

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

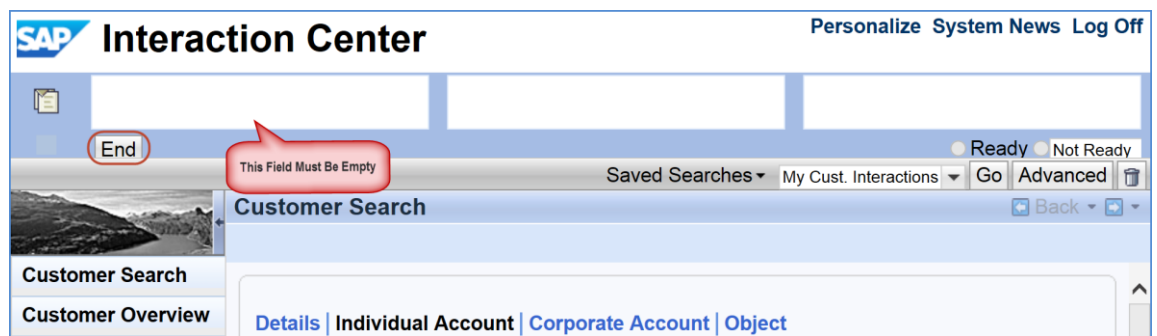
Role required

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

Before you begin

Before creating a saved search:

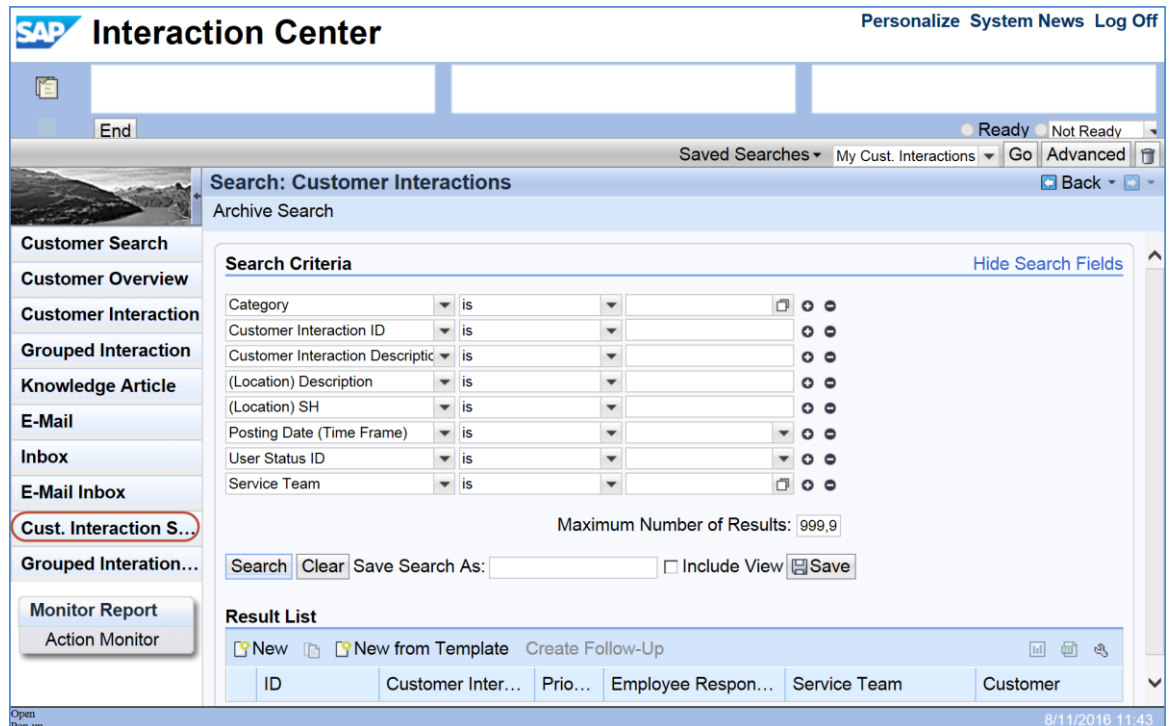
- Ensure you have a clear top portion of your screen
- If the previous customer is displayed, click the **End** button



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.



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

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SAP CRMS Create Saved Searches for Assigned Interactions

Saved search assigned for an employee procedure, *continued*

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

Search Criteria		Hide Search Fields
Category	is	[+]
Customer Interaction ID	is	[+]
Customer Interaction Description	is	[+]
(Location) Description	is	[+]
(Location) SH	is	[+]
Posting Date (Time Frame)	is	[+]
User Status ID	is	[+]
Service Team	is	[+]

Result: An extra search criteria displays.

Note: Alternatively, click the '-' 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 Search Fields
Category	is	[+]
Employee Responsible ID	is	[+]
Category		[+]
Grouped Interaction ID		[+]
Employee Responsible ID		[+]
Customer Interaction Description		[+]
(Location) Description		[+]
(Location) SH		[+]
Posting Date (Time Frame)		[+]
User Status	is	[+]
Service Team	is	[+]

Result: Employee Responsible ID displays as a search criteria.

