

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

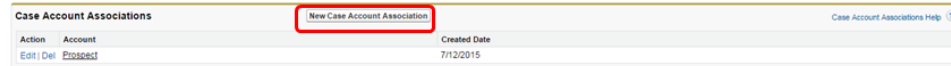
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Step By Step

Case Account Associations

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



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

• 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.



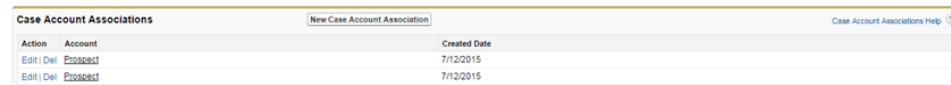
Case Account Association Edit

Information

Case:

Account:

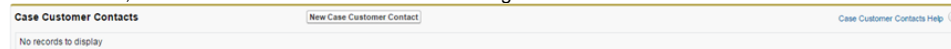
• The Account is added to the Case Account Association related list.



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

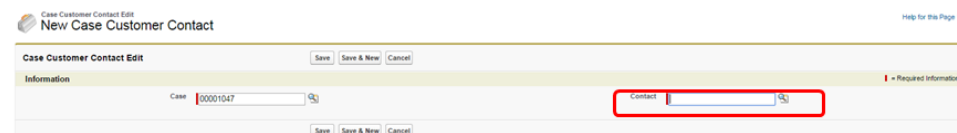
Case Customer Contacts

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



Action	Case Customer Contact: Name	Contact Name	Contact Role	First Name	Email
Del	R-0022	Nikola Tesla		Nikola	tesl2430331@tesl.com

• 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.



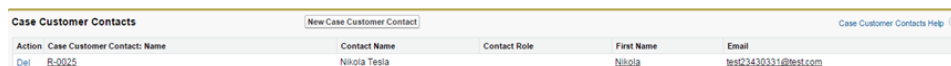
Case Customer Contact Edit

Information

Case:

Contact:

• The Contact is added to the Contact related list.



Action	Case Customer Contact: Name	Contact Name	Contact Role	First Name	Email
Del	R-0022	Nikola Tesla		Nikola	tesl2430331@tesl.com

Customer Request Products

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

Customer Request Products

No records to display.

- 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.

Customer Request Product Edit

Save Save & New Cancel

Information

Case: 00003878 Product: [Empty]

Application/End Use: [Empty] Manufacturing Plant: [Empty]

Save Save & New Cancel

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

Action	Product	Created Date	Level
Edit Del	08L1METHYL DUFHOS	1/12/2015	Level 4
Edit Del	1,12-DODECANEDIPHOSPHONIC ACID	7/12/2015	Level 4

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.

Open Activities

New Event **New Task**

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
Edit Del	Approval required	Christian De Jona	✓	25/06/2015	In Progress	High	Christian Cano

Task Edit

Save Save & New Task Save & New Event Cancel

Task Information

Assigned To: Christian Cano

Subject: [Empty]

Due Date: [15/07/2015]

Process: --None--

Closed Date: [15/07/2015]

Action: [Empty]

Result: [Empty]

Additional Information

Status: Not Started

Priority: Normal

Phone: 0499673848

Email: john.warne@system.com

Activity History

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

-Tasks

-Emails

Activity History

Log a Call Mail Merge Send an Email

No records to display.

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				
Action	Team Member	Member Role	Case Access	Modified By
Remove	David Ramez	ReadWrite	ReadWrite	Christian Cano 15/07/2015 19:52
Remove	Christian Cano	ReadWrite	ReadWrite	Christian Cano 15/07/2015 19:52
Remove	John Smith	ReadWrite	ReadWrite	Christian Cano 15/07/2015 19:52
Remove	Laurie Clark	ReadWrite	ReadWrite	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	
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.

Date	User	Action
2015-07-15 19:39:47	Christian Cano	Changed Contact from John Smith to John Wayne.
		Changed Contact from 0032500001H0WSA42 to 0032500001kvhXAAQ.
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 18:09:52	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.

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

Google Docs & Attachments Add Google Doc | Attach File

No records to display

Add Existing Google Doc 00001021

Add Existing Google Doc Save | Cancel

Add an existing Google Doc to 00001021

Google Doc Name

Google Doc URL [Take me to Google Docs](#)

Save | Cancel

Add Google Doc
Select a name for your Document and fulfill the URL.

[Back to the top](#)

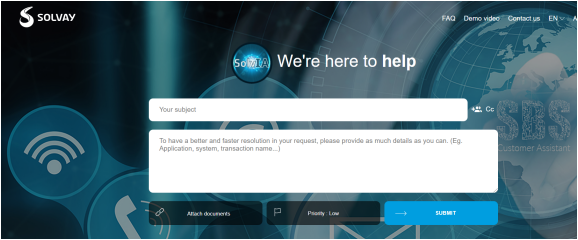
Related articles

- [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