

Complaint: Internal Investigation

Overview

In this section, you will find information about:

- How to find a complaint assign to you
- The investigation information to input
- The root cause analysis (8D, 5 WHY)
- The corrective actions
- The Assignee notification

Concerned profiles:

ALL

Step By Step

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Next process step

• ASDA vidual update the status to Under investigation, then new

EditDeleteClose Case

Send Acknowledgement MailSend Customer ResponseGenerate 8D ReportSend Internal Email

1. Complaint Registration

2. Under Investigation

3. Customer Response U...

4. Customer Communica...

5. Complaint Closure

6. Closed

Process Information

<https://drive.google.com/open?id=1ovR9saYvP710pA09b45PGe5v63p8PzzF7gE8td1ts>

Case Information

Case Number	00019469	Status	Under Investigation
Case Owner	Filipe De Souza Santos [Change]	Severity	Standard
(8D) Ship To Account	A I B BEATA DOBOSIEWICZ	Motive	Delivery
(8D) Customer Classification		Sub-Motive	Driver behaviour
Sold To Account	A I B BEATA DOBOSIEWICZ	Motive & Submotive Definition	http://drive.google.com/open?id=0B7gPzsf2by70VY...
Partner Type	Sold-to & Ship-to	Confidential	☐
GBU	Special Chem	Solvay Company	☐
BU	Catalysis	Case Currency	EUR
Product		Case Origin	
Resolution Site Code	PQS	Case Record Type	Open Complaint
Resolution Site	SLV-PT /POVOA (SU)		
Country	Poland		
(8D) Originator	Julien Gasqueton		
Picture taken	☐	8D	☐
Inspected by an agent		Requested Sample	☐
Internal Complaint	☐		

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• Let's follow John, working in Supply Chain and member of a Investigation Queue for his GBU, while he completes the Investigation part of the Complaint

Investigator notification

- In order to get to the Complaint page, Nicole can either *find* the Complaint on the **Case** object using the view with the Name of his Queue or simply *click* on the Complaint link in the **notification email**.



*** Internal usage only ***

An acknowledgement email for the Complaint 00001126 registered in Salesforce by David Rampel has been sent and the investigation can begin.

Please update the Complaint with the investigation information and update the status to "Under Review" when completed.

To display the complaint, please click on this link: <https://solvaytest1.com--Dev1.cs80.my.salesforce.com/000150000000c5Bf>

Case Number	00001126
Received Date	1/07/2015
Ship To Account	BASF SCHWARZHEIDE GMBH
Sold To Account	BASF SCHWARZHEIDE GMBH
GBU	Novecare
Country	Germany
Product Family	
Originator	David Rampel

Personalized Complaint Investigator			
New Cases	Accept	Change Owner	Help
Case Number	Case Name	Subject	
00001126	Test Case	Test Case	

The following views are available:

- All Open Complaints
- My Cases
- My Complaints
- My Open Cases
- Recently Viewed Cases

The view "My Complaints" shows the Complaints where the user is in the Case Team.

Investigation

1

Since John is part of a Queue that is the new Owner on the Investigation phase he should 'pick up' the Complaint for himself (meaning that he should be the new Owner of the Complaint) in order to:

Allow the other members of the Queue to know that John is working on the Complaint and remove the Complaint from the Queue scope

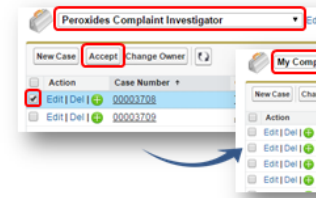
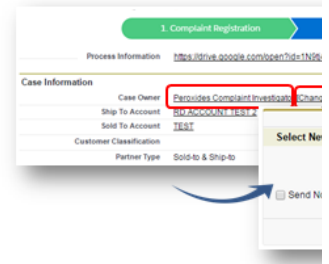
Be added automatically to the Case Team as the Investigator

John have two ways of transfer the ownership from his Queue to himself:

Accept the Complaint from the Queue List View

Or, open the Complaint record page and manually change the Owner to himself by clicking the 'Change' button next to the Owner Name

1 Accept the Complaint from

2 Open the Complaint record
'Change' button next to

2

•Once John is the new Owner, he can open the Complaint, click on Edit and scroll down to the Investigation section to start filling the Investigation information.

Case Details Edit Send

1. Complaint Registration 2. Under Investigation

Process Information <https://drive.google.com/open?id=1N9f>

Case Information

Case Number	00019469
Case Owner	John Gooch [Change]
(RD) Ship To Account	A I B BEATA DOBOSIEWICZ
(RD) Customer Classification	A I B BEATA DOBOSIEWICZ
Sold To Account	A I B BEATA DOBOSIEWICZ
Partner Type	Sold-to & Ship-to
GBU	Special Chem
BU	Catalysis
Product	
Resolution Site Code	POS
Resolution Site	SLV-PT /POVOA (SU)
Country	Poland
(RD) Originator	Julien Gasqueton

3

- Under the Investigation section, John can *flag* basic information on the Complaint:
 - Justified:** Is the Complaint Justified?
 - Recurring Cause:** Is it a Recurring Complaint?
 - HSE:** Identify that a Complaint has HSE-aspect (i.e. leak of product).
 - Compliance:** Flag if guidelines have been breached.
 - Insurance:** Indicate that the insurance has been informed about the case.
 - Inspected by an agent:** Was the issue physically inspected by an agent?

