Quick Help Guide
SAP CRMS Login, Navigation and Layout

Introduction   This quick help guide provides details on the following features of the SAP Customer Relationship Management system (CRMS)

- Roles
- How to log on to CRMS
- Screen layout
- Moving around
- Maximising/minimising the screen
- Mandatory fields
- Error and information messages
- Entering data
- The end button
- Changing your password
- Personalising assignment blocks
- How to log off

Roles   There are three roles within the system, all with different levels of access

Role	Description
Advisor	Creates all the interactions within the system.
Professional	Has access to update template information within the system and is primarily an administrative role.
Manager	Works on the interactions within the system. This role is unable to create interactions.

How to log on to CRMS

Step 1: Access to CRMS is via following URL:

Internal user will use the link on Onramp
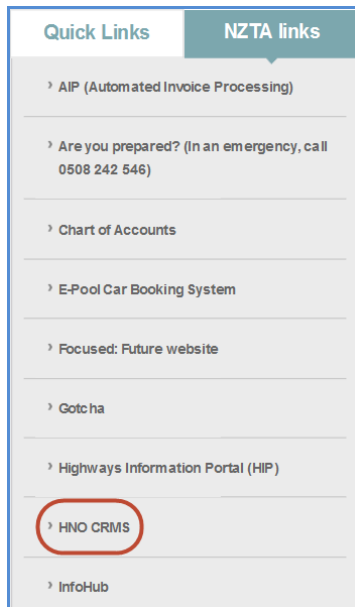
External user will access and Log On through Citrix

Note: If the SAP logon page displays, enter your Network User ID and Password in the User and Password field and click Log On, or press the Enter button on your keyboard.
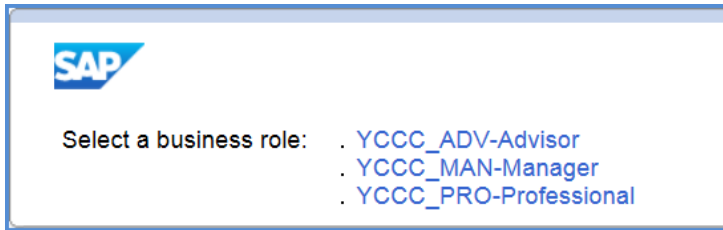

Result: If you have more than one role assigned in the system, the Select a Business Role screen displays.

How to log on to CRMS, *continued*

Step 2: Click on the role required. An Example of the select screen is shown below.

Select a business role:
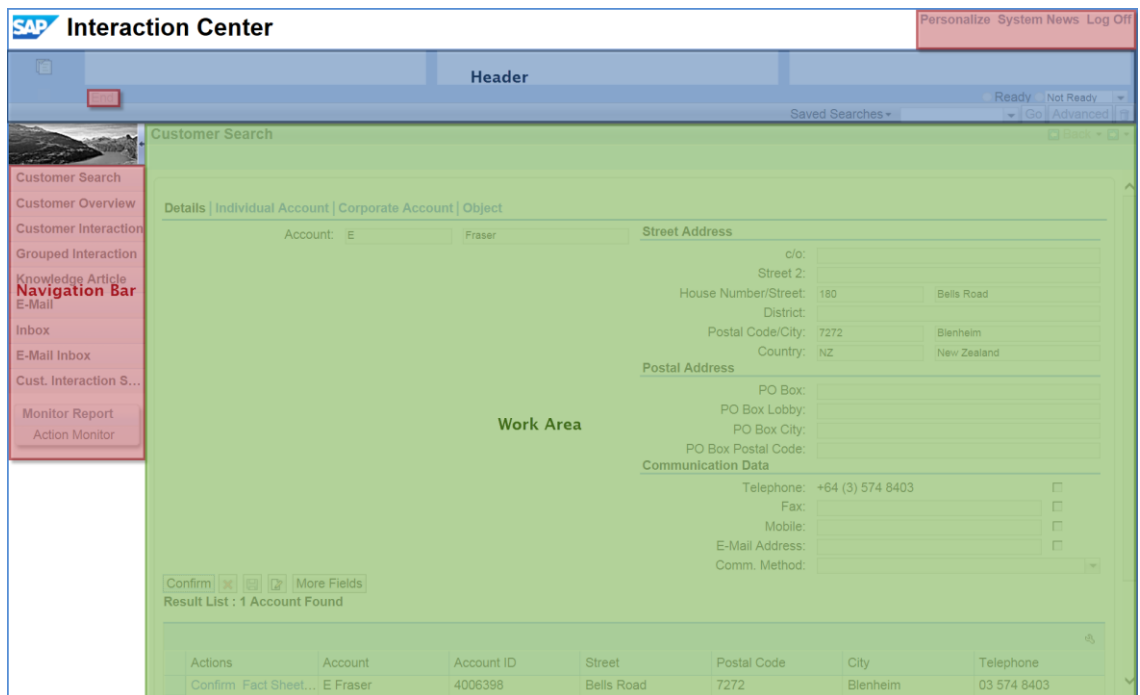- YCCC_ADV-Advisor
- YCCC_MAN-Manager
- YCCC_PRO-Professional

