Quick Help Guide
SAP CRMS Create Customer – Corporate

Introduction

This quick help guide contains details to create a new corporate (non-individual) customer record in the SAP Customer Relationship Management System (CRMS).

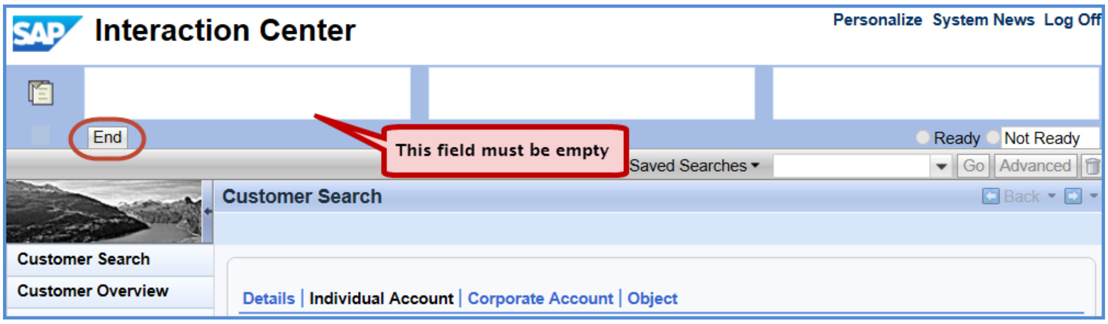
Role required

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

Before you begin

Before creating a new customer record in CRMS, you must:

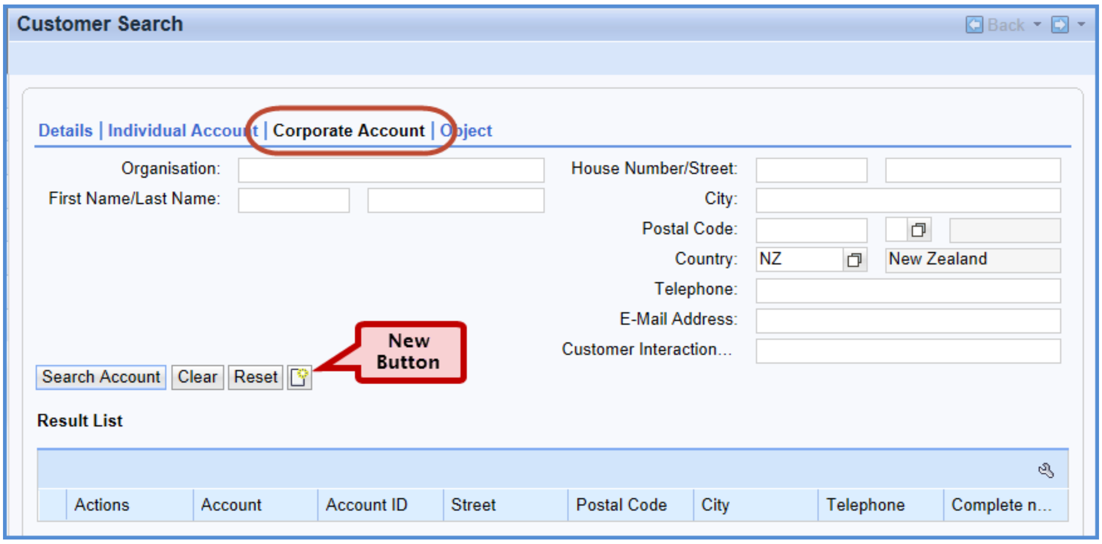
- Perform a search to ensure that no prior record exists for this customer.
- Ensure you have a clear top portion of your screen.
- If the previous customer is displayed, click the **End** button.



Procedure

The following procedure describes how to create a corporate customer and its related partners.

Step 1: In the Customer Search screen, select the **Corporate Account** tab and click the **New** button.



Result: The Customer Search screen re-displays with additional fields to be entered.

