

Customer Request: Processing the Customer Request

Overview

In this section, you will find information about:

- The assignee notification
- The processor notification
- The resolution status

Concerned profiles:

ALL

Step By Step

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Assignee Notification

• As defined previously, David assigned an **Originator** and **Notified** user to the Customer Request and the rules will assign the **Approver** and the **Processor** Users or Group of Users. These different assignees are the persons that are in charge of part of the Customer Request.

• Once John has approved the **Customer Request**, the **Status** is updated to **Approved**

• The person in charge is notified by an email. A notification flow sends an email to the appropriate assignee to inform him/her that the status was changed and that further

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 John! The Customer Request has been Approved and a notification has been sent to the Processor (Laurie based on the GBU Rules) to inform her that she needs act on it.

Processor notification

•In order to get to the Customer Request page, Laurie 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]. 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

When there is any notification goes to customer from the customer request, add the 'Account Name' in the Subject title of all Customer Request e-mails as below.

Sandbox: PELLION TECHNOLOGIES - For Customer Request 00043881 the Status as change to Approval Pending

☐ Inbox x

Sophie Millet
to jeremie.seabra

2:21 PM (1



*** Internal usage only ***

For more details please consult SFDC.

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

Case ID	00043881
Account Name	PELLION TECHNOLOGIES
End Customer	
GBU	Peroxides
BU	Peroxides
Customer	

Providing an answer to the Customer Request

•The person responsible for processing the Customer Request will provide the Answer/Solution to the Customer Request in the Customer Response Set fields:

-**Completed Date:** Date that the Answer/Solution is populated on the Customer Request.

-**Customer Response Proposal:** Free text box to provide the full Answer/Solution to the Customer Request.

-**Customer Response Proposal Details:** Free text box to provide more details on the Answer/Solution to the Customer Request => **New Winter 17' Re**

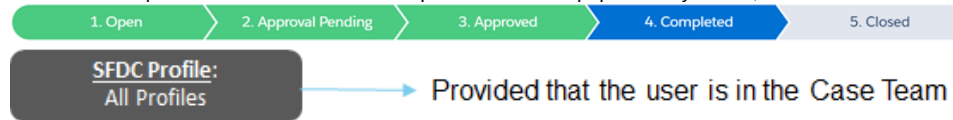
-**Time Spent:** Time spent (in hours) on the Customer Request Answer/Solution. The fact that it is measured in hours can be found on the help text.

▼ Resolution

Initial Resolution Date
Initial Resolution

Time Spent 1

•Once the Completed Date and Customer Responses fields are populated by Laurie, the status is automatically changed from “**Approved**” to “**Complete**”



Mandatory Fields

•In order to go from the Status “Approved” to “Resolved”, the following fields have to be populated:

- -Resolution Date
- -Resolution

•If these fields are not populated, the user will not be able to update the Status.

•On the other hand, as seen in the previous slide, if both fields are populated, the Status will automatically change from “**Approved**” to “**Resolved**” once the Customer Request is saved.

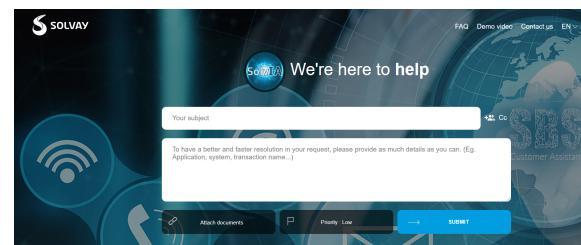
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Related articles

- [Customer Request: Introduction](#)
- [Customer Request: Create a customer request](#)
- [Customer Request: Approval Process](#)
- [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