

Customer Request: Create a customer request

Table of content

Overview

In this section, you will find information about how to create a customer request in Salesforce.

Concerned profiles:

ALL

- **Step By Step**
 - New Case Creation
 - Case Information
 - Severity
 - Customer Request
 - Visibility
 - Customer Contact Information
 - Request Description
 - Adding Products
 - Adding Additional Accounts
- **Related articles**
- **Need help?**

Step By Step

New Case Creation

[Chatter Case](#)
[Timeline](#)
[Cases](#)
[Opportunities](#)
[Competitive Insights](#)
[Cross BU Leads](#)
[Analytics](#)

[Home](#)
[Chatter](#)
[Accounts](#)
[Contacts](#)
[Activities](#)
[Visit Reports](#)
[Account Plans](#)
[Cases](#)
[Opportunities](#)
[Competitive Insights](#)
[Cross BU Leads](#)
[Analytics](#)

Create New...

Recent Items

00001070

00001126

00001188

00001172

00001176

00001170

00001172

Custom Links

Messages and Alerts

Home

View: My Cases

Create New View

Recent Cases

Case Number

Account Name

Subject

Contact Name

Product Family

Severity

Status

Date/Time Opened

00001070

BAYER GAS France

—

Lambert, Jamie

—

Minor

Completed

13/05/2015 14:16

00001126

Test.soldto.CG

—

Smith, John

—

Minor

Acknowledgement Sent

10/07/2015 18:05

00001188

—

—

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—

Minor

Approved

13/07/2015 8:56

00001172

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Minor

Rejected

9/07/2015 10:17

00001170

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Minor

Approval Pending

10/07/2015 17:16

00001176

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Minor

Approved

10/07/2015 17:26

00001172

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Minor

Approval Pending

10/07/2015 17:18

00001173

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Minor

Approval Pending

9/07/2015 12:57

00001054

Test.soldto.CG

Test.Complaint_1

Test.Contact.CG

—

Minor

Completed

11/05/2015 10:07

00001068

BAYER GAS France

Bothe

Lambert, Jamie

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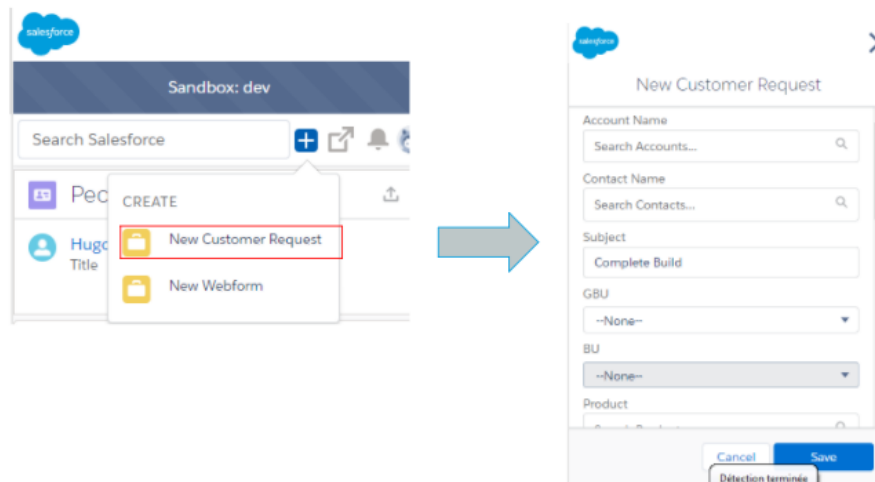
Closed

13/05/2015 12:32

• When creating a new Customer Request the user needs to choose between the different types of Cases that exist.

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• Under the Case tab, David clicks on New to create a new Customer Request.



There is another way they encourage students to begin following the steps given below.

A new button has been created on Lightning for Gmail and it allows the user to create a new customer.

Record Type
Chose record type between available options.

Case Record Types
All the available Case Record Types are referenced here with a description.

Record Type Name	Description
Customer Request	Choose this Record Type to create a new Customer Request.
Open Complaint	Choose this Record Type to create a new Complaint.
Sample Request	Choose this Record Type to create a new Sample Request.

• David now needs to select the Record Type for the Case.

• H e h a s t h e c h o i c e b e t w e e n C o m p l a i n t , S a m p l e R e q u e s t a n d C u s t o m e r R e q u e s t.

