

Create / Change / Display Customer Contact Record

Module: PSCD // Process: Customer Service

Transactions Used: BCT0 / BCT1 / BCT2 / FMCAOV

BP Contact		<input type="checkbox"/> Delete
Partner		
BusinessPartner	504907	
Contact Person		
Contact Attributes Business Objects		
Date/Time	03/01/2016 13:10:08	Created by
Class	PMT	
Action	GEN	AuthorizGroup
Type	1 Telephone	
In/Outgoing	1 Incoming	
Add. Info		
Priority	4 4-Low	
Customer Info.		

Overview

Customer contact records are created to document contact with the customer regarding their account. The customer records are categorized by the subject matter (Application, General, Payment, Report), the method of contact (email, telephone, etc.), and whether it was incoming, outgoing, or internal communication

Process

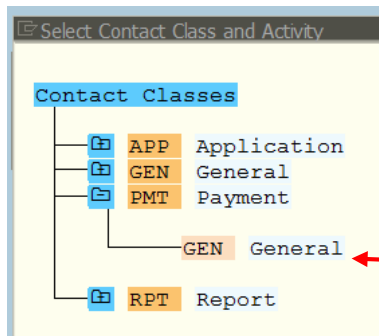
NOTE: The very first contact with a business partner must be created using t-code BCT0. Once a contact has been entered, it can be viewed in the BP Overview screen (FMCAOV) and subsequent contacts can be created from the overview screen (see step 03).

01 Create customer contact record

Enter transaction code **BCT0**

Complete the screen as follows:

- Enter the business partner number
- Enter the contact person number if appropriate
- Enter the date when the contact occurred
- Select the appropriate class from the dropdown menu (open the folder and click on General)



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Create Contact

BP Contact Delete

Partner

BusinessPartner 504907

Contact Person

Contact Attributes **Business Objects**

Date/Time 03/01/2016 13:10:08 Created by

Class PMT

Action GEN AuthorizGroup

Type 1 Telephone

In/Outgoing 1 Incoming

Add. Info

Priority 4 4-Low

Customer Info.

Create Contact

BP Contact Delete

Partner

BusinessPartner 504907 Communication Management Services / 14250 NW Science Par

Contact Person

Contact Attributes **Business Objects**

Function	Object Role Description	Object Description
<input type="button" value="Create Relationship"/>	Reference	

Contract Object for Public Sector Applications

Contract Object 92020301

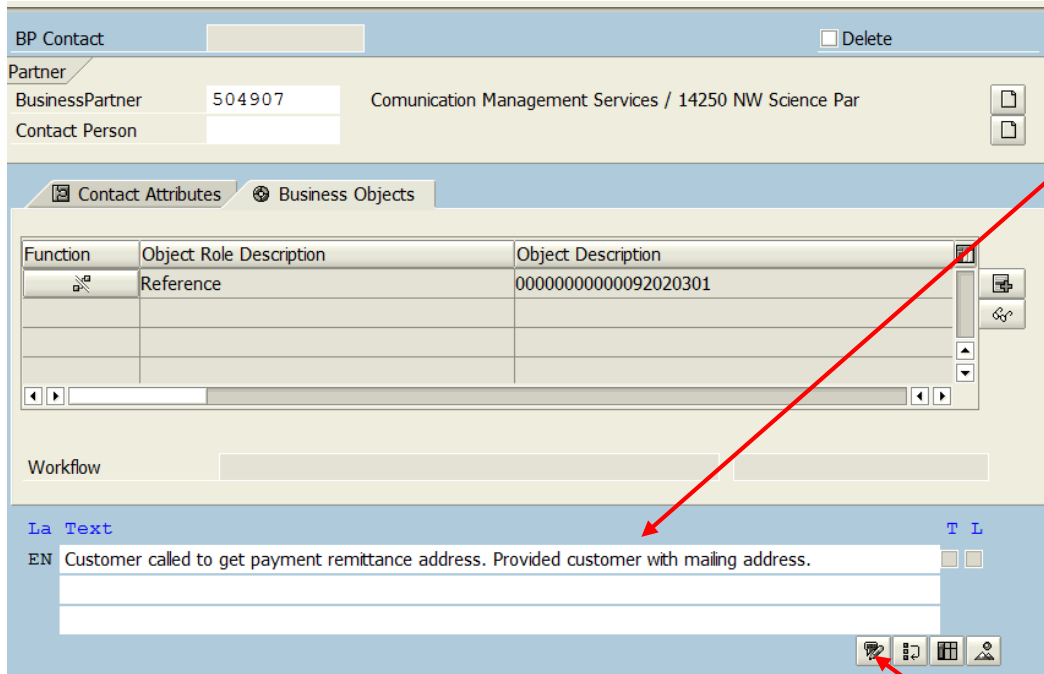
01 (cont'd)

