Sample: Create a Sample

Overview

In this section, you will find information about:

- How to create a sample.
- Which fields are mandatory
- How to select a product

Concerned profiles:

Sales - Customer Service - Supply Chain

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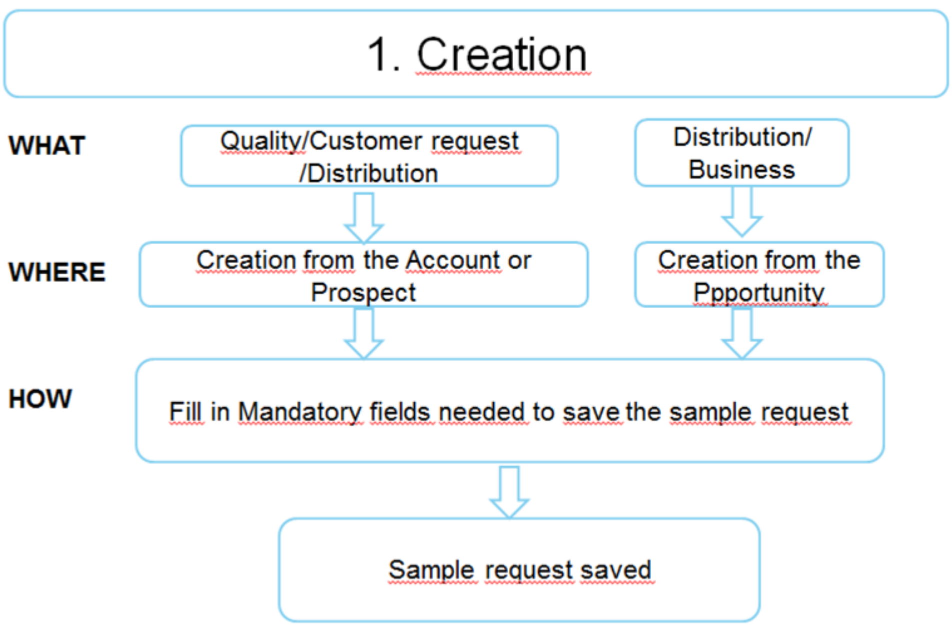
Step By Step

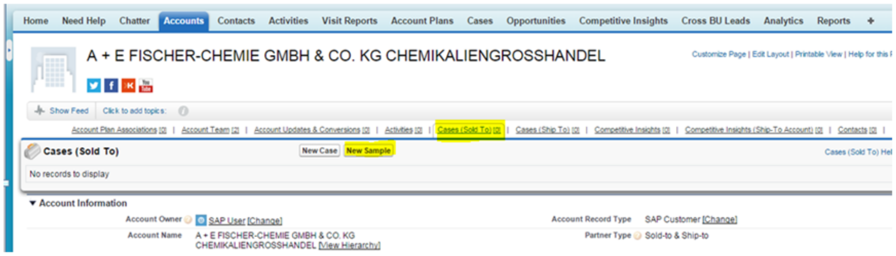
Creation process



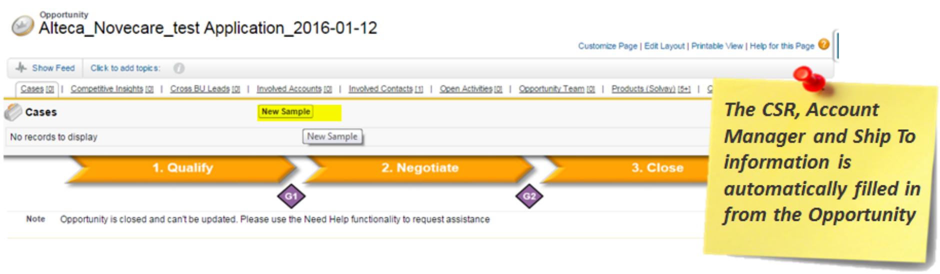
Sample request creation

Creation of the sample request can be done from:

- The account / The prospect related list



- The opportunity related list



A Sales Rep wants to send a Sample to a Customer to show the new Product Solvay has just released and creates the Request on the system

He provides the general information about the Sample Request.

