FD - P21. Customer Specific Requirements

Version Control

Version	Date	Description	Author
v.1	09.03.2018	Creation	Jeremie Seabra
v.2	08.02.2021	Update	Gonçalo Silva

Reference Documents

folder 03. Business Rules & Queues

GBU	Business Rules and Queue Members
Aroma Performance	
Novecare	
Technology Solutions	
Oil & Gas	

1. Functional Process

Process Overview

The Customer Specific Requirements module allows to capture, log, approve, assess the feasibility, and track implementation of a Customer Specific Requests. In case of similar requests, a Customer Specific Requirements can be cloned.

Definition & use cases

Definition

There are 2 types of customer requests:

- **Standard customer requests**
  - A customer request represents one or more demand(s) from a customer related to one or several areas (e.g. logistics, packaging, documentation, training, technical support, regulatory compliance)
- **Customer Specific Requirements**
  - A Customer Specific Requirement process deals with managing requests coming from the customer that deviate from Solvay GBU standard offering (e.g. product specifications, way of handling quality system, shipping)
- **Scope:**
  - In Scope : Customer Specific Requirements
  - Not in Scope: Standard Customer Request, Sample Requests

A Customer Specific Requirement has 6 main phases which are as follows:

Registration	Prompt logging of a Customer Specific Request after reception and Submitting it for pre-Approval
Pending Pre-Approval	Rules for the Approval process have been implemented by each GBU where a CSR can be automatically approved, be assigned to a User to approve or rejected, or be assigned to a group of Users.
Assessment	After the CSR is pre-approved, it is assigned to a User or a group of Users to be assessed. Depending on the type of Requirement, different assessments may need to be performed (Analytical, Industrial, Supply-Chain). Once the assessment is complete the user must provide a Global Feasibility Conclusion.
Approval Pending	Rules for the Approval process have been implemented by each GBU where a CSR can be automatically approved, be assigned to a User to approve or rejected, or be assigned to a group of Users.
Under Implementation	Ater (final) Approval, the Customer Specific Requirement implementation is tracked.
Active	Once the implementation is complete, a Customer Specific Requirement becomes (and stays) Active, until it is no longer relevant and can be deactivated.

The Customer Specific Requirement process is divided into 6 different **Phases** and 8 different **Status**.

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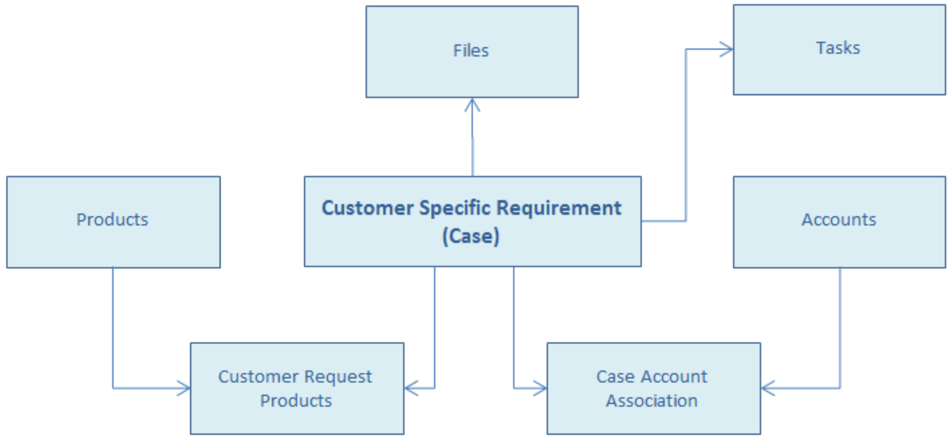
Phase	Status	Definition	Record Type
Registration	New	As soon as the Customer Specific Requirement is created	Customer Specific Requirement
Pending Pre-Approval	Pending Pre-Approval	When the Customer Specific Requirement is submitted for pre-approval	
Assessment	Under Assessment	Once the Approver has pre-approved the Customer Specific Requirement	
Approval Pending	Approval Pending	Once the Assessment has been completed	
Implementation	Under Implementation	Once the Approver has approved the Customer Specific Requirement	
Active	Active	Once the Implementation has been completed	
	Inactive	When the Customer Specific Requirement has been 'Active' but is no longer relevant	
	Rejected	When the Customer Specific Requirement has been rejected in one of the two approval processes.	