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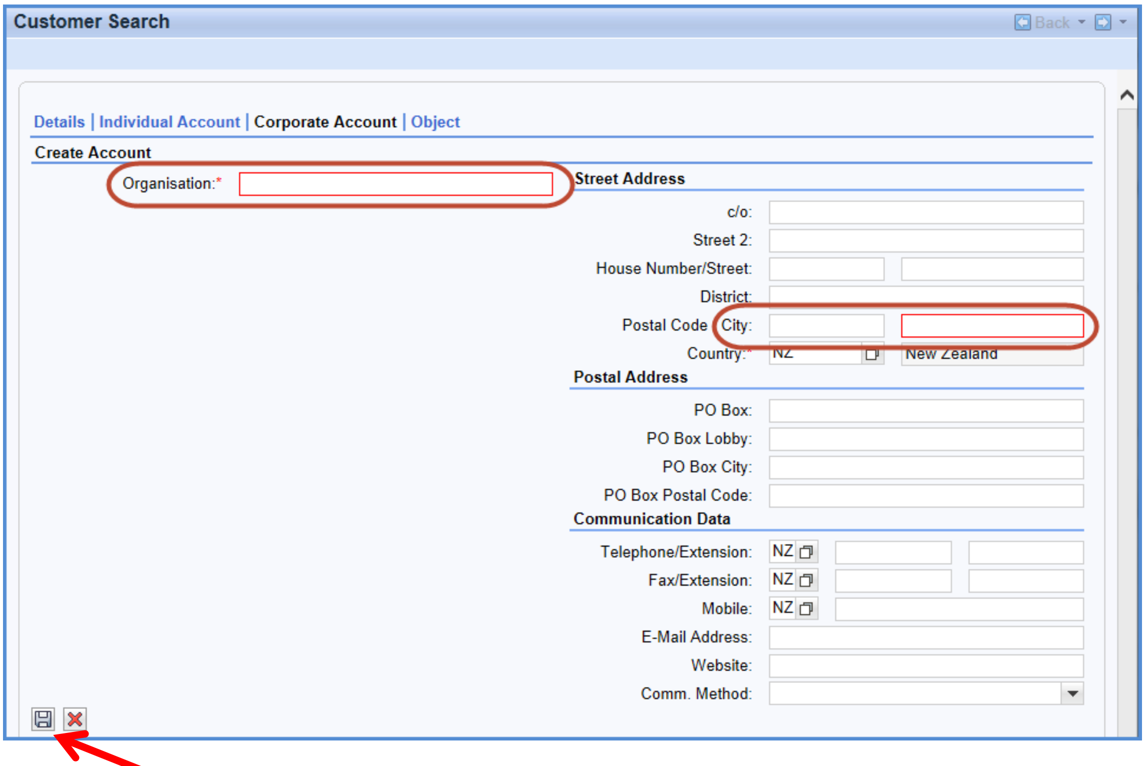
Procedure, *continued*

Step 2: Enter as many details as possible into the available fields.

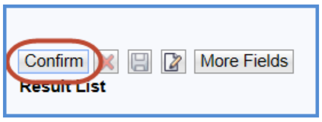
- **Organisation's name** and **City** are mandatory fields.
- You can use the Scratch Pad to copy details from an organisation's web page.



Step 3: Click the **Save** button near the bottom left of the Customer Search screen.

Result: The record is saved and a corporate customer is created.

Step 4: Click the **Confirm** button.



Result: Customer record is selected, the name displays in the header details and in the Confirmed Partners assignment block.

