Quick Help Guide

SAP CRMS Setup a Customer Interaction Reported by a Third Party

Introduction

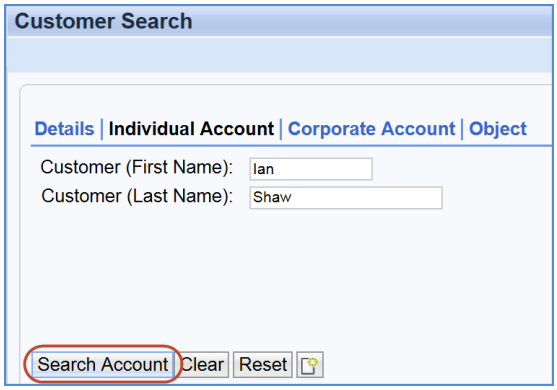
This quick help guide provides details to record a Customer Interaction where the issue has been reported by a third party.

Role required

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

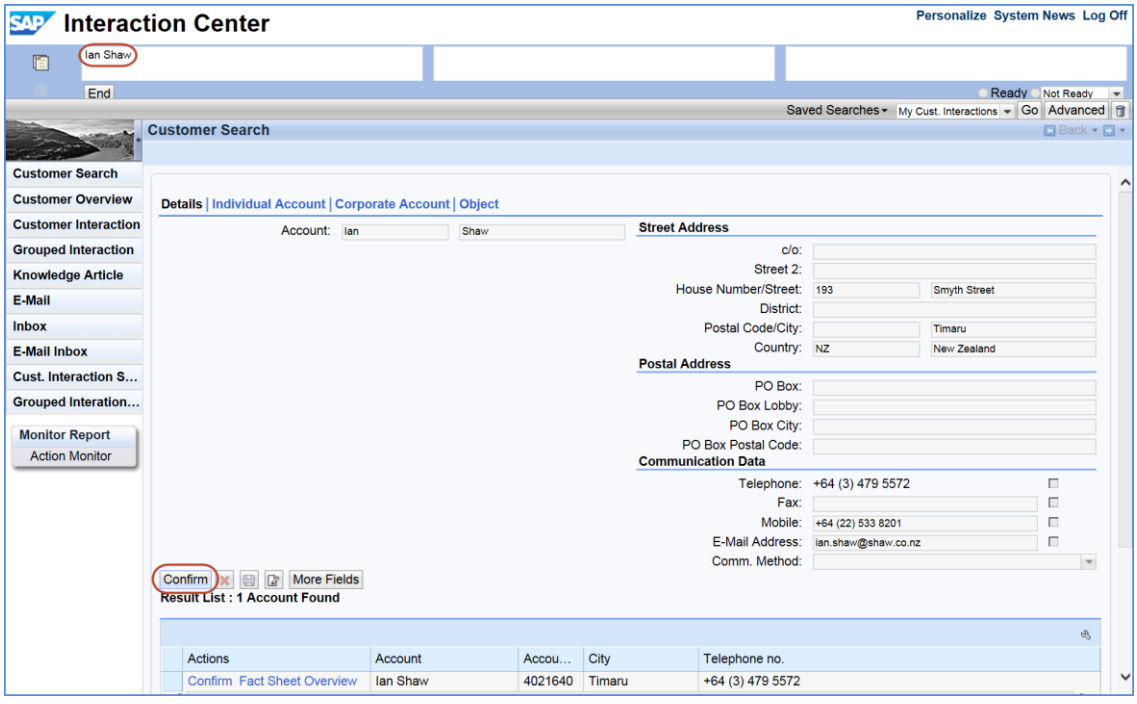
Interaction reported by a third party process

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.



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.



