

# FD - P12. Webform

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## Version Control

| Version | Date       | Description              | Author        |
|---------|------------|--------------------------|---------------|
| v.1     | 19.03.2018 | Creation                 | Sophie Millet |
| v.2     | 04.06.2018 | Version update Lightning | Sophie Millet |

## Reference Documents

| GBU                    | Business Rules and Queue Members                                                                                                                                                      |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Aroma Performance      | <a href="https://docs.google.com/spreadsheets/d/1TR_-X88nzKlajroYBrGcCiS9NKP1g-7KC2Sj-Yvb3o">https://docs.google.com/spreadsheets/d/1TR_-X88nzKlajroYBrGcCiS9NKP1g-7KC2Sj-Yvb3o</a>   |
| Coatis                 | <a href="https://docs.google.com/spreadsheets/d/11sjeHUn-ozuJmjwS4D-ipAUuQPUIX4G6bSpK0wMcl9o">https://docs.google.com/spreadsheets/d/11sjeHUn-ozuJmjwS4D-ipAUuQPUIX4G6bSpK0wMcl9o</a> |
| Fibras                 | <a href="https://docs.google.com/spreadsheets/d/1YCvo8LIW5B9hypFhvEFEq8LhwwD6ufTGv-Glf295NYo">https://docs.google.com/spreadsheets/d/1YCvo8LIW5B9hypFhvEFEq8LhwwD6ufTGv-Glf295NYo</a> |
| Novecare               | <a href="https://docs.google.com/spreadsheets/d/1YgwrUUVsdlx4vYkZPuvEMgqf6cp5LqPZ8vkhb1h674E">https://docs.google.com/spreadsheets/d/1YgwrUUVsdlx4vYkZPuvEMgqf6cp5LqPZ8vkhb1h674E</a> |
| Performance Polyamides | <a href="https://docs.google.com/spreadsheets/d/1upjnCZLlc7oMpVuamDt7EtSG9Xv9GeJy13ANMws-Yy4">https://docs.google.com/spreadsheets/d/1upjnCZLlc7oMpVuamDt7EtSG9Xv9GeJy13ANMws-Yy4</a> |
| Peroxides              | <a href="https://docs.google.com/spreadsheets/d/1rb5DoKDUFELjVGt4ef1Jbc4u41T5cYQmfyET9Bi-ZUo">https://docs.google.com/spreadsheets/d/1rb5DoKDUFELjVGt4ef1Jbc4u41T5cYQmfyET9Bi-ZUo</a> |
| Silica                 | <a href="https://docs.google.com/spreadsheets/d/11TfJpah5nSTQrCTWPdWZpuMgKmFIqM2b1pkxrRveaYY">https://docs.google.com/spreadsheets/d/11TfJpah5nSTQrCTWPdWZpuMgKmFIqM2b1pkxrRveaYY</a> |
| Soda Ash & Derivatives | <a href="https://docs.google.com/spreadsheets/d/17RwP5IFwoPPREbW-X_vUSUVrEbqCYmZM7yqPcd6d7LQ">https://docs.google.com/spreadsheets/d/17RwP5IFwoPPREbW-X_vUSUVrEbqCYmZM7yqPcd6d7LQ</a> |
| Special Chem           | <a href="https://docs.google.com/spreadsheets/d/15uK-JN52UDig1S3W9KuYIL0fiRZGgd2O9yzp-9ulvh0">https://docs.google.com/spreadsheets/d/15uK-JN52UDig1S3W9KuYIL0fiRZGgd2O9yzp-9ulvh0</a> |

## 1. Functional Process

### Process Overview

A Webform is the record of an interaction from a prospect/customer from the Web ([Solvay.com](https://www.solvay.com))

There are different forms available on [Solvay.com](https://www.solvay.com) :

- Specific product inquiry forms
  - 4 forms available to request a sample, a quotation, a documentation or a general question
  - In that cases, the product has been identified/selected by the prospect/customer and the WebForm is directly assigned to the GBU contacts.
- General Request form
  - The Product/GBU is not known
  - The case will be analyzed by the Customer Information team (SBS OTC Delivery) and then transmitted to the GBU Contacts.

