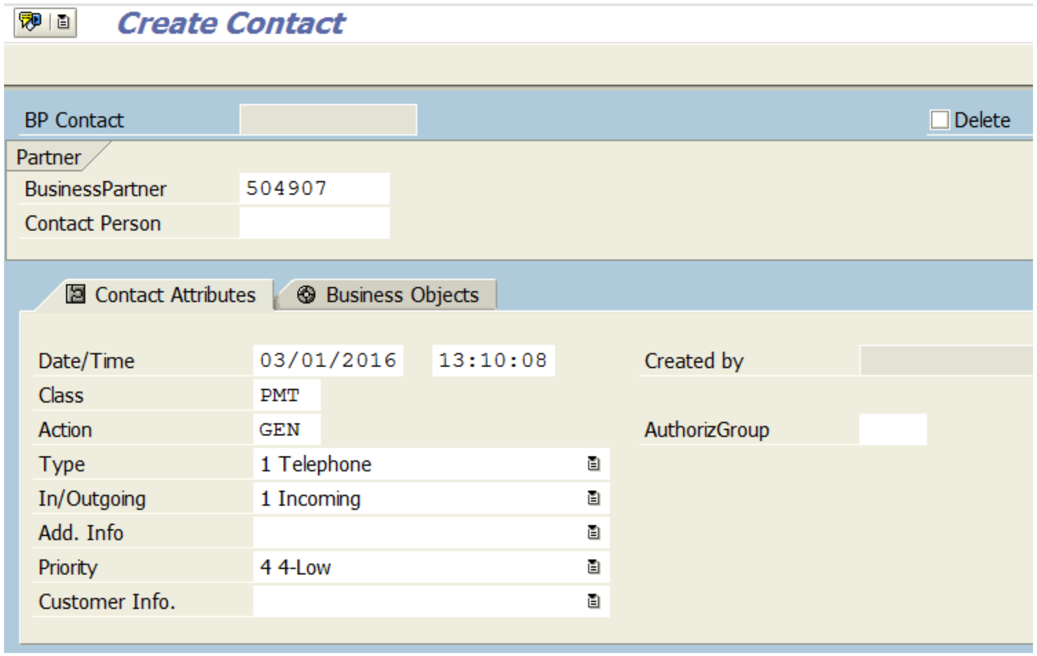
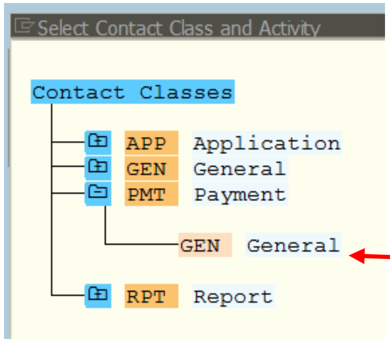
Create / Change / Display Customer Contact Record

Module: PSCD // **Process:** Customer Service
Transactions Used: BCT0 / BCT1 / BCT2 / FMCACOV





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 (FMCACOV) 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:

a. Enter the business partner number

b. Enter the contact person number if appropriate

c. Enter the date when the contact occurred

d. Select the appropriate class from the dropdown menu (open the folder and click on General)

