

Introduction This quick help guide provides details to record a Customer Interaction where the issue has been reported by a third party.

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

Interaction reported by a third party process **Step 1:** Search for the person affected by the Interaction (this is NOT the person that initiated the contact/Interaction). Create the customer account if required.

Customer Search

Details | Individual Account | Corporate Account | Object

Customer (First Name):
 Customer (Last Name):

Search Account Clear Reset

See: HNO CRMS Create Customer Individual Quick Help Guide.

Step 2: Click **Confirm** so that the affected partner's details are displayed in the top portion of the screen.

SAP Interaction Center Personalize System News Log Off

Ian Shaw

End

Ready Not Ready

Saved Searches My Cust. Interactions Go Advanced

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Customer Search

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

Details | Individual Account | Corporate Account | Object

Account: Ian Shaw

Street Address

c/o:
 Street 2:
 House Number/Street: 193 Smyth Street
 District:
 Postal Code/City: Timaru
 Country: NZ New Zealand

Postal Address

PO Box:
 PO Box Lobby:
 PO Box City:
 PO Box Postal Code:

Communication Data

Telephone: +64 (3) 479 5572
 Fax:
 Mobile: +64 (22) 533 8201
 E-Mail Address: ian.shaw@shaw.co.nz
 Comm. Method:

Confirm More Fields

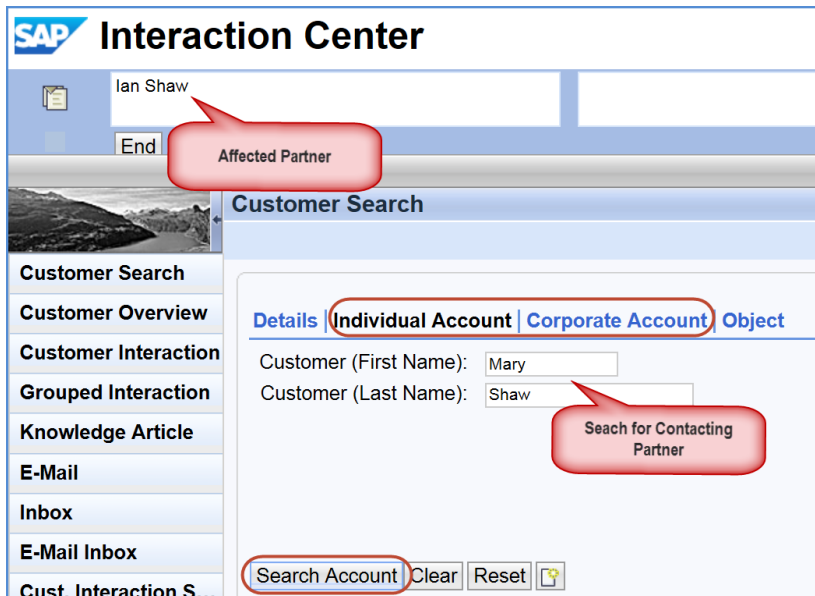
Result List : 1 Account Found

Actions	Account	Accou...	City	Telephone no.
Confirm Fact Sheet Overview	Ian Shaw	4021640	Timaru	+64 (3) 479 5572

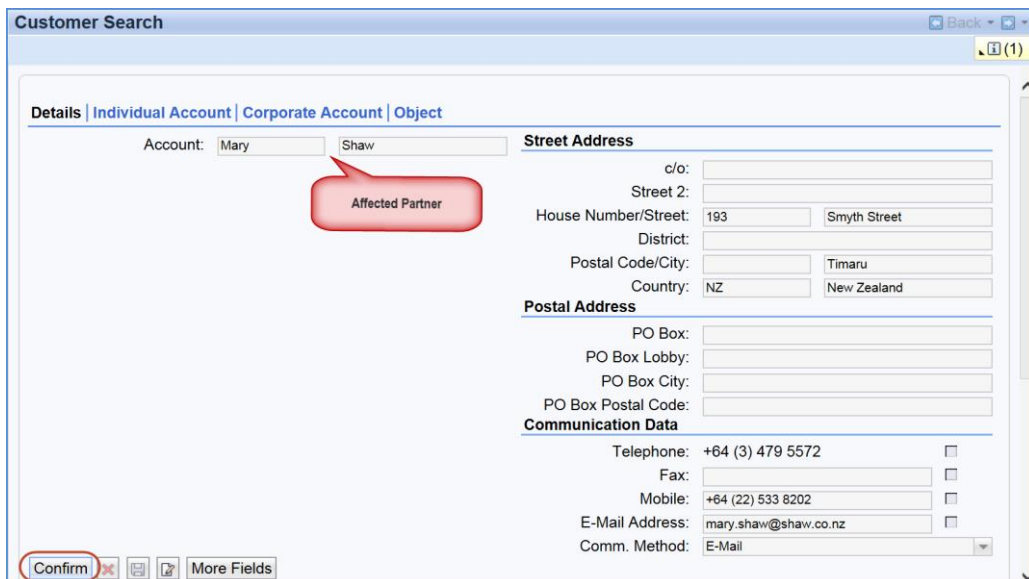
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Interaction reported by a third party process, continued

Step 3: Click either **Individual Account** or **Corporate Account** and search and enter the details of the person making contact.



Step 4: Search and if necessary, create the record. **Confirm** the partner's details.



Result: The reported by details are shown in the **Confirmed Partners** section.

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Quick Help Guide

SAP CRMS Setup a Customer Interaction Reported by a Third Party

Interaction reported by a third party process, continued

Step 5: On the **Confirmed Partners** section of the screen, in the **Partner Function** row, select from the drop down list **Reporter (on behalf)**.

Confirmed Partners					
Update					
	Actions	Account	Account ID	Partner Function	City
▶	Fact Sheet Overview	Ian Shaw	4021640	Main Partner Contact Partner Reporter (on behalf)	Timaru
▶	Fact Sheet Overview	Mary Shaw	4021720		Timaru

Step 6: Click **Update**.

Confirmed Partners					
Update					
	Actions	Account	Account ID	Partner Function	City
▶	Fact Sheet Overview	Ian Shaw	4021640	Main Partner	Timaru
▶	Fact Sheet Overview	Mary Shaw	4021720		Timaru

Result: Details are updated.

Step 7: Create the Interaction.

See: HNO CRMS Create Customer Interaction Quick Help Guide.