## Use cases

Webform process has 4 main steps which are as follows:



|                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Webform Registration</b>              | The WebForm registered by the prospect/customer is received into Salesforce                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Webform Analysis &amp; Assignment</b> | <p>There are 2 cases (depending on the information selected/registered by the Visitor/Prospect on <a href="https://www.solvay.com">Solvay.com</a>)</p> <ul style="list-style-type: none"> <li>• If the GBU is identified in the WebForm, it is assigned to the GBU contacts</li> <li>• If the GBU and/or Product are not identified in the WebForm, the Customer Information team will check the case and transmit the Webform case to the GBU contacts</li> </ul> |
| <b>Webform Treatment</b>                 | <p>Different options depending on the Webform case relevancy :</p> <ul style="list-style-type: none"> <li>• generate a new prospect/contact</li> <li>• convert the case onto a new Opportunity or a new Case: Sample or Customer request</li> <li>• provide an answer directly and go to Closure</li> <li>• or skip this step and go directly to Closure</li> </ul>                                                                                                |
| <b>Webform Closure</b>                   | Once the case has been treated it should be closed.                                                                                                                                                                                                                                                                                                                                                                                                                |

## Webform Registration

### Specific product inquiry forms

A customer accesses [solvay.com](https://www.solvay.com) website and navigates to the [Product Finder](#). (to test : [Product catalog QA website](#))

The customer selects a product to check product details, and contacts Solvay using webforms to :

- request a sample
- request a quotation
- ask for documentation
- ask a general question

### General request form

A customer accesses [solvay.com](https://www.solvay.com) and asks directly a question without selecting a product in the catalog

### Coatings form

A customer accesses [Coatings website](#) and asks a question related to a product line selected depending on a range of business functionalities.

## Webform Analysis & Assignment

Once submitted, the form is transferred to SFDC using the Salesforce Web-to-Case feature and directly routed to a Queue, depending on the GBU related to the selected product or business functionality. When the email provided in the form is an existing contact's email in SFDC data base, the contact and the account are automatically added to the webform record.

An acknowledgment mail is automatically sent by SFDC using the customer email address, and a mail notification is sent to the queue members.

## Webform Treatment

An internal user (Solvay employee with an active SFDC license) processes the webform record:

## Investigation

- Assign to himself
- Generate a new prospect & a new contact
- Generate a contact
- Submit for approval

## Review

- Answer the webform by email
- Convert to :
  - An opportunity
  - A sample request
  - A customer request

While performing those activities, the user may also :

- Clone the webform

## Webform Closure

- Closed : When the WebForm is closed and an answer has been given to the prospect but there is no follow-up
- Closed – Accepted : When a WebForm has been converted into an Opportunity or a Case (Sample request or Customer Request). This status is automatically updated when the WebForm is converted.
- Closed – Rejected : When the WebForm is closed without answer to the prospect