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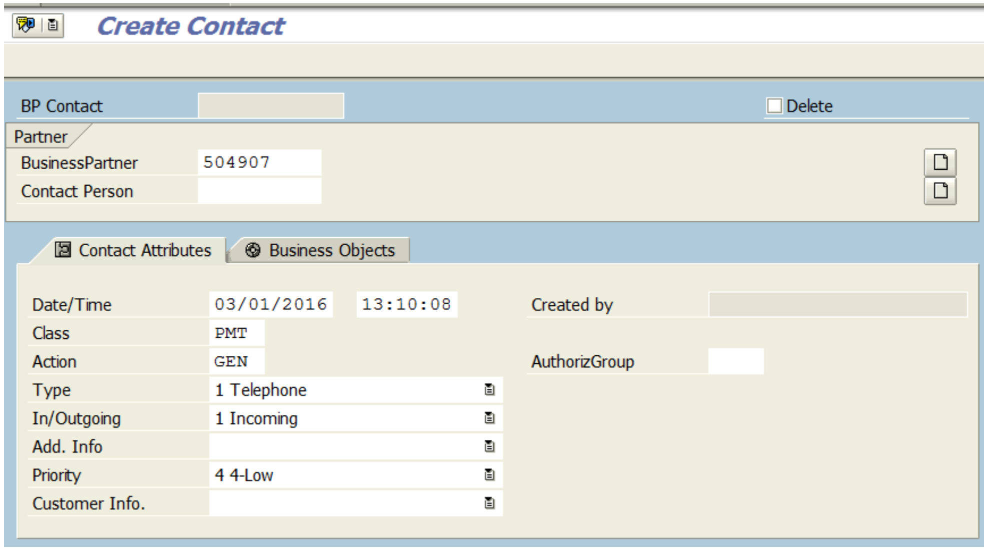
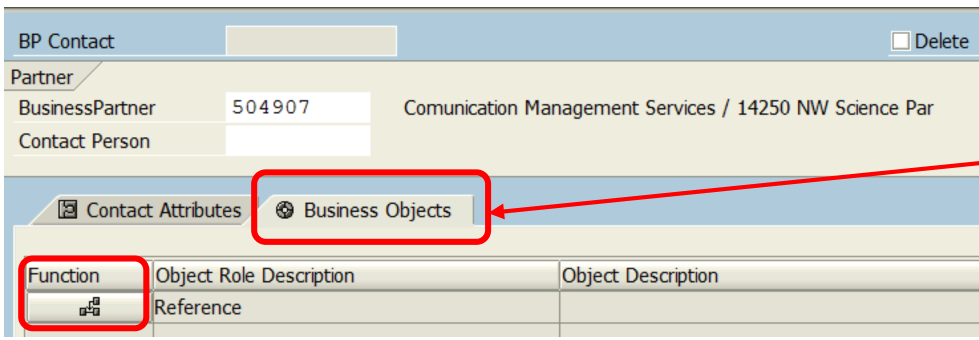
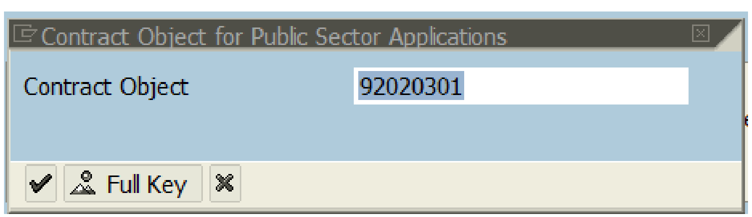






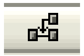
01 (cont'd)

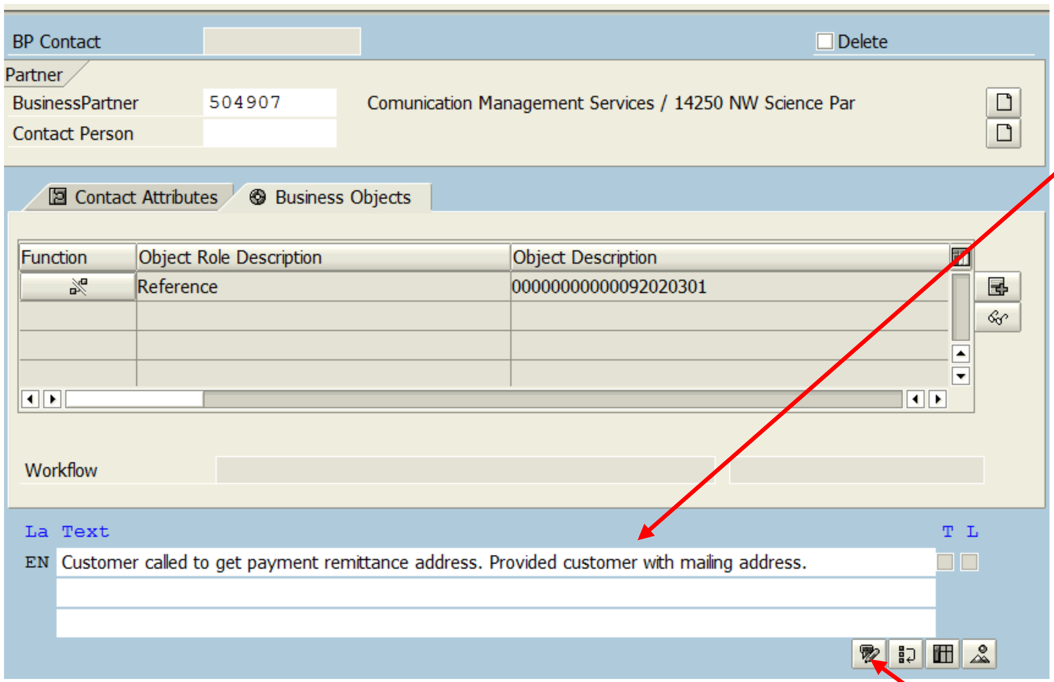
e. Select the Type of contact from the dropdown list

