



SAP CRMS Create Saved Searches for Assigned Interactions

Introduction This quick help guide details how to create a saved search to identify interactions assigned to a Specific person Service team **Role required** You need to be logged on as an Advisor to perform this task. **Before you** Before creating a saved search: begin • Ensure you have a clear top portion of your screen • If the previous customer is displayed, click the End button Personalize System News Log Off SAPY Interaction Center M (End) Ready O Not Ready This Field Must Be Empty Saved Searches - My Cust. Interactions - Go Advanced **Customer Search Customer Search Customer Overview** Details | Individual Account | Corporate Account | Object

Saved search assigned for an employee procedure

Follow the steps below to create a saved search to locate interactions assigned to a specific person. **Step 1:** Click **Cust Interaction Search**.

SAPY Interact	tion Center				Personalize	System News Log	Off
End						Ready Not Ready	
				Saved Search	My Cust. Interactions	s 🕶 Go Advanced	Û
and the second second	Search: Customer Inte	racti	ions			🖸 Back 🝷 📘	3 -
Cano Cano Cano Cano Cano Cano Cano Cano	Archive Search						
Customer Search							
Customer Overview	Search Criteria					Hide Search Fields	
	Category	▼ is		•	0 0		
Customer Interaction	Customer Interaction ID	▼ is		•	00		
Grouped Interaction	Customer Interaction Descripti			•	0 0		
Knowledge Article	(Location) Description	▼ is		•	0 0		
	(Location) SH	▼ is	\$	•	0 0		
E-Mail	Posting Date (Time Frame)	▼ is	\$	•	0 0		
Inbox	User Status ID	▼ is	;	•	0 0		
E-Mail Inbox	Service Team	▼ is	;	•	0 0		
Cust. Interaction S			Maxin	num Number of Results	999,9		
Grouped Interation	Search Clear Save Sea	rch A	s:	□ Include View	Save		
Monitor Report	Result List						
Action Monitor		Tem	plate Create Fo	llow-Up		H H &	
	ID Custo	omer I	Inter Prio	Employee Respon	Service Team	Customer	~
Open Pon-un				·		8/11/2016 11:	:43

Result: The **Customer Interaction** screen displays.





SAP CRMS Create Saved Searches for Assigned Interactions

Saved search assigned for an employee procedure, *continued*

Step 2: Click the 'o' icon to add another search criteria.

Search Criteria				Hid	e Search Fields
Category	•	is	•	٥	0 •
Customer Interaction ID	•	is	•		0 0
Customer Interaction Descript	ic 🔻	is	•		0 0
(Location) Description	•	is	•		0 0
(Location) SH	•	is	•		0 0
Posting Date (Time Frame)	•	is	•	•	0 0
User Status ID	•	is	•	•	0 0
Service Team	•	is	•	đ	0 0

Result: An extra search criteria displays.

Note: Alternatively, click the 'o' icon to remove a search criteria.

Step 3: From the drop down box (for search criteria you've inserted), select **Employee Responsible ID**.

Search Criteria				Hide Sea	rch Fi	elds
Category	•	is	•	٥	• •	
Employee Responsible ID	-	is	-	đ	• •	
Category			•		• •	
Grouped Interaction ID		\sim	-		0 0	
Employee Responsible II	<u> </u>		-		0 0	
Customer Interaction De	scrip	otion	•		••	
(Location) Description			•		• •	
(Location) SH		\sim	-	-	00	
Posting Date (Time Fram	ie)	15	-	-	0 0	
Service Team	-	is	-	đ	• •	

Result: Employee Responsible ID displays as a search criteria.

Search Crite	eria						Hide Sea	rch	Fields
Category		•	is		•		000		
Employee Res	ponsible ID	Ŧ	is		•				
Customer In	Search: Partners Webpage Dia	alog	15				00		X
Customer Int	Search Criteria						Hide Search	Field	
(Location) De	Search Criteria	1					Hide Search	Fie	
(Location) SI	Last Name			•	is	•		0	•
Posting Date	First Name			•	is	Ŧ		0	•
User Status	User		-	•	is	Ŧ	ð	0	•
Service Tear	Service Team			•	is	•		0	•
					Μ	lax	timum Number of Results:	99	9,9
Search C	Search Clear		Reset						`

Result: The Search Partners window displays.





