Customer Requests: Related Lists

Overview

In this section, you will find information about:

- Account association
- Customer Request Contact
- Customer Request Product
- Open Activities
- Activity history
- How to attach documents

Concerned profiles:

ALL

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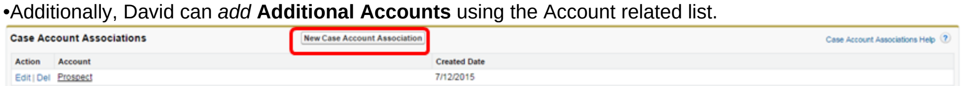
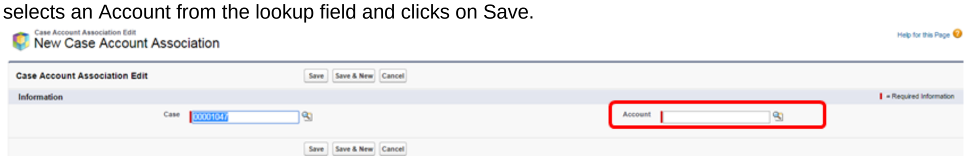
Step By Step

Case Account Associations

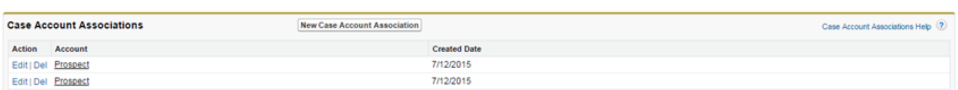
•Additionally, David can *add* **Additional Accounts** using the Account related list.



•In order to add an Additional Account, David goes on the Case Account Associations related list, clicks on the “New Case Account Association” button, selects an Account from the lookup field and clicks on Save.

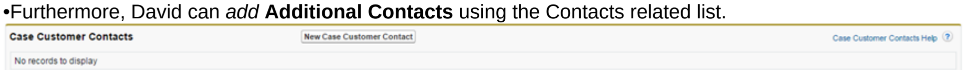


•The Account is added to the Case Account Association related list.

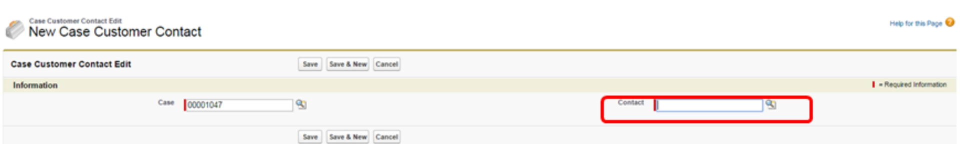


Case Customer Contacts

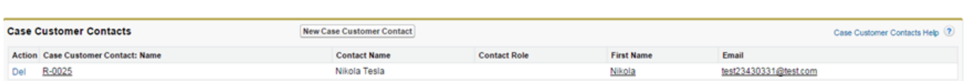
•Furthermore, David can *add* **Additional Contacts** using the Contacts related list.



•In order to add an Additional Contact, David goes on the Contact related list, clicks on the “New Contact” button, selects a Contact from the lookup field clicks on Save.

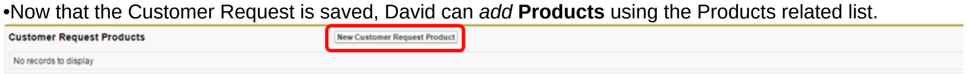


•The Contact is added to the Contact related list.

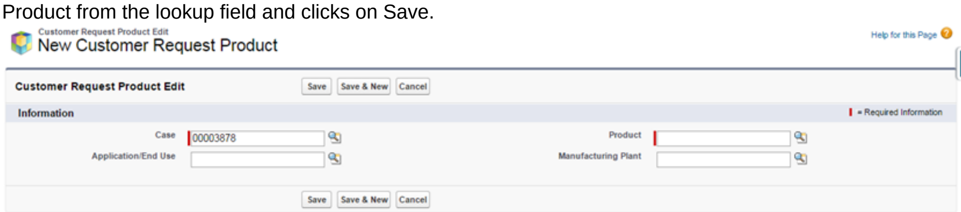


Customer Request Products

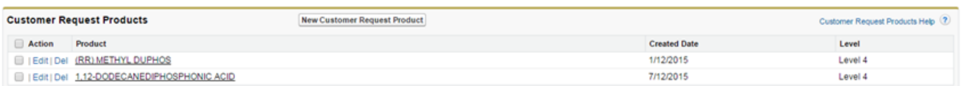
•Now that the Customer Request is saved, David can *add* **Products** using the Products related list.



