Quick Help Guide
SAP CRMS Assigned Interactions

Introduction

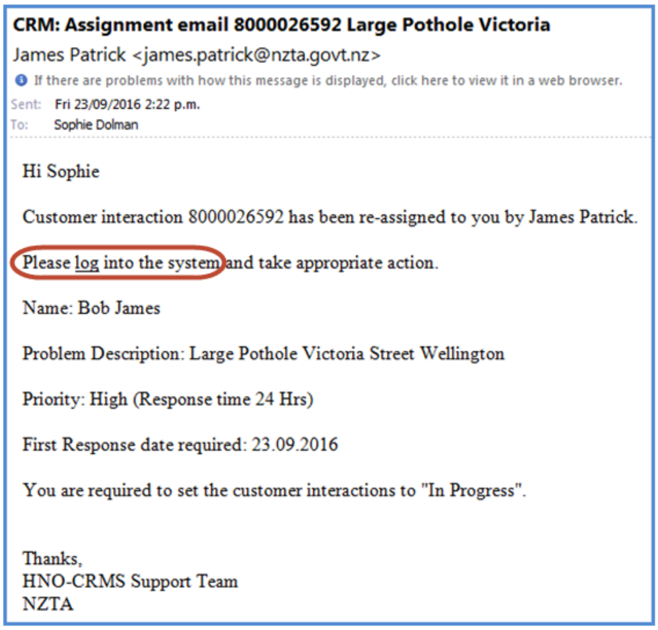
This quick help guide contains instructions on what to do with an interaction that has been assigned to you within the SAP Customer Relationship Management System (CRMS).

Role required

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

Procedure

Step 1: When you are assigned an interaction you will receive an email like the example below. Click on the link to log into the system.


CRM: Assignment email 8000026592 Large Pothole Victoria
James Patrick <james.patrick@nzta.govt.nz>
If there are problems with how this message is displayed, click here to view it in a web browser.
Sent: Fri 23/09/2016 2:22 p.m.
To: Sophie Dolman

Hi Sophie

Customer interaction 8000026592 has been re-assigned to you by James Patrick.

Please log into the system and take appropriate action.

Name: Bob James

Problem Description: Large Pothole Victoria Street Wellington

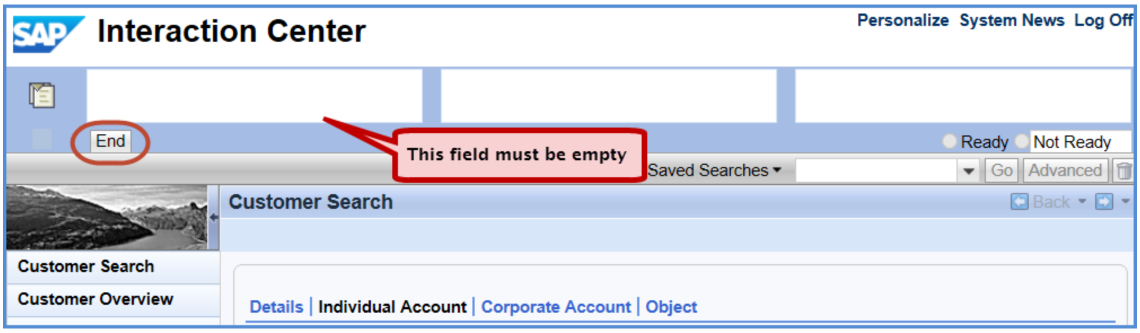
Priority: High (Response time 24 Hrs)

First Response date required: 23.09.2016

You are required to set the customer interactions to "In Progress".

Thanks,
HNO-CRMS Support Team
NZTA

Step 2: Ensure you have a clear top portion of your screen. If the previous customer is displayed, click **End**.



