Communicating with Customer

Case Management

In General

- Customer may need to be approached for several reason in different point in time of a case lifecycle.
- Its recommended to capture those conversations in the Case record under **Interaction Record**

IMPORTANTE: Documenting a conversation with a customer can be mandatory if there is a contractual obligation

Option A: Communicating with Customer via External Info functionality in the Case Record

1a Open Case Record.

2a Choose External Info and type a message.

3a Click Save.

Option B: Communicating with Customer via telephone/e-mail and documenting in the Interaction Record

1b Open a Case.

2b In the Interaction tab, click NEW.

3b Fill in the Information.

4b Click Save.

Notes

There are 2 ways of sending an External Info to a Customer:

- **By clicking Save**

Customers receives the information but an answer is not necessarily requested. Case state remains the same

- **By clicking on Save Reply**

Customer receives the information and an action is expected from them .
Case state changes to awaiting info as the record now is at customer side.

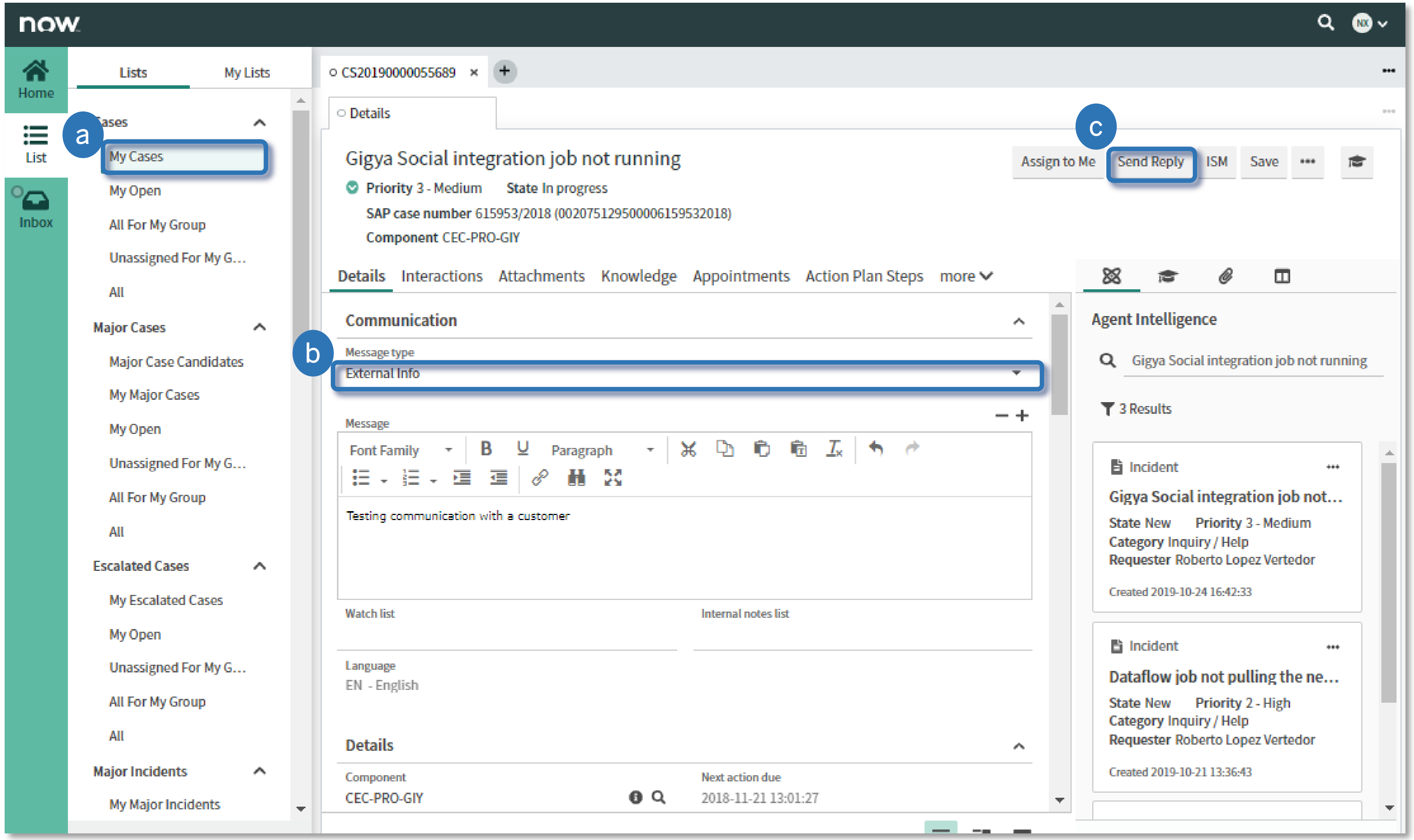
Processing Time

IRT is stopped with the first qualified response from SAP to the customer by using **External Info** and clicking **Save or Send Reply**

ORT is still running when **Save** is used to send an External Note to a Customer, but it is paused when **Send Reply** is used.