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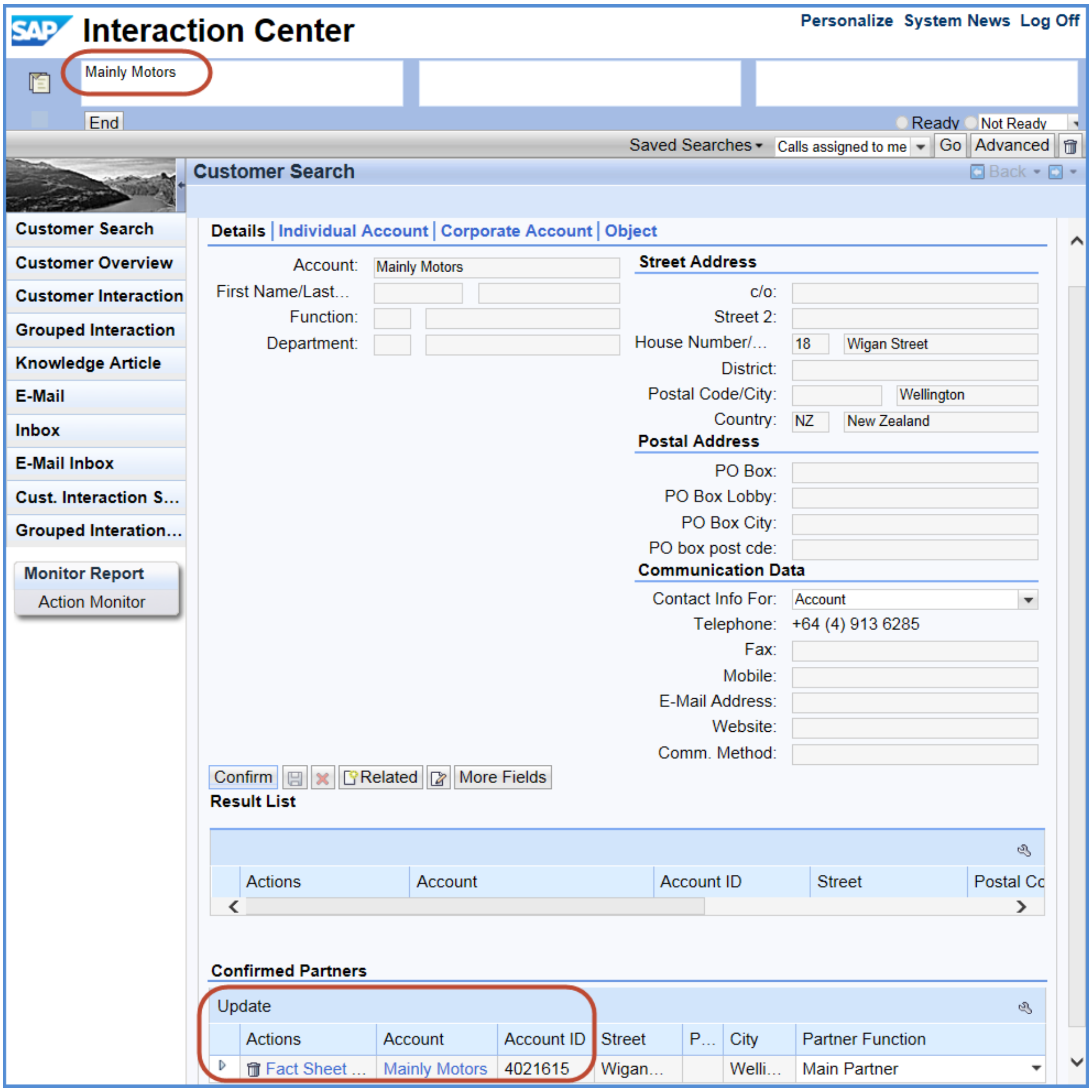
Procedure, *continued*

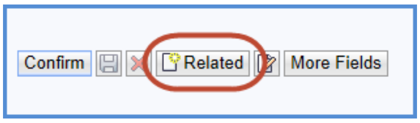


Step 5: Do you have a customer's name to record contact name details?

If yes, go to Step 6.

If no, click the activity required – eg Customer Interaction or Grouped Interaction.

Step 6: Click the **Related** button.



