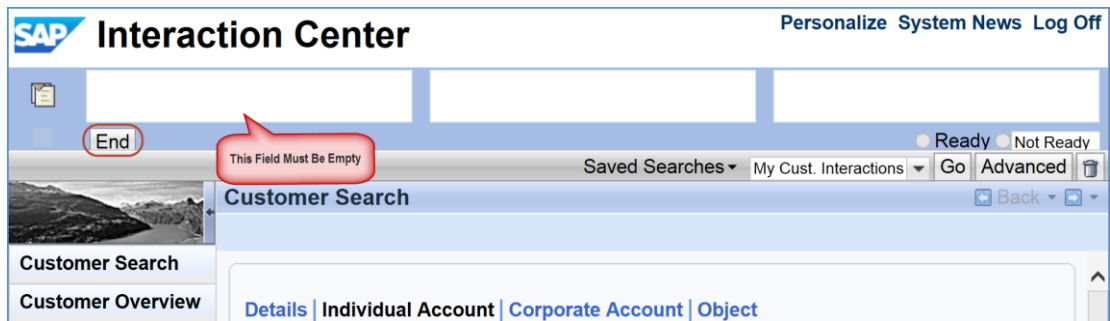


Introduction As a rule, all Customer Interactions where the customer wishes to be anonymous and there are no contact details require to be created under one customer record. This quick help guide contains details of how to update a Customer Interaction record with name details if these are provided after the initial request.

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

Before you begin

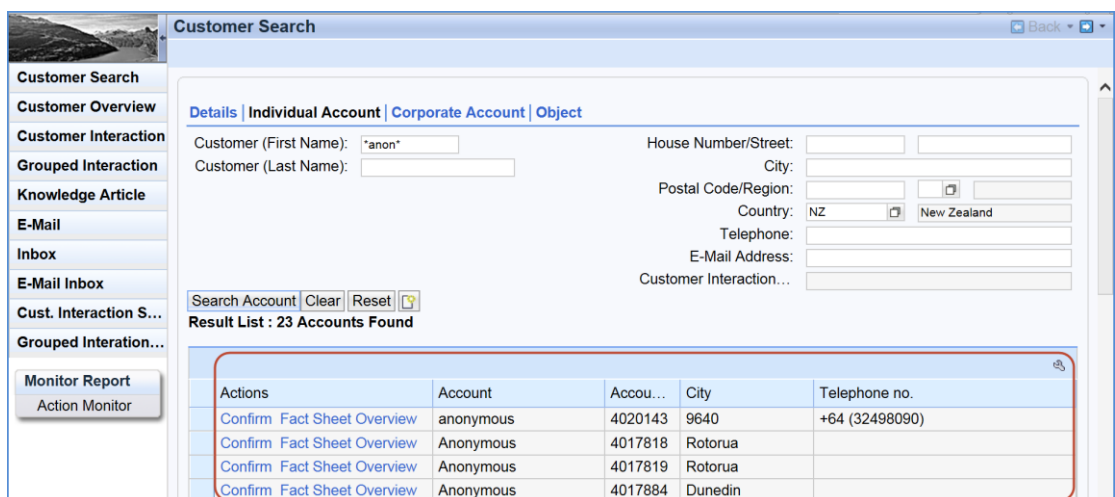
- Ensure you have a clear top portion of your screen. If the previous customer is displayed, click **End**.



- Customer Interactions must have been created and saved to the Anonymous customer.
- Search and locate the Anonymous customer record.
- Search, locate or create a **customer account** record under the name you now know the customer as.

Update an anonymous customer interaction

Step 1: Search for the Customer Interaction. This may either be provided by the customer via an Interaction number or you may have performed a search for Customer Interactions for Anonymous through the **Customer Overview** menu option.



Continued on next page

Update an anonymous customer interaction, continued

Step 2: Click on the **Fact Sheet** link of the Anonymous customer to edit.

Actions	Account	Accou...	City	Telephone no.
Confirm Fact Sheet Overview	Anonymous	4021297	Dargaville	+64 (9) 4394391
Confirm Fact Sheet Overview	Anonymous	4017796	Puhoi	
Confirm Fact Sheet Overview	Anonymous	4020255	Auckland	+64 (9) 262 5104
Confirm Fact Sheet Overview	Anonymous	4021035	Helensville	+64 (9) 262 5104
Confirm Fact Sheet Overview	Anonymous	4021711	Palmerston North	
Confirm Fact Sheet Overview	Anonymous (M&O)	4019720	Hamilton	
Confirm Fact Sheet Overview	Anonymous Anonymous	4018460	Rotorua	
Confirm Fact Sheet Overview	Anonymous Farm Co...	4020356	Dunedin	

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Result: The customer's **Fact Sheet** screen is displayed.

Step 3: Select the Customer ID of the Customer Interaction to view/edit.

Individual Account: Anonymous / Palmerston North - Account Fact Sheet					
Contacts					
Name	Function	Department	Work Address	Phone/Ext.	E-Mail
Anonymous					
Interaction History					
Transaction Type	ID	Description	Status	Start Date	End Date
Customer Int. R...	43574	No Text Available	Completed	10.11.2016	10.11.2016
Customer Intera...	8000026661	Road Flooded on SH1	Created	10.11.2016	

Note: The Transaction type **Customer Interaction** (ID 8000XXXXX) is the actual Interaction that the customer is associated with. The Transaction type **Customer Int. Record** (ID 1XXX No Text Available) is any changes or edits made to a Customer Interaction.