• David selects Customer Request and clicks on Continue. This will open the Customer Request edit page.

Case Information

1

Basic information needs to be populated in the Case Information section. This section contains the following fields:

- Account Name:** Main Account (can be Ship-to, Sold-to or Corporate Group)
- Subject:** Subject of the Request

Case Information Required Information

Account Name	Status Open
Subject	Final communication Sent ☐
GBU -None-	Received Date (22/01/2016)
BU -None-	Estimated Resolution Date (22/01/2016)
Product Family	Requested Resolution Date (22/01/2016)
Type -None-	Severity Medium
Sub-Type -None-	Case Origin Inbound email
Originator	Confidential ☐
Approver	
Processor	
Notified	



Additional Accounts can be added to the Accounts related list.

-GBU

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-Sub-type : More granular level of Type
-Originator : User who logged the Customer Request
-Case Owner: User or Group of Users that are responsible to act on the Customer Request on each phase

2

Basic information needs to be populated in the Case Information section. This section contains the following fields:

-Status:
Open – Pending Approval – Approved – Resolved – Closed – Rejected

The screenshot shows a 'Case Information' form. The left-hand section contains fields for Account Name (TEST FF), Subject (Customer Request), GBU (Novicare), BU (Agro), Product, Type (Labels (Ecocert/Ecolabels)), Sub-Type (None), Originator (Filipe Freitas), and Case Owner (Filipe Freitas). The right-hand section, highlighted by a red box, contains fields for Status (Open), Final communication Sent, Received Date (13-09-2016), Estimated Resolution Date (13-09-2016), Requested Resolution Date (13-09-2016), Priority (Medium), GBU Customer Segmentation (IGBU-46317), Case Origin (None), Case Recount Type (Customer Request), Clone Customer Request (checked), Confidential (checked), and Manufacturing Plant.



Estimated Resolution Date

Automatically filled in for some GBU based on Customer Classification and Priority for example

**-Final
Communication
Sent**

: Checkbox that flags if Customer Communication has been sent.

**-Received
Date**

: Date that Solvay received the Customer Request (Mandatory).

-Estimated Resolution Date
:
Estimated date when the Customer Request will be resolved (Mandatory for some GBUs).

- Requested Resolution Date:
Requested date when the Customer Request should be resolved (Mandatory).

-Priority : Low - Medium - High / By default on "Medium". => Severity has now been renamed to Priority

-Case Origin: Inbound email - Inbound call - Face to Face - Website

-Confidential: Restrict visibility of the Customer Request.

Case Information	
Account Name	TEST FF
Subject	Customer Request
GBU	Novecare
BU	Agro
Product	
Type	Labels (Eccert/Ecolabels)
Sub-Type	-None-
Originator	Filipe Freitas
Case Owner	Filipe Freitas
Status	Open
Final communication Sent	
Received Date	13-09-2016 (13-09-2016)
Estimated Resolution Date	13-09-2016 (13-09-2016)
Requested Resolution Date	13-09-2016 (13-09-2016)
Priority	Medium
GBU Customer Segmentation	GBU-46317
Case Origin	-None-
Case Record Type	Customer Request
Clone Customer Request	☒
Confidential	☐
Manufacturing Plant	

3

Each Customer Request can be linked to assigns. The different assigns are the persons in charge of one or more steps of the Customer Request process. •David *can* **Assign** 2 different people to the Customer Request:

-Originator
:
The person logging the Customer Request – in our case David.

-Notified
:
The person that needs to be notified of the Customer Request The Approver and the Processor will be automatically assigned by the System based on each GBURule

Severity

1

During the Customer Request Registration step,

David needs to fill-in the Severity of the Customer Request.

There are 3 types of Severity:
- High
- Medium
- Low

•The Severity is by default on the value **Medium**.

Status

Received Date

Estimated Resolution Date

Severity

Case Origin

Type

Confidential ☐

2

The definition of these severity values is the following:

Severity*	Definition
High	- According to GBU's customer segmentation, servicing level¹ or commercial agreement defined with the customer - Emergency requests (i.e. critical impact on customer's processes² and/or lead-time is critical for the customer)
Medium ³	According to GBU's standard answer lead-time, GBU's customer segmentation, servicing level or commercial agreement defined with the customer
Low	- According to GBU's customer segmentation, servicing level or commercial agreement defined with the customer - Any open question from the customer with <u>no commitment in terms of timing</u> (i.e. "nice-to-have" requests, general questions related to documentation, surveys, ...)