Step 4: Click the '🔍' icon at the right hand side of the 'Employee Responsible ID' criteria row.

Search Criteria		Hide Search Fields
Category	is	[+]
Employee Responsible ID	is	[+]
Customer Interaction ID		[+]
Customer Interaction Description		[+]
(Location) Description		[+]
(Location) SH		[+]
Posting Date (Time Frame)		[+]
User Status	is	[+]
Service Team	is	[+]

Search Criteria		Hide Search Fields
Last Name	is	[+]
First Name	is	[+]
User	is	[+]
Service Team	is	[+]

Maximum Number of Results: 999,9

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.

Search Criteria Hide Search Fields

Last Name	is	Lucas	+	-
First Name	is		+	-
User	is		+	-
Service Team	is		+	-

Maximum Number of Results: 999,9

Search Clear Reset

Result List

Last name	First name	Employee ID	Phone	E-Mail
Lucas	Carl	4013854		carl.lucas@opus.co.nz
Lucas	Louise	4021560		louise.lucas@nzta.govt.

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.

Search Criteria Hide Search Fields

Last Name	is	Lucas	+	-
First Name	is		+	-
User	is		+	-
Service Team	is		+	-

Maximum Number of Results: 999,9

Search Clear Reset

Result List

Last name	First name	Employee ID	Phone	E-Mail
Lucas	Carl	4013854		carl.lucas@opus.co.nz
Lucas	Louise	4021560		louise.lucas@nzta.govt.

Result: The **Employee Responsible ID** field populates with the selected Employee Responsible ID.

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SAP CRMS Create Saved Searches for Assigned Interactions

Saved search assigned to an employee procedure, continued

Step 7: Type a name for the search into the **Save Search As** field and click **Save**.

Search Criteria		Hide Search Fields
Category	is	
Employee Responsible ID	is	4021560
Customer Interaction ID	is	
Customer Interaction Description	is	
(Location) Description	is	
(Location) SH	is	
Posting Date (Time Frame)	is	
User Status ID	is	
Service Team	is	

Maximum Number of Results: 999,9

Search Clear Save Search As: Calls assigned to me Include View Save

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 Interaction Center Personalize System News Log Off

End Ready Not Ready

Search: Customer Interactions Saved Searches Calls assigned to me Go Advanced

Archive Search Back (1)

Search Criteria		Hide Search Fields
Category	is	
Employee Responsible ID	is	4021560
Customer Interaction ID	is	

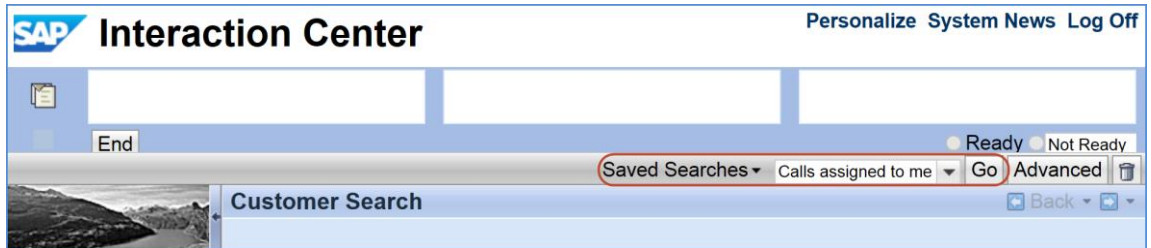
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SAP CRMS Create Saved Searches for Assigned Interactions

