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SAP - CRM

SAP Manual for finals users

April 2014


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1. Changes control

Version	Description	Autor	Creation Date
V01	Creation	NH HQ CRM	01/03/2014
V01	Creation	NH HQ Marketing	01/03/2014

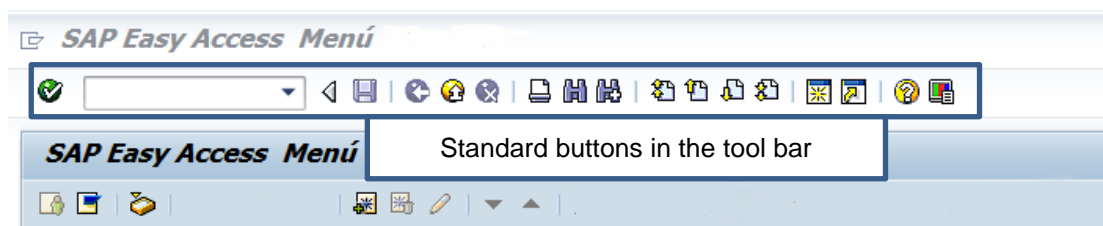
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2. Objective

The objective of this manual is to give the knowledge in SAP tool (CRM module) to the final users.

3. Basic Information

Initial Screen



Main Menu. Allows the access to the different functionalities of the system. Depending on the users, these option can be different. This menu has a submenu


Standard buttons in to tool bar: Allows the user to have a quick access to different operations. If some of this buttons are in grey, it means that the function is not available.





















The user will be able to search the transaction in the following window to go directly to that transaction




Standard buttons

	Enter		First page / Previous page
	Execute (F8)		Next page / Last page
	Save		Creates new session
	Back (F3)		Help
	Exit		Customize local layout
	Cancel		Sort ascending/descending
	Print		Insert / delete line
	Find		Export
	Generate graphic		Bring variant

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	Send mail		Multiple selection
	Set filter		Place
	Copy fields		Open list (matchcode SAP)
	Select all Deselect all		Multiple selection
	Other		Item detail screen
	Create		Display / Compress
	Display document		Create role
	SAP Menu		SAP Business Workplace
	Display / Change		Add/ Delete favorites
	Change		Move favorites up/down

NOTE: If you scroll with the mouse over the button you will be able to see an explanation.


Mandatory fields: A field is mandatory when this icon  is shown and must be filled in. If the field with this icon is not filled in, you will not be able to continue and an error message will appear.

Copy the content of a field: By pressing CTRL + Y, we can select the field and we will be able to copy the content using CTRL + C and paste using CTRL + V.

Explanation of each field (F1)

To get the explanation of a screen field, you need to select that field and press F1.

List of values in the select field - Match code (F4)

Most of the fields allow the user to press F4 or the  to see the list of values you can choose, and the possibility to sort using different criteria.

Grey fields: The fields in grey mean that the function / field is blocked and cannot be filled. The only fields that can be filled in are the white ones.


Search help: we need to use asterisk (*) as search criteria:

Example:

GIORGIO the system search all the data that **CONTAIN** the word: GIORGIO

GIORGIO* the system search all the data that **BEGIN** by :GIORGIO

***GIORGIO** the system search all the data that **FINISH** by: GIORGIO

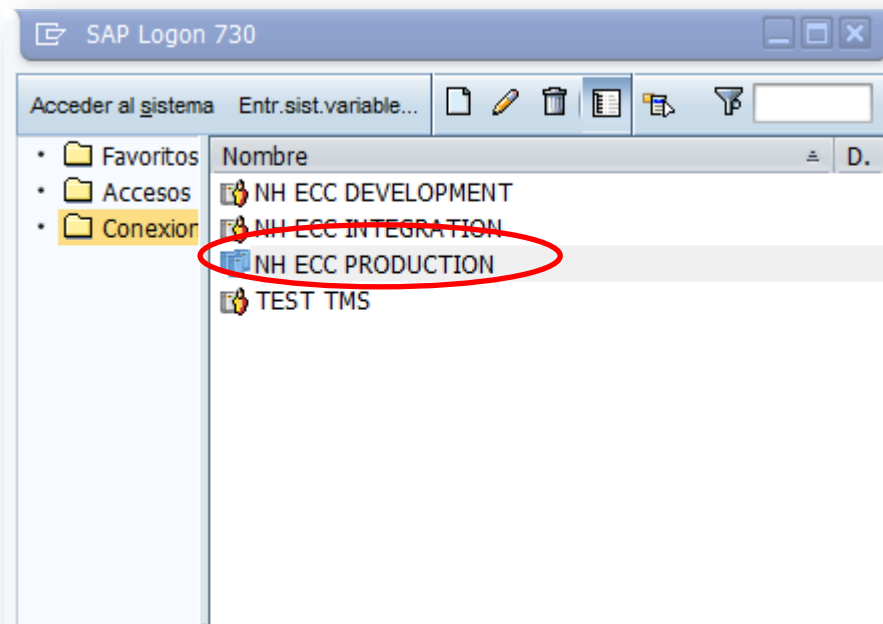
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4. Introduction to Master Data

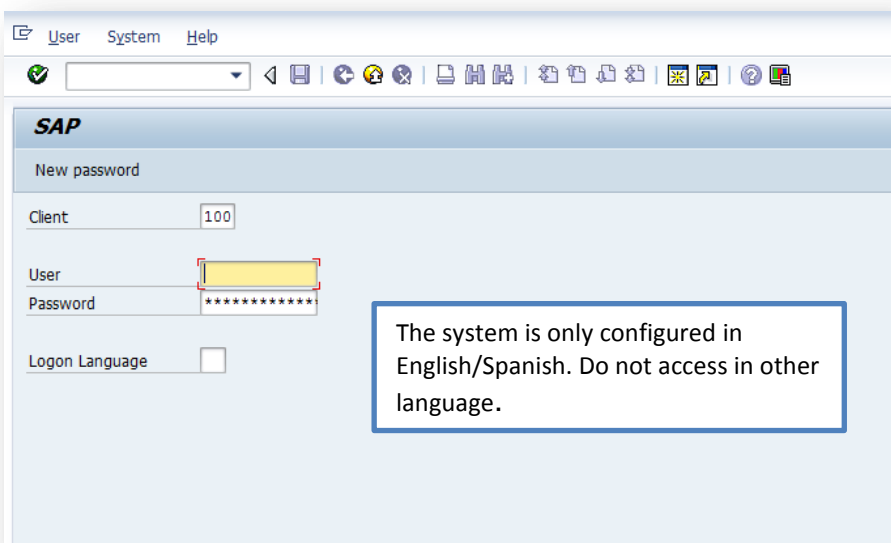
The Clients Master Data have all the information relate to the clients lodged in all the hotels.

