

Using Corporate Accounts

WHEN TO USE A CORPORATE ACCOUNT?

Corporate Accounts should be used when the Interaction relates to a non-individual person. For example, Corporate Account's should be used for the following:

- The police
- Fonterra requesting information about road requirements
- The Council
- A Member of Parliament requesting data
- Etc.

HOW TO USE A CORPORATE ACCOUNT?

Note: You must perform a search for the Corporate Account first before creating a new one.

If a new Corporate Account needs to be created:

1. Select Corporate Account
2. Complete the fields and Save the record
3. Search for the Corporate Account using Customer Search
4. Once located, select Confirm, the Corporate Account record will be displayed
5. Select Related, the Create Contact person page will be displayed
6. Complete details of the contact person for the organisation and, Save the record

Using Corporate Accounts

Customer Search Back

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

Create Account

Organisation: *

Street Address

c/o:

Street 2:

House Number/Street:

District:

Postal Code / City:

Country: * NZ New Zealand

Postal Address

PO Box:

PO Box Lobby:

PO Box City:

PO Box Postal Code:

Communication Data

Telephone/Extension: NZ

Fax/Extension: NZ

Mobile: NZ

E-Mail Address:

Website:

Comm. Method:

2 **Result List**

-
- 3** **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

Result List : 1 Account Found | 2 Related Partners Found

Has Contact Person

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

Using Corporate Accounts

7. When creating the Customer Interaction, the corporate customer will be automatically populated in the **Customer** field, if not, search for the customer to include on the Interaction

8. If the person calling about the Interaction is reporting an issue on behalf of the organisation, then the **Reported By** field must be used

9. Search for the reporting person to include. If the individual customer account record doesn't exist, a new one must be created

10. The **Reported By** person can be created the same way an Individual Account is created

11. Once the new **Reported By** record is created, add it to the Interaction page

Customer Interaction: New

Save | Cancel | Edit | New | New from Template | More+

Details

General Data

ID:

Description*:

8 Customer*: Pacific Haulage

9 Reported By: Tony Berryman

Employee Responsible: Louise Lucas

Service Team: Training

Service Request

Business Group*:

Category:

Sub-category:

Descriptor:

Processing Data

Status: Created

Auto E-Mail on Compl...

Source*:

Priority*:

Customer Call Back R...

Reason

Type*:

Sub-type:

Capacity: Member of Public

Location

Physical Address:

SH RS/RP:

Description*:

Dates

Event Date: 22.11.2016 09:08 AM

Request Start*: 22.11.2016 09:08 AM

Due Date:

Relationships

Customer Search

Details | Individual Account | Corporate Account

Customer (First Name):

Customer (Last Name):

Search Account Clear Reset **10**

Customer Interaction: New

Save | Cancel | Edit | New | New from Template | More+

Details

General Data

ID:

Description*:

Customer*:

Reported By:

Employee Responsible:

Service Team:

Processing Data

Status:

Auto E-Mail on Compl...

Source*:

Priority*:

Customer Call Back R...

Dates

Event Date:

Request Start*:

Search Criteria

Account ID is 4021641

Last Name is

First Name is

Employee Responsible ID is

Maximum Number of Results: 999,9

Search Clear Reset **11**

Result List: 2 Contacts Found

Name	Account	E-Mail	Phone
Tony Berryman	Pacific Haulage	tberryman@pacifichaulage.c...	+64 (27) 889 3746
Sarah Billington	Pacific Haulage	sbillington@pacifichaulage.c...	