SAP CRMS Create Saved Searches for Assigned Interactions

Saved search assigned for an employee procedure, *continued*

Step 5: Type name details into the applicable fields and click **Search**. The more details entered, the more refined the search will be and the less results returned. At least one field must be entered.

Last Name		▼ is	S	- (Lucas		\supset	• •
First Name		▼ is	S	-				• •
User		▼ is	s	•			đ	• •
Service Team		▼ is	S	-				• •
Search Clear I	Reset			Maxi	mum Nur	nber of Res	ults: [999,9
	Reset			Maxi	mum Nur	nber of Resi	L	999,9
	Reset First name		Employee ID	Maxi		nber of Resi E-Mail	L	
Result List			Employee ID 4013854	1			[<u>n</u> ø

Result: Records matching the criteria are displayed in the **Result List** section.

Note: If you are not sure of the entire name use wildcards (*) before and/or after any characters you are sure of. E.g *Jo*n* will return John, Jon, Joan, Johnathan, Johnson etc.

Step 6: Select the line of the employee required.

ast Name	-	is	•	Lucas		0	•
irst Name	•	is	-			0	•
Jser	•	is	-		Ć	0	•
Service Team	-	is	-			0	•
Search Clear F	Reset		Max	mum Nu	mber of Result	s: 99	9,9
	Reset		Max	mum Nu	mber of Result	s: 99	9,9
	Reset	Employee ID	Max		mber of Result E-Mail		
Result List		Employee ID 4013854			1		Ľ

Result: The Employee Responsible ID field populates with the seleted Employee Responsible ID.





SAP CRMS Create Saved Searches for Assigned Interactions

Saved search Step 7: Type a name for the search into the Save Search As field and click Save. assigned to Search Criteria **Hide Search Fields** an employee procedure, Category 🔻 is -000 continued **4**021560 Employee Responsible ID 🔻 is 000 Customer Interaction ID 0 0 🔻 is Ŧ Customer Interaction Descriptic - is -00 (Location) Description 🔻 is Ŧ 0 0 (Location) SH ▼ is • 00 Posting Date (Time Frame) 🔻 is Ŧ - O O User Status ID 🔻 is - O O Ŧ Service Team 🔻 is -000 Maximum Number of Results: 999,9 Search Clear Save Search As: Calls assigned to me Include View Bave

Result: The search is saved. It will display in the list of saved searches at the top left of the **Search: Customer Interactions** screen.

SAP Intera	ction Center					Perso	nali	ze Sy	/stem News Log	Off
End									Ready Not Read	dy
				Saved S	ea	rches - Calls assign	ed t	o me	Go Advanced	Û
	Search: Customer	Intera	ctions						🖸 Back 🝷 🖸	- [
and the second s	Archive Search								<u>,</u> i((1)
Customer Search	Querral Quitante									~
Customer Overview	Search Criteria							н	ide Search Fields	
Customer Interactio	Category	•	is		•		0 (• •		
	Employee Responsible I	•	is		•	4021560		• •		
Grouped Interaction	Customer Interaction ID	-	is		-		(•		

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SAP CRMS Create Saved Searches for Assigned Interactions

Running a
saved
search

To run a saved search, select the search from the drop down list and click Go.

Note: The search can be run from any screen.

SAP	Interaction Center	Personalize System News Log Off
	End	Saved Searches - Calls assigned to me - Go Advanced
	Customer Search	🗈 Back 🖛 🖸 🔹

Result: All interactions assigned to the employee ID selected display.