Use Cases

The scope of this workstream is a Customer Specific Requirement flow managed end-to-end in Salesforce which is used to:

2. Data Model & security

Main objects



1. **Case**: Standard Salesforce Object to store and manage all general information regarding a Customer Specific Requirement
2. **Accounts**: Standard Salesforce Object to manage the information about the Customer related with the Customer Specific Requirement
3. **Files**: Standard Salesforce Object to manage the Files related to that Customer Specific Requirement
4. **Case Team**: Standard Salesforce Object to manage all the actors related to the Customer Specific Requirement Process and to manage accessibility to the Case
5. **Customer Request Products**: Custom Object to manage the Products Level 4 and 5 that are related to the Customer Request
6. **Case Account Association**: Custom Object to manage the association of additional Accounts (besides the main one identified in the Account field) in the Customer Specific Requirement.

Customer Specific Requirement Security Model

Who can create?	Any user can register a Customer Specific Requirement
Who can see?	If the Visibility is set to "Shared" every user can access the record. If the Visibility is set to "GBU Restricted" only users from the GBU can see the record.
Who can update?	Only users in Case Team or above role hierarchy of a user in the Case Team, and the Owner.
Who can delete?	A Customer Specific Requirement cannot be deleted. Only the System Administrator (SBS) can delete a record.

3. Customer Specific Requirements Features

Features

Customer Specific Requirement Assignments

Assigning a Customer Specific Requirement to a User or a Group of User is to pass the responsibility to act on that record on a particular phase of the process. On Salesforce, the Assignment is based on the field **Case Owner**.

A Case Owner can be a **User** (Solvay employee with a Salesforce license) or a **Queue** (a group of Users that should be part of a team to handle Customer Specific Requirements with the same criteria).

Based on each GBU own process and rules, the Assignment can be performed by:

- **Manually changing the Owner** – at any time, a User with Access to a Customer Request can click the button **Change** next to the current owner and select a new User/Queue to be the new Owner
- **Automatically selecting the actors** – the GBU has provided the rules, based on Customer Specific Requirement criteria, to allow the System to automatically change the Ownership of a Customer Request to a specific User or a Queue when the Status changes

The Actors are managed on the Case Team. The Users are added to the Case Team i) manually by a User or ii) automatically by the System when they are the new Owners of a Customer Specific Requirement. When the Users are added automatically to the Case Team, they are added with the correct Role based on the current Customer Specific Requirement Phase.

Customer Specific Requirement Approval Processes

After the registration phase is completed by the User and all the information related to the Customer Specific Requirement is provided (General Information, Description, Accounts and Contacts, and Products), the record must be manually submitted by the User to be approved by clicking on the '**Submit for Approval**' button. Based on System Rules and GBU Rules, a Customer Specific Requirement can be:

- **automatically approved** - the Status will be automatically changed to **Under Assessment** and the Customer Request will be assigned to the User or Group of Users responsible for the Assessment.
- **assigned to be approved** - the Status is changed to **Pending Pre-Approval** and the User or Group of Users responsible for approving the Customer Specific Requirement will be notified.

During the approval process, the Customer Specific Requirement will be frozen until it is "Approved" or "Rejected".

If additional information is needed before the approval of the Customer Specific Requirement, or some part needs to be corrected, it can be "recalled" by clicking on the Recall button on the Approval related list. Once the information has been delivered, the request can be submitted for approval again.

Similarly, when the user completes the Assessment of the Customer Specific Requirement, he has to manually 'Submit for Approval' for a final approval, before the Customer Specific Requirement is implemented by the plants. Based on the GBU rules, the Customer Specific Requirement can be :

- **automatically approved** - the Status will be automatically changed to **Under Implementation** and the Customer Request will be assigned to the User or Group of Users responsible for the Assessment.
- **assigned to be approved** - the Status is changed to **Approval Pending** and the User or Group of Users responsible for approving the Customer Specific Requirement will be notified.

Customer Specific Requirement Notifications

On each step of the Customer Specific Requirement Management Process, a set of Solvay personalities (Salesforce or not Salesforce Users) needs to be notified that a new Customer Specific Requirement has now moved to a specific Status in order to act (Owners) or to be informed.

On each Status change, an email is sent from Salesforce to a group of users, based on System Rules and GBU Rules that should be stored and displayed in the Emails related list of a Customer Specific Requirement. There are three types of Addresses that are notified Email when the Status is changed:

- The new Owner – if your GBU has implemented assignment rules and the owner is changed automatically to a specific User or to a Queue, the new Owners will receive the Notification Email.
- The Case Team – all Case Team Members, independent of their Role will receive the Notification Email
- Solvay Contacts on Notification Rules – group of contacts (not necessary Salesforce Users) that are selected to be notified when the Status is changed based on each GBU Rules.