It is essential that the Master Data information is loaded as this manual indications to guarantee a good data quality of the data base.


Log in screen



Enter your user and your password. In case of hotel users (generic accesses) please share the password with all the staff.



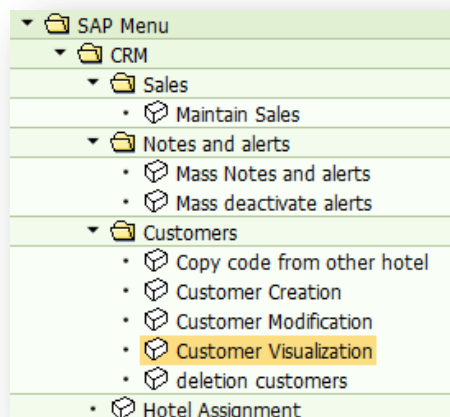
Note: your access user could be locked because different reasons. A special e-mail adrees is enable to support final users in case of locked access users:

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- In case the password is wrong typed more than 5 times, the access user will be locked
- In case you the password need to be reseted because you don't remember the correct one

In both cases, send an e-mail to infosec@nh-hotels.com to unlock/reset your access user.

After login the main screen we will have the transactions available depending on the role:



Clients are splitted in different Groups depending on the client type, each group has a different range of numbers:

Description	Numeration
Guests	0 to 999.999.999
Travel Agencies	1.000.000.000 to 1.999.999.999
Companies	2.000.000.000 to 2.999.999.999
Fictitious (NIFS duplicates because of rates)	3.000.000.000 to 3.099.999.999

5. Style Manual

5.1 General


All characters entered in any master client data, in any field, must be written in CAPITAL LETTERS WITHOUT ACCENTS. Mail and URL will be automatically translated into lowercase.

Special care must be taken with German names, Ä is recorded as AE, Ö as OE, Ü as UE, ß as SS (e.g.: MÜNCHEN remain as MUENCHEN)

5.2 Mail

In case that no e-mail address is provided, field is not allowed to leave in soft and it must be written as follows: NO E-MAIL

5.3 Numbers

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No symbols or separators (+, -, \, *, </>...) can be used for those fields requiring numbers (phone, fax, fiscal identification, postal codes, ...)

In the case of telephone and fax number, whole numbering will be introduced without spaces or any symbol, maintaining the structure "country code + prefix + telephone number" (e.g.: Buenos Aires telephone number, 11 4124-6700, we will need to register in the following way: 541141246700, without "00" code for international calls)

5.4 Dates

Dates will be entered always with the same format DD.MM.YYYY (it exist a calendar available)

5.5 Text fields

Length fields for name and last names are limited to 35 characters each of them.

5.6 Individuals

In case where the length of the text is longer than the field, we will write UNABBREVIATED (to the extent permitted), as follows::

- LAST NAME 1: ALVAREZ DE CASTANEDA – 20 characters
- LAST NAME 2: FERNANDEZ-JAUREGUI – 18 characters

LAST NAME: ALVAREZ DE CASTANEDA FERNANDEZ-JAUR – 35 characters

We must introduce the name and last name appearing on the identity card. Abbreviations, initials, accents, ... shall not be used. It is only allowed to use the '-' or ''' in case of specific names or last names (e.g.: Shaquille O'Neal, Scarlett O'Hara, Johan-Friso, Marie-Anne, Jean-François, ...)

5.7 Organizations

Whenever possible, the whole company name will be written.

In case where the length of the text is longer than the field, abbreviations will be used in order not to sacrifice its ending, as shown:

- INTERNATIONAL BUSINESS & DEVELOPMENT LTD – 40 characters
- INTL. BUSINESS & DEVELOPMENT LTD - 32 characters

The endings indicating the type of societies are MANDATORY and will be also completed in capitals and separated by a space.

Acronyms or contractions for the companies endings will be written without any punctuation marks (SL, LTD, LDA, SAB, NV instead of S.L., LTD., LDA., S.A.B., N.V.)

Although punctuation marks are not allowed or the company name or the company ending, characters '&', '-' y '@' are allowed, e.g.:

- WAL-MART STORES, INC. → WAL-MART STORES INC
- PROCTER & GAMBLE LTD. → PROCTER & GAMBLE LTD

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5.8 Tax identification field

To fill the tax identification field, both of individuals and of the companies, the alphanumeric value will be specified following always the general rules, i.e., no spaces, no dashes, no bars,... will be used.

- A-28027944 → A28027944
- X-9757326-R → X9757326R
- 32.947.435-K → 32947435K

5.9 Address fields

“Street” field

In order to fill it correctly, acronyms or abbreviations as appear on the identification cards must be used, omitting punctuation marks:

- AVDA. DA LIBERDADE → AVENIDA DA LIBERDADE
- LEIPZIGER STR. → LEIPZIGER STREET
- PSO. DE LA CASTELLANA → PASEO DE LA CASTELLANA

In case of an official document not be available (that is, we receive the information verbally, via e-mail,...) we will omit the type of road when is not part of the name

- AVENIDA DA LIBERDADE → AVENIDA DA LIBERDADE
- CALLE SANTA ENGRACIA → SANTA ENGRACIA

“Number” field

Shall indicate, if apply, the number, doorway, block, floor, door, ... These data are recorded with a spacing between each of them and excluding the ordinal number abbreviation.

- For “second floor, door B, doorway 5, number 117”


→ should write: 117 5 2 B

5.10 Particularities of free text fields

The format must be the same as in text fields, ALWAYS respecting the general rules and taking into consideration data protection regulations of each country.


It will be shared by all BU's, so comments will be written in English.

Use contractions is allowed as long as they are clear by everyone; entering derogatory or inappropriate comments is forbidden.

