

Sample: Processing the Sample

Overview

In this section, you will find information about:

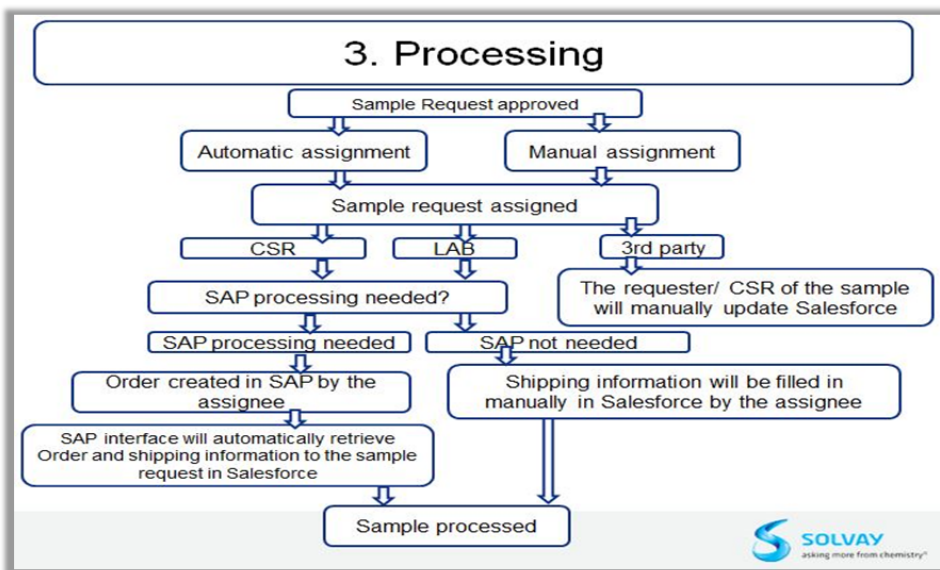
- How is done the assignement for processing
- What to do to process a sample
- The interface with SAP and what is updated in SalesForce

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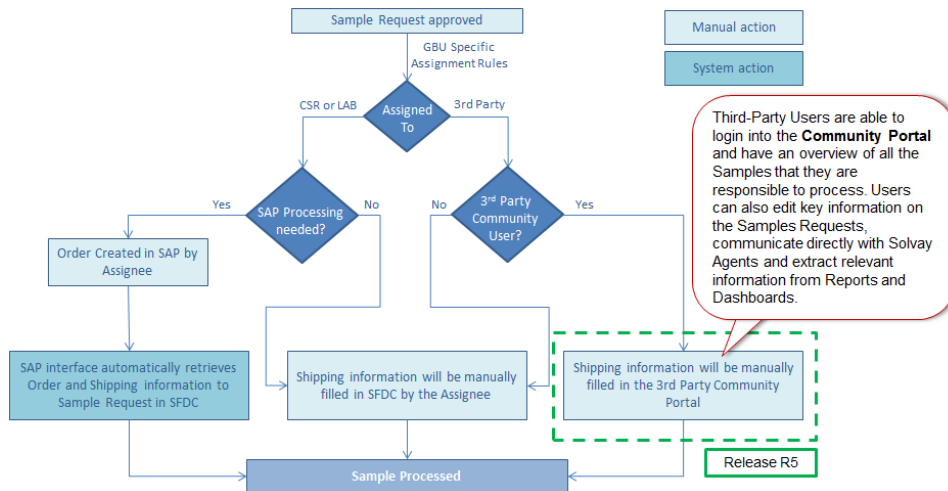
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Step By Step

Processing
The CSR receives a notification for a new Sample request to be processed
If the GBU works with SAP for managing Sample orders, the CSR will integrate the new Sample request with the SAP Order information



New R5 feature: Third Party Users are able to login into the **Community Portal** !



Assignment

Case
00001224

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed | Click to add topics

Approval History | Open Activities | Activity History | Google Docs & Attachments | Case History

Case Detail

Edit | Delete | Close Case | Clone | Sharing | Submit for Approval

Process

1. New | 2. Pending approval | 3. Approved | 4. Rejected | 5. Ordered | 6. Shipped | 7. Delivered | 8. Closed

Loading...

I-CHEMIE GMBH & CO. KG
GROSSHANDEL

Case Number 00001224

Status New
Follow up date Reminder
Severity Medium
Initial Description GBU Performance Polyamides
Subject BU EP CIG
Category Date/Time Opened 16/02/2016 17:30
Sub-Category Case Owner Yasmina Fares Change!
Region EMEA CSR
Account Manager Yasmina Fares

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• Automatically by the system when the sample is at status is a provided and criteria are met



Change Case Owner

This screen allows you to transfer cases from one user or queue to another. When you transfer ownership, the new owner will own:

- all open activities (tasks and events) for this case that are assigned to the current owner

Note that completed activities will not be transferred. Open activities will not be transferred when assigning this case to a queue.

