

**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.

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

**Step 1: Search for and confirm the Corporate Account.**

Customer Search

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

Organisation: Pacific Haulage\* x House Number/Street:

First Name/Last Name:  City:

Postal Code:  Country: NZ  New Zealand

Telephone:  E-Mail Address:

Customer Interaction ID:

**Search Account** Clear Reset

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

Result List :1 Account Found | 2 Related Partners Found

Has Contact Person

Actions	Contact Person	Function	Telephone	E-Mail Address
Confirm Fact Sheet Overview	Sarah Billington	Personal Assistant	022 472 6659	sbillington@pacifichaulage.co.nz
Confirm Fact Sheet Overview	Tony Berryman	Marketing Manager	027 889 3746	tberryman@pacifichaulage.co.nz

**Step 2:** In the **Result List** section click **Confirm** alongside the contact applicable to the interaction.

Result List :1 Account Found | 2 Related Partners Found

Has Contact Person

Actions	Contact Person	Function	Telephone	E-Mail Address
Confirm Fact Sheet Overview	Sarah Billington	Personal Assistant	022 472 6659	sbillington@pacifichaulage.co.nz
<b>Confirm</b> Fact Sheet Overview	Tony Berryman	Marketing Manager	027 889 3746	tberryman@pacifichaulage.co.nz

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

Confirmed Partners

Update

Actions	Account	Account ID	Partner Function	City
Fact Sheet Overview	Pacific Haulage	4021641	Main Partner	Wellington
Fact Sheet Overview	Tony Berryman	4021700	Contact Partner	Wellington

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Procedure, continued

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

Confirmed Partners				
Update				
Actions	Account	Account ID	Partner Function	City
Fact Sheet Overview	Pacific Haulage	4021641	Main Partner	Wellington
Fact Sheet Overview	<b>Tony Berryman</b>	4021700	Contact Partner	Wellington

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

**Customer Search** Back

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

First Name / Last Name: Tony Berryman **Street Address**

c/o:

Street 2:

Street/House Number: Stafford Street 12

District:

Postal Code/City: 4475 Wellington

Country: NZ New Zealand

**Postal Address**

PO Box: 2526

PO Box Lobby:

PO Box City: Wellington Central

PO Box Post Code: 4475

**Communication Data**

Telephone: +64 (22) 982 5744

Fax number:

E-Mail Address: tberryman@pacifichaulage.co.nz

Confirm

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

Actions	Account	Account ID	Street	Postal Code	City	Telephone/Exten...
Confirm Fact She...	Tony Berryman	4021700	Stafford Street	4475	Wellington	022 982 5744

**Confirmed Partners**

Update				
Actions	Account	Account ID	Partner Function	City
Fact Sheet Overview	Pacific Haulage	4021641	Main Partner	Wellington
Fact Sheet Overview	Tony Berryman	4021700	Contact Partner	Wellington

**Step 4:** In the navigation bar select 'Customer Interaction'.



**See:** HNO CRMS Create Customer Individual Quick Help Guide.