Result: The Create Contact Person screen displays.

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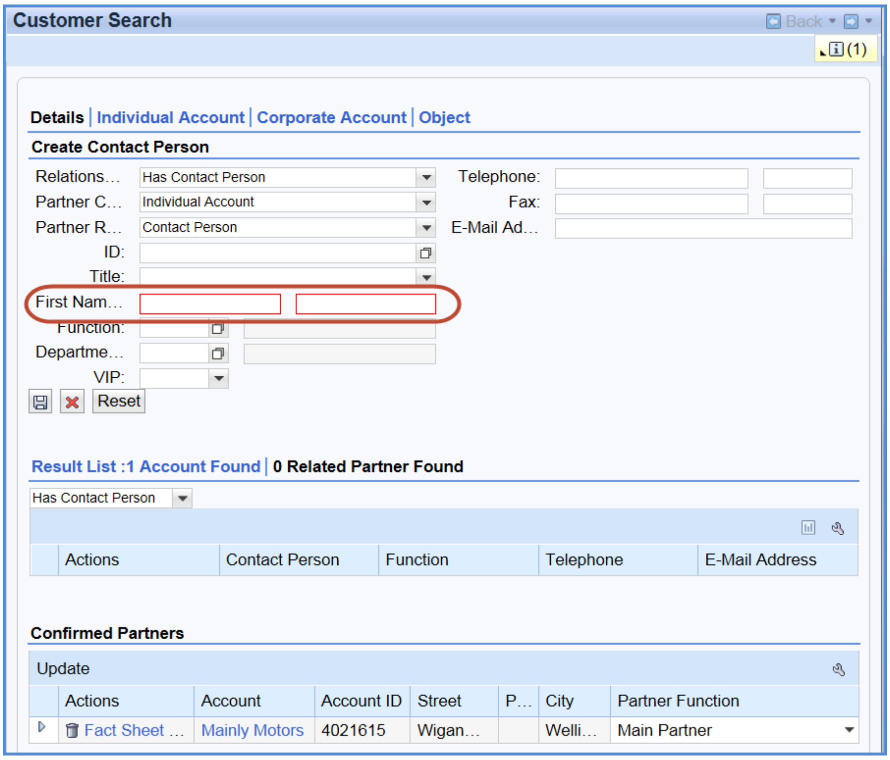
Procedure, *continued*

Step 7: Enter the details of the related contact person. Minimum is first and last name.

- **First Name** and **Last Name** are mandatory fields.



Note: The details have NOT yet been added to the corporate record.

