Quick Help Guide
SAP CRMS Customer Search

Introduction

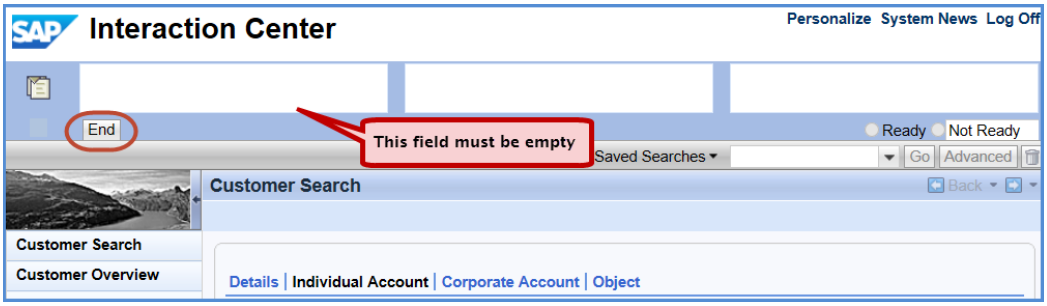
Customer search is at the heart of all interactions within the Customer Relationship Management System (CRMS). Before any interactions can be created, an existing customer must be found, or a new customer created.

Role required

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

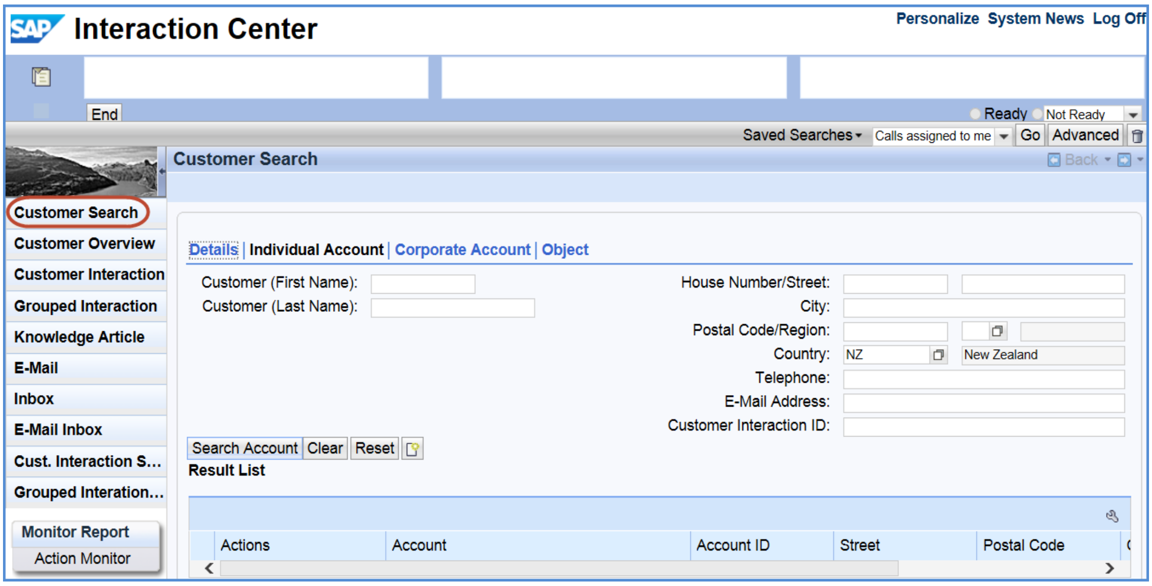
Before you begin

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



Searching for a customer

Step 1: Click on **Customer Search**.



Result: The Customer Search screen displays.

Note: If you have just logged on then this screen will default.

