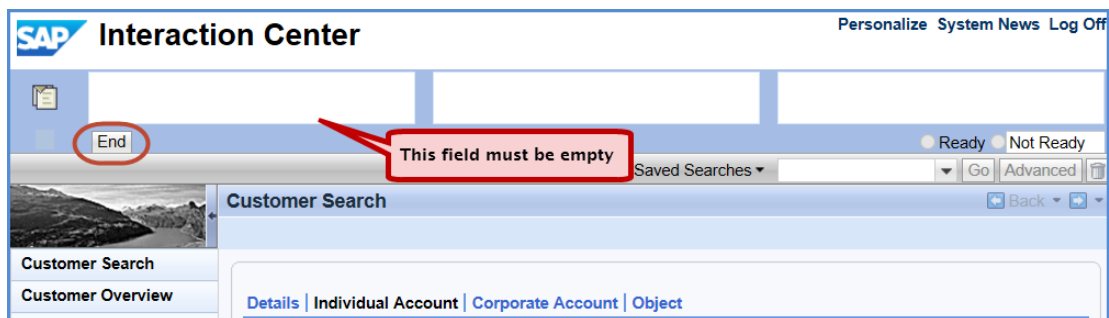


**Introduction** This quick help guide contains details to create a new corporate (non-individual) customer record in the SAP Customer Relationship Management System (CRMS).

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

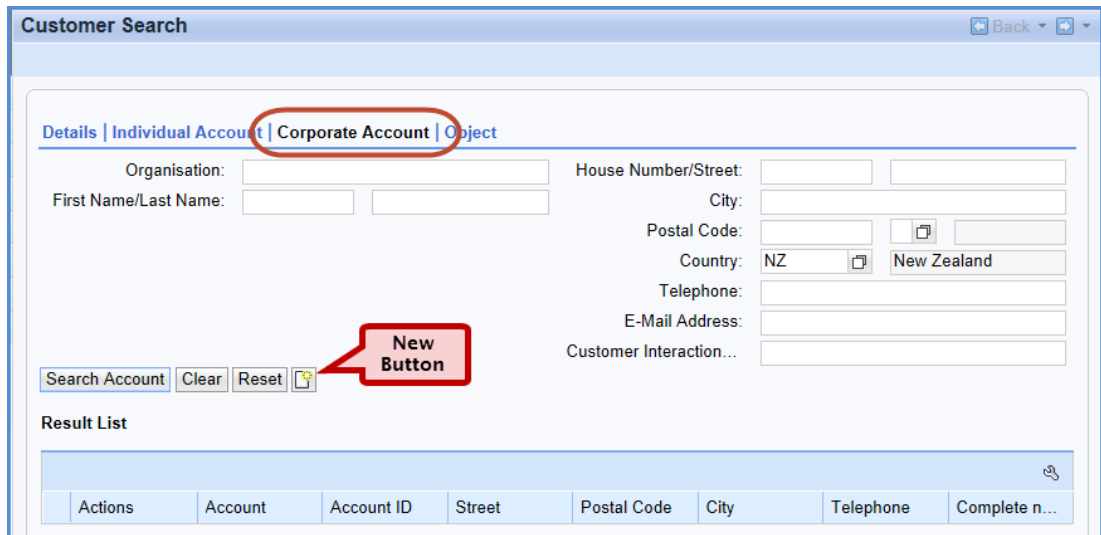
**Before you begin** Before creating a new customer record in CRMS, you must:

- 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** The following procedure describes how to create a corporate customer and its related partners.

**Step 1:** In the Customer Search screen, select the **Corporate 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.

- **Organisation's name** and **City** are mandatory fields.
- You can use the Scratch Pad to copy details from an organisation's web page.

The screenshot shows the 'Customer Search' window with the 'Create Account' tab selected. The 'Organisation' field is highlighted with a red circle. The 'City' field is also highlighted with a red circle. A red arrow points to the 'Save' button (floppy disk icon) located at the bottom left of the form. The form includes sections for 'Street Address', 'Postal Address', and 'Communication Data'.

**Step 3:** Click the **Save** button near the bottom left of the Customer Search screen.

**Result:** The record is saved and a corporate customer is created.

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

The screenshot shows a row of buttons: 'Confirm', 'Save', 'Copy', and 'More Fields'. The 'Confirm' button is circled in red. Below the buttons, the text 'Result List' is visible.