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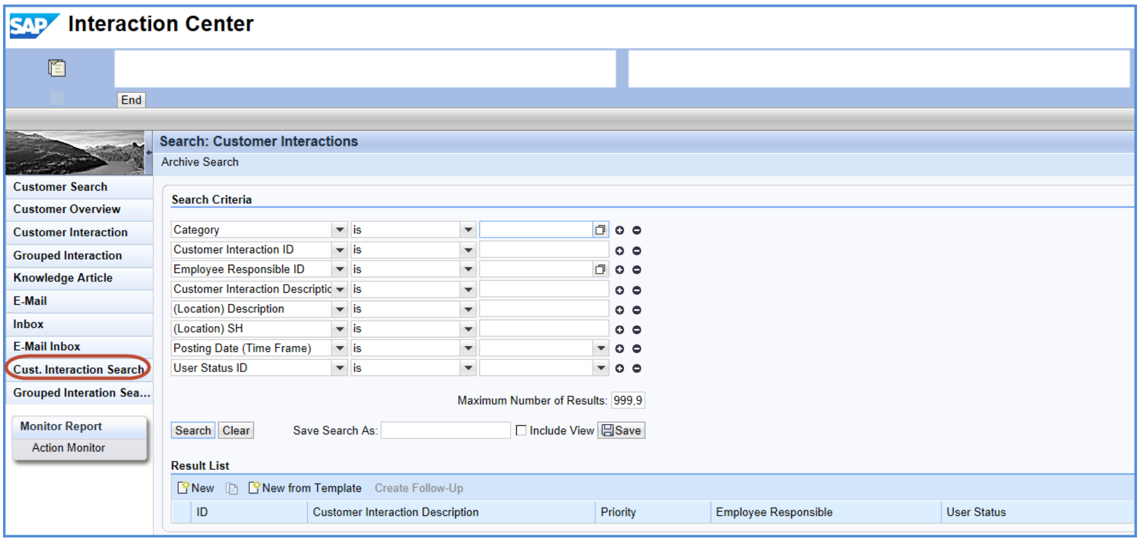
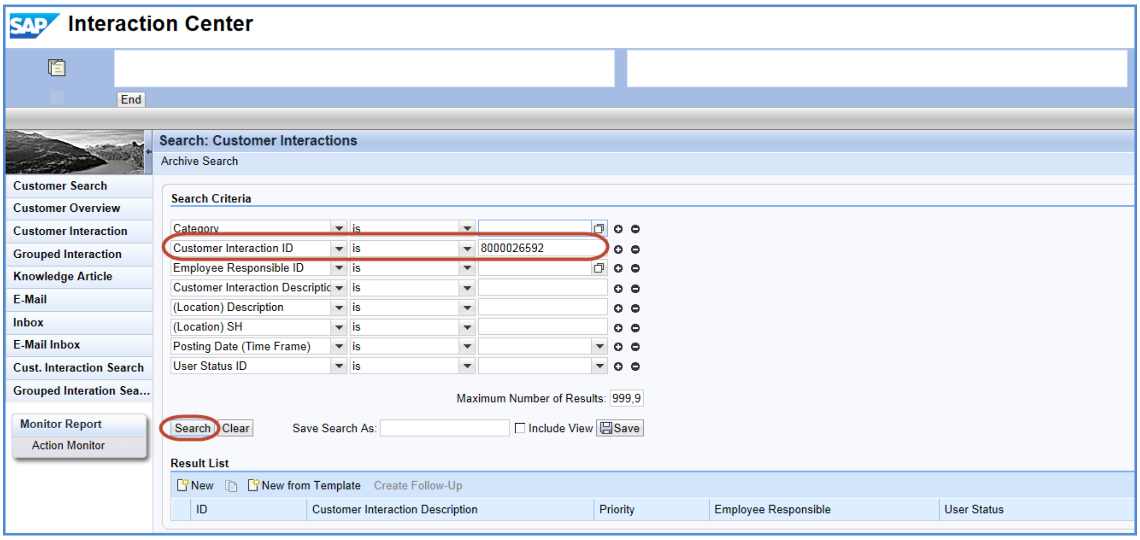
Searching for an assigned customer interaction

Step 3: Click on **Cust. Interaction Search**.



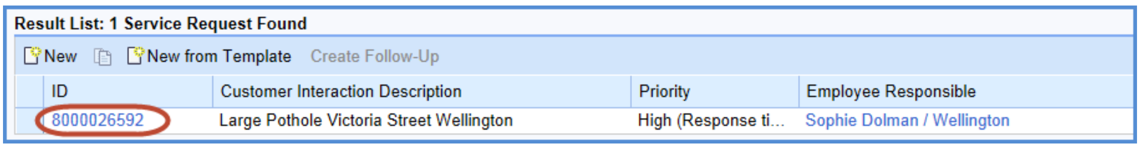
Result: The Customer Interaction Search screen displays.