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:10	
	Title: Master Data							
	ID				Version	01	Revision	00

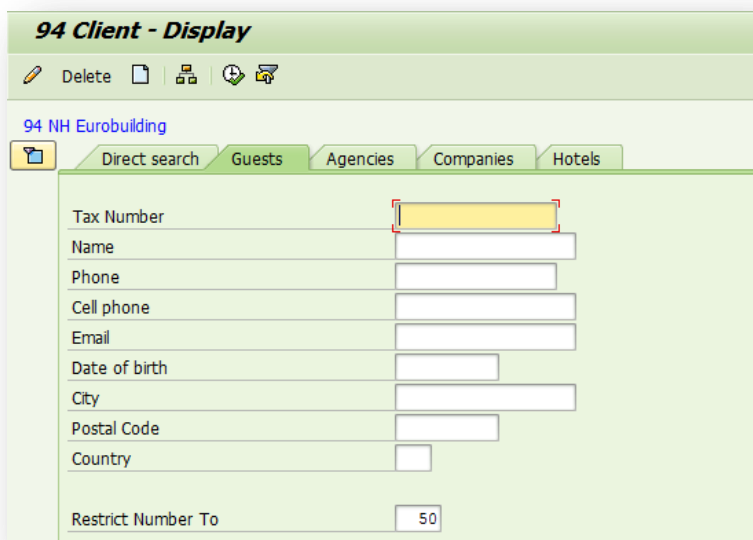
6. Customer creation

First step is to check in SAP if the guest is not already in the system. It is recommended to use “Modify Customer” transaction in order to speed up the process.

•  **ZCRM_CLICREAMOD_GUEST -> Modify customers**

This window will open. Click on Guests

A guests can be found by several options. Click ENTER when you have filled in your search criteria



We will include * in the Name to help the search

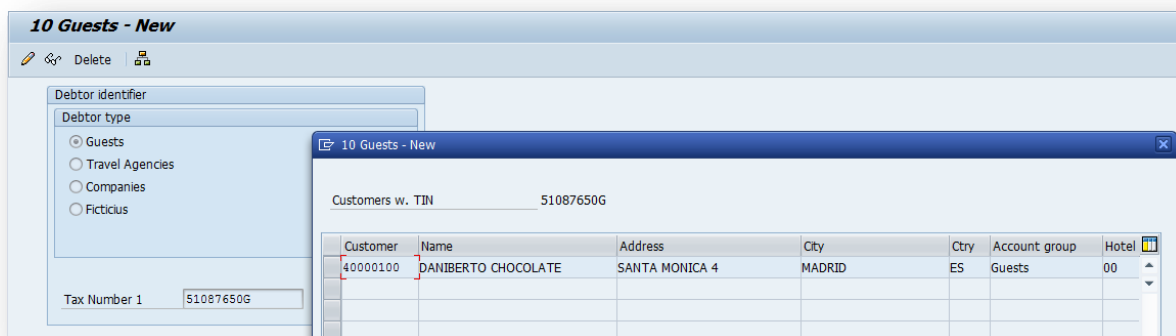
Example:

GIORGIO the system search all the data that **CONTAIN** the word: GIORGIO


GIORGIO* the system search all the data that **BEGIN** by :GIORGIO


***GIORGIO** the system search all the data that **FINSIH** by: GIORGIO

In case the guest is already in the database a new window will pop up showing a list of coincidences. This window will allow you to access the guest's profile selecting the line and pressing on the binoculars icon.



Customer	Name	Address	City	Ctry	Account group	Hotel
40000100	DANIBERTO CHOCOLATE	SANTA MONICA 4	MADRID	ES	Guests	00

If there are no matches, you must click the “NEW” button 

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:11	
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	ID				Version	01	Revision	00

Debtor identifier

Debtor type

☒ Guests

☐ Travel Agencies

☐ Companies

☐ Fictitious

Tax Number 1

Click on ENTER

6.1 Customer Creation (Guests)

This is the Customer Creation Form used to register new guests

00 Guests - New

Related clients

00 NH CHAIN Client

NHREW CREDIT

General data Additional data Special requests Hobbies Statistics

Title

First name ☒

Surname ☒

Street ☒ N°

City ☒

ZIP code ☒ Country ☒

Region

Language ☒

Nationality ☒

Gender unknown

Date of birth Search term

VIP

MobilePh/Phone /

Company ID/Name

Branch

Relationship

Email ☒

URL

You heard of us...

Official document

Tax n° Country

Issue Date Expiry Date

Expeditor place

ID Additional document

Document type Country

Number

Issue Date Expiry Date

Expeditor place

Nationality INE

Place of birth

Province of birth


Father's Name

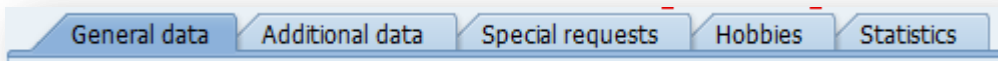
Mother's Name

Veh Registr. No.

☒ Allows mailing

It has 5 tabs to include customer related information:

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6.1.1 General Data

It is used to record the guest's personal, professional, fiscal and contact data.

All fields in this form must be filled in CAPITAL LETTERS (E-mail & url will be automatically translated into lowercase)

6.1.2 Personal information


All fields marked with this symbol  are mandatory.

Title  Possible titles are stored in a check table. They are language-dependent.

First name  First Name.

Surname 

Street  Street name as part of the address.

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House number as part of an address.

Name of the city as a part of the address.

This field contains the postal (zip) code for the house address (street and city).

Here you specify the country key for the customer.

Region (State, Province, County). In some countries, the region forms part of the address. The meaning depends on the country.

The automatic address formatting function prints the region in addresses in the USA, Canada, Italy, Brazil or Australia, and the county in Great Britain.

The language key designates the language in which you display texts, Enter texts, Print documents.

Guest Nationality.

Male/Female.

The date of birth is the basic value used to calculate a person's age.

Short name which is used to set up a match code.

6.1.3 Contact and professional information

Telephone number, consisting of country code, dialling code and number.


This field allows you to relate the guest to an existing company.



In order to do it you must access the company search window by clicking the "LIST" button . (match code)

A new window will pop up and you will be able to look for the company by: Tax number, Name or Telephone.

After you type the search criteria and hit "ENTER" the system will return a list of companies that match the given data from which you will be able to select the company you want to relate the guest to by double clicking the company name.

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	Title: Master Data							
	ID				Version	01	Revision	00

Customer Number (1)

TAs

Companies

Customer

Tax Number 1

Name

Name 2

Telephone 1

Identifier

= 3

Show branches only

Mark removed

=

Maximum No. of Hits

500

✓

✖

✖

You can include * in any on the fields to search for the company.