**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

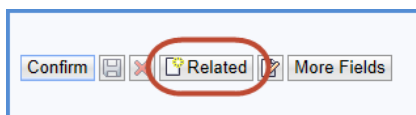
The screenshot shows the SAP Interaction Center interface. At the top, there is a navigation bar with 'SAP Interaction Center' and 'Personalize System News Log Off'. Below this is a search bar containing 'Mainly Motors' (circled in red). The main area is titled 'Customer Search' and contains a 'Details' tab. The 'Details' tab is divided into several sections: 'Account' (Mainly Motors), 'Street Address' (c/o, Street 2, House Number/... 18 Wigan Street, District, Postal Code/City: Wellington, Country: NZ New Zealand), 'Postal Address' (PO Box, PO Box Lobby, PO Box City, PO box post cde), and 'Communication Data' (Contact Info For: Account, Telephone: +64 (4) 913 6285, Fax, Mobile, E-Mail Address, Website, Comm. Method). Below these sections are buttons for 'Confirm', 'Related', and 'More Fields'. A 'Result List' table is shown below, with columns for Actions, Account, Account ID, Street, and Postal Cc. The 'Confirmed Partners' section is also visible, with a table containing columns for Actions, Account, Account ID, Street, P..., City, and Partner Function. The 'Related' button in the 'Confirmed Partners' section is circled in red.

**Step 5:** Do you have a customer's name to record contact name details?

If **yes**, go to Step 6.

If **no**, click the activity required – eg Customer Interaction or Grouped Interaction.

**Step 6:** Click the **Related** button.



**Result:** The Create Contact Person screen displays.

*Continued on next page*

**Procedure,**  
*continued*

**Step 7:** Enter the details of the related contact person. Minimum is first and last name.

- **First Name** and **Last Name** are mandatory fields.

**Customer Search** [Back] (1)

**Details** | [Individual Account](#) | [Corporate Account](#) | [Object](#)

**Create Contact Person**

Relations... Has Contact Person Telephone: [ ] [ ]  
 Partner C... Individual Account Fax: [ ] [ ]  
 Partner R... Contact Person E-Mail Ad... [ ]  
 ID: [ ] [ ]  
 Title: [ ]  
**First Nam...** [ ] [ ]  
 Function: [ ] [ ]  
 Departme... [ ] [ ]  
 VIP: [ ]

[ ] [X] Reset

**Result List : 1 Account Found | 0 Related Partner Found**

Has Contact Person [ ]

Actions	Contact Person	Function	Telephone	E-Mail Address
[ ]	[ ]	[ ]	[ ]	[ ]

**Confirmed Partners**

Update [ ]

Actions	Account	Account ID	Street	P...	City	Partner Function
[ ]	Mainly Motors	4021615	Wigan...		Welli...	Main Partner

**Note:** The details have NOT yet been added to the corporate record.

*Continued on next page*

**Procedure,**  
*continued*

**Step 8:** Click the **Save** button.

**Result:** The contact details are displayed in the Related Partner section

Back ▾

### Customer Search

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

<p>Account: <input type="text" value="Mainly Motors"/></p> <p>First Name/Last...: <input type="text" value="Jackson"/> <input type="text" value="Mcdonald"/></p> <p>Function: <input type="text" value="0001"/> <input type="text" value="Executive Board"/></p> <p>Department: <input type="text"/></p>	<p><b>Street Address</b></p> <p>c/o: <input type="text"/></p> <p>Street 2: <input type="text"/></p> <p>House Number/...: <input type="text" value="18"/> <input type="text" value="Wigan Street"/></p> <p>District: <input type="text"/></p> <p>Postal Code/City: <input type="text"/> <input type="text" value="Wellington"/></p> <p>Country: <input type="text" value="NZ"/> <input type="text" value="New Zealand"/></p> <p><b>Postal Address</b></p> <p>PO Box: <input type="text"/></p> <p>PO Box Lobby: <input type="text"/></p> <p>PO Box City: <input type="text"/></p> <p>PO box post cde: <input type="text"/></p> <p><b>Communication Data</b></p> <p>Contact Info For: <input type="text" value="Contact Person"/></p> <p>Telephone: <input type="text" value="+64 (4) 913 6285"/></p> <p>Fax: <input type="text"/></p> <p>Mobile: <input type="text"/></p> <p>E-Mail Address: <input type="text"/></p>
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**Result List :1 Account Found | 1 Related Partner Found**

Actions	Account	Account ID	Street	Postal Code
<a href="#">Confirm</a> <a href="#">Fact Sheet O...</a>	Mr. Jackson McDonald	4021613	Hunter Street	

Confirmed Partners				
Update				
Acti...	Account	Account ID	Partner Function	City
<input type="button" value="Fa..."/>	Mainly Motors	4021615	Main Partner	Wellington

**Step 9:** Click the **Confirm** button.

**Result:** Contact details have been added to the corporate record. This is shown by the contact details displaying in the header and the Confirmed Partners assignment block.

