Customer Request: Approval Process

Overview

In this section, you will find information about the approval process.

Concerned profiles:

ALL

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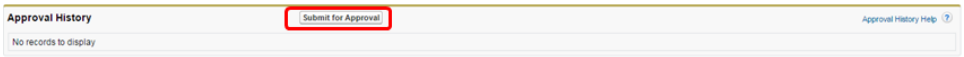
Step By Step

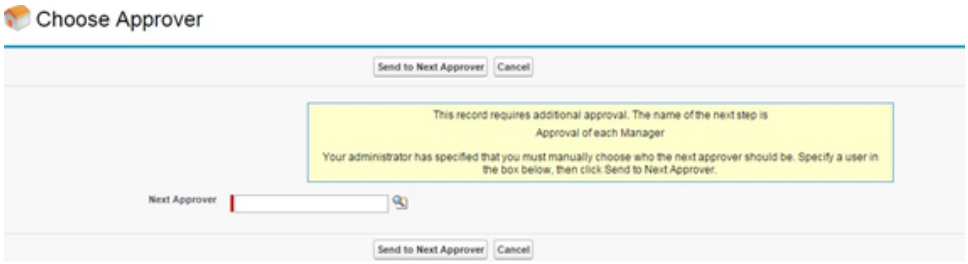
Process

•After all the information related to a Customer Request, not only the information on the Page layout but also the information on the related lists, the Customer Request should be submitted for Approval. To Submit for Approval, Users need always to click the "**Submit for Approval**" button.



•If the Submitter is a Salesrep or from the GBU PePol, the Customer Request will be automatically Approved. Else, the Customer Request status will be changed to **Pending Approval**. During the Approval process, the Customer Request will be frozen until it is **Approved** or **Rejected**.
•Each GBU have its own rules to assign User or Group of Users for approval :

- Current customer request owner must manually Submit for approval to active defined business rule : Approver is choosen manually :



Automatically assign the Approver based on Criteria from the Customer Request

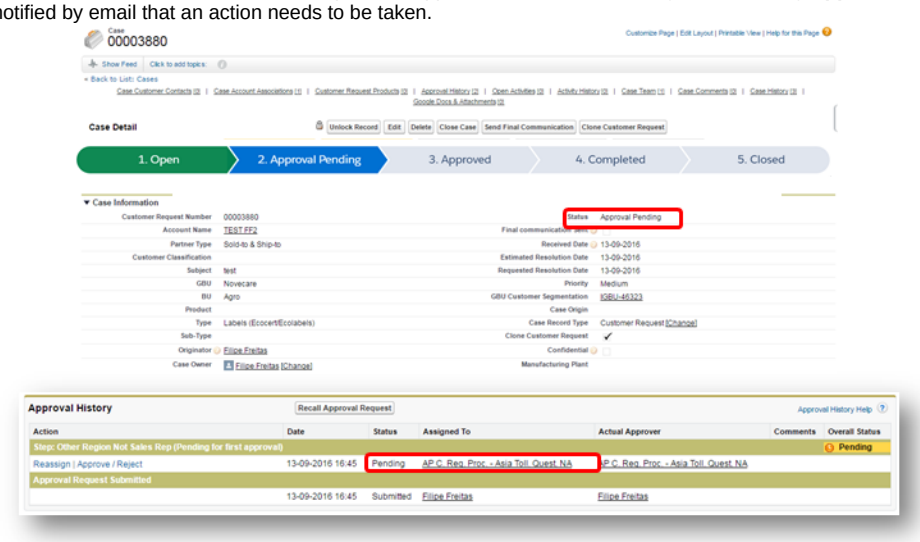
Recall the Approval Request

•If additional information is needed before the Approval of the Customer Request, it can be recalled with a comment. Once the information has been delivered, the Request can be submitted for Approval again

•When the Customer Request is Approved, the Status will automatically be changed to Approved

Next process step

•As David *submitted* the Customer Request for Approval, the **Status** is changed to **Pending Approval** and the User or Group of Users that have been a notified by email that an action needs to be taken.



•Let's follow **John**, working as a Sales Representative and member of a Queue that has been assigned as Approver by his GBU rules, while he complet

Approver notification

•In order to get to the Customer Request page, John can either *find* the Customer Request on the **Case** object or simply *click* on the Customer Request link in the **notification email.**

*** Internal usage only ***

A new Customer Request has been registered in SFDC by [ORIGINATOR] and requires your approval. For more details please consult SFDC.