- Select the Type of contact from the dropdown list
- Select whether the contact was incoming, outgoing, or internal
- Select a priority from the dropdown list
- Click on the Business Objects tab and enter the corresponding contract object
 - Double-click on the Create Relationship icon under *Function*
 - Enter the Contract Object number
 - Click the green check-mark

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The screenshot shows the SAP Customer Contact Record form. At the top, there is a 'BP Contact' header with a 'Delete' checkbox. Below this, the 'Partner' section includes 'BusinessPartner' (504907) and 'Communication Management Services / 14250 NW Science Par'. The 'Contact Person' field is also visible. The main area is divided into 'Contact Attributes' and 'Business Objects'. The 'Business Objects' table has the following data:

Function	Object Role	Description	Object Description
	Reference		00000000000092020301


Below the table is a 'Workflow' section. At the bottom, there is a 'Text' section with a text area containing the text: 'Customer called to get payment remittance address. Provided customer with mailing address.' To the right of the text area are 'T' and 'L' buttons. At the bottom right of the text area is an 'Editor' icon.

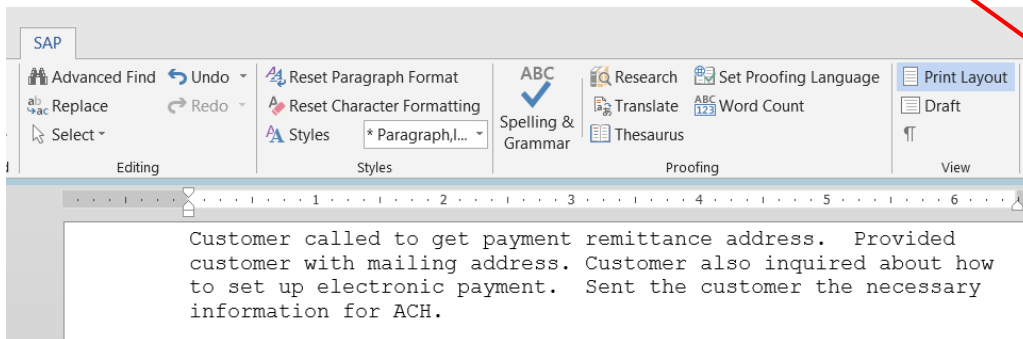
01 (cont'd)

- i. Enter your notes regarding the customer contact in the Text field.
- j. Click Save 
- k. A message will appear at the bottom of your screen indicating that the contact has been created.

 Contact 10000000001 has been created

Hints for entering Text:

1. Three blank lines appear in the Text section to be used for comments.
2. Each line is longer than what appears on the screen. You can type to the end of the line if necessary.
3. If additional space is needed for the comments, click on the Editor icon . A screen will open up for you to enter your comments.
4. Once you've completed your comments, click the green back-arrow and Save.



The screenshot shows the SAP Editor window. The title bar says 'SAP'. The menu bar includes: 'Advanced Find', 'Undo', 'Reset Paragraph Format', 'ABC', 'Research', 'Set Proofing Language', 'Print Layout', 'Replace', 'Redo', 'Reset Character Formatting', 'Spelling & Grammar', 'Translate', 'Word Count', 'Draft', 'Select', 'Styles', '* Paragraph, L...', 'Thesaurus'. The main text area contains the text: 'Customer called to get payment remittance address. Provided customer with mailing address. Customer also inquired about how to set up electronic payment. Sent the customer the necessary information for ACH.'