Information such as the Sold to Account and Contact, the Initial Description and the GBU and BU should be provided

He details the Shipping information:

There are 3 types of Adress that can be selected and that will be displayed on the page layout and all the Emails related to Complaints:

1. Ship-to: select a Ship-to account from the system and use the Ship-to adress

2. Contact: select a Ship-to account and a Contact from the Ship-to and use the Contact adress

3. Manual: don't select records from the system but use the fields on the right side of the group to manually enter the Address information

And then, he must select the Product information related to the Sample request

Product selection key statement:

- When a sample is created, the product field is mandatory
- As it is mandatory, a dummy product for each GBU will be created in the product table in case the user does not find the right product or the product still does not exist. If the product selected is a dummy one, a text field is available to fill in the Product name. That product can be specified in details in the description field.
- A sample request is linked to only one product => it is possible to clone a sample request if multiple products are requested
- This product field can contain several levels of products depending on GBU
- All GBUs can chose to filter the lookup results on the level, name, description and so on in order to make the search easy and fast.
- Once the Product is selected, the level above (parent) will appear in a separate field to have the product hierarchy

The Sales rep can add more information to the Samples Request after registering it, such as Attach Document, Tasks and manage the Case Team for the Request

Mandatory fields for all GBUs

Mandatory fields	Always mandatory	Prefilled	GBU
Sold to Account	Yes	If created from an Account, or an Opportunity (field of Sold To Account)	All
Contact demander	Yes	No	All
GBU	Yes	If created from an Opportunity	All
BU	Yes	If created from an Opportunity	All
Account manager	Yes	No	All
Ship to account or Shipping address	Yes	No	All
Product	Yes	No but filtered by GBU	All
Requested arrival date	Yes	No	All
Requested volume	Yes	No	All
Unit of measure	Yes	No	All
Currency	Yes	Yes, from the user page	All

Select the Ship Address information

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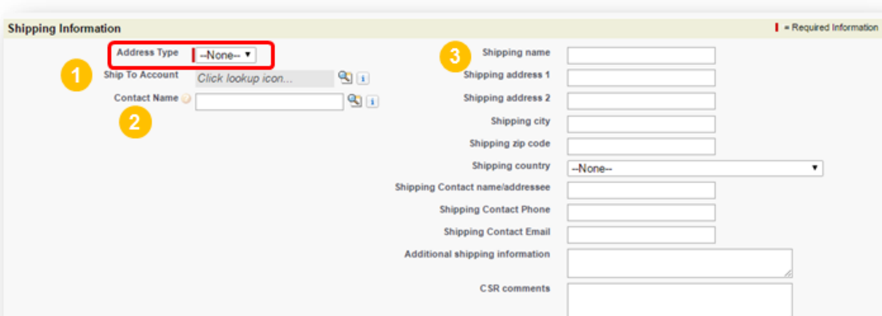

Product selection

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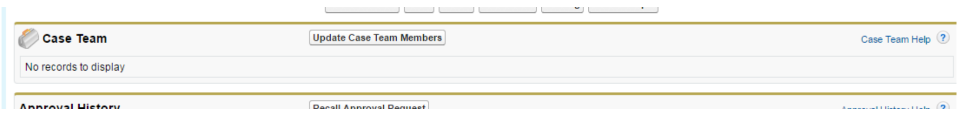
Case Team

Now, you can manage your case team as for other cases



Originator can give access to the tool to other people by adding him in the case team. **=> New Winter 17' Release**	

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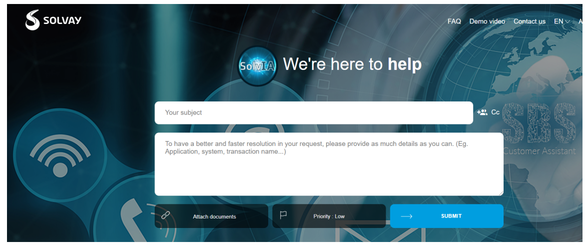
Related articles

Need help?

- Sample: Approval Process
- Sample: Processing the Sample
- Sample: Follow up actions and Closure

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