Quick Help Guide

SAP CRMS Create Customer Interaction

Introduction

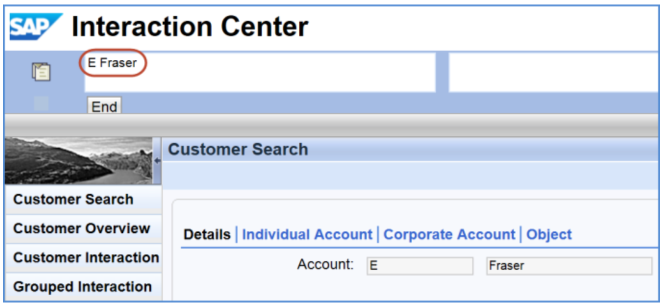
This quick help guide provides details to record a Customer Interaction.

Role required

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

Before you begin

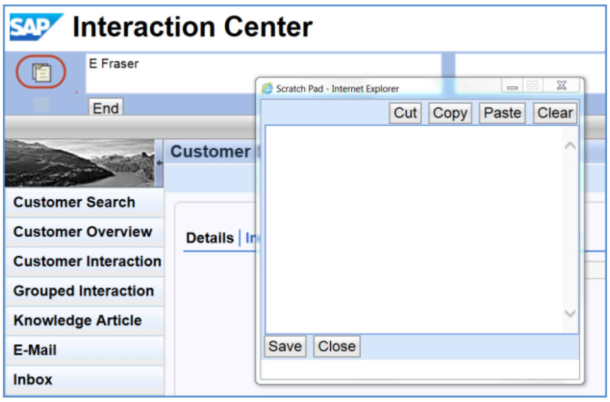
A customer search and confirmation must be performed. Customer details must be shown in the top left of the screen.



Scratch pad

While working in the customer interaction screens, a ‘scratch’ (note) pad is available throughout the entire process which can be used to make notes that can be imported into the interaction record.

To open the scratch pad, click the paper icon in the top portion of the screen alongside the confirmed customer name.



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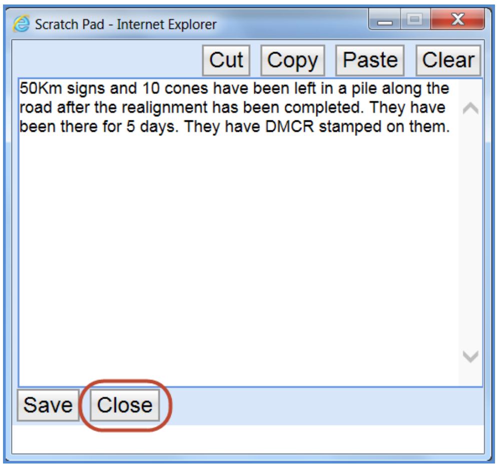
Scratch pad, *continued*

Enter any text relevant to the interaction. You can cut and copy this text into another document, or you can paste in text from another source.

When you have finished, click **Close** to close the pad.



Note: The scratch pad must be closed in order to import the information into a customer interaction record.

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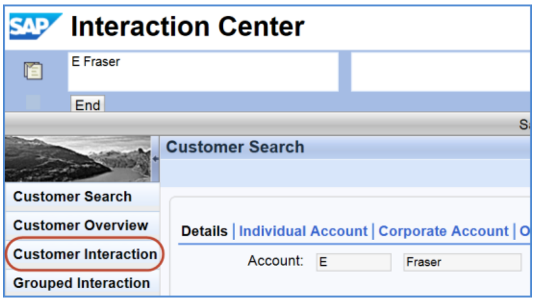
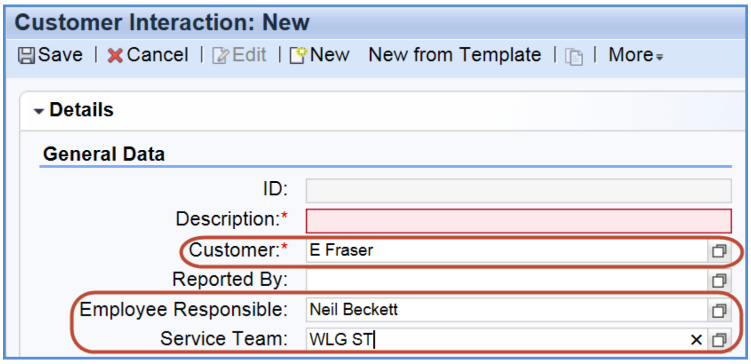
Create customer interaction procedure

Step 1: Ensure you have searched and confirmed an individual account or corporate account.

Step 2: Click **Customer Interaction**.



Result: The Customer Interaction: New screen displays. Customer name will be pre-populated from the customer details, your name and service team will be populated into the **Employee Responsible** and **Service Team** fields.



Note: For details on the Reported by field, refer to page 7 of this quick help guide.

Step 3: The following table contains descriptions of the fields available on the Customer Interaction page. Mandatory fields are identified with an asterisk. These are the minimum amount of information required to be captured to successfully create an interaction record.

Field	Description
General Data	
Description*	Enter a short description of the interaction which is like a 'title'.
Customer*	Will be pre-populated with the name of the confirmed customer as mentioned above. If you want to change the customer associated with the interaction you can can use the search button located at the right hand side of the field . **Note:** The customer's name will be validated and an error message will be displayed if the customer does not exist in CRMS, or if left blank.

