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Procedure Owner(s) – list Functions: Service / Order Services functions		Revision's Training Requirements – select one or both (per section #9): Awareness _ Formal <u>X</u>	

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1 PURPOSE


- 1.1 To provide operator instruction on how to properly create a contact partner record in the SAP CRM environment.

2 SCOPE – APPLIES TO WHERE & WHEN THE PROCEDURE IS USED

- 2.1 Procedure is followed anytime a new contact person is required. People affected are anyone that currently processes service requests or orders in the SAP CRM environment.

3 DEFINITIONS AND ACRONYMS

- 3.1 **Account:** MTS assigned Site Number of equipment location.
- 3.2 **Contact:** Person / End user contacting MTS for assistance.
- 3.3 **Interaction Center (IC):** Interface used by agent to operate in the CRM environment.
- 3.4 **Web UI:** Standard web user interface for CRm Service
- 3.5 **SAP CRM:** CRM system used to enter information.

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3.6 **Service Request:** Internal request for another department to do something.


4 GRAPHIC (IF NEEDED)

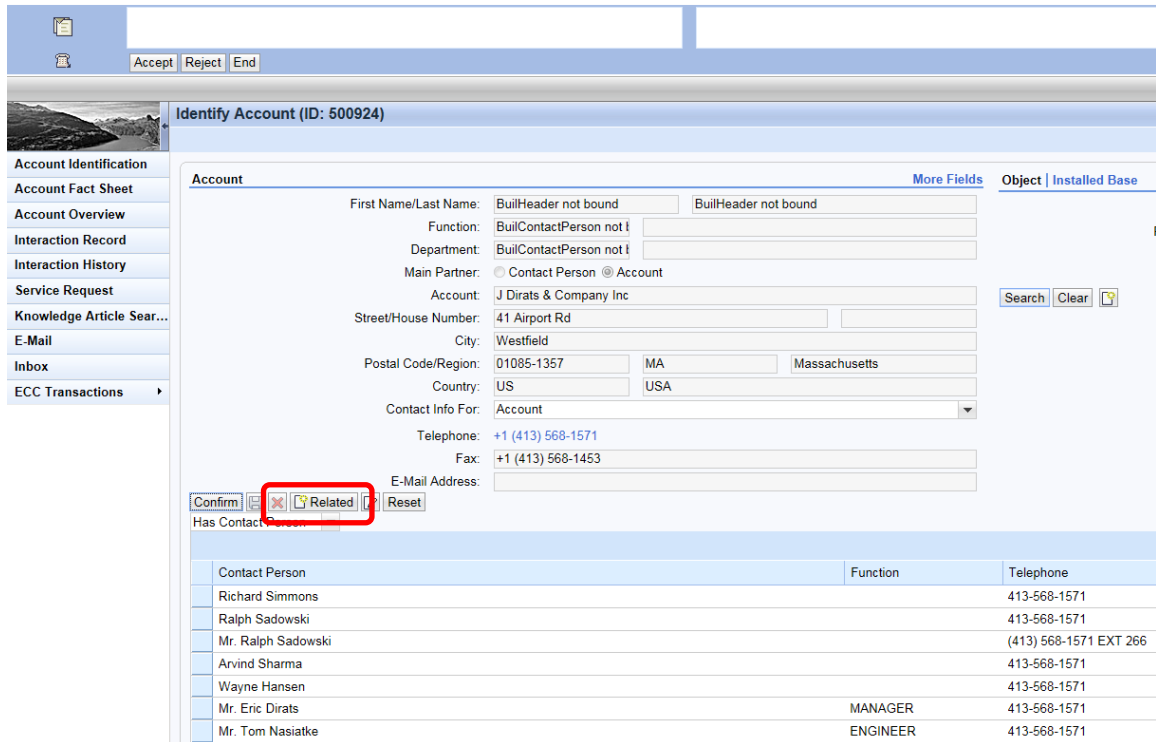
5 RESPONSIBILITIES

- 5.1 **Interaction Center Agent / Role:** Adding contacts from the Interaction Center Agent role.
- 5.2 **Worldwide Service:** Adding contacts from the standard Web UI roles.