Customer Specific Requirements can be cloned with versionning (Aroma Perf)

A feature to manage versioning of SCR exists for GBU Aroma Perfomarnce : user will be asked if existing SCR must be de-activated and for which reason .

4. Specific Rules & Automation

Registration

In order to create a new Customer Specific Requirement, on the Case tab, the user needs to click on the "New" button, select the Customer Specific Requirement record type and click on "Continue". Additionally,Customer Specific Requirement can be created from a related list on the Account page from which the user can see all existing cases for this Account as well as creating a new one. When creating a Customer Specific Requirement from this related list on the Account page, the Account is automatically populated.

When the user creates a Customer Specific Requirement, he has the ability to register the following information:

Case Information

Field	Definition
Customer Request Number	Customer Specific Requirement reference automatically assigned by the System
Case Record Type	Case Record Type
Ship-To Account	Main Customer related to the Customer Specific Requirement
SAP ID	SAP ID's of the main Ship-To Account, automatically filled by the system.
Customer Classification	GBU Customer Classification, automatically calculated by the System
Contact Name	Customer Contact
GBU	GBU of the requestor
BU	BU of the requestor

Type	Type of Customer Specific Requirement defined by GBU
Sub-Type	Sub-Type of Customer Specific Requirement defined by GBU related to the Type selected
Regulatory Related	Checkbox to identify if the Customer Specific Requirement is related to Regulatory questions
Subject	Short Description of the Customer Specific Requirement subject
Initial Description	Full Description of the Customer Specific Requirement
Annual Contribution (addition or loss)	Indicates what is the expected contribution of this Customer Specific Requirement. Can be specified in any currency (not linked to Case Currency)
Justification	Reason to implement this Customer Specific Requirement
Case Owner	User/Queue currently responsible to take action on the Customer Specific Requirement
Status	Current status of the Customer Specific Requirement
Priority	Priority of this Customer Specific Requirement. 'Medium' by default.
Case Origin	Original Channel of the Customer Specific Requirement (Inbound email, Inbound Call, Mail shot, Teleconference, Face to Face, Website)
Received Date	Date that the Customer Specific Requirement has been received
Requested Resolution Date	Date at which the Customer has requested that the Customer Specific Requirement should be completed
Originator	User that has logged the Customer Specific Requirement
Account Manager	Account Manager
Customer Service Representative	Customer Service Representative
Product (Family)	Product Level 3 for which this Customer Specific Requirement should be applied
# of Related Products	Number of products (Level 4 and 5) in related object Customer Request Products. Automatically calculated by the system.
Customer Request Products	List of products (Level 4 and 5) in related object Customer Request Products. Automatically calculated by the system.
Manufacturing Plant Code	Manufacturing Plant (lookup to select plant)
Manufacturing Plant	Name of the Manufacturing plant selected above, automatically calculated by the system.
Shipping Site Code	Shipping Site (lookup to select plant)
Shipping Site	Name of the Shipping site selected above, automatically calculated by the system.
Visibility	Set visibility of the Customer Specific Requirement : Shared/GBU restricted.

The section above is available on the Edit Mode of the Customer Request and should be populated by the Originator when registering a Customer Specific Requirement.

On this Registration Phase, the Users are able to provide more information on the different related list available on the Customer Specific Requirement page:

Customer Request Products

On the Customer Specific Requirement it's possible to select one Product Family (Level 3) related to the Customer Specific Requirement. On the Customer Request Products list is possible to add several Product Materials (Level 4 or 5) related to the Product Family selected.

All products/material are maintained in the products related list, where it’s also possible to select an Application End Use for the Products for information purpose.

Case Team

Users can be assigned to a Case Team. This allows the appropriate users to have read/write access to the Customer Request as well as receive the appropriate notification emails.

Since users are automatically added on the case team when they take ownership (with the appropriate corresponding role for each status), the case team is also helpful to track who was responsible for each part of the Customer Specific Requirement.

Case Account Associations

On the Customer Request, a primary Customer is maintained on the page layout with the ability to maintain multiple Customers on the related list. This will allow a Customer Specific Requirement to be processed for more than one Customer at the same time.

Open Activities / Activity History

Create and keep track of current (open) and past (completed) activitties/tasks related to this Customer Specific Requirement.

Files

On this related list, both Google Docs and files from the computer can be attached.

Approval Process (Pre-Approval)

As detailed on the the Approval Process section above, users must at all times submit manually a Customer Specific Requirement for approval after all the relevant information is provided. When an approval is requested by the GBU the status is changed to **Pending Pre-Approval** and the User or Group of Users responsible for the approval are notified. When the Customer Specific Requirement is approved, the status is changed to **Under Assessment** or to Rejected if not approved.