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Change Contact: Initial Screen

BP Contact 10000000001

Business Partner Contact (1)

Restrictions

Business Partner 504907

Contact Person

Contact Class

Action

Date

Contact Type

Business Partner Contact (1) 1 Entry found




Restrictions

Partner	Contact	Action	Date	Time	Contact
504907	General		02/11/2016	13:16:20	10000000001

02 Change/display customer contact record using transaction codes

Customer contact records can also be changed and displayed from the Business Partner overview screen (FMCACOV); see step 04.

Enter transaction code **BCT1** or **BCT2**

- In the BP Contact field, click the drop-down menu to find the contact record you want to change/display.
- Enter the business partner number.
- Click the green checkmark 
- All contact records for the business partner are displayed. Double-click on the one you want to change/display.
- Click the green checkmark 
- The contact record will appear. Make the necessary changes.
- Click Save 

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The screenshot shows the 'Business Partner Overview' screen. At the top, there are tabs for 'Display Business Partner', 'Account Maintenance', 'Credit', and 'Dunning'. Below this is the 'Master Data' section with fields for 'Business Partner' (504907), 'Name', 'Telephone', and 'Fax'. At the bottom, there are tabs for 'Overview', 'Item List', 'Balances', 'Contacts', 'Correspond.', and 'Inb'. The 'Contacts' tab is highlighted with a red box. Below the tabs are buttons for 'AcctBalance' and 'Cleared Items'.

03 Create customer contact record in Business Partner Overview

Customer contact records can be created from the Business Partner overview screen.

Enter transaction code **FMCACOV**

- a. Enter business partner number
- b. Click on the *Contacts* tab
- c. Click on *Create Contact*
- d. Follow Step 01, a thru k

The screenshot shows the 'Business Partner Overview' screen with the 'Contacts' tab selected. The 'Master Data' section shows 'Business Partner' 504907 and 'Name' 'Communication Management Services'. Below the tabs, there is a 'Create Contact' button highlighted with a red box. To the right of the button is a 'List of Cust. Contacts' button. Below these buttons is a table of customer contacts for business partner 504907.

Action	Action	BP Contact	Class	TO	Cont.Per...	Created by	CustInfo	Date
GEN	General	10000000001	RPT	1		JOAMARTIN		02/11/2016

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The screenshot shows the 'Business Partner Overview' screen. At the top, there are buttons for 'Display Business Partner', 'Account Maintenance', 'Credit', and 'Dunning'. Below this is the 'Master Data' section with fields for 'Business Partner' (504907), 'Name', 'Telephone', and 'Fax'. At the bottom, there is a navigation bar with tabs for 'Overview', 'Item List', 'Balances', 'Contacts', 'Correspond.', and 'Inb'. The 'Contacts' tab is highlighted with a red box. Below the navigation bar are buttons for 'AcctBalance' and 'Cleared Items'.

04 Change/view customer contact record in Business Partner Overview

Customer contact records can be viewed and/or changed from the Business Partner overview screen.

Enter transaction code **FMCACOV**

- a. Enter business partner number
- b. Click on the *Contacts* tab

The screenshot shows the 'Business Partner Overview' screen with the 'Contacts' tab selected. The 'Master Data' section shows 'Business Partner' 504907 and 'Name' 'Communication Management Services'. Below the navigation bar, there are buttons for 'Create Contact' and 'List of Cust. Contacts'. A table titled 'Customer Contacts for 504907' is displayed. A red arrow points to the 'CustInfo Date' column of the first row in the table.

Action	Action	BP Contact	Class	TO	Cont.Per...	Created by	CustInfo Date	Ior...	Long tex
GEN	General	10000000001	RPT	1		JOAMARTIN	02/11/2016	1	02/11/2016

- c. All contact records are listed. To view the text, double-click on the item you want to view.