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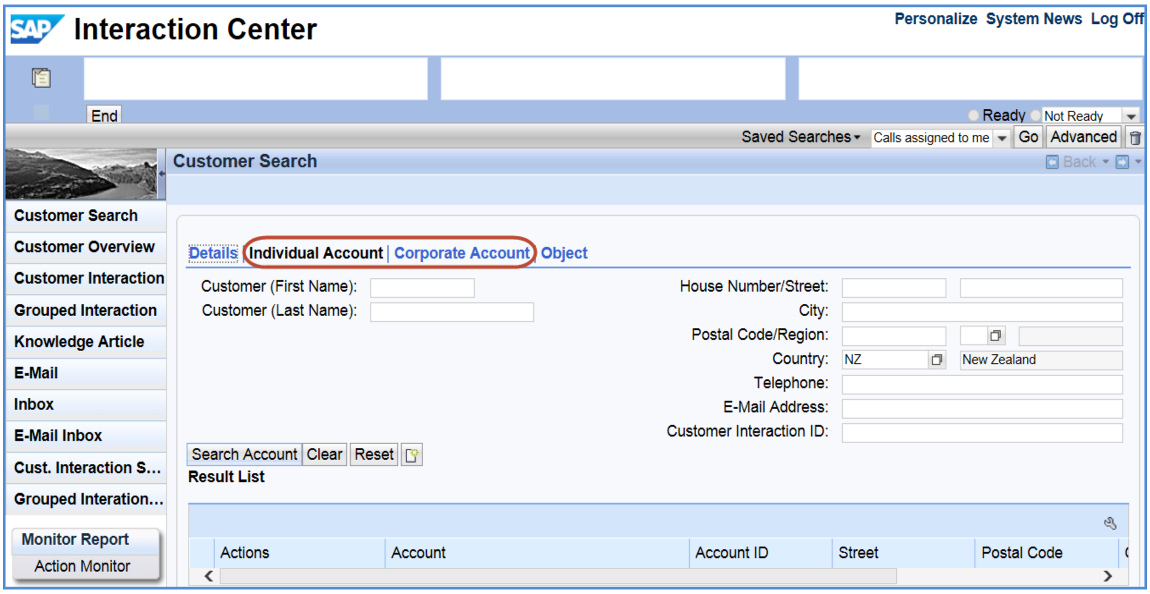
Searching for a customer, *continued*

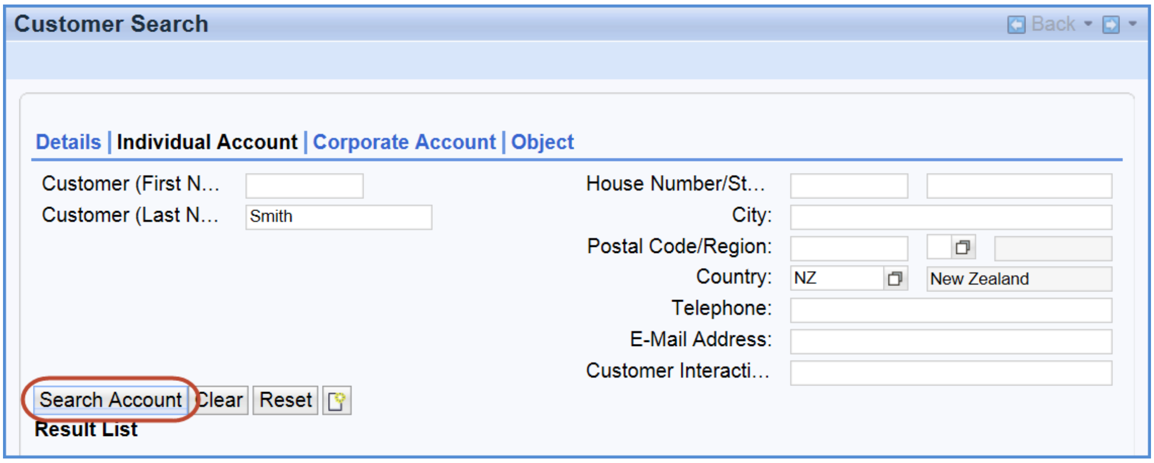
Step 2: Select either Corporate or Individual depending on the customer type you are looking for.



Step 3: Enter name details into the first and/or last name field. If you do not know the name details you can search on any of the other details displayed.

Note: If you are unsure of the spelling, you can insert an asterisk * to perform a wider search. Eg '*Jo**' will return values such as Joseph, John, Jon, Jochem, etc, and '**call**' will return values such as MacCall, McCall and Callum etc.