Result: The screen related to the role displays.

Screen layout

CRMS is designed like a webpage with the following components:

- Header
- Navigation Bar
- Work Area

| Moving around	**Within a screen**
	Navigation is most efficient using a mouse, however you can choose to use the tab key on your keyboard to move between fields.
	Between screens
	To navigate between screens within the system, you must use the navigation buttons at the top right hand portion of the screen – using the browser back and forward arrows at the very top left will navigate back to the previous web page.
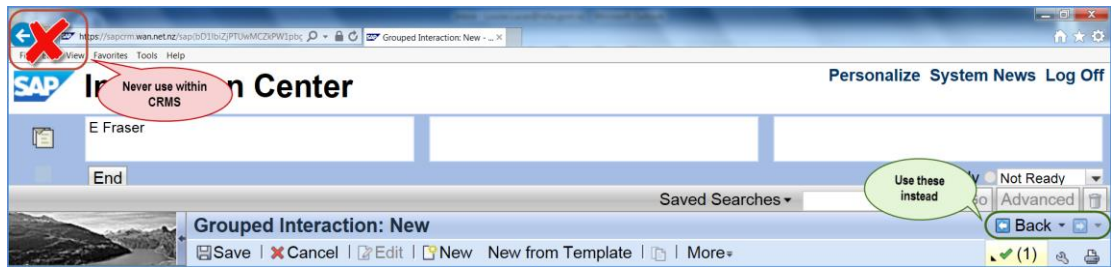
| Maximising/ Minimising the screen	The F11 button will enable fullscreen mode so that the Internet browser interface is hidden. Pressing F11 again will return the screen to the normal browser interface.
	Tip: While in fullscreen mode, the system will prevent you from using the wrong navigation buttons as they are hidden.

Mandatory fields	Mandatory fields are displayed with a red asterisk * alongside. If you try to save or move away from a screen and mandatory elements have not been entered, the fields will be highlighted in red.

Continued on next page

| **Error and information messages**	Error and information messages display in the message bar at the top right of the screen. Error messages are marked in red and may prevent further progress. Information messages are shown in yellow.
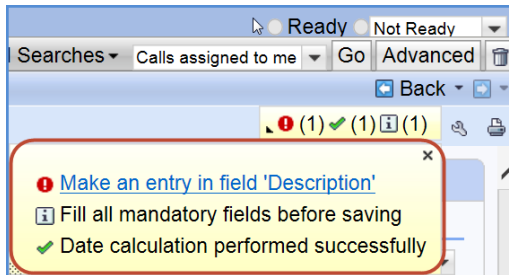
Entering data	CRMS is case sensitive. How you type in any text is how it will be displayed. There are no validations on the text to insert any capitalisation.

Example: "john smith" or "main street" will be added to the system in this format, **not** John Smith.

The End button	When using the Interaction Centre (logged in as an Advisor), CRMS is built around the identification and selection of a customer.

When you have finished working on an interaction record or a customer record, you must press the **End** button to clear the customer details, otherwise any other interactions you create will be attached to the customer displayed in the top left hand corner panel.
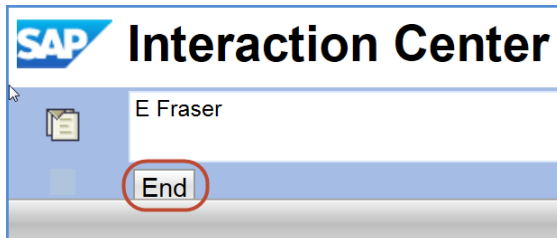
Passwords	Passwords are synchronised with your NZTA (windows) login. When you change your NZTA login, your login details in CRMS will change to match automatically.