*Please note that the definition of severity is GBU specific and it may vary according customer segmentation, servicing level and/or commercial terms defined with customers. Any specific detail related to GBU internal procedures should be shared during CRM training sessions.

¹The servicing model represents how the GBUs address customer / segment needs

² Critical means, for example that customer's production line could be stopped if the customer request is not resolved in due time. (Not exhaustive)

³The user can select these values from the pick list but by default the value is set on "Medium".

SOURCE: Interviews with GBUs

Customer Request Visibility

Customer Requests have 2 visibility options to manage confidential cases

•**Visible**: the Customer Request is visible by everyone (by default)

•**Confidential**: By ticking the box "Confidential", user make the Customer Request accessible only to the **Owner** (User or Queue), the **Approver** and the **Case Team**.

The screenshot shows a 'Case Information' form with the following fields and values:

- Account Name: TEST FF
- Subject: Customer Request
- GBU: Novicare
- BU: Agro
- Product: Labels (Eccert/Ecolabels)
- Type: Labels (Eccert/Ecolabels)
- Sub-Type: --None--
- Originator: Filipe Freitas
- Case Owner: Filipe Freitas
- Status: Open
- Final communication Sent: ☐
- Received Date: 13-09-2016
- Estimated Resolution Date: 13-09-2016
- Requested Resolution Date: 13-09-2016
- Priority: Medium
- GBU Customer Segmentation: IGBU-46317
- Case Origin: --None--
- Case Record Type: Customer Request
- Clone Customer Request: ☒
- Confidential**: ☒ (highlighted with a red box)
- Manufacturing Plant:

Customer Contact Information

1

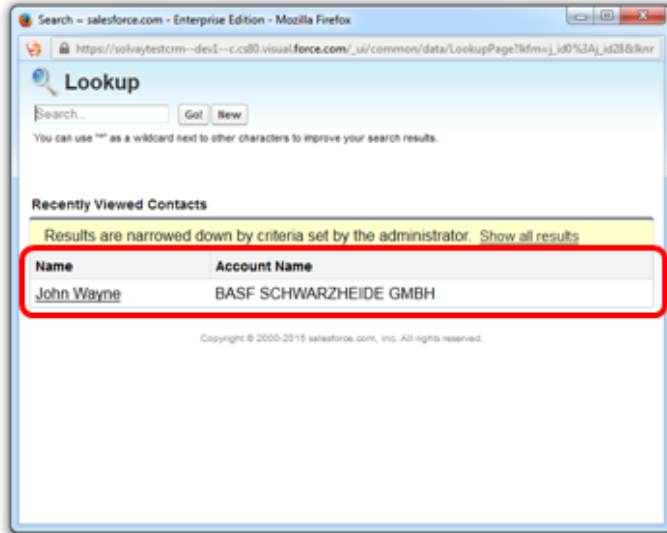
Multiple contacts can be maintained on the Customer Request. David can maintain a main Contact and has the possibility to add **Additional Contact** when the Customer Request is saved.

Customer Contact Information

Contact Name

Example

When choosing a Contact, David can search for any Contact but the Contacts related to the Account Name will be the ones displayed by default. To show all results related to the Account Name, David needs to click on "Show all results".



Request Description

More detailed information on the Customer Request are populated in the Description Section. This section contains the following fields:

-**End Customer:** Final Customer (Ship-to).

-**Internal Description:** Detailed description of the Customer Request

-**Opportunity:** Opportunity related to the Customer Request.



Legislation on distributor1

Receiving the distributor's / end customer's name is forbidden unless specific technical/quality support.

Description

End Customer

Initial Description

Opportunity

Once David has populated all the relevant fields for his Customer Request, he can save it by clicking on the **Save** button.