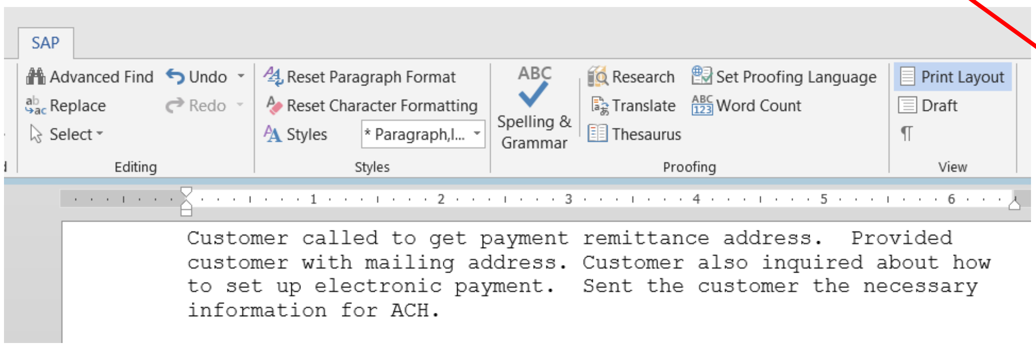
f. Select whether the contact was incoming, outgoing, or internal

g. Select a priority from the dropdown list

h. Click on the Business Objects tab and enter the corresponding contract object

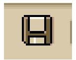
- Double-click on the Create Relationship icon under *Function* 
- Enter the Contract Object number
- Click the green check-mark



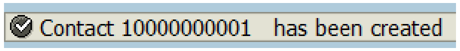


01 (cont'd)

i. Enter your notes regarding the customer contact in the Text field.

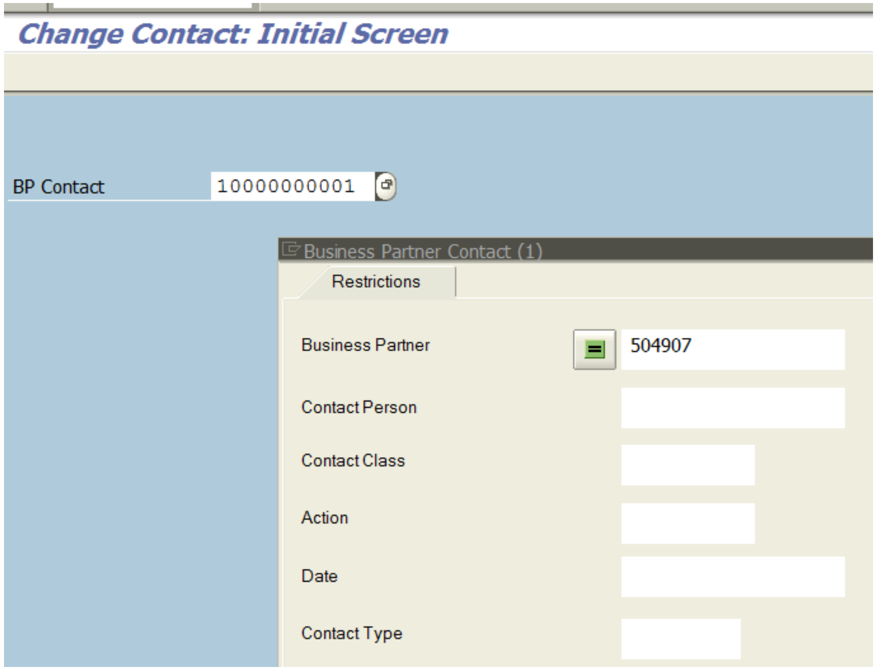
j. Click *Save* 

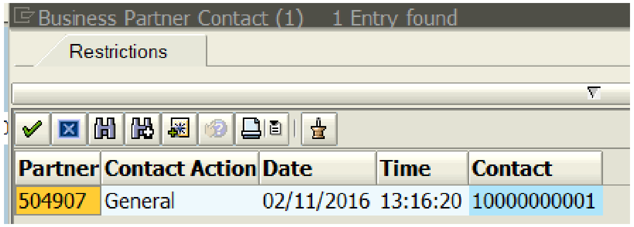
k. A message will appear at the bottom of your screen indicating that the contact has been created.