Assessment

Once the Customer Specific Requirement is approved, the Users or group of Users responsible for Assessing the feasibility of the Requirement are notified to act on the Case. The Users will provide a description of what was assessed, provide a Feasibility Conclusion, and finally submit the Requirement for a final Approval.

Feasibility

Depending of the type of Customer Specific Requirement being assessed, one or more feasibility assessments may need to be completed :

- Analytical
- Industrial
- Supply Chain

Each one of this 3 types have a dedicated section, with dedicated fields :

Feasibility (Analytical)

Field	Definition
Lab. Capable of Measuring Specification	Assessment on Laboratory capability of measuring specifications
External Laboratory Needed	Assessment on need of External Laboratory
Estimated Laboratory Costs	Estimation on laboratory costs
Comments for Analytical Feasibility	Comments regarding the Analytical Feasibility assessment

Feasibility (Industrial)

Field	Definition
Prod. Capable of Meeting Requirements	Assessment on Production Capabilities
Estimated Production Costs	Estimation on Production costs
Comments for Industrial Feasibility	Comments regarding the Analytical Feasibility assessment

Feasibility (Supply-Chain)

Field	Definition
Implies MTO instead of MTS	Yes if it Implies Make-to-Order instead of Make-to-Stock
Will have Impact on Stock Levels	Assessment on if this requirement will have impacts on Stock levels
HSE Impacts	Check if requirement has Health, Security, and Environment impacts
Estimated impact on lead time(# of days)	Assessment on impact on lead time, in number of days
Estimated Supply-Chain Costs	Estimation on Supply-Chain costs
Comments for Supply-Chain feasibility	Comments regarding the Supply-Chain Feasibility assessment

Once these individual assessments of feasibility are completed, the user must provide a **Global Feasibility Conclusion**

Global Feasibility Conclusion

Field	Definition
Plant Feasibility Completed Date	Date when the Feasibility assessment was completed
Plant Feasibility Conclusion	Conclusion (yes/no) of the assessment

Total Estimated Costs	Total Costs (automatically calculated by the system. Sum of previous cost fields)
Global Feasibility Conclusion Comments	Comments regarding global feasibility conclusion

Once the Global Feasibility Conclusion has been filled the user must submit the Customer Specific Requirement for a final Approval before implementation of the requirement by the plants.

Approval Process (Final Approval)

As detailed on the the Approval Process section above, users must at all times submit manually a Customer Specific Requirement for approval after all the relevant information is provided. When an approval is requested by the GBU the status is changed to **Approval Pending** and the User or Group of Users responsible for the approval are notified. When the Customer Specific Requirement is approved, the status is changed to **Under Implementation** or to Rejected if not approved.

Implementation

Once the Customer Specific Requirement is approved, the Users or group of Users responsible for Implementing the feasibility of the Requirement are notified to act on the Case. The Users will provide a description of what was implemented, and finally Activate the Customer Specific Requirement.

Under Implementation

Field	Definition
Implementation Completed Date	Date on which the Implementation of the Csutomer Specific Requirement has been completed
Implementation Validated by Plant	If the implementation has been validated by the plant
Analytical set up	If an Analytical set up was needed
Other set up	If any other set up was needed
MoC Form (if necessary)	If a Management of Change Form was needed

Completion

If applicable, and if provided, the user should register the Customer Feedback on the implementation of his request

Field	Definition
Customer Satisfaction	Feedback from the Customer on its satisfaction, if applicable
Customer Satisfaction Comments	Customer Satisfaction Comments, if applicable
Reason Not Implemented	If the Customer Specific Requirement has not been implemented the reason should be specified

Once the implementation has been completed the user should change the status to "**Active**". The Customer Specific Requirement once active remains in this status until it is no longer relevant or needed. When no longer needed the Customer Specific Requirement status should be changed to "**Inactive**" (during the clone is also possible to deactivate the current Customer Specific Requirement)

Note: For Aroma when the Ship to Account, Case Account Associations or Customer specific requests products is changed the Customer Specific Requirement goes back to Implementation.

Appendix

Type and Sub-Type

GBU	Type	Sub-Type
Aroma Performance	Analytical	Specifications
		Others
	Packaging	Labeling
		Pallets
		Specific Packaging
		Others
	Supply Chain	Documentation

		Logistic Equipment
		Number of Batches
		Safety Stock
		Sampling
		Shelf-Life
		Others