SAP▼ Interact	ion Center					Personalize System News Log Of
1						
End						Ready Not Ready
End					Saved Searches	 Calls assigned to me - Go Advanced F
	Search: Customer	Interactions				Back - 🖸
· · · · · · · · · · · · · · · · · · ·	Archive Search					
Customer Search						
Customer Overview	Result List: 33 Serv	vice Requests Found				Show Search Fields
	PNew 🗈 PNew	r from Template Create Follow-Up				H 🗐 🔍
Customer Interaction	ID	Customer Interaction Description	Priority Employee Re	Service	Customer	User Status
Grouped Interaction	8000026660	Flooding drains block Bells Road	High (Louise Lucas	Trainin	lan Shaw / Timaru	Created
Knowledge Article	8000026655	New Year Beach Party Date Advised	Medi Louise Lucas		Pacific Haulage / We	Created
E-Mail	8000026654	Northern Gateway Tollroad Feedback	Low (Louise Lucas		Ann Smith / Blenhei	Assigned/Awaiting Acceptance
Inbox	8000026653	Graffiti on NZTA Billboard	Medi Louise Lucas	Trainin	Mark Richards / Mas	Created
	8000026652	Rubbish Dumped on Main Road	High (Louise Lucas	Trainin	Marie Pulson / Welli	Awaiting Completion
E-Mail Inbox	8000026651	Cattle on Road SH57	Low (Louise Lucas	Trainin	lan Shaw / Timaru	Created
Cust. Interaction S	8000026650	Slip - Manawatu Gorge	High (Louise Lucas	Trainin	Gloria Barnes / Woo	Assigned/Awaiting Acceptance
Grouped Interation	8000026600	Property Access	Medi Louise Lucas	Trainin	Bob Armour / Wellin	Assigned/Awaiting Acceptance
	8000026584	Tree Blocking Road	High (Louise Lucas	Trainin	lan Shaw / Timaru	Assigned/Awaiting Acceptance
Monitor Report	8000026583	Abandoned Vehicle Near Picton	Medi Louise Lucas	Trainin	John McIntyre / Pict	Resolved/Closed
Action Monitor	8000026582	Graffiti on Bridge Near Blenheim	High (Louise Lucas	Trainin	John McIntyre / Pict	Resolved/Closed
	8000026581	Sign Fallen Over Near Murchison	Medi Louise Lucas	Trainin	John McIntyre / Pict	Assigned/Awaiting Acceptance
	8000026580	Litter on Road - Methven	High (Louise Lucas	Trainin	John McIntyre / Pict	In Progress
	8000026537	Slip - Manawatu Gorge	High (Louise Lucas	Trainin	Mary Vanhover / Wo	Assigned/Awaiting Acceptance
	8000026536	Congestion of Wellington Motorway	High (Louise Lucas	Trainin	Jessica Wright / Pal	In Progress
	8000026535	Stop sign fallen over	High (Louise Lucas	Trainin	Barrys Diner / Palme	Assigned/Awaiting Acceptance
	8000026534	Cones left on side road	High (Louise Lucas	Trainin	Cara Anderson / Wel	Assigned/Awaiting Acceptance
	8000026533	Graffiti on Signs	Medi Louise Lucas	Trainin	Marie Hayward / Pal	In Progress
	8000026532	Pothole - SH63	Medi Louise Lucas	Trainin	Fernlea Primary Sch	In Progress
	8000026531	Fallen Tree - SH2	Very Louise Lucas	Trainin	Jessica Wright / Pal	Resolved/Closed
			Back 1 2 For	ward •		

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SAP CRMS Create Saved Searches for Assigned Interactions

Saved
search
assigned to
a service
team
procedureFollow the steps below to create a saved search to locate interactions assigned to a specific
Service Team.Step 1: Follow Steps 1 & 2 from the Saved search assigned to an employee procedure above.

Step 2: Select Service Team in the drop down box.

Search Criteria								Hide Search Fields	
						_			
Category	•	is		•	Ľ	7	0	•	
Employee Responsible ID	•	is		•	Ć	7	0	• •	
Customer Interaction ID	•	is		•		0 0		• •	
Customer Interaction Description	•	is		•			0	• •	
(Location) Description	•	is		•			0	0	
(Location) SH	•	is		•			0	• •	
Posting Date (Time Frame)	•	is		•		•	0	• •	
User Status ID	•	is		•		•	0	0	
Service Team	•	is		•		•	0	0	
Reporter									
Request Start			Maxir	nui	m Number of Results	s:	999	99,9	
Due Date									
Priority		□ Include View 🗄 Save							
Service Team									
Partner ID			~						
Partner Function									

Step 3: Click the 'D' icon at the right hand side of the 'Service Team' critieria row.