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.*





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**

a. In the BP Contact field, click the drop-down menu to find the contact record you want to change/display.

b. Enter the business partner number.

c. Click the green checkmark 

d. All contact records for the business partner are displayed. Double-click on the one you want to change/display.

e. Click the green checkmark 

f. The contact record will appear. Make the necessary changes.

g. Click *Save* 

03 Create customer contact record in Business Partner Overview

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

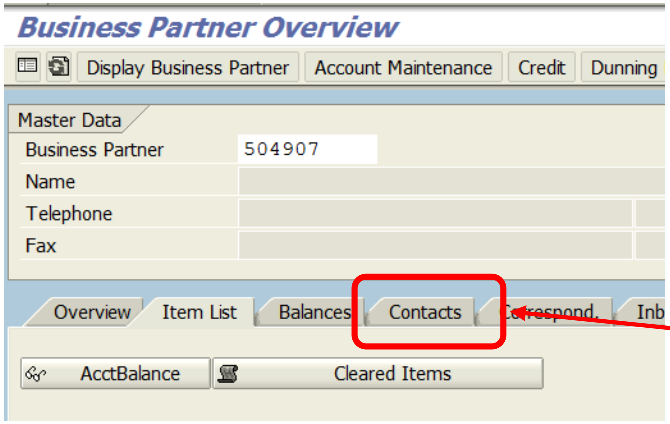
Enter transaction code **FMCACOV**

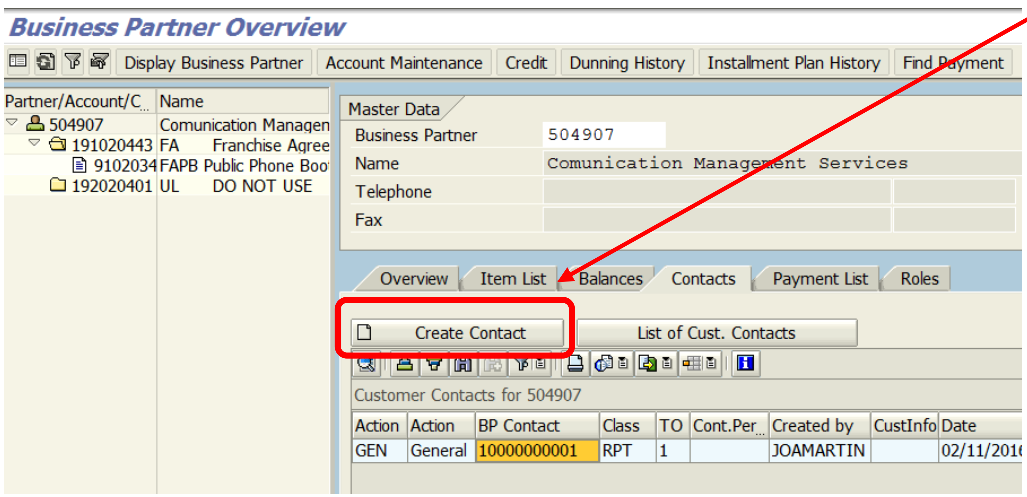
a. Enter business partner number

b. Click on the *Contacts* tab

c. Click on *Create Contact*

d. Follow Step 01, a thru k





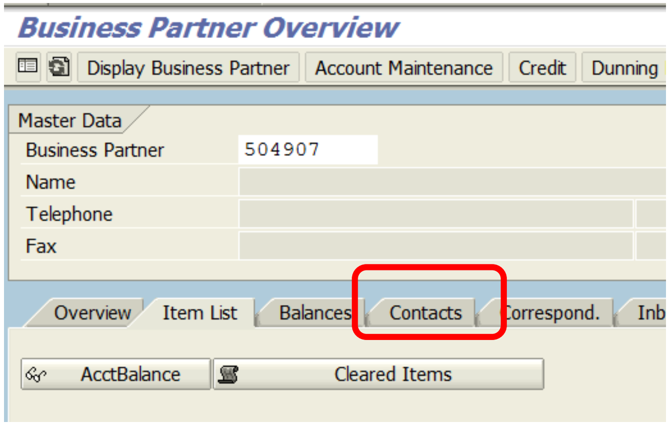
04 Change/view customer contact record in Business Partner Overview

