **First Name** and **City** are mandatory fields. If the customer wishes to remain anonymous, type “Anonymous” into the first name field.



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.

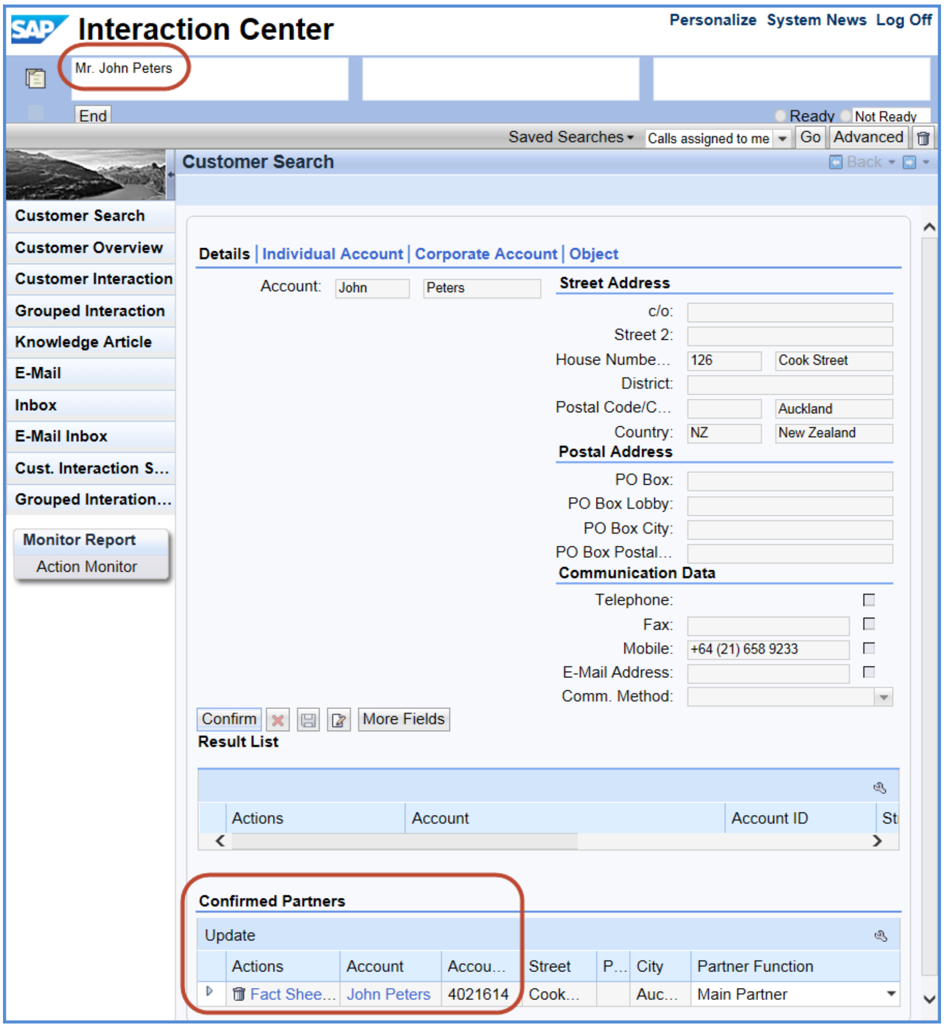
Step 4: Click the **Confirm** button.



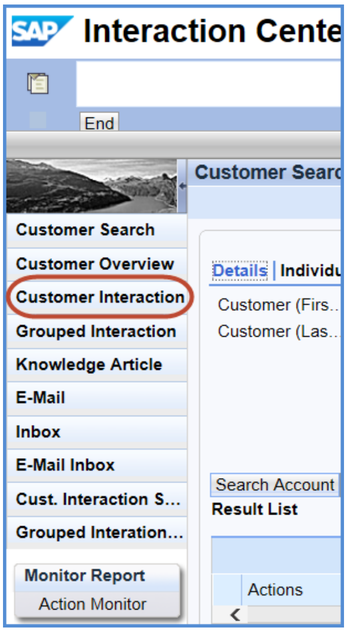
Result: Customer record is selected, the name displays in the header details and in the **Confirmed Partners** assigment block.

Continued on next page

Procedure,
continued



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



See: SAP CRMS Create Customer Interaction Quick Help Guide.