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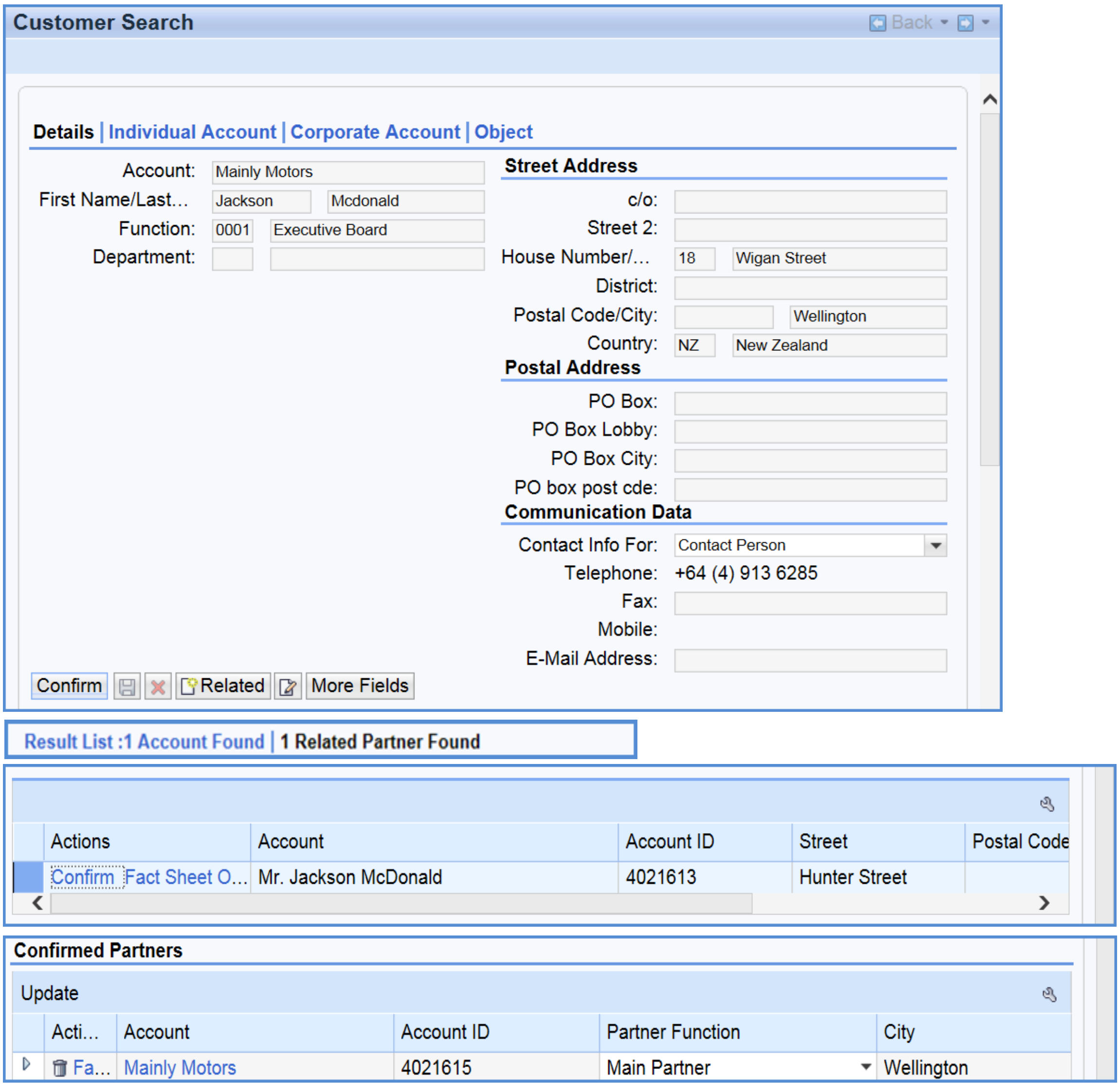
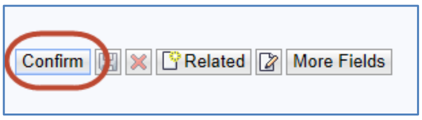
Procedure, *continued*

Step 8: Click the **Save** button.

Result: The contact details are displayed in the Related Partner section



Step 9: Click the **Confirm** button.



Result: Contact details have been added to the corporate record. This is shown by the contact details displaying in the header and the Confirmed Partners assignment block.

