

Introduction This quick help guide contains steps to manage customer details (Individual and Corporate Customers) in the Customer Relationship Management System (CRMS).

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

Manage customer details (individual)

Locating an Individual Customer

Step 1: Locate and select the customer using the **Customer Search**.

See: HNO CRMS Customer Search Quick Help Guide.

Step 2: Click **Confirm** to select the customer to manage.

Result List : 4 Accounts Found

Actions	Account	Accou...	Street	City
Confirm Fact Sheet Overview	Rach and Andy Mitchell	4009383	Western Bay Road	Mangakino
Confirm Fact Sheet Overview	Mr. Rob Mitchell	4019262		Turangi
Confirm Fact Sheet Overview	Rosealee Mitchell	4002251	Long Valley Road	Havelock
Confirm Fact Sheet Overview	Mr. Ryan Mitchell	4021576	Grey Street	Palmerston North

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Manage customer details (individual),
continued

Step 3: Click the **Edit** button. The page will redisplay with details in edit mode.

Customer Search [Back] (1)

Details | Individual Account | Corporate Account | Object

Account: Ryan Mitchell **Street Address**

c/o:

Street 2:

House Number/Street: 65 Grey Street

District:

Postal Code/City: Palmerston North

Country: NZ New Zealand

Postal Address

PO Box: 1122

PO Box Lobby:

PO Box City:

PO Box Postal Code: 4410

Communication Data

Telephone: +64 (6) 356 8872

Fax:

Mobile: +64 (22) 644 9921

E-Mail Address: ryan.mitchell@mitchellindustries.co.nz

Comm. Method: E-Mail

Confirm [X] [Print] [Edit] More Fields

Result List : 4 Accounts Found

Step 4: Make the necessary changes and click the **Save** button.

Customer Search [Back] (1)

Details | Individual Account | Corporate Account | Object

Account: Ryan Mitchell **Street Address**

c/o:

Street 2:

House Number/Street: 65 Grey Street

District:

Postal Code/City: Palmerston North

Country: NZ New Zealand

Postal Address

PO Box: 1122

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PO Box City: Palmerston North

PO Box Postal Code: 4410

Communication Data

Telephone/Extension: NZ 06 356 8872

Fax/Extension: NZ

Mobile: NZ 022 644 9921

E-Mail Address: ryan.mitchell@mitchellindustries.co.nz

Comm. Method: E-Mail

Confirm [X] [Print] [Save] More Fields

Result List : 4 Accounts Found

Result: The Customer's details are updated.

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Manage customer details (corporate)

Locating a Corporate Customer

Step 1: Locate and select the customer using the **Customer Search**.

Step 2: Click **Confirm** to select the contact person to manage.

Result List :1 Account Found | 2 Related Partners Found

Has Contact Person

Actions	Contact Person	Function	Telephone
Confirm Fact Sheet Overview	Sarah Billington	Personal Assistant	022 472 6659
Confirm Fact Sheet Overview	Tony Berryman	Marketing Manager	027 889 3746

Step 3: Click the **Edit** button. The page will re-display with details in edit mode.

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Manage customer details (corporate), continued

Step 4: Click the **Edit** button. The page will re-display with details in edit mode.

Customer Search Back

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

<p>Account:* Pacific Haulage</p> <p>First Name/Last Name:* Tony Berryman</p> <p>Function: 0010 Marketing Manager</p> <p>Department:</p>	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p style="text-align: center; color: #c00000; font-weight: bold;">Update Any Relevant Fields</p> </div> <p>Street Address</p> <p>c/o:</p> <p>Street 2:</p> <p>House Number/Street:</p> <p>District:</p> <p>Postal Code/City: Wellington</p> <p>Country:* NZ New Zealand</p> <p>Postal Address</p> <p>PO Box:</p> <p>PO Box Lobby:</p> <p>PO Box City:</p> <p>PO box post cde:</p> <p>Communication Data</p> <p>Contact Info For: Contact Person</p> <p>Telephone/Extension: NZ 027 889 3746</p> <p>Fax/Extension:</p> <p>Mobile:</p> <p>E-Mail Address: tberryman@pacifichaulage.co.nz</p>
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Confirm
Related
More Fields

Click to Save Changes