To display the Customer Request, please click on this link : [Case Link]

Account Name	[ACCOUNT NAME]
End Customer	[END CUSTOMER]
GBU	[GBU])
BU	[BU]
Request type	[TYPE]
Originator	[ORIGINATOR]
Customer Contact	[CONTACT NAME]
Received Date	[RECEIVED DATE]
Estimated Answer Date	[ESTIMATED ANSWER DATE]
Status	[STATUS]

Product
[PRODUCT]

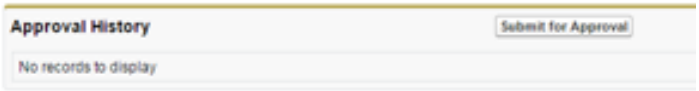
Description
[DESCRIPTION]
Request Description
[REQUEST DESCRIPTION]

THIS IS AN AUTOMATED MESSAGE - Please do not reply

Assignee Notification

As defined previously, David was assigned as **Originator** and **Notified** any required user about the Customer Request. In addition the business rules defined will automatically assign the Approver and the Processor as User or Group of Users. These different assignees will have the ownership at deferent status to peform actions on the Customer Request.

Once David has created the **Customer Request** and submitted it for Approval, the **Status** is updated to **Pending Approval**.



Base on David GBU's rules, the Approver for this Customer Request is a Queue. A notification flow sends an email to all Queue members informing them that the status was changed and that further action is needed. The routing table is the following:

Status	Pending Approval	Approved	Resolved	Closed	Rejected
Recipient	• User or Queue	• User or Queue • Notified	• Notified		• Originator

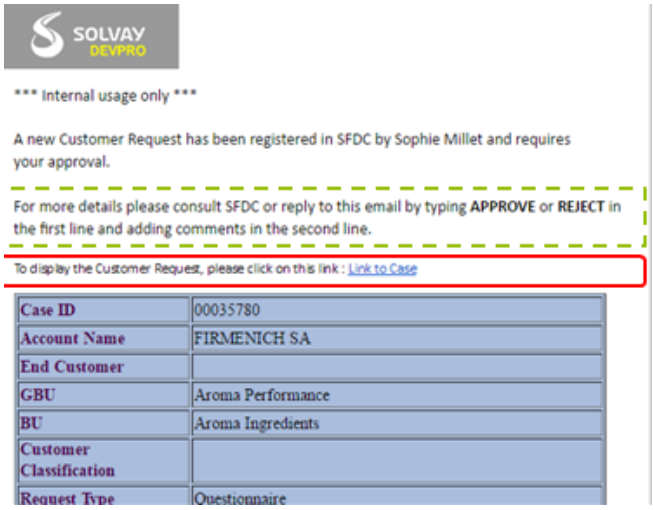
These notifications are meant for users who need to **take action** on the Customer Request. Other users can always consult the Customer Request or the Reports if they need information on a Customer Request.

Well Done David! The Customer Request is created and submitted and submitted for Approval and a notification has been sent to the Approver (John) to inform him that he needs to approve or reject the Customer Request.

John Receive a Notification Email to Approve

In order to get to the Customer Request page, John can either

- find the customer Request on the case object
- simply click on the customer request link in the notification email,
- **answer directly by email using the wording <<APPROVE >> or << REJECT>>**

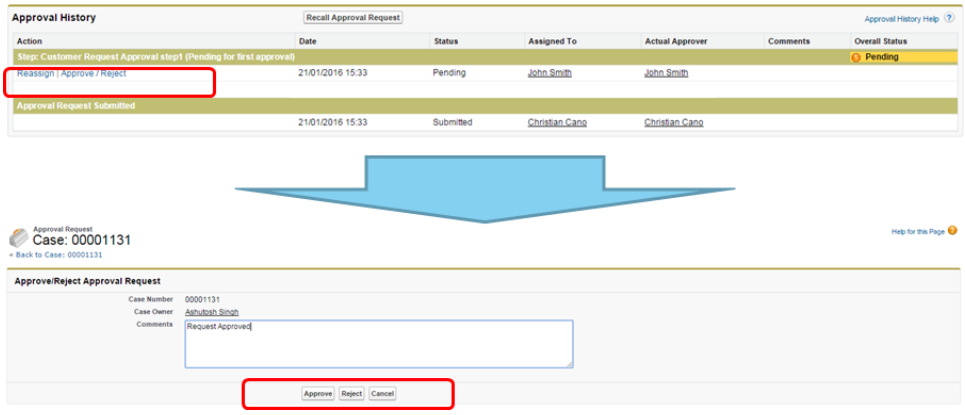


Approving the Customer Request

After Reviewing the Customer Request , John approves it.

- If John didnot answer directly by email,

1 Once John opens the Customer Request, he can scroll down to the Approval History related list and click **Approve** or **Reject** it.



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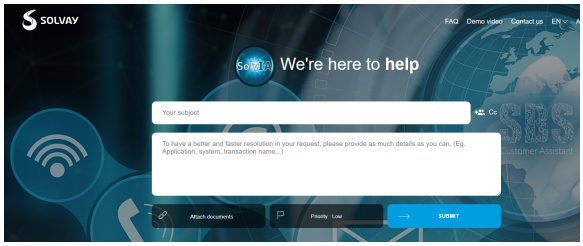
- Customer Request: Introduction
- Customer Request: Create a customer request
- Customer Request: Processing the Customer Request
- Customer Request: Final Communication
- Customer Request Closure
- Customer Requests: Related Lists

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