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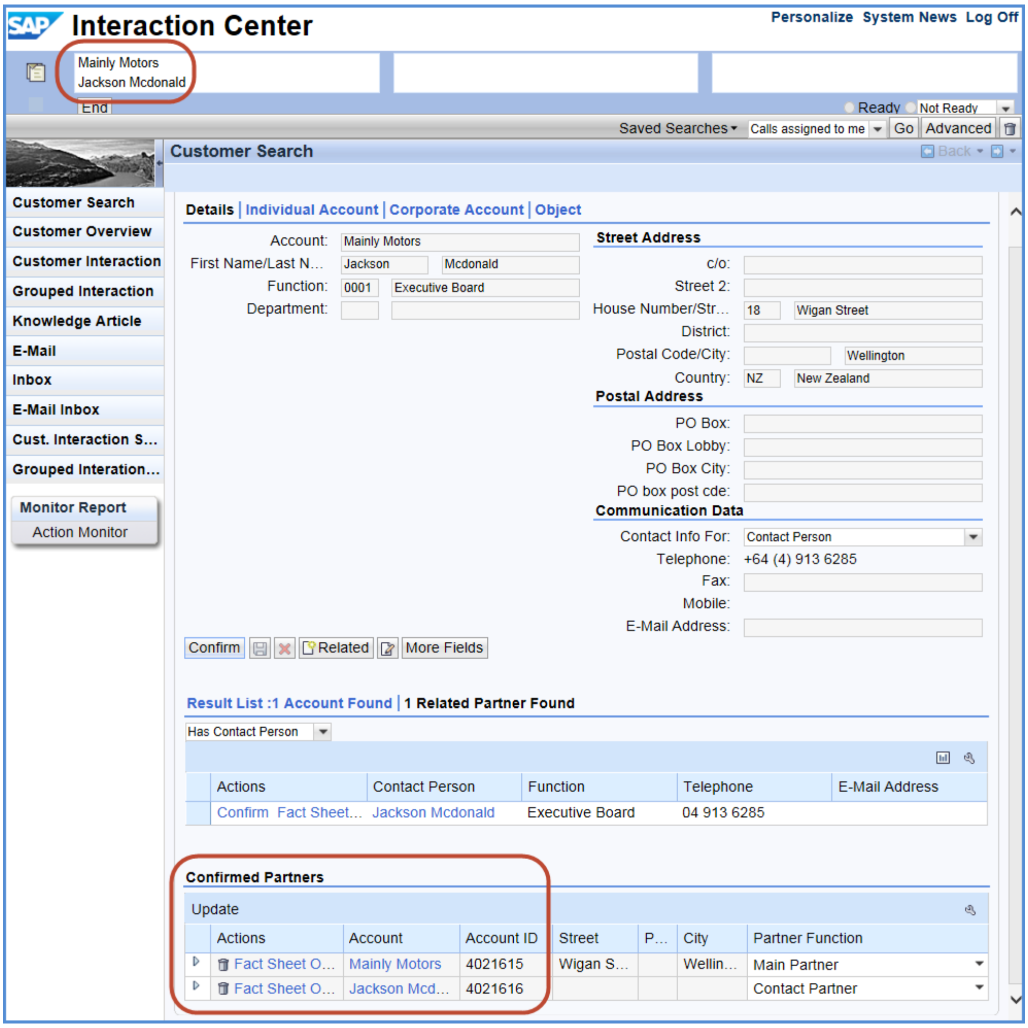
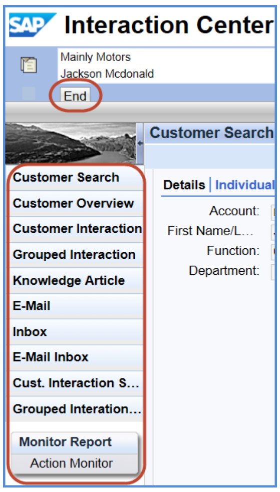
Procedure, *continued*



Step 10: Do you want to record an interaction eg Customer Interaction or Grouped Interaction?

If yes, see SAP CRMS Create Customer Individual Quick Help Guide.

If no, click the **End** button to exit the current page and return to the Customer Search page.



Note: A corporate account can have more than one contact associated to it. Repeat the above procedure from **Step 5** for each contact.