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

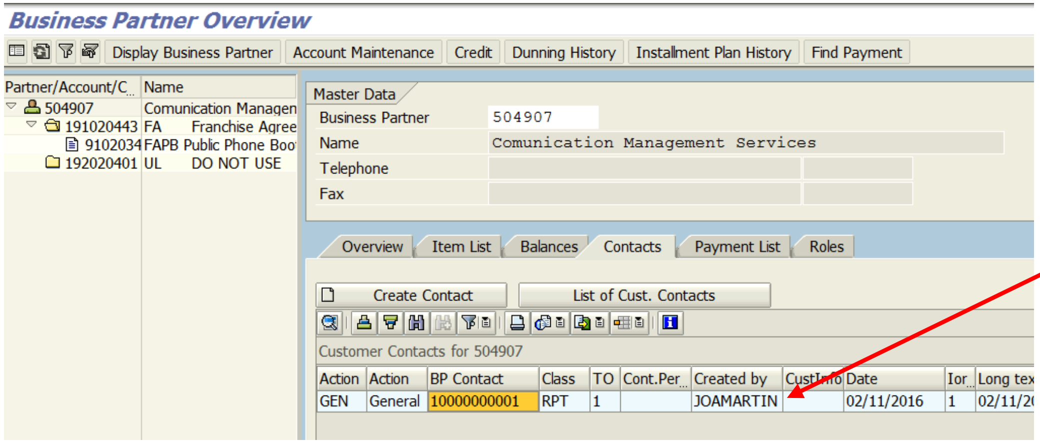
Enter transaction code **FMCACOV**

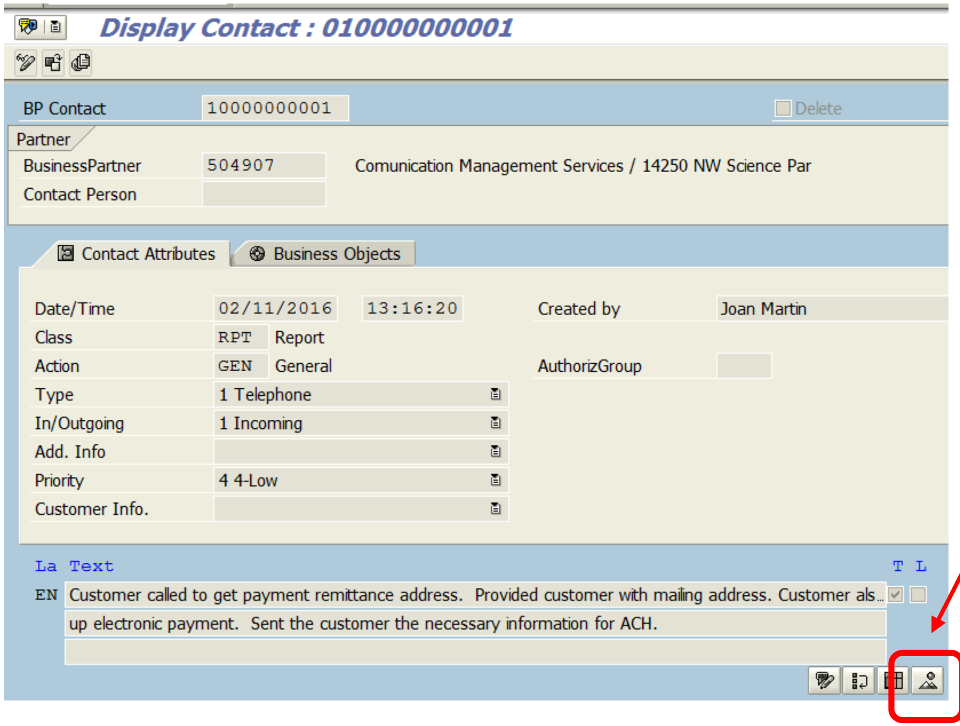
a. Enter business partner number

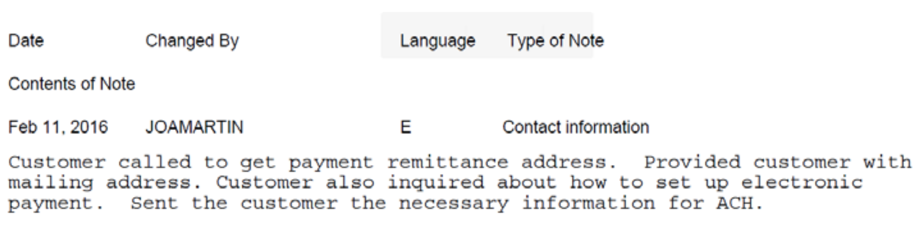
b. Click on the *Contacts* tab



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







04 (cont'd)

d. The contact text will appear

e. Click on the Long overview icon (mountain) to see the entire text

f. To change a record, click on the *Display <-> Change* icon

The text and Contact Attributes can now be changed

g. Click *Save* to save your changes

– END –