Option 1: Communicating with Customer via External Info functionality in the Case Record

1a Open Case Record.
2a Choose External Info and type a message.
3a Click **Save**.



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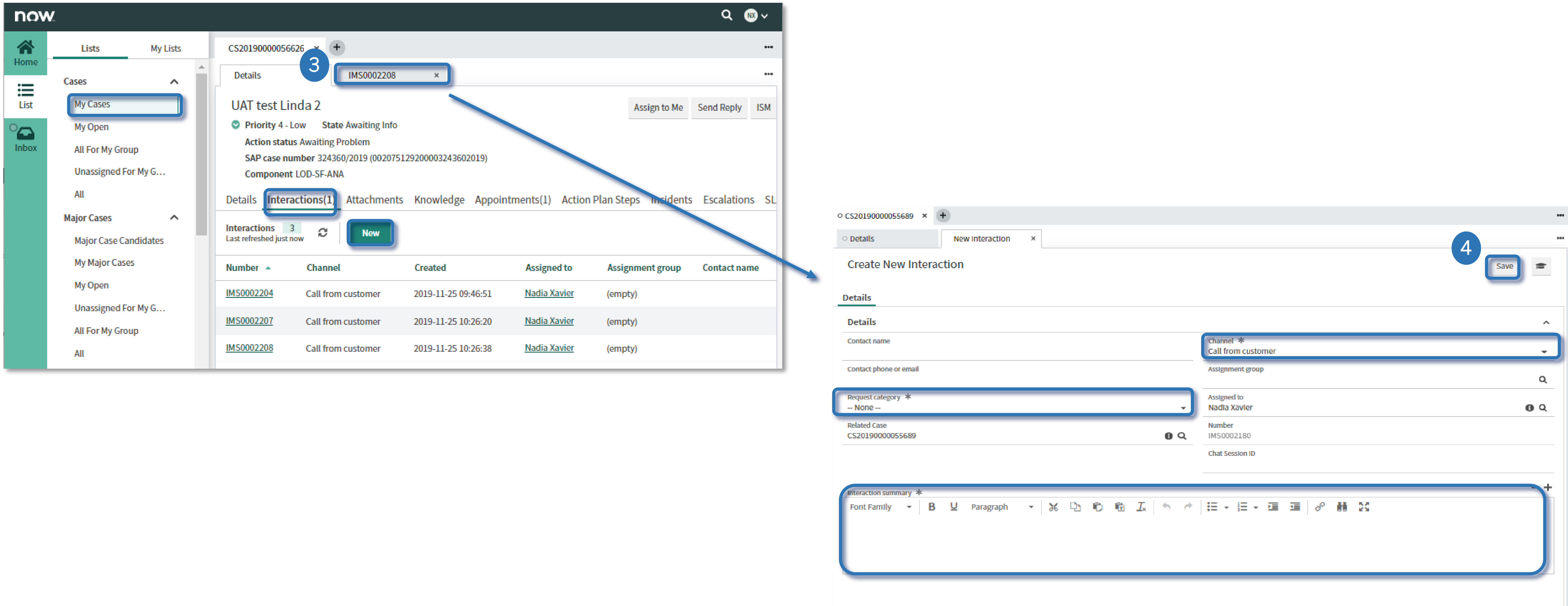
Option B: Communicating with Customer via telephone/e-mail and documenting in the Interaction Record

1b Open a Case
2b In the Interaction tab, click NEW
3b In the new tab, fill in the Information
4b Click Save



Change Log

What is a change log?

What you are reading is official SAP process documentation. Stringent version control is required for Compliance purposes. Thus, this **change log** is a record of who made what changes to this content & when, in case further follow up is needed.

Please send any questions or concerns to

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Process Manager

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Melinda Ludanyi	July 1, 2019	▪ WIPS 4.0 initial document	Draft
2.0.0	Nádia Xavier	Nov 22.2019	▪ WIPS 4.0 Golden Standard Baseline Document	Released