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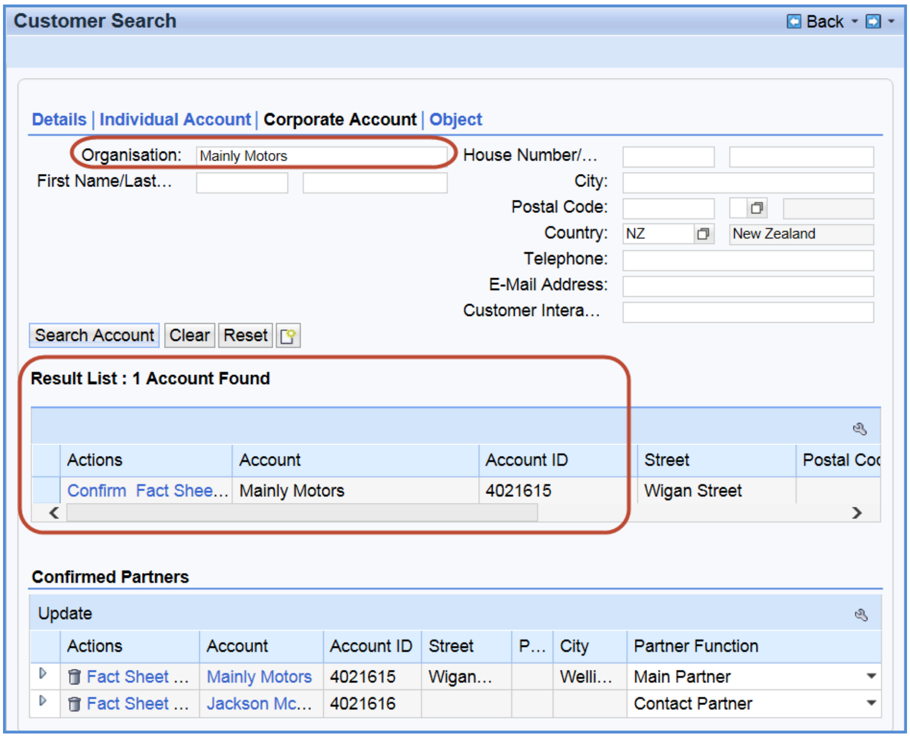
Selecting from multiple contacts

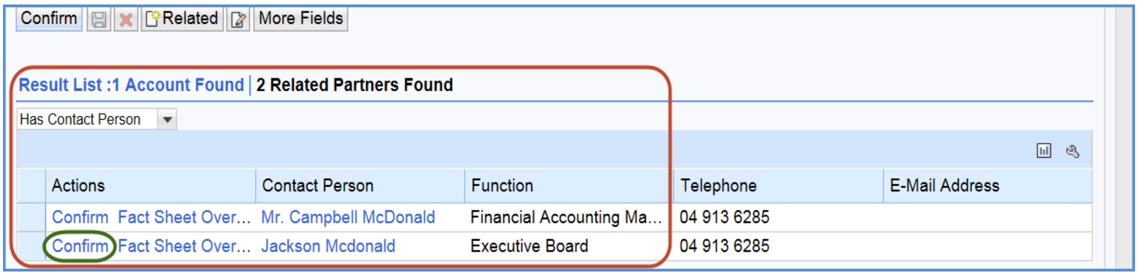
When selecting the corporate account to record a customer interaction against:

Step 1: Search for and confirm the corporate account.

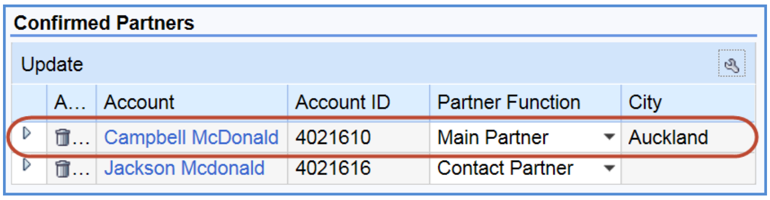


Result: A list of contacts will display in the **Result List** section.

Step 2: In the **Results List** section, click **Confirm** alongside the contact applicable for the interaction.