Example:

NES the system search all the data that CONTAIN: NES

NES* the system search all the data that START with: NES

*NES the system search all the data that END with: NES

TAs		Companies				
Customer	Tax Number 1	Name 1	Name 2	Telephone 1	OnlyBra...	Remov...
2000001831	30702024834	DATASTAR ARGENTINA		43138111		<input type="checkbox"/>
2000001840	30706059470	AGUAS DEL GRAN BUENOS AIR		2600		<input type="checkbox"/>
2000001889	A08154015	LABORATORIOS NOVAG SA		936003900		<input type="checkbox"/>
2000001919	6824DP1NO	NOVARTIS PHARMA BV		3782100		<input type="checkbox"/>
2000002017	DE114103379	DEUTSCHE BANK AG		6991000		<input type="checkbox"/>
2000002064	NO VAT	ERGO LEBENSVERSICHERUNG A		6376		<input type="checkbox"/>
2000002113	DE122 789 648	REWE - ZENTRAL - AKTIENGE		1490		<input type="checkbox"/>
2000002157	DE129274202	SIEMENS AG		8992210		<input type="checkbox"/>
2000002261	DE145339492	EHEIM GMBH & CO. KG		7002		<input type="checkbox"/>
2000002459	5643TW1DA	DAF TRUCKS NV		402142741		<input type="checkbox"/>
2000002462	5651GG5FE	FEI COMPANY BV		402766429		<input type="checkbox"/>
2000002470	DE119379254	WESTLB AG		826		<input type="checkbox"/>
2000002527	5145NJ1IT	ITW FOILS BV		569400		<input type="checkbox"/>
2000002754	3000DK760U N	UNILEVER NV		2174000		<input type="checkbox"/>
2000002760	2909VA806TH	THYSENKRUPP BENELUX		4479 202		<input type="checkbox"/>
2000002762	NL004233943B01	PROVIMI HOLDING BV		4239614		<input type="checkbox"/>
2000002773	3034KA33CU	FOREST METAL GROUP BV		4337334		<input type="checkbox"/>
2000002778	3155RR22RE	REVAHO BV		525444		<input type="checkbox"/>
2000002779	2719EE5AS	ASTRAZENECA BV		3632222		<input type="checkbox"/>
2000002830	2661CZ52DE	MONSANTO VEGETABLE SEEDS		5292222		<input type="checkbox"/>

<div>Client</div> <div>nh</div> <div>HOTELES</div>	Project: SAP CRM Manual		Date: 20/04/2014		Page:15	
	Title: Master Data					
	ID		Version	01	Revision	00

The list will close automatically filling the Company ID and Name fields in the guest's profile.

Company ID/Name	1009675573	UNIGLOBE TRAVEL ITALY
-----------------	------------	-----------------------

Branch	
--------	--

This field will allow you to relate the customer to an specific branch of the company he is related to.



In order to do it you must click the "LIST" button and the system will display a list of branches of the company from which you can choose. If there are no branches related to the company the list will be empty.

To select a branch you must double click on its name or hit "ENTER".

Branch	Name 1	S	Street	PostalC...	City	C..	Rg	E-Mail address
0000000004	NESPRESSO SA		FOLGUEROLAS 17	08028	BARCELONA	ES	08	info@nespresso.com
0000000009	NESPRESSO V		GTTTUYTU	36004	VALENCIA	ES	36	

This will automatically close the list and fill the branch field with its ID in the guest's profile.

Branch	0000000004
--------	------------

Relationship	
--------------	--

Assigned position of the client in the company.

Email	<input checked="" type="checkbox"/>
-------	-------------------------------------

The "E-MAIL" field is the most important one while creating a person CRM profile. It has to be filled out according to the pattern: %@%.%

REMINDER: If a guest does not want to add his e-mail address to his profile please enter: NO E-MAIL.


Bear in mind that this field cannot be left empty.

URL	
-----	--

Website / Personal Blog.

You heard of us...	
--------------------	--

references

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:16	
	Title: Master Data							
	ID				Version	01	Revision	00

6.1.4 Tax Information

It is mandatory to fill in at least one identification number**

Official Document:

Official document			
Tax n°	<input type="text"/>	Country	<input type="text"/>
Issue Date	<input type="text"/>	Expiry Date	<input type="text"/>
Expeditor place	<input type="text"/>		

The fields to be completed in relation to the official document are:

Tax n° Tax Number**

Country Here you specify the country key for the customer or vendor.

Issue Date Document issue date.


Expiry Date Document expiry date.

Expeditor place Document expeditor place.

* The **Tax identification number is a unique number by country** and the system validates the format. To find an a description of the field you can access to the detailed list by pressing the F1 key.

** **Exception:** for German guests in Germany hotels it is not mandatory to fulfil this field, but it is highly recommended request an official document.

Pressin F1 you will get from SAP the tax identifier detail per country

<div>Client</div> <div></div> <div>HOTELES</div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:17	
	Title: Master Data							
	ID					Version	01	Revision

Use

Enter the appropriate tax number:

Country	Tax Number
Argentina	CUIT number or CUIL number
Belgium	Enterprise number
Brazil	CNPJ number
Bulgaria	Unified identification code
Chile	RUT number
China	VAT registration number (<i>shui wu deng ji hao</i>)
Colombia	NIT number
Croatia	Legal persons: company identification number Natural persons: JMBG number
Czech Republic	DIC number
France	SIRET number
Greece	Personal ID
Hungary	Tax number
Italy	Fiscal code
Mexico	RFC number
Netherlands	SI registration number (Aansluitnummer UWV) of chain- liability vendor
Peru	RUC number
Philippines	Taxpayer identification number (see below)
Poland	NIP number
Portugal	NIF number
Romania	Tax number
Russia	INN
Slovakia	DIC number
Slovenia	Tax number
South Korea	Natural persons: Personal identification number Legal persons: Corporation ID
Spain	NIF number
Taiwan	GUI registration number
Thailand	Personal ID
Turkey	Name of business partner's tax office
Ukraine	Taxpayer identification number
United Kingdom	Company registration number
United States	Social security number
Venezuela	RIF number

If this customer identification document is other than the one that appears in the above list, this should be registered as an **ID Additional document**.