Step 4: Either click **Search Account,** or press **Enter.**



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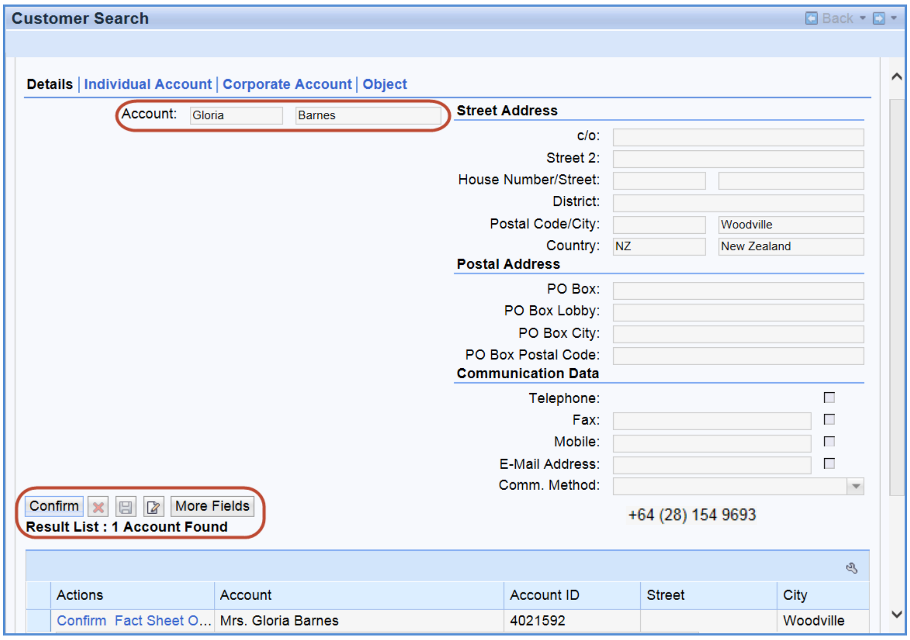
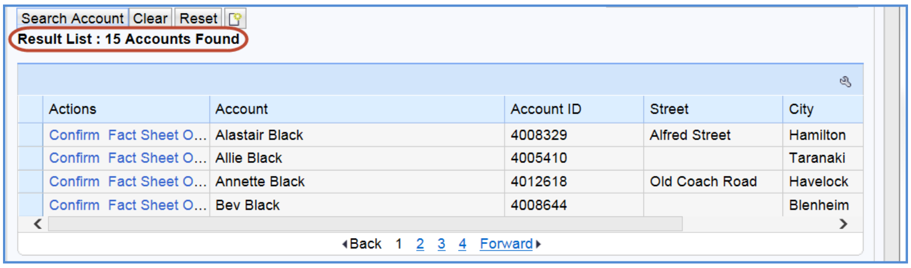
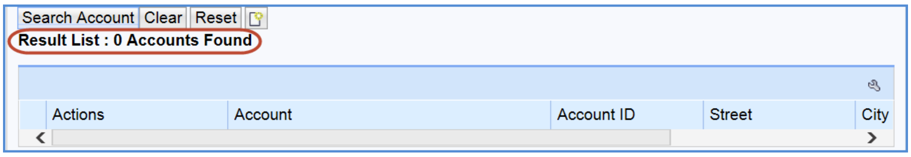
Searching for a customer, *continued*

Result: One of the following will display.

If…	Then…
Only one record exists	The Confirm button, Account ID and customer details display. 
More than one record exists	A list of all matches displays. 
No matches	The message “0 Accounts Found” displays. 