Step 4: In the **Customer Interaction ID** box type the customer interaction ID number (8000026592) Select **Search** or press **Enter**.



Note: You can copy and paste the customer interaction ID number from the assignment email in to the **Customer Interaction ID** box. You are also able to use * for a wildcard search eg 8*26592.

Step 5: Click on the **Customer Interaction ID Number** to open the customer interaction.



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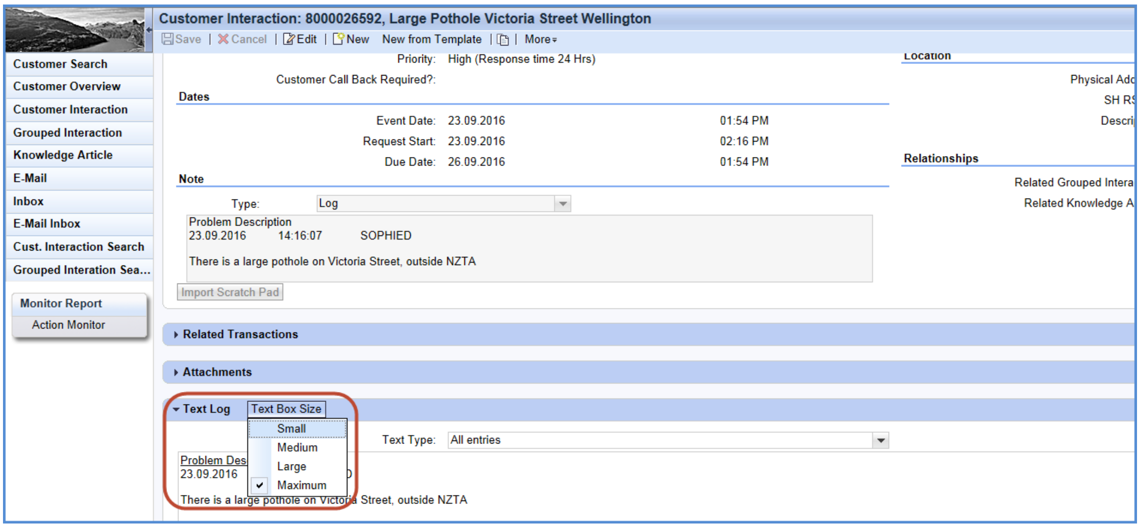
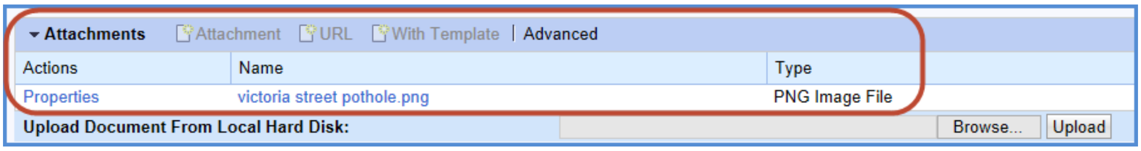
Updating an assigned interaction

Step 6: To view the notes recorded in the interaction, scroll down to the **Text Log**. To view the full text log click on **'Text Box Size'** and select **Maximum.**



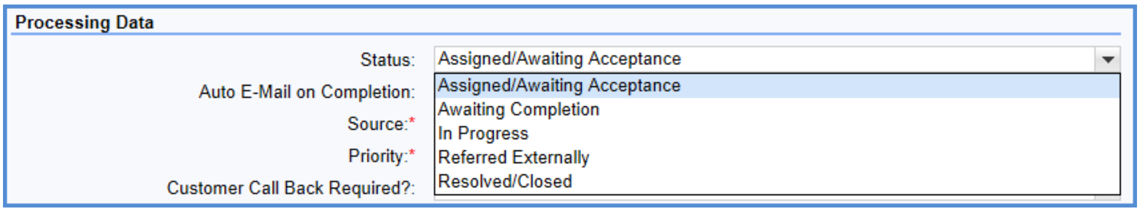
Note: This is where all information from the free text **Note** field relating to the interaction is logged**.**

Step 7: Check the Attachments tab for attached photos, documents, emails threads, links eg to InfoHub documents or Google Maps.



Step 8: To make changes (update/edit) or to assign the interaction to another person, click the **Edit** button at the top of the screen.

