

Customer Request: Create a customer request

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Overview

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

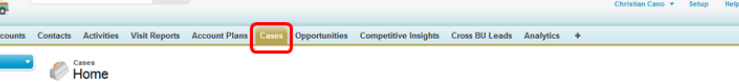
Concerned profiles:

ALL

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Step By Step

New Case Creation



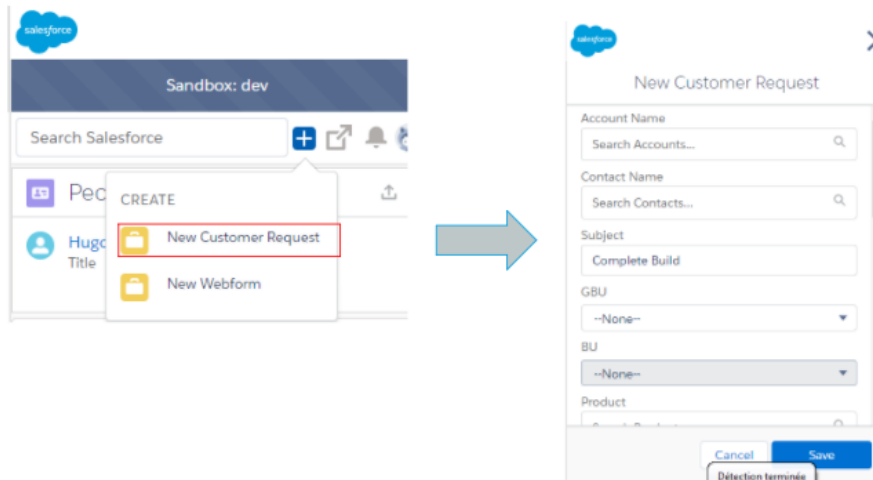
The screenshot shows the Salesforce interface with the 'Cases' tab selected in the top navigation bar. The 'Recent Cases' table is visible, showing a list of cases with columns for Case Number, Account Name, Subject, Contact Name, Product Family, Severity, Status, and Date/Time Opened. The 'Cases' tab is highlighted with a red box, and the 'Recent Cases' table is also highlighted with a red box.

Case Number	Account Name	Subject	Contact Name	Product Family	Severity	Status	Date/Time Opened
000011279	BAYER GAS France	Test soldTo.CG	Lambert, Jamie	Minor	Completed	13/05/2015 14:16	
000011228	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Approval Pending Sent	10/7/2015 18:05	
000011186	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Approved	13/07/2015 8:56	
000011172	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Rejected	9/07/2015 10:17	
000011176	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Approval Pending	10/7/2015 17:16	
000011179	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Approved	10/07/2015 17:26	
000011177	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Approval Pending	10/07/2015 17:18	
000011164	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Approval Pending	9/07/2015 12:57	
000011054	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	Completed	11/05/2015 10:07	
000011068	BAYER GAS France	Test soldTo.CG	Smith, John	Minor	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 the customer requires the standard be created from Lighting by 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.

The screenshot shows the Salesforce 'New Case' page. The page title is 'Select Case Record Type'. Below the title, there is a dropdown menu for 'Record Type of new record' which is currently set to 'Customer Request'. To the left of the main content area, there is a 'Recent Items' list. Below the 'Record Type of new record' dropdown, there is a table titled 'Available Case Record Types'.

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**

: Check box 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	Status	Open
Subject	Customer Request	Final communication Sent	☐
GBU	Novecare	Received Date	13-09-2016 (13-09-2016)
BU	Agro	Estimated Resolution Date	13-09-2016 (13-09-2016)
Product		Requested Resolution Date	13-09-2016 (13-09-2016)
Type	Labels (Eccert/Ecolabels)	Priority	Medium
Sub-Type	None	GBU Customer Segmentation	GBU-46317
Originator	Filipe Freitas	Case Origin	None
Case Owner	Filipe Freitas	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 various fields. The 'Status' is set to 'Open'. The 'Received Date' is '13-09-2016'. The 'Estimated Resolution Date' is '13-09-2016'. The 'Requested Resolution Date' is '13-09-2016'. The 'Priority' is 'Medium'. The 'GBU Customer Segmentation' is 'IGBU-46317'. The 'Case Origin' is '--None--'. The 'Case Record Type' is 'Customer Request'. The 'Clone Customer Request' checkbox is checked. The 'Confidential' checkbox is highlighted with a red box and is currently unchecked. The 'Manufacturing Plant' field is empty.

Customer Contact Information

1

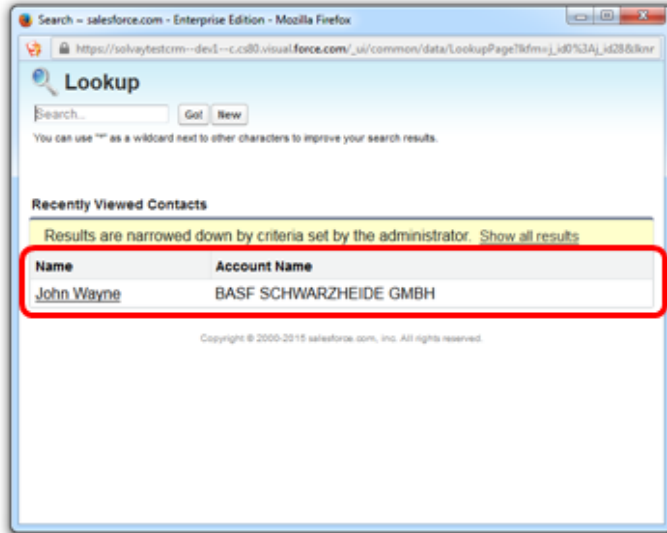
Multiple contacts can be maintained on the Customer Request. David can maintain a main Contact and has the possibility to add **Additional Contact** when the Customer Request is saved.

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.BESINASSA D.E.C.V.	Final communication Sent	
Subject	test sd subject clone11	Received Date	21/04/2016
GBU	Novicare	Estimated Resolution Date	21/04/2016
BU	Agro	Requested Resolution Date	
Product		Severity	Medium
Type	Labels (Eccert/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

 **SOLVAY**
asking more from chemistry®

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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

Case

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, selects an Account from the lookup field and clicks 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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the look up field and click on Save

The Content is added to the Content related list.

Case Customer Contacts				
New Case Customer Contact		Case Customer Contacts Help ?		
Action	Case Customer Contact: Name	Contact Name	Contact Role	First Name
Del	B-0025	Nikola Tesla		Nikola
				test2430331@test.com

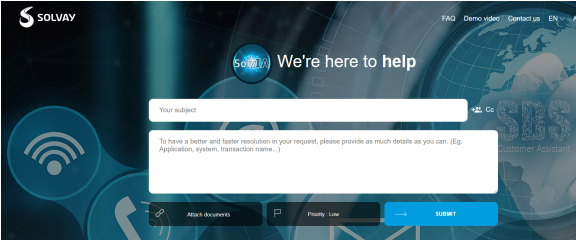
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Related articles

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- [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*