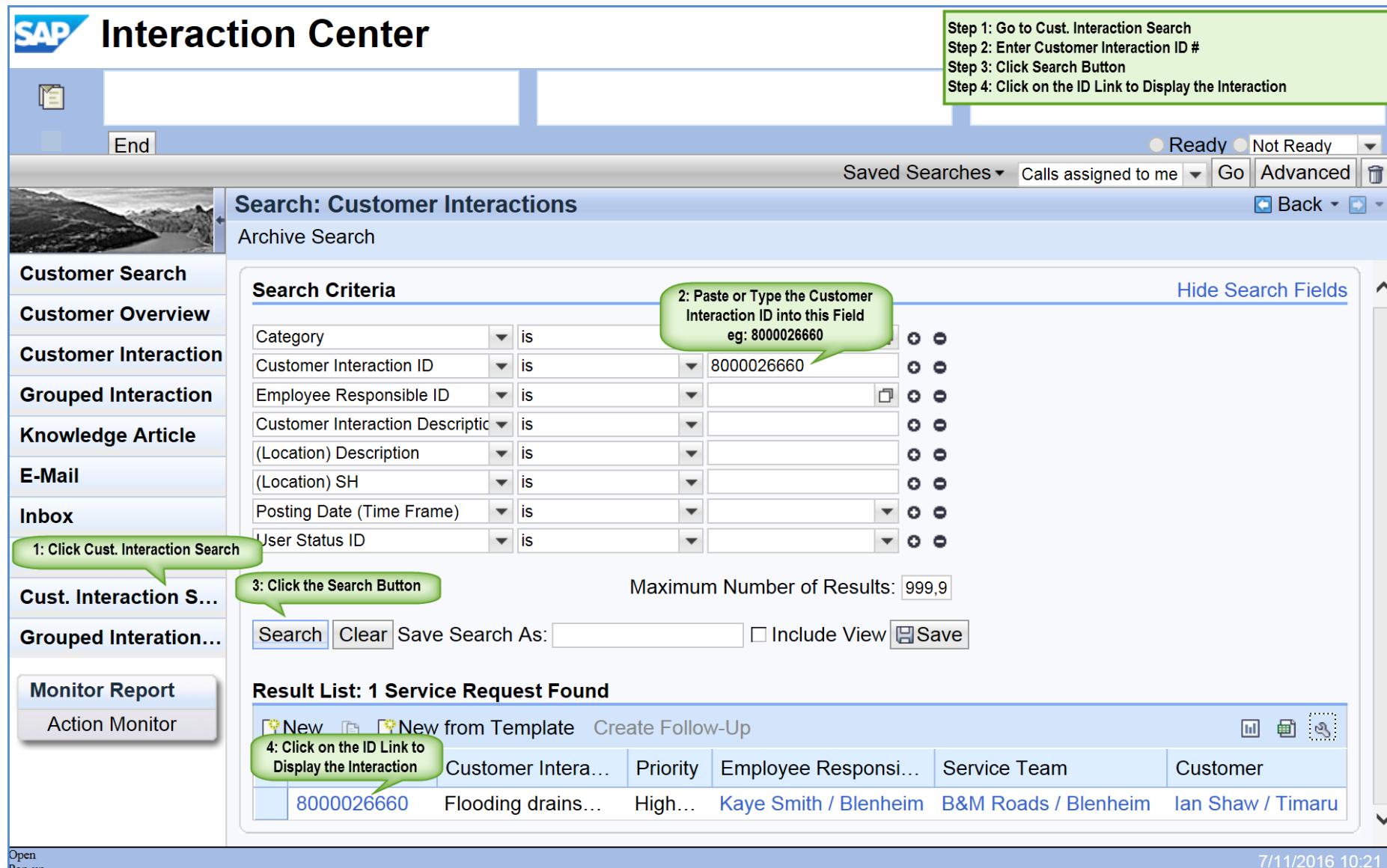# Quick Reference Guide
SAP CRMS Searching for a Customer Interaction