6 PROCEDURE

- 6.1 When starting from the Interaction Agent role, follow the standard procedure to identify the account. When you are at the point to select a contact and the contact person is not in the system, do the following:
 - 6.1.1 Search the account following normal business process.
 - 6.1.2 Click [Related].

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Identify Account (ID: 500924)

Account Identification
Account Fact Sheet
Account Overview
Interaction Record
Interaction History
Service Request
Knowledge Article Search
E-Mail
Inbox
ECC Transactions

Account


First Name/Last Name: BuilHeader not bound | BuilHeader not bound
Function: BuilContactPerson not i |
Department: BuilContactPerson not i |
Main Partner: Contact Person Account
Account: J Dirats & Company Inc
Street/House Number: 41 Airport Rd |
City: Westfield
Postal Code/Region: 01085-1357 | MA | Massachusetts
Country: US | USA
Contact Info For: Account
Telephone: +1 (413) 568-1571
Fax: +1 (413) 568-1453
E-Mail Address: |

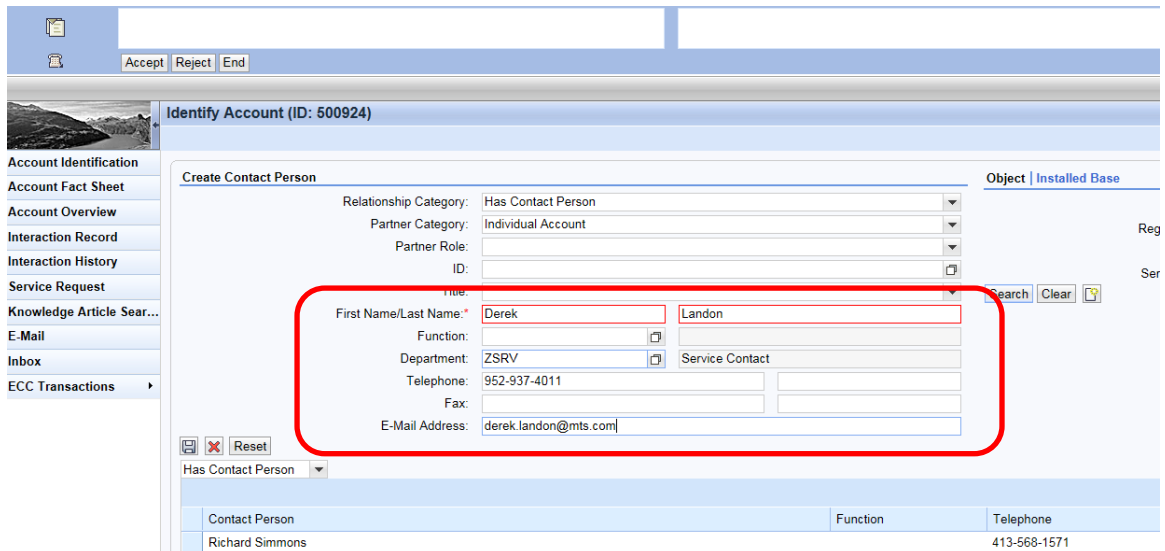
Buttons: Confirm, **Related**, Reset

Contact Person	Function	Telephone
Richard Simmons		413-568-1571
Ralph Sadowski		413-568-1571
Mr. Ralph Sadowski		(413) 568-1571 EXT 266
Arvind Sharma		413-568-1571
Wayne Hansen		413-568-1571
Mr. Eric Dirats	MANAGER	413-568-1571
Mr. Tom Nasiatke	ENGINEER	413-568-1571

- Add the contact person's first and last name.
- Add the phone number.
- Add the contact's email address.
- Add ZSRV as the department.