Result: The **Customer Interaction** screen is displayed.

Step 4: If the Interaction has opened in view mode, click the **Edit** button.

Customer Interaction: 8000026661, Road Flooded on SH1	
Save	Cancel
Edit	New
New from Template More	
Details	
General Data	Service Request
ID: 8000026661	Business Group: HNO
Description: Road Flooded on SH1	Category: Stormwater
Customer: Anonymous	Sub-category: Flooding
Reported By: Anonymous	Descriptor:
Employee Respo... Louise Lucas	
Service Team: Training	
Processing Data	Reason

Continued on next page

Update an anonymous customer interaction, continued

Step 5: Click the paper symbol to the right of the Customer field to change the customer associated with this Interaction.

Customer Interaction: 8000026661, Road Flooded on SH1

Save | Cancel | Edit | New | New from Template | More

Details

General Data	Service Request
ID: 8000026661	Business Group*: HNO
Description*: Road Flooded on SH1	Category: Stormwater
Customer*: Anonymous	Sub-category: Flooding
Reported By: Anonymous	Descriptor:
Employee Respo...: Louise Lucas	
Service Team: Training	
Processing Data	Reason

Result: The **Search Criteria** window displays.

Step 6: Enter the name/details of the customer that will replace Anonymous in this Interaction and click the Search button.

Search: Partners -- Webpage Dialog

Search Criteria Hide Search Fields

Search for: All Accounts

Customer – First Name	is			
Customer – Last Name	is	Shaw		
City	is			
Role	is			
Account ID	is			

Maximum Number of Results: 999,9

Search Clear Reset

Result List

Corporate Account Individual Account Group

ID	Name	Phone	Street	City	Region	Country
<						>

Result: The Search results are displayed in the **Result List** section.

Continued on next page

Update an anonymous customer interaction, continued

Step 7: Select the new customer by clicking on the line with the customer's records.

Result List: 24 Accounts Found

Corporate Account Individual Account Group

ID	Name	Phone	Street	City	Country
4013179	Allen Shaw		119 Whatawhata Road	Hamilton	New Zealand
4009029	Allyson Shaw	+64 (7) 829 8667		Hamilton	New Zealand
4000963	Amy Shaw				New Zealand
4012571	Bev Shaw	+64 (7) 304 8012		Awakeri	New Zealand
4007453	Caroline Shaw			Wellington	New Zealand
4014759	claire shaw			Nelson	New Zealand
4006294	Clare Shaw			Hokitika	New Zealand
4009331	Claude Shaw			Huntly	New Zealand
4004635	Dean Shaw			Manawatu	New Zealand
4021640	Ian Shaw	+64 (3) 479 5572	193 Smyth Street	Timaru	New Zealand

◀ Back 1 2 3 Forward ▶

Result: The selected name is displayed in the Customer field of the Customer Interaction screen.

Customer Interaction: 8000026661, Road Flooded on SH1

Save | Cancel | Edit | New | New from Template | More

Details

<p>General Data</p> <p>ID: 8000026661</p> <p>Description: Road Flooded on SH1</p> <p>Customer: Ian Shaw</p> <p>Reported By:</p> <p>Employee Responsible: Louise Lucas</p> <p>Service Team: Training</p>	<p>Service Request</p> <p>Business Group: HNO</p> <p>Category: Stormwater</p> <p>Sub-category: Flooding</p> <p>Descriptor:</p>
<p>Processing Data</p> <p>Status: Created</p> <p>Auto E-Mail on Completi... <input type="checkbox"/></p> <p>Source: Telephone</p> <p>Priority: High (Response time 24 Hrs)</p> <p>Customer Call Back Req... No call back required</p>	<p>Reason</p> <p>Type: Event</p> <p>Sub-type: Adverse Weather</p> <p>Capacity: Member of Public</p>
<p>Dates</p> <p>Event Date: 10.11.2016 01:33 PM</p> <p>Request Start: 10.11.2016 01:37 PM</p> <p>Due Date:</p>	<p>Location</p> <p>Physical Address:</p> <p>SH RS/RP: SH1</p> <p>Description: Heading south on SH3 from Awahuri</p>
<p>Note</p> <p>Type: Problem Description</p> <p>Import Scratch Pad</p>	<p>Relationships</p> <p>Related Grouped Interac... <input type="checkbox"/></p> <p>Related Knowledge Artic... <input type="checkbox"/></p>

Continued on next page

Update an anonymous customer interaction, continued

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

Customer Interaction: 8000026661, Road Flooded on SH1 [Back]

Save | Cancel | Edit | New | New from Template | More

Details

General Data	Service Request
ID: 8000026661	Business Group*: HNO
Description*: Road Flooded on SH1	Category: Stormwater
Customer*: Ian Shaw	Sub-category: Flooding
Reported By:	Descriptor:
Employee Resp...: Louise Lucas	
Service Team: Training	

Processing Data **Reason**

Result: Interaction is removed from the Anonymous customer record.