<div>Client</div> <div>nh</div> <div>HOTELES</div>	Project: SAP CRM Manual		Date: 20/04/2014		Page:18	
	Title: Master Data					
	ID		Version	01	Revision	00

ID Additional document

Document type

Country

Number

Issue Date

Expiry Date

Expeditor place

The validation applied by SAP over Tax Identifier are based on guest's country residence. Below you will find a summary per country with official documents to be fulfilled in TAX 1 or Additional Document fields

Customer Type	Country	TAX 1	FORMATS	# charaters	ADDITIONAL NUMBER
GUEST	ANDORRA	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	ARGENTINA	CUIL	27264019651	11	PASSPORT, DRIVING LICENCE, OTHERS
	AUSTRIA	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	BELGIUM	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	CHILE	RUN (Rol Único Nacional)	13430507-K	8-L	PASSPORT, DRIVING LICENCE, OTHERS
	COLOMBIA	RUT (Registro Único Tributario)	NO VALIDATION		PASSPORT, DRIVING LICENCE, OTHERS
	CZECH REPUBLIC	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	DOMINICAN REPUBLIC	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	FRANCE	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	GERMANY	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	HAITI	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	HUNGARY	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	ITALY	CODICE FISCALE	BNDMRC80L27F704L	ALPHANUMERIC	PASSPORT, CARTA D'IDENTITA, DRIVING LICENCE, OTHERS
	LUXEMBOURG	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	MEXICO	RFC	BEBA7804243Q9	ALPHANUMERIC	PASSPORT, DRIVING LICENCE, OTHERS
	NETHERLANDS	ANY (NO DOCUMENT VALIDATED)	NO VALIDATION		PASSPORT, DRIVING LICENCE, OTHERS
	POLAND	PESEL	87020156325	11	PASSPORT, DRIVING LICENCE, OTHERS
	PORTUGAL	NIF	95549510	8	PASSPORT, DRIVING LICENCE, OTHERS
	ROMANIA	ANY (NO DOCUMENT VALIDATED)	NO VALIDATION		PASSPORT, DRIVING LICENCE, OTHERS
	SLOVAKIA	ID CARD	SL423073	2+6	PASSPORT, DRIVING LICENCE, OTHERS
	SPAIN	NIF / NIE / DNI	NIE: Y0479884A DNI: 12345678Z	1+7+1 8+1	PASSPORT, DRIVING LICENCE, OTHERS
	SWITZERLAND	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	UNITED KINGDOM	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	UNITED STATES	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	URUGUAY	ANY (NO DOCUMENT VALIDATED)			PASSPORT, DRIVING LICENCE, OTHERS
	VENEZUELA	RIF	V-12934838-7	1+8+1	PASSPORT, DRIVING LICENCE, OTHERS

The Fields to fill in the additional identification document are:

Document type

Identification document type. MANDATORY

Country


Country of residence.

Number

Identification number. MANDATORY

Issue Date

Document issue date.

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:19	
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Expiry Date Document expiry date.

Expeditor place Document expeditor place.

Additional information about the guest profile:

Nationality INE Identifies a particular attribute that applies to the customer for demographic analysis.

Place of birth

Province of birth

Father's Name

Mother's Name

Veh Registr. No. Vehicle registration.


☒ Allows mailing **Allows mailing is selected by default** . If a guest explicitly indicates via a check-in form that he/she does not want to be contacted by NH Hotels, please unmark this box.

IMPORTANT: You must click the 'Save profile' button  in order to save the changes.

6.1.5 Additional Data

This information is for external loyalty programs of third parties that the client may have.

Currently creation/modification of guest is unavailable in SAP. External loyalty programs will be administered in the PMS.

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	ID				Version	01	Revision	00

6.1.7 Hobbies:

This tab allows you to register hobbies and / or interests of the client:

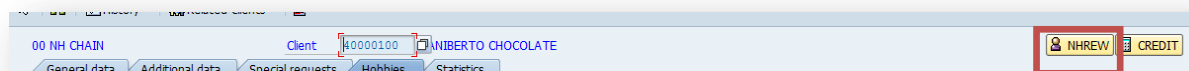
General data	Additional data	Special requests	Hobbies	Statistics
Concept	Description	Hobby enabled		
ZZ01	SPORTS/AMERICAN FOOTBALL	<input type="checkbox"/>		
ZZ02	SPORTS/AUTO & MOTOR	<input type="checkbox"/>		
ZZ03	FREE TIME/BEAUTY & HEALTH	<input type="checkbox"/>		
ZZ04	ENTERTAINMENT/CLIENT EVENTS	<input type="checkbox"/>		
ZZ05	SPORTS/CYCLING	<input type="checkbox"/>		
ZZ06	SPORTS/DANCING	<input type="checkbox"/>		
ZZ07	ENTERTAINMENT	<input type="checkbox"/>		
ZZ08	FREE TIME/FASHION & JEWELLERY	<input type="checkbox"/>		
ZZ09	CULTURE/FILMS & CINEMA	<input type="checkbox"/>		
ZZ10	GASTRONOMY/FOOD & BEVERAGE	<input checked="" type="checkbox"/>		
ZZ11	FREE TIME	<input type="checkbox"/>		
ZZ12	GASTRONOMY	<input type="checkbox"/>		
ZZ13	CULTURE/GENERAL ART	<input type="checkbox"/>		
ZZ14	CULTURE/GENERAL LITERATURE	<input type="checkbox"/>		
ZZ15	CULTURE/GENERAL THEATER	<input type="checkbox"/>		
ZZ16	SPORTS/FOOTBALL/GENERIC	<input type="checkbox"/>		
ZZ17	SPORTS/GOLF SPORT	<input type="checkbox"/>		
ZZ18	SPORTS/HANDBALL	<input type="checkbox"/>		
ZZ19	SPORTS/HOCKEY	<input type="checkbox"/>		
ZZ20	SPORTS/HORSEBACK RIDING	<input type="checkbox"/>		
ZZ21	HOTEL STAYS	<input type="checkbox"/>		

6.1.8 Statistics:

This tab will be used by HQ to generate statistics on customers. Currently not operational.


6.2 NH REWARDS

The creation and / or modification of the NH Hotel Group Rewards membership can be done from the new customer's profile after saving the data or from a pre-existing customer's profile by clicking on the button located on the top right corner.



This will open a new window containing the following columns:

- **Card Number:** Corresponds to the guest identifier (debtor) followed by 0000, it is assigned automatically.
- **Card Type:** Corresponds to the customer tier level, BLUE appears by default, but can be changed by accessing the list of options (HQ Responsibility).
- **Source:** Corresponds to the source, FRONT OFFICE appears by default, but can be changed by accessing the list of options(HQ Responsibility).
- **Active:** This is an opt-out field that allows you to inactivate the customer's the NH Hotel Group Rewards membership.

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- **Inactivation:** Corresponds to the reason that the customer's relationship with the program is inactive. This is a mandatory field if you want to inactivate the client.
- **Creation date:** Membership creation date. Automatically complete..
- **Created by:** It will appear by default the user who has created the membership.
- **Delivery Date:** Corresponds to the date of delivery of the card in case you have to deliver a physical card to the customer. (Currently not in use).
- **Signed:** It is an opt-in field that allows you to create the membership. The customer **must sign** the terms and conditions of the program before.