•In order to add a Product, David goes on the Customer Request Products related list, clicks on the "New Customer Request Product" button, selects a Product from the lookup field and clicks on Save.



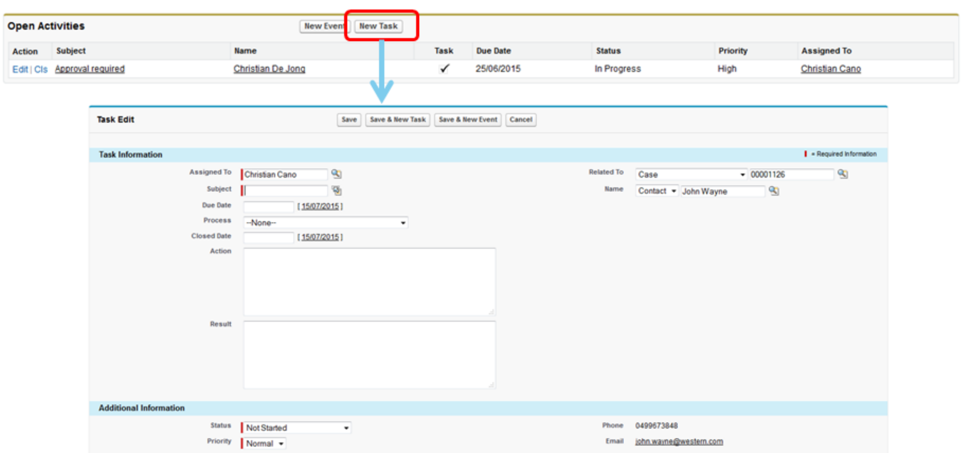
•The Product is added to the Customer Request Product related list.



Open Activities

•It is possible to assign tasks to users directly from the Customer Request and *capture* which **Process** this task is related to. These tasks have a priority, a due date, a close date and free text fields to capture the action and the result.

•To create a new task, the user *clicks* on **New Task** on the Open Activities related list.

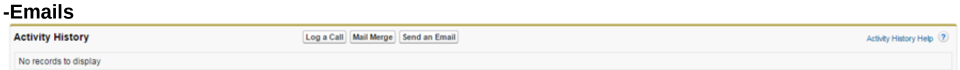


Activity History

•All the activities linked to the Customer Request are monitored in this related list. These activities include:

-Tasks

-Emails



Case Team

•Users can be *assigned* to a **Case Team.** This allows the appropriate users to have read/write access to the Customer Request if the assigned user needs help or is not able to treat the Customer Request.

•The assignees (Originator, Approver, Processor and Notified) are automatically added to the Case Team.

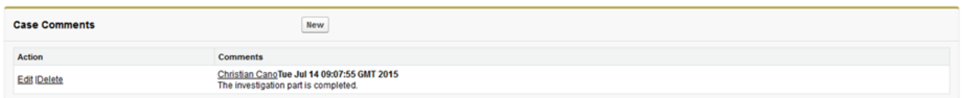
•When a Customer Request is *flagged* as **confidential**, only the users in the Case Team will have read-only or read/write access to the Customer Request depending on their profiles.

Case Team — Update Case Team Members

Action	Team Member	Member Role	Case Access	Modified By
Remove	David Rampel	Read/write	Read/Write	Christian Cano 15/07/2015 19:52
Remove	Christian Cano	Read/write	Read/Write	Christian Cano 15/07/2015 19:52
Remove	John Smith	Read/write	Read/Write	Christian Cano 15/07/2015 19:52
Remove	Laurie Clark	Read/write	Read/Write	Christian Cano 15/07/2015 19:52

Case Comment

•This related list can be used to provide an overall comment on the Customer Request.