Select New Owner

Transfer this case 00001224

Owner

User



☐ Send Notification Email

Save

Cancel

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Actions

- The person assigned for processing will then have to:
- Create an order in SAP when it is relevant
 - Send notification to 3rd party when relevant
 - Update sample request with necessary shipping information

The shipping information can be updated in 2 ways:

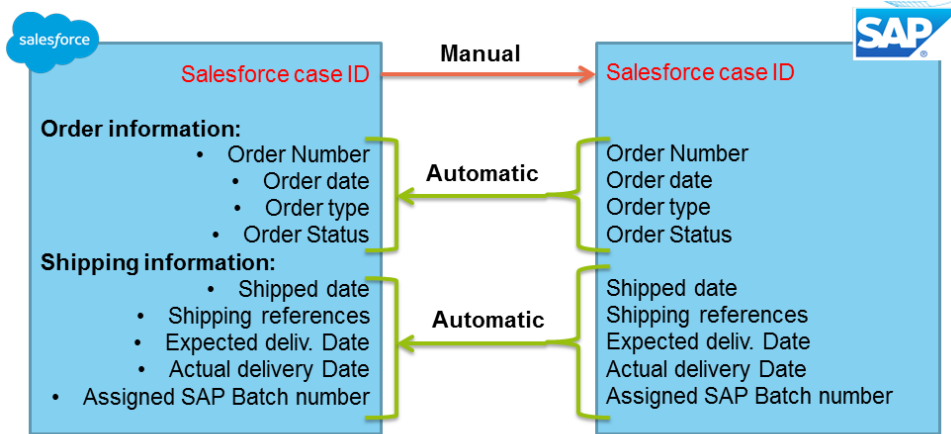
1. **Manually by the CSR** if no SAP order is created and this will be done in the following section:

▼ Other order and Shipping information	
Manual shipping date (No SAP order)	Batch Number
	Tracking Number

2.
inf

▼ S

SAP interface



Manual → The Processor will have to manually enter the case Id in SAP when creating the order.

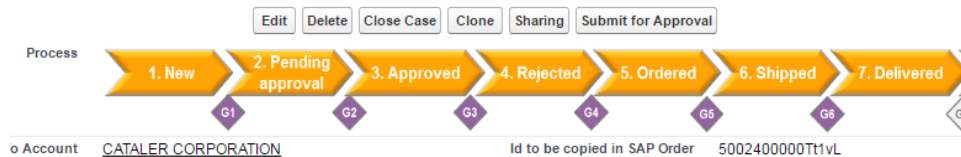
Automatic ← The Interface will automatically retrieve information from SAP once a day until the sample request is closed.

- Once the email you receive, there is what we call the "Sales Force ID"

Dear Processor, A sample is requested by SOLVAY for customer Test account, It has been approved by Li

Sample Case ID	5002400000Tt1vL
Case Number	00003845
Customer Name	

- You can also find this "Sales Force ID" on the case screen



This "Sales force ID" has to be copy/paste as "Purchase order n°" in SAP, in the "Order Data" tab, in the "Ship-to party" section.

You also need to select the "Purchase order type" as "SFDC"

Sales Shipping Billing Document Accounting Conditions Account assignment Partners Texts **Order Data** Status

Sold-to party

PO number
Purchase order date 08.06.2016
Purchase order type
Last contact date
Name
Your Reference
Telephone

Addit.
No. of dunnings 0
Collective no.

Ship-to party

Purchase order no. 5002400000RNgE
Purchase order date
Purchase order type SFDC CRM Salesforce SFDC
Your reference

Pay attention to input nothing else, otherwise the interface with Sales force won't work. So, no additional word like "ID", "Sample",...

If you would like to manage several sample request in the same SAP order, it's possible. To do so, you will have to:

- Create 1 line per sample request
- Add the corresponding sales force ID on each line as « Purchase order n° » in the « Order Data » tab, in the « Ship-to party » section.
- Indicate « SFDC » as « Purchase Order Type ».

This works for every kind of sample, free or not.

This works on both SAP system: PF1 and RCS.

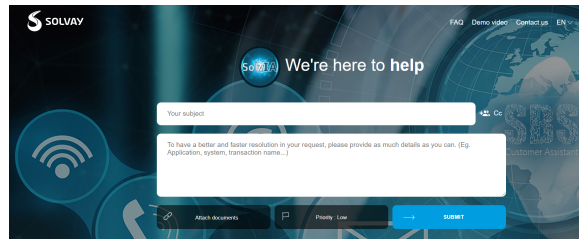
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Related articles

- [Sample: Create a Sample](#)
- [Sample: Approval Process](#)
- [Sample: Follow up actions and Closure](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example