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



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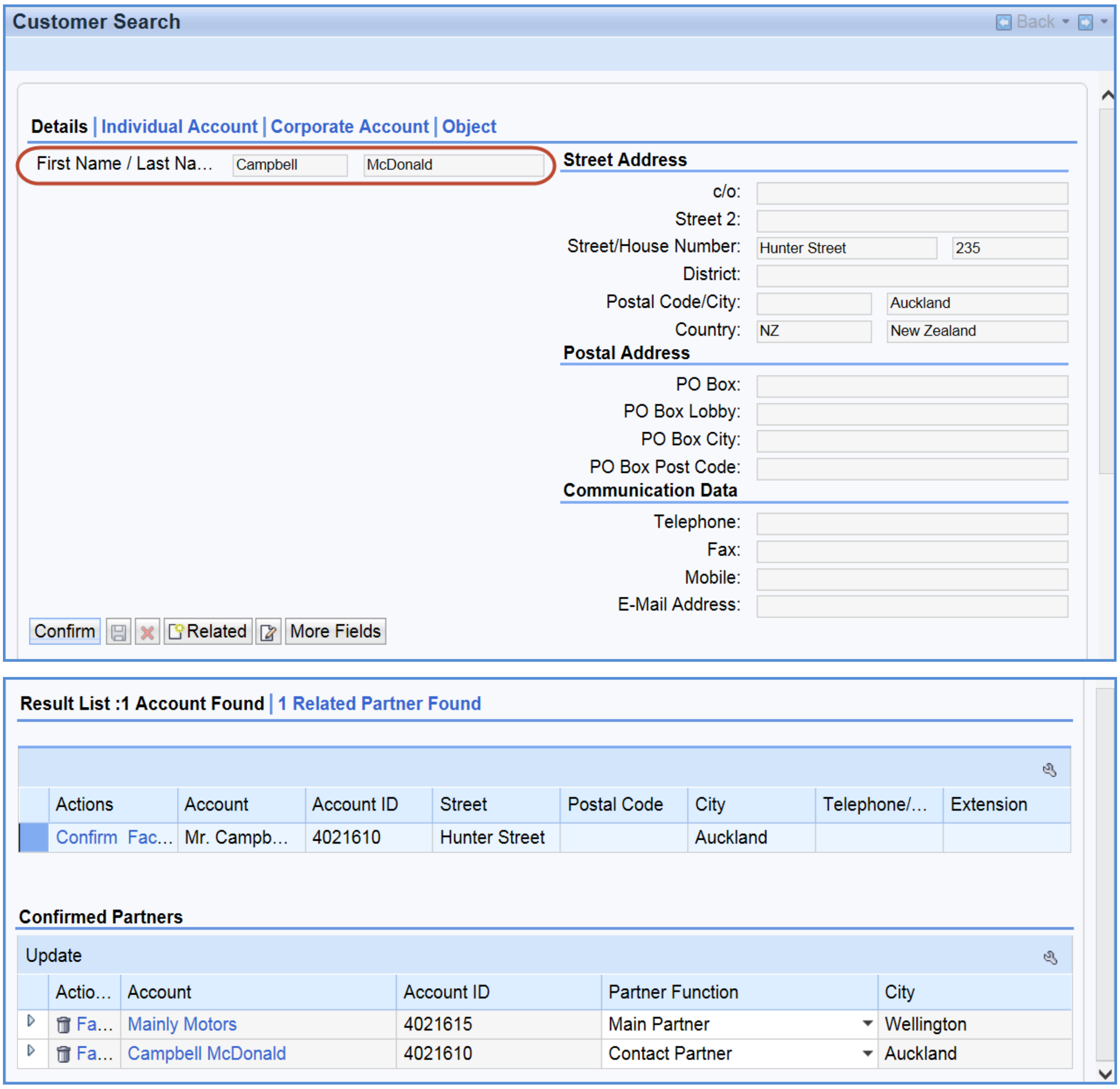
Selecting from multiple contacts, *continued*

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

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



Step 4: Click the activity required – eg Customer Interaction.