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Create customer interaction procedure, *continued*

Step 3, ***continued***

Field	Description
Reported By	The person reporting the issue on behalf of the customer. This will auto fill if left blank in new interactions.
Employee Responsible	The employee responsible for the interaction is the person who will be auctioning the issue. This will default to your name. If you want to change the employee repsonsible you can use the search button located at the right hand side of the field . **Note**: The employee responsible will be validated and an error message will be displayed if invalid or left blank.
Service Team	The service team of which the employee responsible is a member. This will default to your Service Team. To change the service team either type the Service Team number or perform a search by clicking on the search button at the right hand side of the field . **Note:** The service team will be validated and an error message will be displayed if invalid or left blank. An error message will also be displayed if the service team is not associated with the selected employee responsible.
Service Request	
Business Group*	Select HNO from the dropdown list.
Category	Category of the Customer Interaction. Select one category from the dropdown list of categories.
Sub-category	List of sub-categories that give further details to the selected type above. This Sub-category will backfill the Category field if you choose to fill this in first.
Processing Data	
Status	The status of the Interaction. This defaults to Created. This can be changed by selecting another status from the drop down list. The status may change after filling in the other fields. Status cannot be changed back.

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Create customer interaction procedure, *continued*

Step 3, ***continued***

Field	Description
Auto E-Mail on Completion	When the status of the Interaction is changed to Resolved/Closed an automatic email can be generated and sent to the customer. Tick the box if the customer wishes to receive a confirmation email once the Interaction is Resolved/Closed. **Note:** A valid email address must be included in the customer record.
Source*	Where the interaction originated from. Select one source from the dropdown list.
Priority*	The priority of the interaction. Select one priority from the dropdown list. **Note**: If the Reason Type = Complaint, the priority will default to High (Response time 24Hrs).
Customer Call Back Required?	Indicates if and how the customer would like to receive feedback regarding the interaction.
Reason	
Type*	Reason for the customer to contact. Select one from the drop down list.
Sub-type	Specific reason for the customer to contact. The sub-types available are based on the selected Reason Type.
Capacity	The capacity of the customer. Select one capacity from the dropdown list.
Dates	
Event Date	The actual date of the event. This is defaulted to today's date and time. It can be changed to a specified date either by using the calendar or by inputting the date/time in the field.
Request Start*	The Request Start date is when the customer interaction is received by us. This automatically defaults to the day you create the customer interaction. **Note:** This can be changed by clicking on the calendar image and selecting new date or by inputting the date in the field.

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Create customer interaction procedure, *continued*

Step 3, ***continued***

Field	Description
Due Date	The date by which the customer must have received the initial response from us. This corresponds with the Priority but can be changed by clicking on the calendar image and selecting new date, or by inputting the date in the field. **Note:** If the Customer Call Back Required = No call back required, the **Due Date** field will not be populated.
Location	
Physical Address	If known, the physical address of the interaction concerned.
Description*	Free text field. Description of the **location** of the interaction concerned. **Note:** Do not paste the same information into the General Data: Description and Location: Description fields.
SH RS/RP	State Highway Reference Station/Reference Position.
Description*	Free text field. Description of the **location** of the interaction concerned. **Note:** Do not paste the same information into the General Data: Description and Location: Description fields.
Notes	
Type	Free text note area to include additional information. Select the Type of the note from the dropdown list of types. The default type is **Problem Description**.
Import Scratch Pad	Click to insert the information from the scratch pad. **Note:** The scratch pad must be closed in order for the information to be imported.
Relationships	
Related Grouped Interaction	This shows the Related Grouped Interaction number and description of that interaction if there is one associated to that particular interaction. You can also add a Grouped Interaction from here.
Related Knowledge Article	This shows a Knowledge Article attached to the interaction if there is one associated to that particular interaction.

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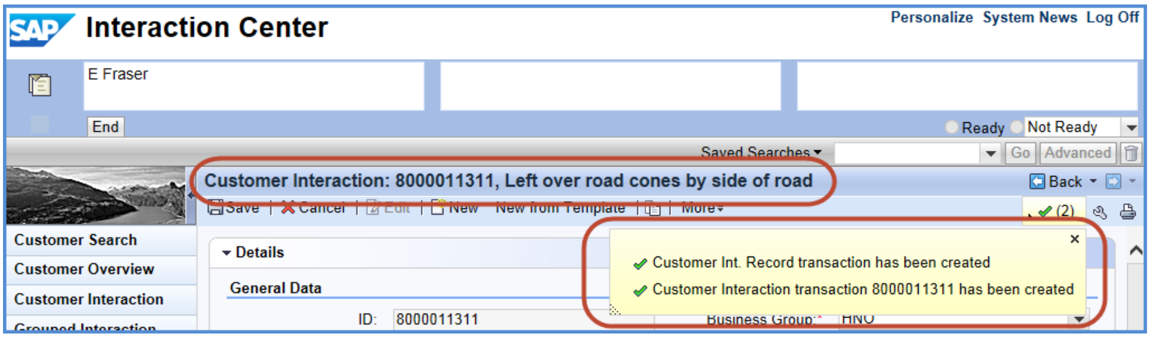
Create customer interaction procedure, *continued*

Step 4: Click **Save.**

Result: An interaction number is assigned. A confirmation message displays confirming the creation of the interaction.



Step 5: Do you wish to attach a knowledge article or other attachment to be emailed to the customer?

Note: The customer record must have an email address attached to attach a knowledge article.

If yes, see: SAP CRMS Create Knowledge Articles Quick Help Guide.

If no, procedure ends**.**