	Search: Partners Webpage Dialog		Saved Searches * Calls assigned to me * Go						
Search: Cust	Search Criteria				Hide Search Fie	elds			
Archive Search									
Search Criter		All Accounts	▼						
Search Onter	Customer – First N	lame 🔻	is	-	0	•			
Category	Customer – Last N	ame 🔻	is	•	0	•			
Employee Respo	City	-	is	-	0	•			
Customer Intera	Role	•	is	•	▼ 0	•			
Customer Intera	Account ID	-	is	•	0	•			
(Location) Descr				Maximum	lumber of Results: 99	99			
(Location) SH				Maximum		0,0			
Posting Date (Ti	Search Clear R	leset		R		~			
User Status ID	<					>			
Service Team	▼ is		•	🗇 c	•				
Maximum Number of Results: 999,9									
Search Clea	r Save Search As:			Include View 📳	Save				

Result: The **Search Partners** window displays.

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SAP CRMS Create Saved Searches for Assigned Interactions

Saved search assigned to a service team procedure, continued

Step 4: Enter search criteria into the **'Customer – Last Name'** search criteria field and select **Organizational Unit** from the **'Role'** criteria. Click the **Search** button.

Search Criteria						Hide S	Search Fields			
Search for: All Ac	counts			•						
Customer – First Name	-	is	•	*nat*		0	•			
Customer – Last Name	-	is	-			0	•			
City	-	is	•			0	•			
Role	-	is	-	Organiz	ational Unit	v 0	•			
Account ID	-	is	•			0	•			
Search Clear Reset										
Corporate Account	🕒 Individu	ual Account [Sroup				II &			
ID Nam	е		Phone		Street	C	ity			
4000221 Nat.	Nat. Off. National Office +64 (4) 894 5400 50 Victoria St W									
4000342 Natio	nal Nation	al								
<							>			

Result: Accounts matching the details entered as search criteria are displayed.

Note: If you are not sure of the entire details use wildcards (*) before and after any characters you are sure of. E.g *NO* will return NO, Northland, HNO etc

Step 5: Select the appropriate record e.g. National Office

Result List: 2 Accounts Found											
P	Corporate Accou	nt 📑 Individual Account 📑	Group		II <i>I</i>						
	ID	Name	Phone	Street	City						
	4000221	Nat. Off. National Office	+64 (4) 894 5400	50 Victoria St	Wellington						
	4000342	National National									
	Ċ				>						

Result: The **Service Team** Responsible field populates with the Service Team Responsible ID as the search criteria.

Search Criteria							Hide Search	Fields
Category	•	is	•	Ő	0	•		
Employee Responsible ID	Ŧ	is	•	đ	0	•		
Customer Interaction ID	-	is	•		0	•		
Customer Interaction Descript	ic 🔻	is	-		0	•		
(Location) Description	-	is	-		0	•		
(Location) SH	-	is	•		0	•		
Posting Date (Time Frame)	•	is	•	•	0	•		
User Status ID	-	is	-	-	0	•		
Service Team	Ŧ	is	- (400022	21 × 🗇	0	•		
Search Clear Save Sea	arch	As:	Maximum Num	ber of Results:		-		





SAP CRMS Create Saved Searches for Assigned Interactions

Search Criteria								
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•	is	-		đ	0	•		
•	is	-			0	•		
•	is	-			0	•		
•	is	-			0	•		
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-	is	-	4000221	đ	0	•		
		Maximu			_			
	* * * * *	 is is is is is is is 	 is <	 is 4000221 	 is 4000221 	 is <		

Result: The search is saved. It will display in the list of saved searches at the top left of the

Search: Customer Interactions screen.

SAP	Interac	tion Center			Personalize System	News Log Off
	End				Rea	dy Not Ready
				Saved Searches -	Calls assigned to NO - Go	Advanced 👕
		Search: Customer	Interactions		Calls assigned to me	🖸 Back 🝷 🖸 🍷
	· Canton	Archive Search			Calls assigned to NO	
	and the				My Cust. Interactions	
Custon	ner Search	Customer Interaction Des	scriptic 🔻 is	-	This Months Interactions This Weeks Interactions	^