Passwords via Citrix	External user cannot change their password via Citrix. Please contact the Service Desk if your password has expired.

Personalising assignment blocks

Assignment blocks display underneath the main information of the interaction. They will differ depending on which screen you are in.

Changing order of assignment blocks

The order these display in can be changed to suit your personal preference. Click on the assignment block title, keep the button pressed down and drag the block to the order you want it to display in, then release the button.

Personalising assignment blocks, *continued*

Changing columns displayed in assignment blocks

To change the order of the columns within an assignment block, click the spanner icon on the right hand side of the block heading to display a list of available columns and those currently displayed.

▼ Customer Interaction History				
Actions	Transaction	Transaction Type	Date	
	Customer Interaction Record		07.09.2016	
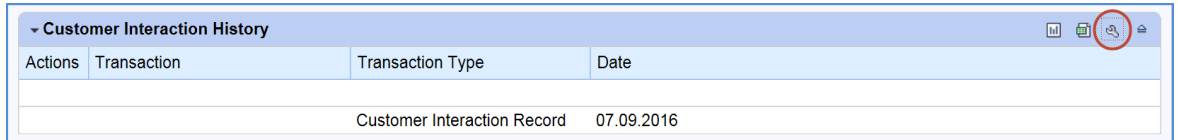
Use the arrows and Up and Down buttons to personalise what and how the columns are displayed. Column widths can also be set either by percentage or by pixels.
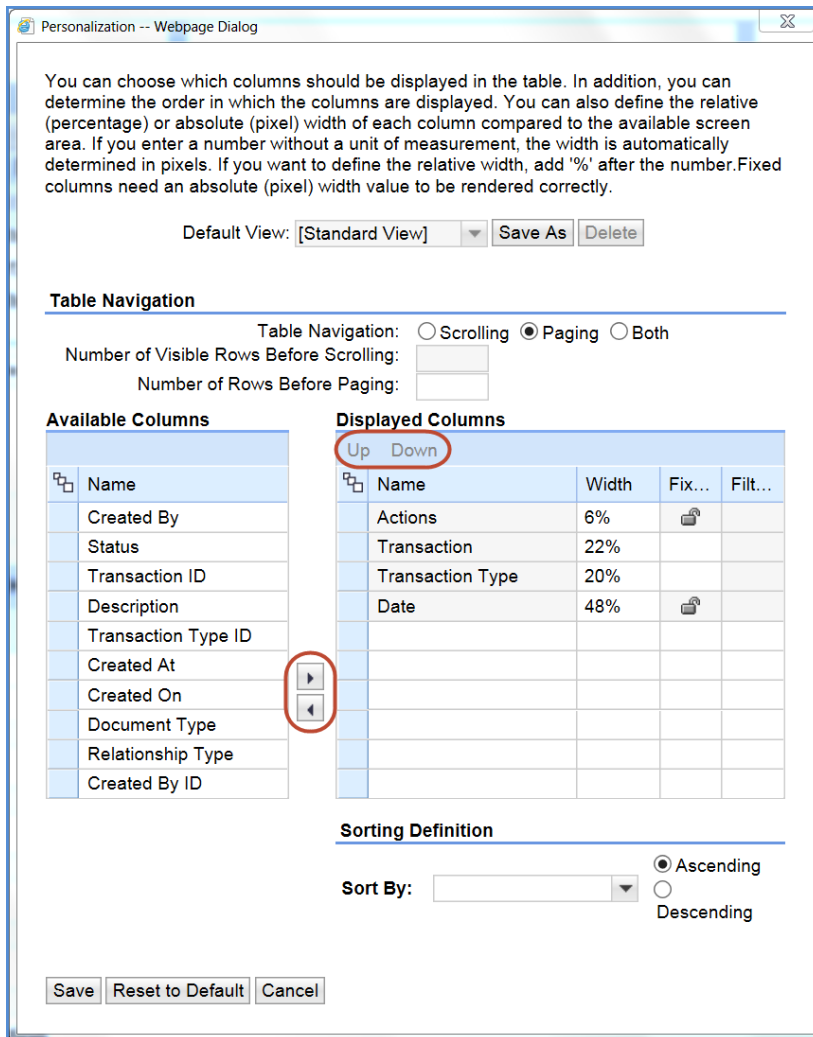
How to log off

To log off the system, click **Log Off** in the top right hand corner.