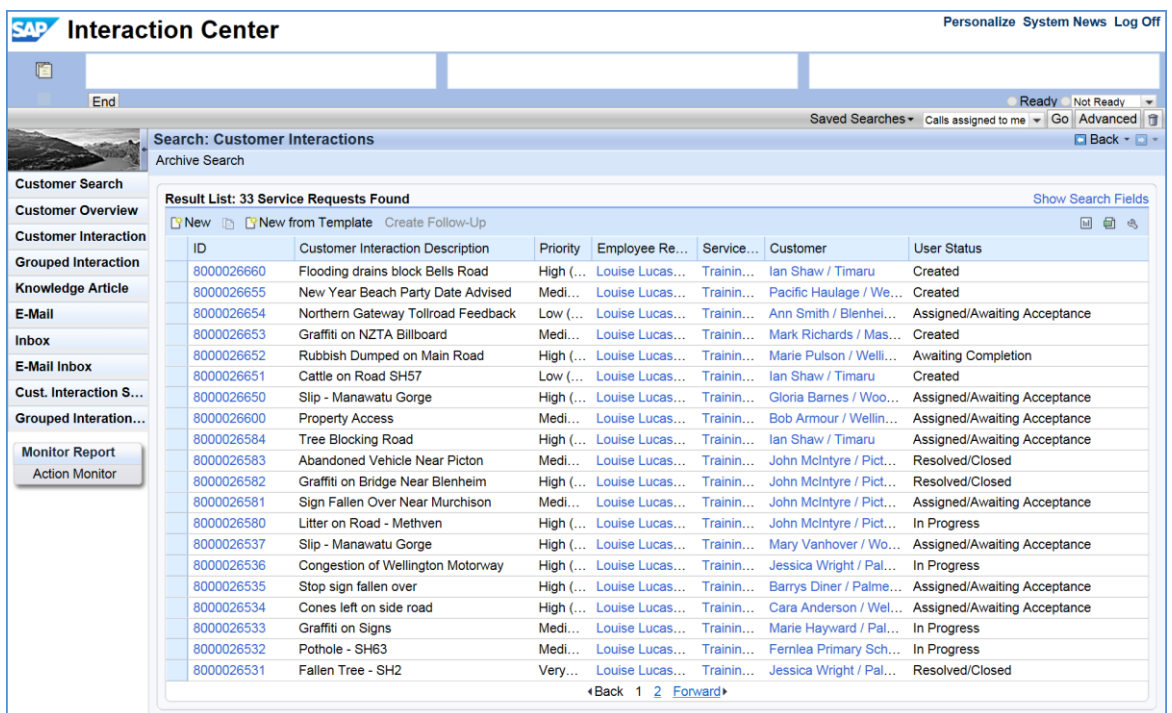
Running a saved search

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.



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



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SAP CRMS Create Saved Searches for Assigned Interactions

Saved search assigned to a service team procedure

Follow 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		+	-
Employee Responsible ID	is		+	-
Customer Interaction ID	is		+	-
Customer Interaction Descriptio	is		+	-
(Location) Description	is		+	-
(Location) SH	is		+	-
Posting Date (Time Frame)	is		+	-
User Status ID	is		+	-
Service Team	is		+	-

Reporter
Request Start
Due Date
Priority
Service Team
Partner ID
Partner Function

Maximum Number of Results: 999,9

Include View

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

Search: Partners -- Webpage Dialog Saved Searches Calls assigned to me

Search Criteria Hide Search Fields

Search for: All Accounts

Customer – First Name	is		+	-
Customer – Last Name	is		+	-
City	is		+	-
Role	is		+	-
Account ID	is		+	-

Maximum Number of Results: 999,9

Service Team is 📄 + -

Maximum Number of Results: 999,9

Save Search As: Include View

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 Search Fields

Search for: All Accounts

Customer – First Name	is	*nat*	+	-
Customer – Last Name	is		+	-
City	is		+	-
Role	is	Organizational Unit	+	-
Account ID	is		+	-

Maximum Number of Results: 999,9

Search Clear Reset

Result List: 2 Accounts Found

Corporate Account Individual Account Group

ID	Name	Phone	Street	City
4000221	Nat. Off. National Office	+64 (4) 894 5400	50 Victoria St...	Wellington
4000342	National National			

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

Corporate Account Individual Account Group

ID	Name	Phone	Street	City
4000221	Nat. Off. National Office	+64 (4) 894 5400	50 Victoria St...	Wellington
4000342	National National			

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

Search Criteria Hide Search Fields

Category	is		+	-
Employee Responsible ID	is		+	-
Customer Interaction ID	is		+	-
Customer Interaction Descriptio	is		+	-
(Location) Description	is		+	-
(Location) SH	is		+	-
Posting Date (Time Frame)	is		+	-
User Status ID	is		+	-
Service Team	is	4000221	x	+

Maximum Number of Results: 999,9

Search Clear Save Search As: Include View **Save**

Continued on next page

SAP CRMS Create Saved Searches for Assigned Interactions

Saved search assigned to a service team procedure, continued

Step 6: Type a name for the search into the **Save Search As** field and click **Save**.

Search Criteria				Hide Search Fields	
Category	is				
Employee Responsible ID	is				
Customer Interaction ID	is				
Customer Interaction Descriptic	is				
(Location) Description	is				
(Location) SH	is				
Posting Date (Time Frame)	is				
User Status ID	is				
Service Team	is		4000221		

Maximum Number of Results: 999,9

Save Search As:
 Include View

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

Search: Customer Interactions screen.

The screenshot shows the SAP Interaction Center interface. At the top, there are links for 'Personalize', 'System News', and 'Log Off'. Below the header, there is a navigation bar with 'End', 'Ready', and 'Not Ready' indicators. A 'Saved Searches' dropdown menu is open, showing a list of saved searches: 'Calls assigned to NO', 'Calls assigned to me', 'Calls assigned to NO', 'My Cust. Interactions', 'This Months Interactions', and 'This Weeks Interactions'. The 'Calls assigned to NO' search is selected. Below the dropdown, the 'Search: Customer Interactions' screen is visible, showing a search criteria table with 'Customer Interaction Descriptic' set to 'is'.