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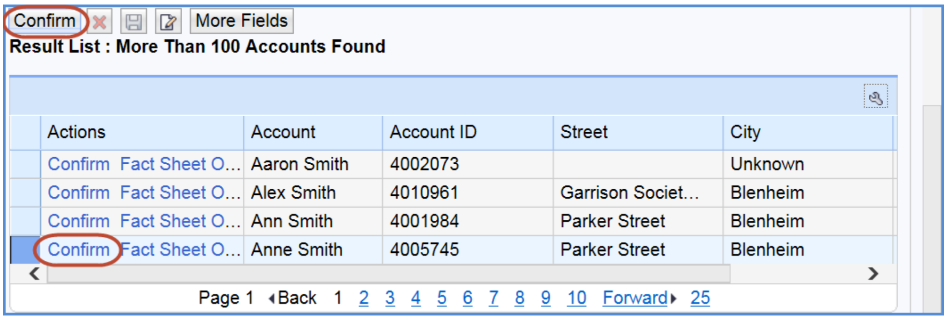
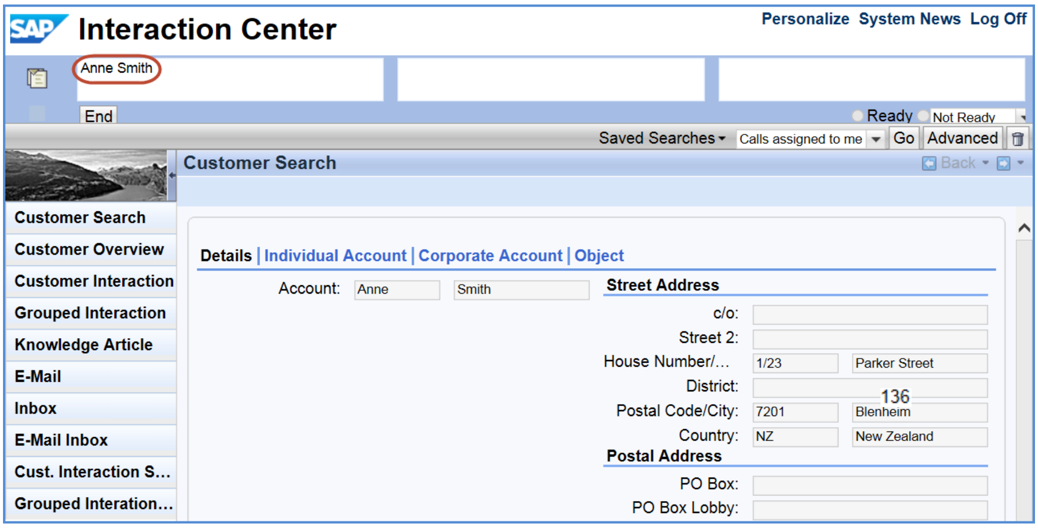
Searching for a customer, *continued*

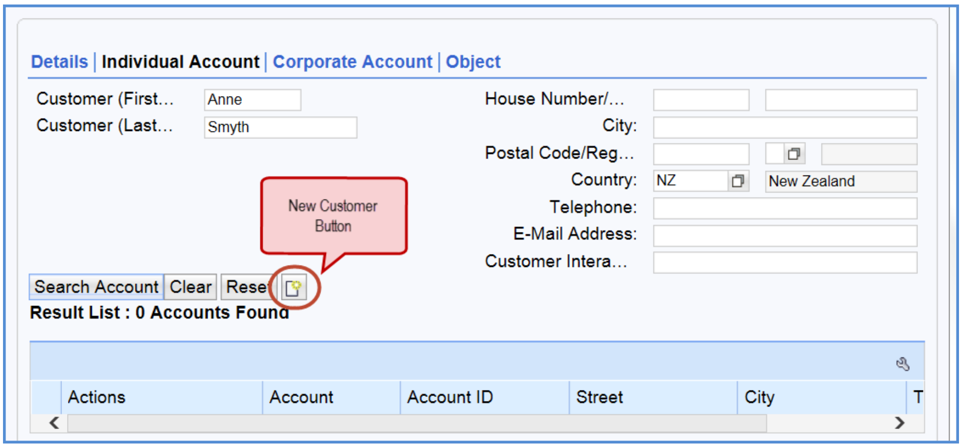
Step 5: If the details displayed match your customer, click **Confirm** – either on the top portion (if available) or alongside the customer record.



Result: Customer name displays in the top portion of the screen. Select the activity required (eg Customer Interaction).



If the details displayed **do not** match your customer, click the **New** button to create the customer if required.



See: HNO CRMS Create Customer Individual Quick Help Guide.