Loyalty cards


00 NH CHAIN

Titular 0010430048 TAHER MAHMOUDZAD Co-holder

	Card Nr.	Card type	Source	Active	Inactivation	Internal numbe	Creation d...	Creation b	Delivery d...	Signed
	104300480000	NORMAL	FRONT_OFFICE	<input checked="" type="checkbox"/>		0	04.03.2014	E00000111655		<input type="checkbox"/>

6.2.1 Co-holder:

If a guest wants to have a NH Rewards co-holder in his account, you should click on and look for the co-holder profile.

 Create co-holder card

Loyalty cards

☒ Copy holder card ☐ Create co-holder card

00 NH CHAIN

Titular 0010429264 FIORENZO PASTONI Co-holder

	Card Nr.	Card type	Internal numbe	Creation d...	Creation b	Delivery d...	Signed
	104292640000	NORMAL		06.03.2014	E00000111655		<input type="checkbox"/>

Holder:

☐ ☐

<div>Client</div> <div>NH</div> <div>HOTELES</div>	Project: SAP CRM Manual		Date: 20/04/2014		Page:23	
	Title: Master Data					
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The new NH Hotel Group Rewards member (co-holder) must sing the terms and conditions of the program.

Loyalty cards
Copy holder card Copy co-holder card
00 NH CHAIN
Titular 0010430048 TAHER MAHMOUDZAD Co-holder 0010151226 FERNANDO CES BRAVO TINOCO

The guest signed that he will agree to the agreements

	Card Nr.	Card type	Source	Active	Inactivation	Internal numbe	Creation d...	Creation b	Delivery d...	Signed
	104300480001	NORMAL	FRONT_OFFICE	<input checked="" type="checkbox"/>			04.03.2014	E00000111655		<input type="checkbox"/>
	104300480000	NORMAL	FRONT_OFFICE	<input checked="" type="checkbox"/>			04.03.2014	E00000111655		<input checked="" type="checkbox"/>

If the client who wants to be a co-holder, but it is a pre-existing holder, an alert message will appear advising that the guest is already NH Rewards member.

In these cases:


- You must inactivate the customer's original membership, losing his/her tier level.
- Or, if you want to link both guests and it doesn't really matter who's the holder and who's the co-holder, you could link the new guest to the membership of the pre-existing holder, in this way it wouldn't lose his/her tier level.

00 NH CHAIN
Titular 0010430048 TAHER MAHMOUDZAD Co-holder

Loyalty cards
Holder: 0010429651

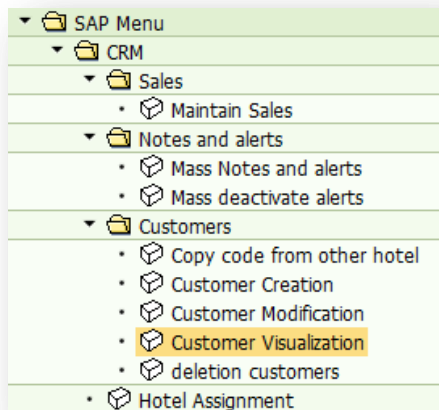
	Card Nr.	Active	Inactivation	Internal numbe	Creation d...	Creation b	Delivery d...	Signed
	104300480001	<input checked="" type="checkbox"/>			04.03.2014	E00000111655		<input type="checkbox"/>

Associated linked to client 10429645

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:24	
	Title: Master Data							
	ID				Version	01	Revision	00

7. Customer visualization

The transaction to see the client information is:



The following screen will follow:

If you know the client ID SAP number you can fill this in this by direct search

00 Client - Display

Delete

00 NH CHAIN

Direct search
Guests
Agencies
Companies
Others


Client identifier

Client






Ext. Client number

We can search by Party ID – Ext. client number (NHS) or by SAP client number


There are more criteria to search a guest:

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	Title: Master Data							
	ID				Version	01	Revision	00

94 Client - Display

Delete     

94 NH Eurobuilding

 Direct search **Guests** Agencies Companies Hotels

Tax Number

Name

Phone

Cell phone

Email

Date of birth

City

Postal Code

Country

Restrict Number To

We will include * in the Name to help the search

Example:



GIORGIO the system search all the data that **CONTAIN** the word: GIORGIO

GIORGIO* the system search all the data that **BEGIN** by :GIORGIO


***GIORGIO** the system search all the data that **FINISH** by: GIORGIO

Once you filled in the field we want to search, click on ENTER to see the results. By clicking in the result you will be able to see the details.


00 Client - Display


Delete  

00 NH CHAIN

 Search filters

Customer	Name	Tax Number 1	Phone	E-Mail Address	City	Postal Code
20000773	NESTLE ESPANA SA	A08005449	912754411	NO E-MAIL	ESPLUGUES LLOBREGAT	08950

You will enter the guest file and you can modify the guest details 

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:26	
	Title: Master Data							
	ID				Version	01	Revision	00

00 Companies - Display

00 NH CHAIN Client: 2000077380 NESTLE ESPAÑA SA NHREW CREDIT

General data Statistics Branches Sales and Agents

Name	NESTLE ESPAÑA SA	Credit status	
Street	AV PAISOS CATALANS EDIFICIO NESTLE	Phone nº	912754411
Nº	25- 51	Fax nº	
City	ESPLUGUES LLOBREGAT	Tax Number 1	A08005449
ZIP code	08950	VAT Reg. No.	
Country	ES Spain	Conc.búsq.	NESTLE ESP
Region	08 Barcelona	Email	NO E-MAIL
Language	ES Spanish	URL	
		Industry	C016 F&B Industry

Global Potential	0	Market segment	
Annual Revenue	0	Market subsegment	
Employees	0	Source of business id.	
		Channel identifier	
		Reason for travelling	

7.1 Copy Data From other hotel

This transaction only applies in those BU where SAP FI is already implemented.

Once you have find the guest/organization you can see the complete profile by clicking on the guest name. In case you need to modify any data the client must be copied in your hotel.