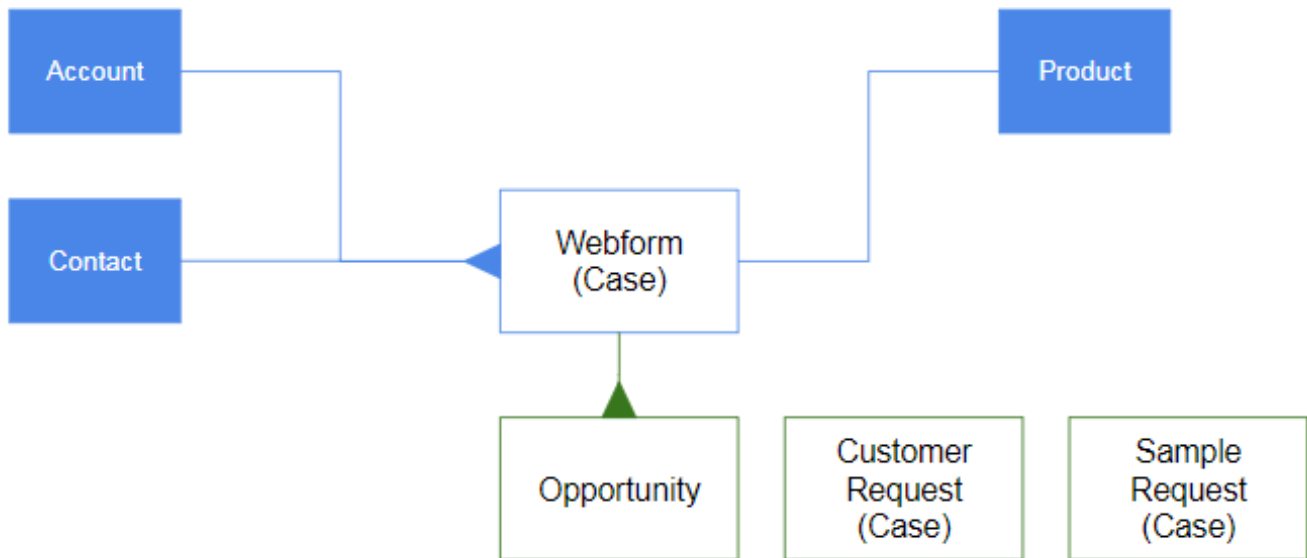
# 2. Data Model & security

## Main objects

1. **Case**: Standard Salesforce Object to store and manage all general information regarding a Webform, or a Customer Request / Sample Request created against the Webform
2. **Account**: Standard Salesforce Object to manage the information about the Customer related to the Webform
3. **Contact**: Standard Salesforce Object to manage the contact person from the Customer
4. **Product**: Standard Salesforce Object to manage the Product (all levels) that is related to the Webform
5. **Opportunity** : Standard Salesforce Object to manage the Opportunity created against the Webform

## Webform Security Model

Open webform (before conversion)  
Closed webform (converted)



|                 |                                                                                                                              |
|-----------------|------------------------------------------------------------------------------------------------------------------------------|
| Who can create? | Solvay.com website automatically creates webforms, no internal user is allowed to create webforms (except Product info team) |
| Who can see?    | Any user belonging to the QUE-Webform public group can see all webforms                                                      |
| Who can update? | Any user belonging to the QUE-Webform public group can update any webforms                                                   |
| Who can delete? | A Webform cannot be deleted. Only the System Administrator (SBS) can delete a Webform                                        |

## 3. Webform Custom Buttons & Features

### 3.1 Features

#### Webform Assignments

Assigning a Webform to a User or a Group of User is to pass the responsibility to act on the Webform on a particular phase of the process. On Salesforce, the Webform 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 Requests with the same criteria).

Based on each [GBU own process and rules](#), the Webform Assignment can be performed by:

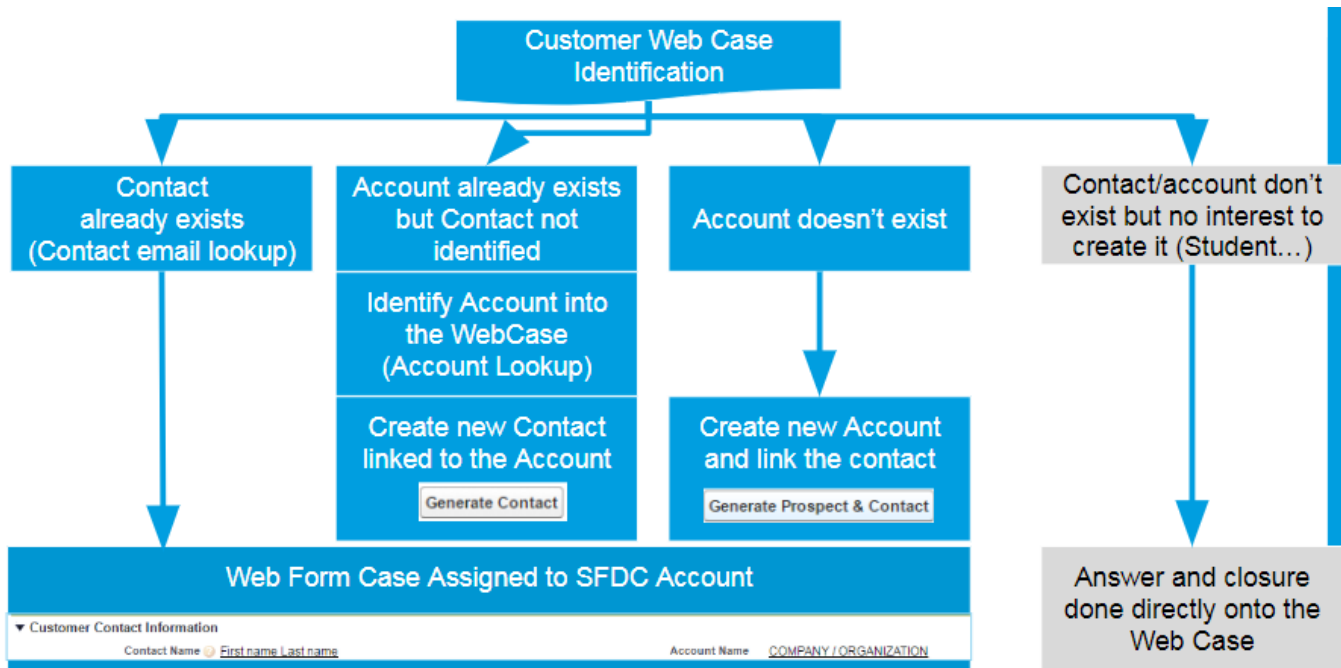
- **Manually changing the Owner** – at any time, a User with Access to a Webform can click the button **Change owner** next to the current owner and select a new User/Queue to be the new Owner
- **Automatically selecting the actors** – the GBU has provided the rules, based on Webform criteria (GBU),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

#### Webform Notifications

When a webform is created by a customer and transferred in SFDC, the user or the queue that is assigned as owner of the webform is informed by an email.