Interaction Center

Step 1: Go to Cust. Interaction Search
Step 2: Enter Customer Interaction ID #
Step 3: Click Search Button
Step 4: Click on the ID Link to Display the Interaction

End

◯ Ready ◯ Not Ready ▼

Saved Searches ▾ Calls assigned to me ▼ Go Advanced 🗑

Search: Customer Interactions   🔄 Back ▾ ▶ ▾

Archive Search

Navigation	
Customer Search	
Customer Overview	
Customer Interaction	
Grouped Interaction	
Knowledge Article	
E-Mail	
Inbox	
Cust. Interaction S...	
Grouped Interation...	
Monitor Report	
Action Monitor	

1: Click Cust. Interaction Search

Search Criteria   Hide Search Fields

2: Paste or Type the Customer Interaction ID into this Field eg: 8000026660

Category	▼	is			⊕ ⊖
Customer Interaction ID	▼	is	▼	8000026660	⊕ ⊖
Employee Responsible ID	▼	is	▼		🗔 ⊕ ⊖
Customer Interaction Descriptio	▼	is	▼		⊕ ⊖
(Location) Description	▼	is	▼		⊕ ⊖
(Location) SH	▼	is	▼		⊕ ⊖
Posting Date (Time Frame)	▼	is	▼	▼	⊕ ⊖
User Status ID	▼	is	▼	▼	⊕ ⊖

Maximum Number of Results: 999,9

3: Click the Search Button

Search Clear Save Search As: [   ] ☐ Include View 💾Save

Result List: 1 Service Request Found

📄New 📋 📄New from Template Create Follow-Up   📊 📇 🔍

4: Click on the ID Link to Display the Interaction

Customer Intera...	Priority	Employee Responsi...	Service Team	Customer
8000026660	Flooding drains...	High...	Kaye Smith / Blenheim	B&M Roads / Blenheim	Ian Shaw / Timaru

Open
Pop-up   7/11/2016 10:21

Quick Reference Guide
SAP CRMS Searching for a Customer Interaction

Interaction Center

Ian Shaw

End

○ Ready ○ Not Ready

Step 5: Click on Edit in the Customer Interaction Screen
Step 6: Employee Responsible Will Change to the Logged In User
Step 7: Change Status
Step 8: Update Interaction Details
Step 9: Click on the Save Customer Interaction Button

Saved Searches ▾ | Calls assigned to me ▾ | Go | Advanced | 🗑

5: Click the Edit Button to Update the Interaction

Customer Interaction: 8000026660, Flooding drains block Bells Road   ◀ Back ▾ ➡ ▾

💾 Save | ✖ Cancel | 📝 Edit | 🌼 New | New from Template | 📋 | More▾

9: Once All Updates Are Done, Click the Save Button

- Customer Search
- Customer Overview
- Customer Interaction
- Grouped Interaction
- Knowledge Article
- E-Mail
- Inbox
- E-Mail Inbox
- Cust. Interaction S…
- Grouped Interation…
- Monitor Report ▾

General Data

ID:	8000026660
Description:*	Flooding drains block Bells Road
Customer:*	Ian Shaw
Reported By:	Ian Shaw
Employee Re…	Louise Lucas
Service Team:	Training

6: Take Note that the Employee Responsible Automatically Changes to You

Processing Data

Status:	Created
Auto E-Mail o…	☐
Source:*	Telephone
Priority:*	High (Response time 24 Hrs)
Customer Call…	No call back required

7: Change the Status to Either 'Assigned' or 'In Progress'

Service Request

Business Gro…	HNO
Category:	Stormwater
Sub-category:	Flooding
Descriptor:	

Type:*	Comment
Sub-type:	
Capacity:	Member of Public

8: Change/Update Any Other Fields with Details of the Interaction

Location

Physical Addr…	Bells Road

Open Pop-up

7/11/2016 11:19