

Complaint: Related Lists

Overview

In this section, you will find information about:

- Complaint contact
- Open activities
- Activity history
- Complaint team
- Complaint comments
- Complaint history
- Google docs & Attachements

Concerned profiles:

ALL

Step By Step

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Case Customer Contacts

Case Customer Contacts

New Case Customer Contact

No records to display

Case Customer Contacts Help ?

Case Customer Contact Edit

New Case Customer Contact

Help for this Page ?

Case Customer Contact Edit

Save Save & New Cancel

Information

Case 00001047

Contact

Save Save & New Cancel

Required Information

Case Customer Contacts

New Case Customer Contact

Case Customer Contacts Help ?

Action	Case Customer Contact: Name	Contact Name	Contact Role	First Name	Email
Del	R-0025	Nikola Tesla		Nikola	test23430331@test.com

It is possible to assign additional conditional contacts to the Complaint using the Case C

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er Contact related list and click on Save

Open Activities

•It is possible to assign Complaint tasks to users only from the Complaint and capture which **P**rocess 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

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

New Task

Task Edit

Save Save & New Task Save & New Event Cancel

Task information

Assigned To: Christian Cano

Subject: []

Due Date: [19/01/2016]

Process: --None--

Closed Date: [19/01/2016]

Action: []

Result: []

Task Record Type: Complaint Task

Related To: Case

Name: Contact - test test

Activity History

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

Activity History

[Log a Call](#) [Send an Email](#) [View All](#)

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit	Email Case Closure Notification	Christian De Jong	✓	24/06/2015	Christian Cano	24/06/2015 11:15
Edit	Investigation start validation	Christian De Jong	✓	24/06/2015	Christian Cano	23/06/2015 14:18
Edit	Investigation start validation	Christian De Jong	✓	24/06/2015	Christian Cano	23/06/2015 14:15
Edit	Email Accusé de réception de votre plainte	Christian De Jong	✓	15/06/2015	Christian Cano	15/05/2015 16:49
Edit	Email Case Closure Notification	Christian De Jong	✓	15/06/2015	Christian Cano	15/05/2015 9:49

[Show more »](#) [Go to list »](#)

- Tasks

- Acknowledgement E-mails

- Final Communication to the Customer

- Address e-mails

Case Team

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Case Team					
Update Case Team Members					
Action	Team Member	Member Role	Case Access	Visible In Customer Portal	Modified By
Remove	User John Smith	Case Team Member	Read/Write	☐	Christian Carg, 19/01/2016 15:53
Remove	User Laurie Clark	Case Team Member	Read/Write	☐	Christian Carg, 19/01/2016 15:53
Remove	User David Rameel	Case Team Member	Read/Write	☐	Christian Carg, 19/01/2016 15:53

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/ write access to the Complaints department pending ongoing their of issues.

Case Comment

• This related activities list can be used to provide an overall all comment on the Complaint.

Case Comments	
New	
Action	Comments
Edit Delete	Christian Caga/lee Jul 14 09:07:55 GMT 2015 The investigation part is completed.

Case History

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Case History		
Date	User	Action
2015-07-15 19:39:47	Christian Cano	Changed Contact from John Smith to John Wayne
		Changed Contact from 00325000001kQW5AA2 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		

• This allows to observe first and then add what a need when.

Google Docs & Attachments

1

Documents can be attached to the Complaint 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.

2

Documents can be attached to the Complaint in 2 different ways

-Attach a file: add an document from your computer.

Google Docs & Attachments Add Google Doc Attach File

No records to display

Attach File to Case 00001369

- 1. Select the File**
Type the path of the file or click the Browse button to find the file.
Choose File No file chosen
- 2. Click the "Attach File" button.**
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)
Attach File
- 3. Click the Done button to return to the previous page.**
(This will cancel an in-progress upload.)
Done

Step 1
Select your file from your Computer

Step 2
Click on "Attach File"

Step 3
Click on "Done" and the Document will be saved.

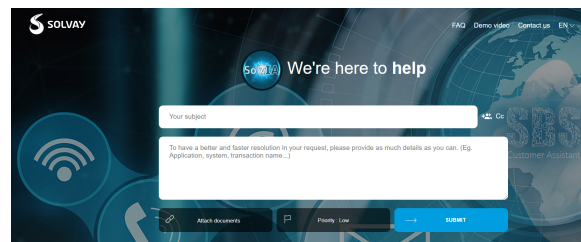
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Related articles

- [Complaint: Create a complaint](#)
- [Complaint: Sending the Acknowledgement Email](#)
- [Complaint: Internal Investigation](#)
- [Complaint: Commercial Response](#)
- [Complaint: Customer Communication](#)
- [Complaint: Close a complaint](#)
- [Complaint: Reporting on Complaints](#)

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