*Continued on next page*

Procedure,  
continued

The screenshot shows the SAP Interaction Center interface. At the top, the account name 'Mainly Motors Jackson Mcdonald' is displayed and circled in red. Below this is the 'Customer Search' section with tabs for 'Details', 'Individual Account', 'Corporate Account', and 'Object'. The 'Details' tab is active, showing fields for Account, First Name/Last Name, Function, Department, Street Address, Postal Address, and Communication Data. A 'Result List' table is shown below, containing one entry for 'Jackson Mcdonald'. At the bottom, a 'Confirmed Partners' table is also circled in red, listing 'Mainly Motors' and 'Jackson Mcdonald' as partners.

Actions	Contact Person	Function	Telephone	E-Mail Address
Confirm	Jackson Mcdonald	Executive Board	04 913 6285	

Actions	Account	Account ID	Street	P...	City	Partner Function
Fact Sheet O...	Mainly Motors	4021615	Wigan S...		Wellin...	Main Partner
Fact Sheet O...	Jackson Mcd...	4021616				Contact Partner

**Step 10:** Do you want to record an interaction eg Customer Interaction or Grouped Interaction?

If **yes**, see SAP CRMS Create Customer Individual Quick Help Guide.

If **no**, click the **End** button to exit the current page and return to the Customer Search page.

This screenshot shows the left-hand navigation menu of the SAP Interaction Center. The 'End' button is circled in red, indicating the next step in the procedure. Other menu items include Customer Search, Customer Overview, Customer Interaction, Grouped Interaction, Knowledge Article, E-Mail, Inbox, E-Mail Inbox, Cust. Interaction S..., Grouped Interaction..., Monitor Report, and Action Monitor.

**Note:** A corporate account can have more than one contact associated to it. Repeat the above procedure from **Step 5** for each contact.

Continued on next page

**Selecting from multiple contacts**

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

**Step 1:** Search for and confirm the corporate account.

The screenshot shows the 'Customer Search' window with the 'Corporate Account' tab selected. The search criteria include 'Organisation: Mainly Motors'. The 'Result List' section shows one account found:

Actions	Account	Account ID	Street	Postal Code
Confirm Fact Shee...	Mainly Motors	4021615	Wigan Street	

Below the result list is the 'Confirmed Partners' section, which is currently empty.

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

**Step 2:** In the **Results List** section, click **Confirm** alongside the contact applicable for the interaction.

The screenshot shows the 'Customer Search' window with the 'Result List' section expanded. The 'Confirm' button is highlighted in green. The 'Result List' section shows two related partners found:

Actions	Contact Person	Function	Telephone	E-Mail Address
Confirm Fact Sheet Over...	Mr. Campbell McDonald	Financial Accounting Ma...	04 913 6285	
Confirm Fact Sheet Over...	Jackson Mcdonald	Executive Board	04 913 6285	

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

The screenshot shows the 'Confirmed Partners' table with the newly added partner highlighted in red:

A...	Account	Account ID	Partner Function	City
...	Campbell McDonald	4021610	Main Partner	Auckland
...	Jackson Mcdonald	4021616	Contact Partner	

*Continued on next page*

Selecting from multiple contacts, continued

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

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

**Customer Search** Back

[Details](#) | [Individual Account](#) | [Corporate Account](#) | [Object](#)

**Street Address**

c/o:

Street 2:

Street/House Number:

District:

Postal Code/City:

Country:

**Postal Address**

PO Box:

PO Box Lobby:

PO Box City:

PO Box Post Code:

**Communication Data**

Telephone:

Fax:

Mobile:

E-Mail Address:

**Result List : 1 Account Found | 1 Related Partner Found**

Actions	Account	Account ID	Street	Postal Code	City	Telephone/...	Extension
<a href="#">Confirm Fac...</a>	Mr. Campb...	4021610	Hunter Street		Auckland		

**Confirmed Partners**

Update

Actio...	Account	Account ID	Partner Function	City
▸ <a href="#">Fa...</a>	Mainly Motors	4021615	Main Partner	Wellington
▸ <a href="#">Fa...</a>	Campbell McDonald	4021610	Contact Partner	Auckland

**Step 4:** Click the activity required – eg Customer Interaction.