18 Client - Modify

18 NH Abascal

Search filters

Customer	Name	Surname	Phone	Tax Number 1	E-Mail Address
15983378	ADELAIDA JULIOS ROMERO		649439657	08959540M	ADELAIDA.JULIOS@RTVE.ES
23121011	ADEMIR JULIO DE BASTOS			CW955377	AJBASTOS@SANEPAR.COM.BR

If the client is not copied in your hotel you will see the following error message:

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	Title: Master Data							
	ID				Version	01	Revision	00

18 Guests - Display

18 NH Abascal Client 15983378 ADELAIDA JULIOS ROMERO Ext. Client number 15983378 NHREV CREDIT

General data Additional data Special requests Hobbies Statistics

Title Date of birth Search term ADELAIDA.J

First name ADELAIDA MobilePh/Phone / 649439657

Surname JULIOS ROMERO Company ID/Name

Street REAL Nº 61 2 Branch

City CEUTA Relationship

ZIP code 51001 Country ES Spain Email ADELAIDA.JULIOS@RTVE.ES

Region 51 Ceuta URL

Language ES Spanish You heard of us...

Nationality ES Spanish Gender unknown

Official document Tax nº 08959540M Country ES

Issue Date Expiry Date

Expeditor place

ID Additional document Document type Country

Number

Issue Date Expiry Date

Expeditor place

Nationality INE Father's Name ☐ Allows mailing

☒ The Customer has not been created for this hotel. Display only

SAP SEI (1) 200


In case you want to modify the profile, go back to the main menu

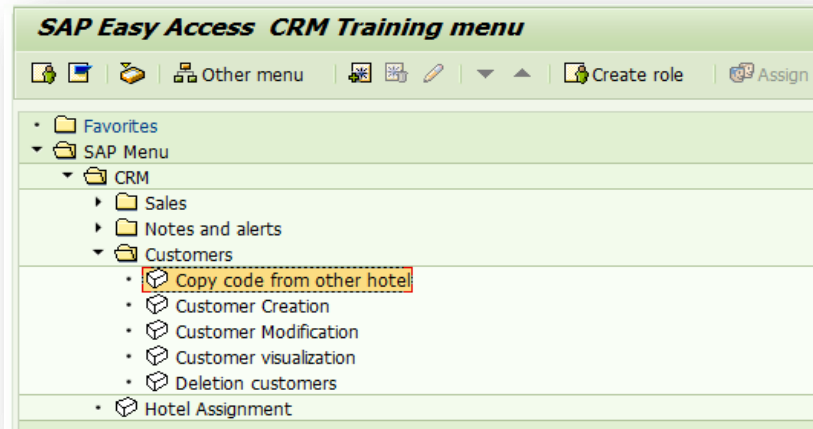
Deselect deletion Go to System Help

18 Guests - Display

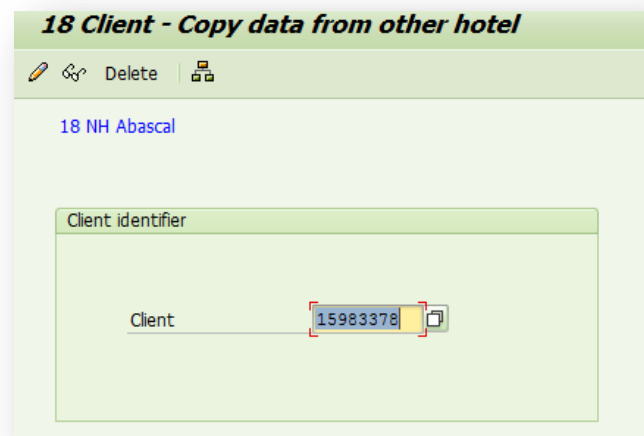
18 NH Abascal Client 15983378 ADELAIDA JULIOS ROMERO Ext. C

General data Additional data Special requests Hobbies Statistics

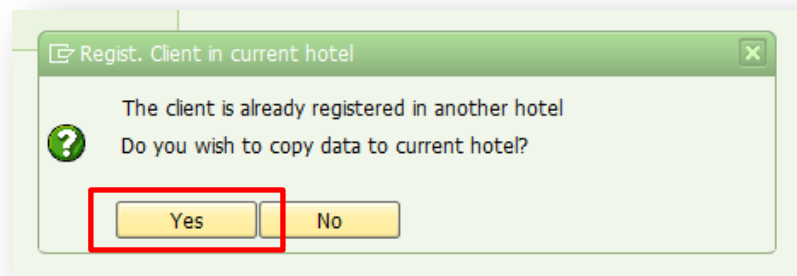
<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:28	
	Title: Master Data							
	ID				Version	01	Revision	00




Client number is automatically filled in search field



Click on ENTER



From now on you can modify any data.

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:29	
	Title: Master Data							
	ID				Version	01	Revision	00

7.2 Master Data tabs

We will detail information on each tab:

GUEST

General Data

00 NH CHAIN Client 455673 CARLOS RAMOS SANCHEZ

General data Additional data Special requests Hobbies Statistics

Title
First name CARLOS
Surname RAMOS SANCHEZ
Street MIQUEL SERVET N° 211
City SANT PERE DE RIBES
ZIP code 08810 Country ES Spain
Region 08 Barcelona
Language ES Spanish
Nationality ES Spanish
Gender Male

Date of birth
VIP
Phone/MobilePh / 666718527
Fax nº
Company ID/Name
Branch
Relationship
Email NO E-MAIL
URL
You heard of us...

Postal Data **Personal Data**

Official document
Tax nº 52213599B Country ES
Issue Date
Expiry Date
Expeditor place

ID Additional document
Document type Passport Country
Number
Issue Date
Expiry Date
Expeditor place

Fiscal Data

Nationality Cataluña
Place of birth
Province of birth
Father's Name
Mother's Name
Veh Registr. No.

☐ Allows mailing

Additional Data


It will be used to inform the external loyalty cards (Iberia Plus...)

00 NH CHAIN Client 455673 CARLOS RAMOS SANCHEZ NHREV CREDIT

General data Additional data Special requests Hobbies Statistics

Loyalty cards

Active	Type	Card type	Number	Description
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:30	
	Title: Master Data							
	ID				Version	01	Revision	00

Special requests

This tab is to inform the guest preferences at Corporate level, please DO NOT inform here the preferences at Hotel level


Hobbies

In this tab you will have the option to enter the Guests hobbies. The list has been defined by Corporate Marketing department

Concept	Description	Hobby enabled
ZZ01	SPORTS/AMERICAN FOOTBALL	<input type="checkbox"/>
ZZ02	SPORTS/AUTO & MOTOR	<input type="checkbox"/>
ZZ03	FREE TIME/BEAUTY & HEALTH	<input type="checkbox"/>
ZZ04	ENTERTAINMENT/CLIENT EVENTS	<input type="checkbox"/>
ZZ05	SPORTS/CYCLING	<input type="checkbox"/>
ZZ06	SPORTS/DANCING	<input type="checkbox"/>
ZZ07	ENTERTAINMENT	<input checked="" type="checkbox"/>
ZZ08	FREE TIME/FASHION & JEWELLERY	<input type="checkbox"/>
ZZ09	CULTURE/FILMS & CINEMA	<input type="checkbox"/>



Statistics

This tab allows you to see the segmentation of the guest.