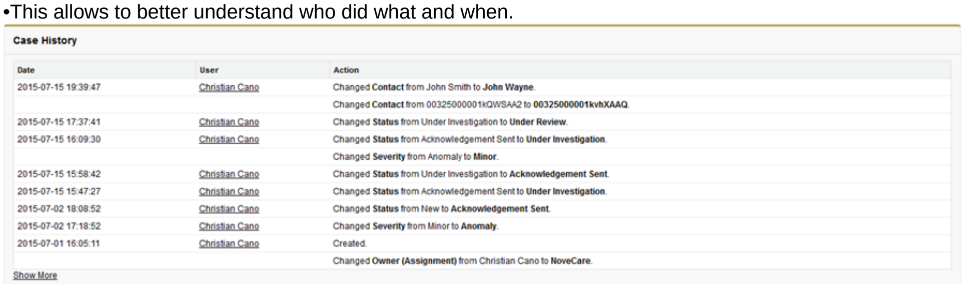
Case Comments — New

Action	Comments
Edit | Delete	Christian Cano Tue Jul 14 09:07:55 GMT 2015 The investigation part is completed.

Case History

•Changes made to the Customer Request are tracked in this related list.

•This allows to better understand who did what and when.



Case History

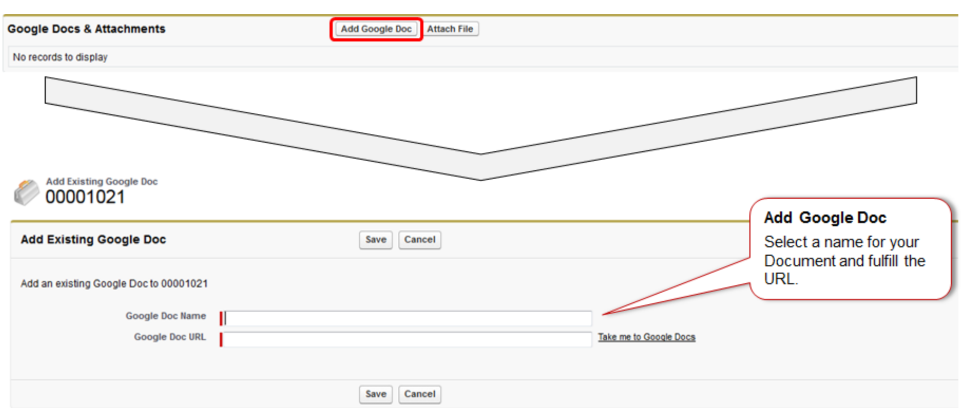
Date	User	Action
2015-07-15 19:39:47	Christian Cano	Changed **Contact** from John Smith to **John Wayne**.
		Changed **Contact** from 00325000001kQWSAA2 to **00325000001kvhXAAQ**.
2015-07-15 17:37:41	Christian Cano	Changed **Status** from Under Investigation to **Under Review**.
2015-07-15 16:09:30	Christian Cano	Changed **Status** from Acknowledgement Sent to **Under Investigation**.
		Changed **Severity** from Anomaly to **Minor**.
2015-07-15 15:58:42	Christian Cano	Changed **Status** from Under Investigation to **Acknowledgement Sent**.
2015-07-15 15:47:27	Christian Cano	Changed **Status** from Acknowledgement Sent to **Under Investigation**.
2015-07-02 18:08:52	Christian Cano	Changed **Status** from New to **Acknowledgement Sent**.
2015-07-02 17:18:52	Christian Cano	Changed **Severity** from Minor to **Anomaly**.
2015-07-01 16:05:11	Christian Cano	Created.
		Changed **Owner (Assignment)** from Christian Cano to **NoveCare**.

Show More

Google Docs & Attachments

•Documents can be attached to the Customer Request in 2 different ways

-Add Google Doc: add an existing document from its Google Drive URL



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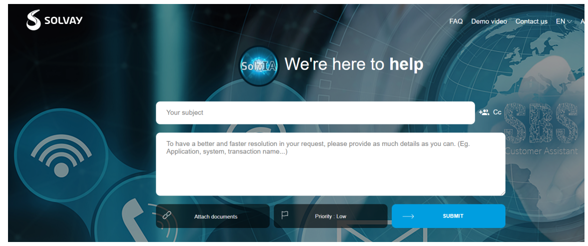
Related articles

- Customer Request: Introduction
- Customer Request: Create a customer request
- Customer Request: Approval Process
- Customer Request: Processing the Customer Request
- Customer Request: Final Communication
- Customer Request 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/

- Activity: Create my business calendar



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