#### Account/Contact recognition

## Classic process :

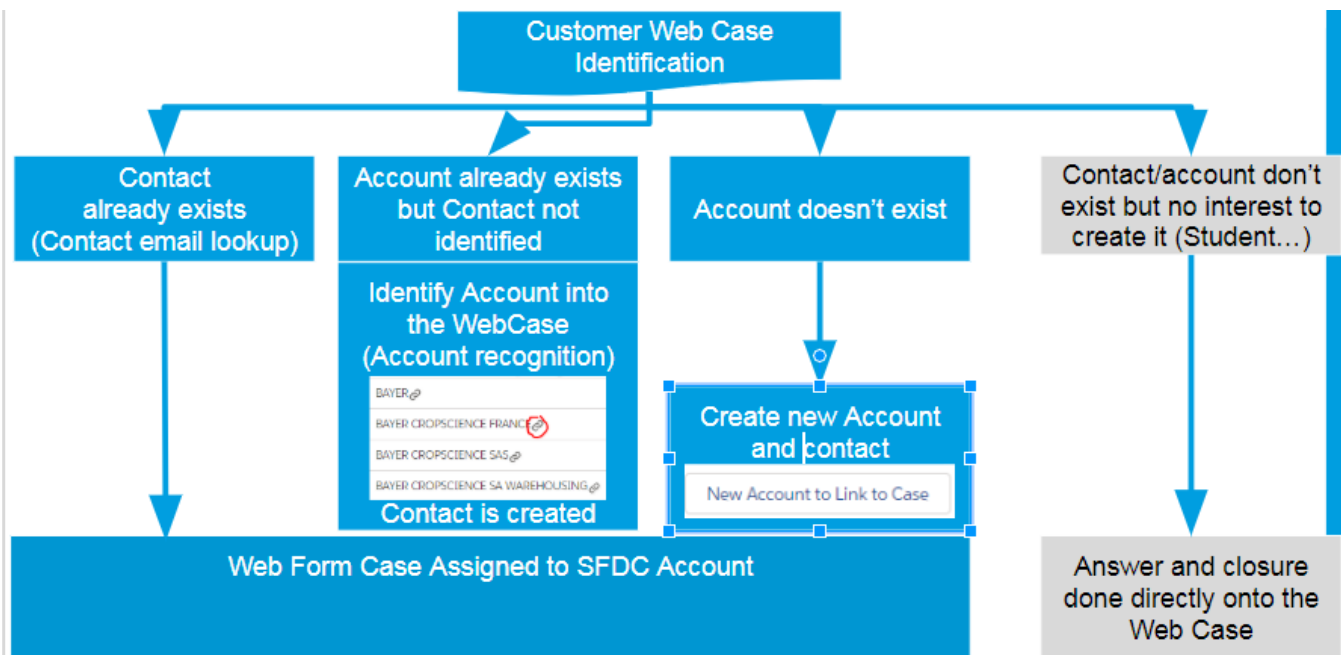


If the email address entered on the webform is an existing email address of a contact in SalesForce, the system automatically links the webform to that contact and to the (primary) related account.

If not, the user will choose one of the following options:

1. "Generate Prospect & Contact" Button : If the account is not existing in the system, the user can generate a new prospect and a new contact using the webform information (entered by the customer)
2. "Generate Contact" Button : If the account exist, once the account is selected (manually) and linked to the webform, the user can generate a new contact using the webform information (entered by the customer)

## Lightning process :



If the email address entered on the webform is an existing email address of a contact in SalesForce, the system automatically links the webform to that contact and to the (primary) related account and display the information on the Account/Contact recognition component :

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**Account/Contact Recognition**

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**ADFERT ADITIVOS IND E COMERCIO LTDA**

Record Type: SAP Customer  
 Corporate Group: DECISION: VARIOUS  
 Partner Type: Sold-to & Ship-to  
 Partner Sub-Type:

---


**Doe**

Phone:  
 Email: sophie.millet-ext@solvay.com  
 Job Department: Other  
 Function: Researcher

---

Webform will be closed when Sample Request will be created.

[Convert to Sample Request](#)

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If not, the user will choose one of the following options:

1. Link to existing account using the anchor: the system will search and propose an account name containing an exact match of the "web company" name entered by the customer and the country (matching with account mailing address country)


**Account/Contact Recognition**

You have to link one account and one contact to the webform.

Search result of candidates for account :

10 account(s) found in **France** containing **bayer** in the name.

You can select one of them by clicking on anchor or create a new one with the button.

---

BAYER 

---

BAYER CROPSCIENCE FRANCE 

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BAYER CROPSCIENCE SAS 

Then, the contact will automatically be created and added on the webform.

2. If none account is matching, or none retrieved, the user can use the "Create a new Account to link to Case" Button to create a new prospect. The contact will automatically be created and added on the webform.

## Conversion process

At any time, the WebForm Case can be converted onto an other CRM case : Sample Request, Customer Request or Opportunity by clicking the "Convert" button (in the Lightning component, it's a button in the "Account/Contact recognition" component, visible only once the account & contact has been linked to the webform)

- In that case the WebForm will be closed with the Status « Closed – Accepted » and a new Case will be initiated with Pre-filled information. The New Case will follow the standard corresponding CRM process.
- The Conversion process has to be done by user having the authorization to create a new case.
- Before converting the case, the New Case type should be checked or amended if necessary

## 3.2 Custom Buttons

### "Send Answer" Button

At any time, a direct answer can be provided to the customer directly from the Webform using the mail standard editor and Solvay templates. The email is sent to the contact email address