6.1.3 Click [Save] (disk icon).

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Identify Account (ID: 500924)

Account Identification

Account Fact Sheet

Account Overview

Interaction Record

Interaction History

Service Request

Knowledge Article Search

E-Mail

Inbox

ECC Transactions

Accept Reject End

Create Contact Person

Relationship Category: Has Contact Person

Partner Category: Individual Account

Partner Role:

ID:

First Name/Last Name: Derek Landon

Function:

Department: ZSRV Service Contact

Telephone: 952-937-4011

Fax:

E-Mail Address: derek.landon@mts.com

Reset

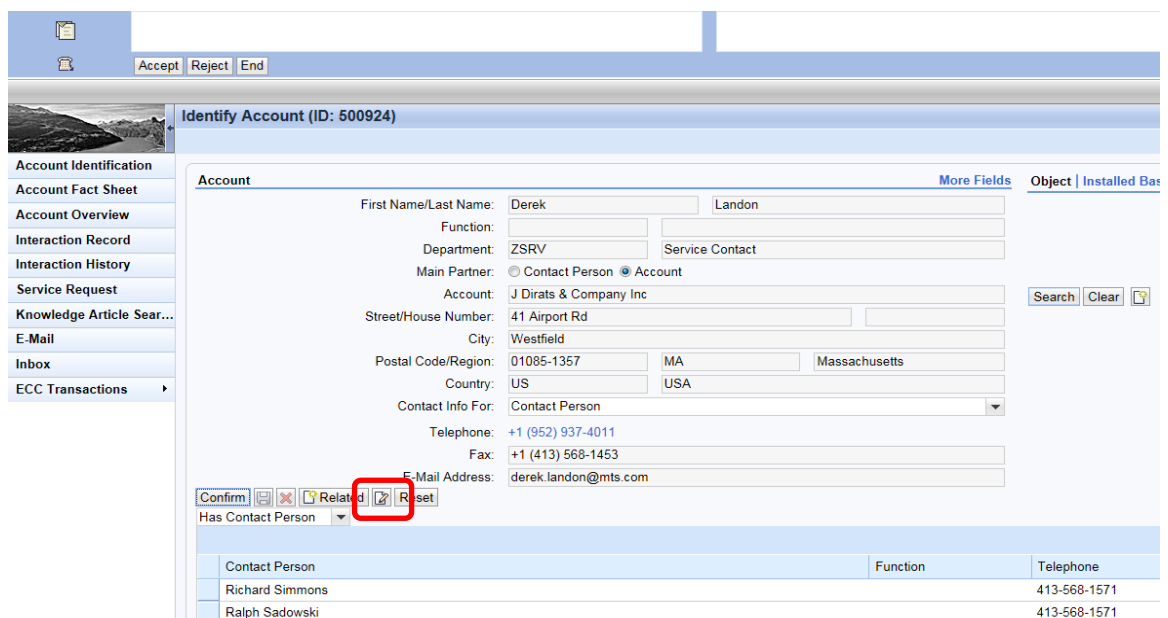
Has Contact Person

Contact Person	Function	Telephone
Richard Simmons		413-568-1571

6.1.4 Ensure the new contact is available from the contact list and continue with your normal procedure (contact should automatically be selected for you).

6.2 To edit information on an existing contact, do the following

6.2.1 Follow normal procedure to identify the account and contact. Before clicking [confirm], click [edit] (paper and pencil icon).



Identify Account (ID: 500924)

Account Identification

Account Fact Sheet

Account Overview

Interaction Record

Interaction History

Service Request

Knowledge Article Search

E-Mail

Inbox

ECC Transactions

Accept Reject End

Account

More Fields

Object | Installed Base

First Name/Last Name: Derek Landon

Function:

Department: ZSRV Service Contact

Main Partner: Contact Person Account

Account: J Dirats & Company Inc

Street/House Number: 41 Airport Rd

City: Westfield

Postal Code/Region: 01085-1357 MA Massachusetts

Country: US USA

Contact Info For: Contact Person

Telephone: +1 (952) 937-4011


Fax: +1 (413) 568-1453

E-Mail Address: derek.landon@mts.com

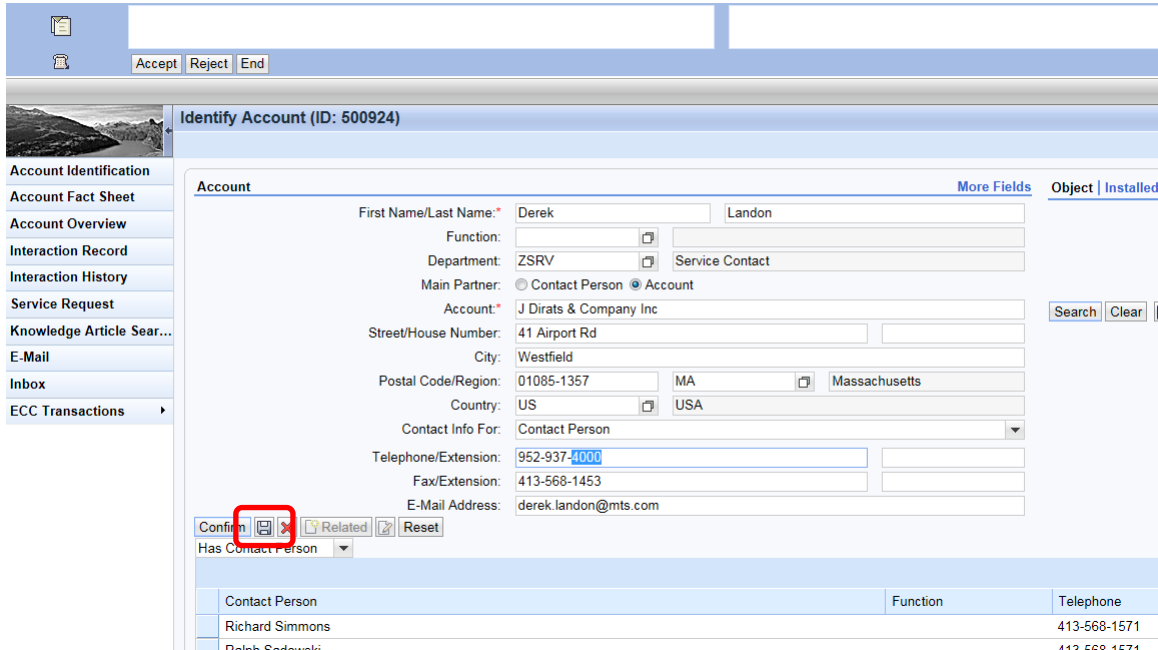
Confirm Edit Related Reset

Has Contact Person

Contact Person	Function	Telephone
Richard Simmons		413-568-1571
Ralph Sadowski		413-568-1571

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6.2.2 Edit or enter new information. In this example, the phone number has been changed. Click [Save] (disk icon).



Identify Account (ID: 500924)

Account Identification

Account Fact Sheet

Account Overview

Interaction Record

Interaction History

Service Request

Knowledge Article Search

E-Mail

Inbox

ECC Transactions

Account

First Name/Last Name: Derek Landon

Function: []