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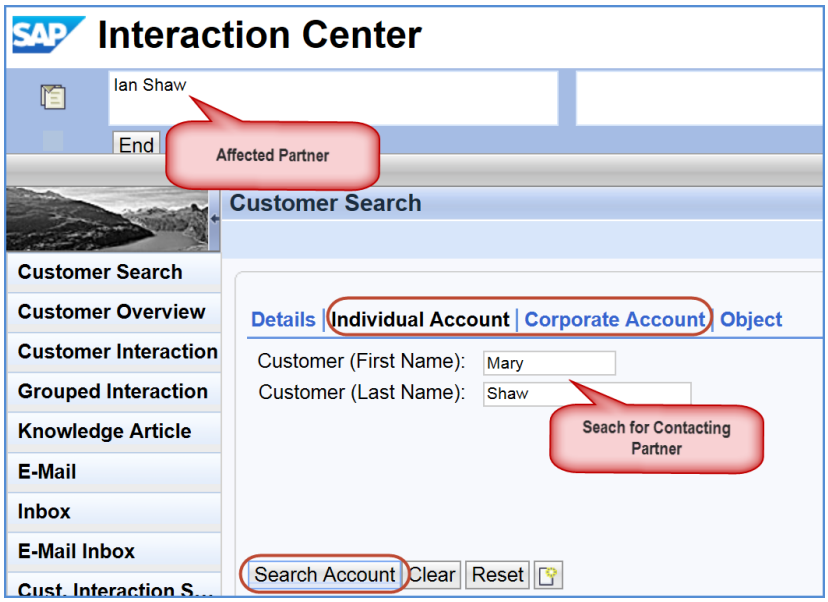
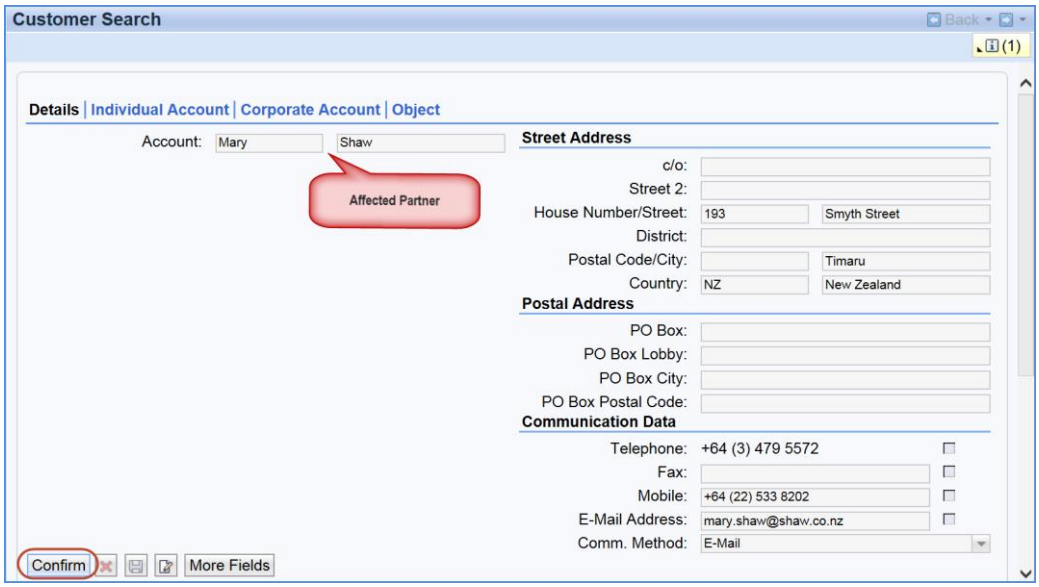
Interaction reported by a third party process, *continued*

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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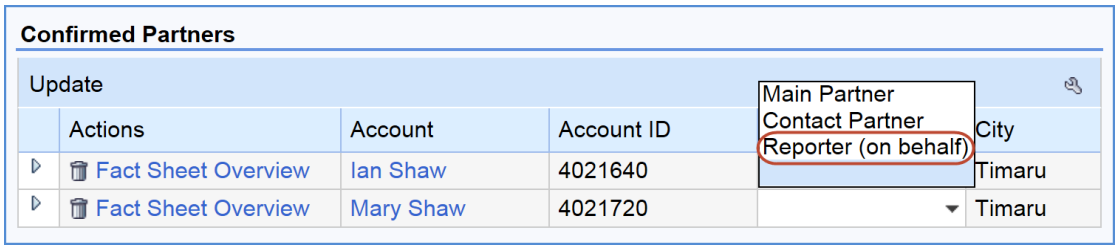
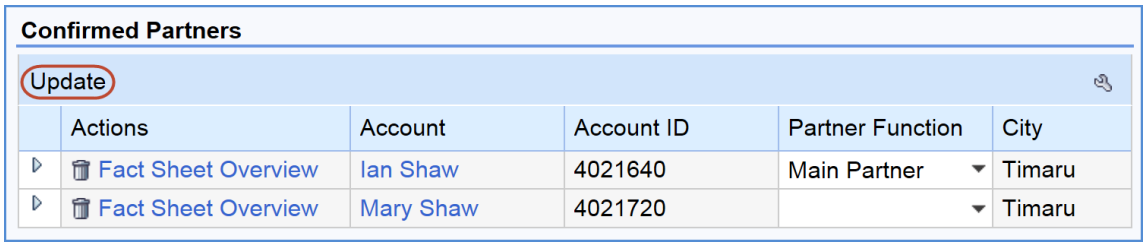
Interaction reported by a third party process, *continued*

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



Step 6: Click **Update.**



Result: Details are updated.

Step 7: Create the Interaction.

See: HNO CRMS Create Customer Interaction Quick Help Guide.