Case 00001309 Customize Page | Edit Layout | Printable View | Help for this Page

[Show Feed](#) [Click to add topics](#)

[Back to List: Cases](#)

[Case Customer Contacts](#) | [Case Account Associations](#) | [Customer Request Products](#) | [Approval History](#) | [Open Activities](#) | [Activity History](#) | [Case Team](#) | [Case Comments](#) | [Case History](#) | [Google Docs & Attachments](#)

Case Detail Edit | Delete | Clone | Close Case | Send Final Communication | Clone Customer Request

1. Open → 2. Approval Pending → 3. Approved → 4. Completed → 5. Closed

▼ Case Information

Customer Request Number	00001309	Status	Approved
Account Name	A.P. RESIN S.A. DE C.V.	Final communication Sent	☐
Subject	test sd subject clone11	Received Date	21/04/2016
GBU	Novocare	Estimated Resolution Date	21/04/2016
BU	Agro	Requested Resolution Date	
Product		Severity	Medium
Type	Labels (Ecoert/Ecolabels)	Case Origin	
Sub-Type		Case Record Type	Customer Request
Originator	Sushant Kumar Chingra		
Approver	Ashutosh Singh		
Processor	Chhavi Gupta		
Notified	☐		

Adding Products

Now that the Customer Request is saved, David can add products using the product related list.

Customer Request Products

New Customer Request Product

No records to display

Information

Customer Request Product Edit

Save

Save & New

Cancel

Information

Case00003878

Product

Application/End Use

Manufacturing Plant

Save

Save & New

Cancel

Help for this Page

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

Customer Request Products			
New Customer Request Product			
Customer Request Products Help			
Action	Product	Created Date	Level
Edit Del	IBRI1METHYL DI PHOS	1/12/2015	Level 4
Edit Del	1,12-DODECANEDIPHOSPHONIC ACID	7/12/2015	Level 4

For Fibra's & Coatis : when creating a customer

▼ Case Information

Customer Request Number00048391

Account Name

ADFERT ADITIVOS IND E COM

Partner Type

Sold-to & Ship-to

Customer Classification

Subject

Customer request

GBU

Coatis

BU

Phenol Chain

Case Team

Update Case Team Members

Action	Team Member	Member Role	Case Access
Remove	User: Sophie Millet	Originator	Read/Write
Remove	User: Sandra Mori	Account Manager (SAP)	Read/Write

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Adding Additional Accounts

• Additionally, David can add additional accounts using the Account related list.

Case Account Associations

New Case Account Association

Case Account Associations Help ?

Action	Account	Created Date
Edit Del	Prospect	7/12/2015

• In order to add an additional

Case Account Association Edit

New Case Account Association

Help for this Page ?

Case Account Association Edit

[Save](#) [Save & New](#) [Cancel](#)

Information

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Account

[Save](#) [Save & New](#) [Cancel](#)

Required Information

Account, David goes on to the Case Account Association's related list, click on the "New Case Account Association

ation" button, select a new Account from the lookup field and click on Save.

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

Case Account Associations		
New Case Account Association		
Case Account Associations Help ?		
Action	Account	Created Date
Edit Del	Prospect	7/12/2015
Edit Del	Prospect	7/12/2015

• Further more, David can add additional contacts using the Contact s related li st.

Case Customer Contacts

New Case Customer Contact

Case Customer Contacts Help ?

No records to display

In order to add an Addi ti

Case Customer Contact Edit

New Case Customer Contact

Help for this Page ?

Case Customer Contact Edit

Save Save & New Cancel

Information

Case 00001047

Contact

Required Information

Save Save & New Cancel

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Case Customer Contacts				
New Case Customer Contact			Case Customer Contacts Help	
Action	Case Customer Contact: Name	Contact Name	Contact Role	First Name
Del	B-0002	Nikola Tesla		Nikola
				test2430331@test.com

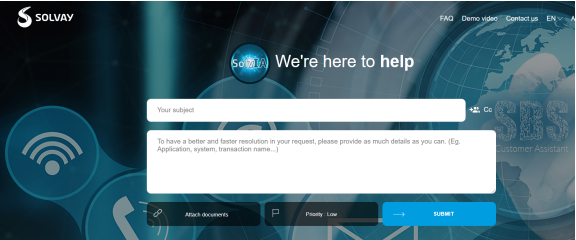
[Back to the top](#)

Related articles

- [Customer Request: Introduction](#)
- [Customer Request: Approval Process](#)
- [Customer Request: Processing the Customer Request](#)
- [Customer Request: Final Communication](#)
- [Customer Request Closure](#)
- [Customer Requests: Related Lists](#)

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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