<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:31	
	Title: Master Data							
	ID				Version	01	Revision	00


NHREW

By clicking this button  you will see the Guest and associated NH Reward card information.

00 NH CHAIN Client **10128957** **MANUEL ARCOS DORADO** Ext. Client number **10128957**  




General data Additional data Special requests Hobbies Statistics

 Titular **0010129535** AHMED ALAMEDDINE  Co-holder

	Card Nr.	Card type	Source	Active	Inactivation	Internal numbe	Creation d...	Creation b	Delivery d...	Signed
	101295350000	BLUE	FRONT_OFFICE	<input checked="" type="checkbox"/>		0	28.02.2014	E000000024593		<input type="checkbox"/>

Now you can add/modify any data:

18 Guests - New

  Related clients 

18 NH Abascal Client **15983378** **ADELAIDA JULIOS ROMERO** Ext. Client number **15983378**

General data Additional data Special requests Hobbies Statistics

Title

First name

Surname

Street N°

City

ZIP code Country Spain

Region Ceuta

Language Spanish

Nationality Spanish

Gender

Date of birth Search term

MobilePh/Phone /

Company ID/Name

Branch

Relationship

Email

URL

You heard of us...

Official document

Tax n° Country

Issue Date Expiry Date

Expeditor place

ID Additional document


Document type Country

Number

Issue Date Expiry Date

Expeditor place


Nationality INE Father's Name ☒ Allows mailing

<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:32	
	Title: Master Data							
	ID				Version	01	Revision	00

7.3 Complete client profile

If you know the party ID you can introduce in client identifier field

The **NH Rewards** membership is the only field that can be updated if the customer is not copied into the centre of the hotel that is modifying the profile.

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8. Organizations (COMPANIES / AGENCIES)

Remember sending the template for request for Organization creation to CRM Service (*Template_Party Creation or Update_HOTELS and BO*). Depending on the Organization's residence send your request to:

crm.service.it@nh-hotels.com
crm.service.ce@nh-hotels.com
crm.service.es@nh-hotels.com
crm.service.blx@nh-hotels.com
crm.service.am@nh-hotels.com



TEMPLATE_Party
Creation or Update_

General data:

00 NH CHAIN Client 2000003048 CAPGEMINI NEDERLAND BV

General data Statistics Branches Sales and Agents

Postal Data Name: CAPGEMINI NEDERLAND BV Street: . REYKJAVIKPLEIN Nº: 1 City: UTRECHT ZIP code: 3543 KA Country: NL Netherlands Region: Language: EN English	Fiscal and Contact Data Credit status: Phone nº: 6890063 Fax nº: Tax Number 1: 3528BJ100CA VAT Reg. No.: Conc.búsq.: CAP GEMINI Email: VICTOR.WAGENAAR@CAPGEMINI.COM URL: Industry: C010 Consultancy & Audit
Global Potential: 0 Annual Revenue: 0 Employees: 0	Segmentation Statistics Market segment: Market subsegment: Source of business id.: Channel identifier: Reason for travelling:

Branches

It will show all the branches associated with the customer as well as the Agents (contact person) and Sales.



→ by clicking this icon you will see the Contact person of that Branch




→ by clicking this icon you will see the Account Handler in charge of that branch



→ by clicking this icon you will see the relation between the branch with a company

The address showed in this screen will be the one mark as Office.

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Agent (Contact)

Sales **Agents**

Client's agents

Agent	No a...	Name	Phone Nº	e-mail	Remarks
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

Agents(contact) to each branch

Branch Agent

Branch	Branch Name	Agent	No active	Name	Phone nº	E-Mail address	Remarks
0000000010	TEST ALAMEDA DE MADRID SA	1	<input type="checkbox"/>	JUAN SIN MIEDO	3462154236	JUANSINMIEDO@HOTMIAL.COM	
*1		6	<input type="checkbox"/>	ROCIO ALBERTI	34652512365	ROCIO@TESTALAMEDA.COM	

Statistics


This tab allow you to see the segmentation of the Company or Agency.

00 NH CHAIN Client 1009667364 CARLSON WAGONLIT TRAVEL MEETINGS &

General data **Statistics** Branches Sales and Agents

Statistics by hotel chain


Market segment	Distribution
Market subsegment	AGENC Agency
Source of business id.	
Channel ID	
Reason for travelling	


<div>Client</div> <div></div>	Project: SAP CRM Manual				Date: 20/04/2014		Page:36	
	Title: Master Data							
	ID				Version	01	Revision	00

The corporate segmentation of the account will be:

Airlines	Crew
	Layover
	Cargo
Corporate Accounts	Key (>1.000 employees)
	Large (250 - 1.000 employees)
	Small & Medium (< employees)
	Self-Employed
MICE	MICE Agency
	Event Organizer (when the agency handles different kind of business)
	MICE Consortium
	PCO (Professional Congress Organizer)
	Incentive House
	Training Specialist
	Sport Events Organizer
	Corporate Event Organizer (Specialist)
	DMC (Destination Management Company), ie. Keydm (CWT)
	OTA (Online Travel Agency), ie. Starcite, Cvent..
	Event division (ie. Marcom agency)
Distribution	Agency
	Tour Operator
	Wholesaler
	Incoming
	Consortia, ie. Radius
	TMC (Travel Management Company), ie. CWT
	OTA (Online Travel Agency), ie. Booking.com

Credit

By clicking the button  you will be able to see the credit information. (only authorized role is allowed to inform the credit limit)

00 NH CHAIN	Client	1009667364	CARLSON WAGONLIT TRAVEL MEETINGS &	Ext. Client number	9667364	NHREW	
General data Statistics Branches Sales and Agents							

Branches

TA/TO connected

Credit control for client 2000003048.

2000003048 CAPGEMINI NEDERLAND BV

Assignment level	Assignment		Credit limit	Curr...	Status	Pa...	Remarks
Hotel	▼ 114	NH Palacio de Caste...	10.000,00	ER	Approved	▼ C015	