Department: ZSRV Service Contact

Main Partner: Contact Person Account

Account: J Dirats & Company Inc

Street/House Number: 41 Airport Rd

City: Westfield

Postal Code/Region: 01085-1357 MA Massachusetts

Country: US USA

Contact Info For: Contact Person

Telephone/Extension: 952-937-4000

Fax/Extension: 413-568-1453


E-Mail Address: derek.landon@mts.com

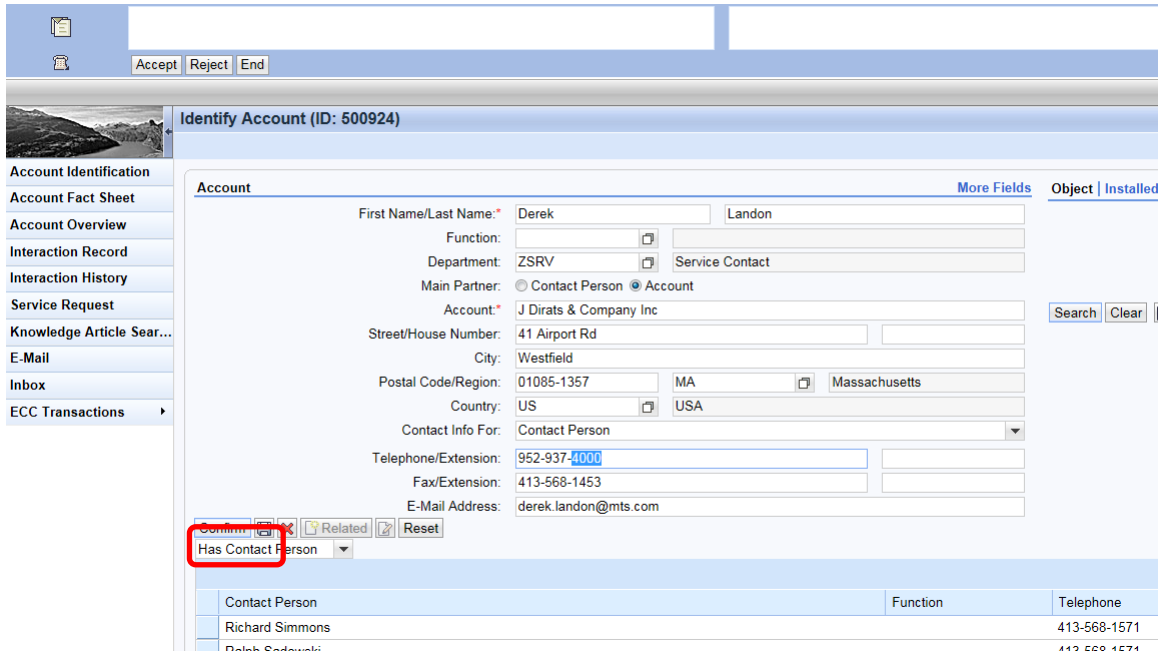
Confirm [] [] Related [] Reset

Has Contact Person []

Contact Person	Function	Telephone
Richard Simmons		413-568-1571
Derek Sadayati		413-568-1571

6.2.3 Confirm the account and contact to continue.

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Identify Account (ID: 500924)

Account Identification
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E-Mail
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Account

First Name/Last Name: Derek Landon
Function:
Department: ZSRV Service Contact
Main Partner: Contact Person Account
Account: J Dirats & Company Inc
Street/House Number: 41 Airport Rd
City: Westfield
Postal Code/Region: 01085-1357 MA Massachusetts
Country: US USA
Contact Info For: Contact Person
Telephone/Extension: 952-937-4000
Fax/Extension: 413-568-1453
E-Mail Address: derek.landon@mts.com

Has Contact Person

Contact Person	Function	Telephone
Richard Simmons		413-568-1571
Derek Landon		413-568-1571

- 6.3 When starting from any of the standard Web UI roles, follow the standard procedure to search for the contact. When you are unable to locate the contact in the system, do the following:
- 6.3.1 Click [Accounts & Products].
 - 6.3.2 Search “Accounts” and enter the appropriate Site Number in the Account ID field and click [Search].
 - 6.3.3 From the list, select the appropriate Site to add the contact.
 - 6.3.4 At the Account overview page, scroll down to the Contacts assignment block.
 - 6.3.5 Click [New] in the header area of Contacts.
 - 6.3.6 Add the contact’s first and last name.
 - 6.3.7 Add the contact’s phone number.
 - 6.3.8 Add the email address.
 - 6.3.9 Set “ZSRV” as the department.
 - 6.3.10 Click [Done] (green checkmark).

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6.3.11 The contact should now be added under the appropriate site. To verify, search for the contact in the contact list.

7 ASSOCIATED QUALITY RECORDS – AS STATED IN THE QUALITY RECORDS LIST

Required Record

8 REFERENCE FORMS / TEMPLATES / DOCUMENTS

Form / Template / Document Title	Location


9 CURRENT REVISION'S TRAINING REQUIREMENTS

Training requirements are determined by the document owner.

1. Select Awareness **and/or** Formal training requirements.
2. List (below) the functions or groups that require the training.

Select (mark X)	Training Type	Training Definition
	Awareness	Awareness training is conducted by communication, which is sent/delivered by the approver/author/owner of the document to the affected employees/groups.
X	Formal	Formal training requires the approver/author/owner to collect/store evidence that the affected employees/groups were trained.

Functions/Groups that require Awareness to this procedure:

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- Awareness: List here the function(s) or group(s) that require Awareness training.
- Formal: Call center and Order Services functions

10 REVISION HISTORY & APPROVAL

Revision History			
Rev	Description of Change	Author	Effective Date
1	Initial Document	Derek Landon	7/24/2015

Approval of Current Revision		
Name / Function	Signature	Date
Derek Landon / Global Customer Support Manager	Derek Landon	7/24/2015