Step 9: You are now required to update the **Status**. In most cases it will be showing initially as Assigned/Awaiting Acceptance. After the interaction has been Created, **t**he options are: Awaiting Completion, In Progress, Referred Externally or Resolved/Closed.



Note: Please see CRMS Status Definitions for an explanation of each status.

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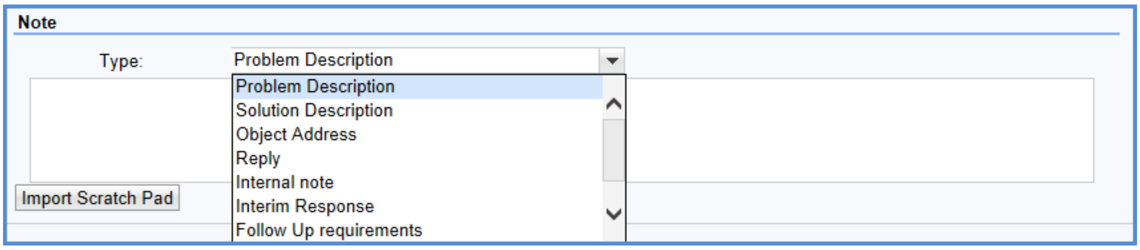
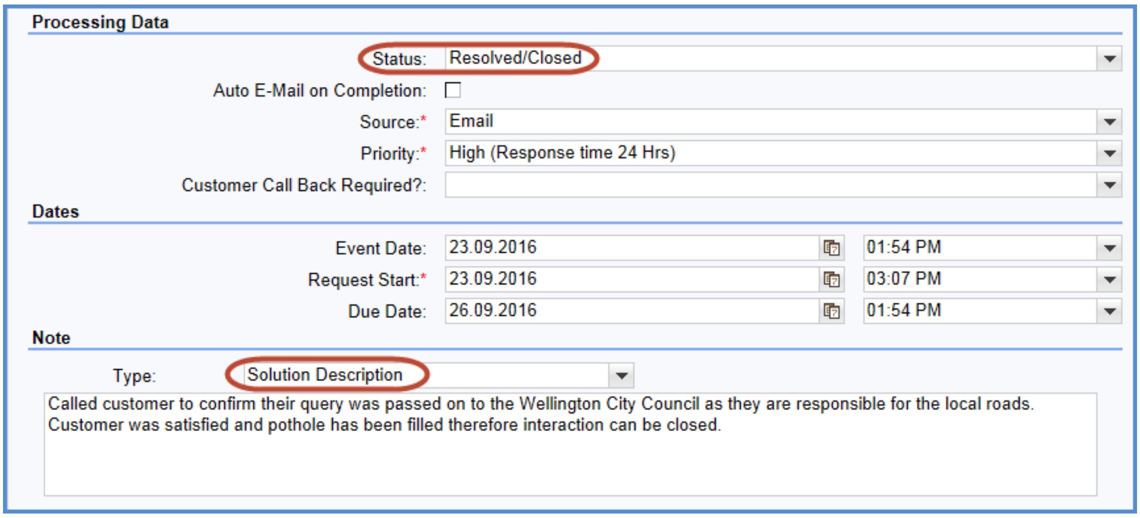
Updating an assigned interaction *continued*

Step 10: You are now required to update the **Note** box with details of your actions with the customer. Next to **Type**, you can select from the drop down options available in regards to the relevance of the type of update to the interaction.



Note: Until the interaction has been saved you can edit each **Type** of **Note** – as though it is a separate page of a notebook eg if you paste information in to **Problem Description** and then change the **Type** to **Solution Description** your pasted information will disappear from the **Note** box – but remains visible if you change the **Type** back to **Problem Description.**

Step 11: If the interaction with the customer has been concluded, next to **Type** select **Solution Description** from the drop down list. Use the free text field to type or paste in the actions and response to the customer.



Note: Once an interaction has been updated to **Resolved/Closed**, the interaction cannot be re-opened. If the issue re-occurs after it has been **Resolved/Closed** in CRMS, a new interaction will need to be logged against the customer with a reference to the previous interaction number recorded.

Step 12: The status can be updated to **Resolved/Closed.**

Step 13: Check all the interaction fields and details are completed with the best information possible.

Step 14: Click **Save**.