Investigation

Justified ☒ Yes

Recurring cause ☐

HSE ☐

Compliance ☐

Insurance ☐

Recurring Cause

4

- Still under the Investigation section, John can *mention* some information as free text:

- **Internal Description:** Internal description of the problem.
- **Summary of Internal Investigation:** General output of the investigation.
- **Estimated Costs:** Estimation of the total costs of the Complaint.
- **Non-Detection Analysis:** Why was the issue not detected?
- **Impact on Other Customers:** Does this Complaint impact other customers?
- **Impact on Other Products:** Does this Complaint impact other products?

Investigation

Justified ☐ Yes ☐ No

Recurring cause ☐

HSE ☐

Compliance ☐

Insurance ☐

- Under the Investigation section, John can also flag if a Sample was Requested. In that case, additional fields appear:

Sample Requested Date
 Sample Received Date
 Customer Sample Reference
 Sample Source

Investigation

Justified ☐ Yes ☐ No

Recurring cause ☐

HSE ☐

Compliance ☐

Insurance ☐

Root Cause Analysis

Root Cause

Root Cause Investigation Required ☐ Yes ☐ No

Department

Root Cause Investigation Summary

Internal Comment

Detailed Root Cause Analysis Attached ☐

S WHY ☐

• The next step is to fill in the Root Cause Analysis

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the users should change the value of Root Cause Investigation Required to «No».

For Root Cause Selection, the department picture has been reduced from 13 to 10 now.

Department ?	--None--	
	--None--	
	Customer Service	
	Sales	
	Technical Marketing	
	Corp - Logistics	
Internal Comment ?	Plant - Logistics	
	Plant - Production	
	Plant - Technical & Process Service	
5 WHY ?	Research & Innovation	
	SBS	
	Supplier - Carrier	

Corrective Actions

During

Corrective Action Plan Development and Implementation	
Due Date	[2001/2015]
Corrective Actions Required	Yes
Action Plan	
Lessons Learned	
Completed Date	[2001/2015]
Corrective Actions Implemented	--None--
Reason Not Implemented	
Incurred Costs	

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Recurrence Prevention & Effectiveness Verification	
Due Date	[24/08/2015]
Completed Date	[24/08/2015]
Corrective Actions Effective	-None- ▼
Effectiveness Assessment Details	

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Case Information

Case Owner	Sophie Millet
(80) Ship To Account	L'OREAL
Sold To Account	L'OREAL
GRU	Novacare
BU	Home & Personal Care
Product	LINEAR ALCOHOL ETHOX
(80) Material Code	
(80) Material Description	
Resolution Site Code	8167
(80) Originator	User
(80) Investigator	User
(80) Commercial Assignee	User



Send Acknowledgement Mail



Case Information

Case Number	00050750
Case Owner	Jeremie Seabra [Change]
(80) Ship To Account	L'OREAL

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Update Case Team Members			
Action	Team Member	Member Role	Case Access
Remove	User: Yiting YEQ	Originator	Read/Write
Remove	User: tran.ni	Account Manager (SAP)	Read/Write
Remove	User: CAMILLE JOURDE	Commercial Assignee	Read/Write

CUSTOMER COMPLAINT	
Answer Notice	
	Complaint reference : 00047254
	Received date :
	Contact : CAMILLE JOURDE
	Phone number : + 33 1 49 37 68 17
	Email : camille.jourde=solvay.com@example.com

Assignee Notification

- John's GBU has implemented a rule that the new Owner should be a specific User as the Commercial Assignee for this Complaint criteria.
- Once John has completed the Investigation part, he can update the Status to Under Review.
- The User or Queue in charge is notified by an email. A notification flow sends an email to the appropriate assignee to inform him that the status was changed and that further action is needed.
- The Case Team Members and the Solvay Contacts that are selected to be notified when the Status is changed to Under Review are also notified.
- Additionally, if John would like to manually assign the Complaint to a particular Colleague or to one of the Queues available on the System, she should click the Change button next to her name and select a value on the screen.

- These notifications are meant for users who need to take action on the Complaint. Other users can always consult the Complaint or the Reports if they want additional visibility.
- Well Done David** ! The Complaint is created and a notification has been sent to the Investigator to inform him that he can begin the Investigation.
- * Make sure you select the flag 'Send Notification Email' in order for the new Owner to receive the notification

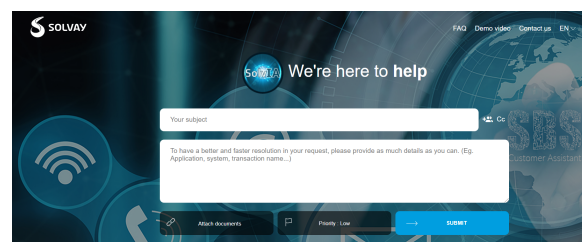
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Related articles

- [Complaint: Create a complaint](#)
- [Complaint: Sending the Acknowledgement Email](#)
- [Complaint: Commercial Response](#)
- [Complaint: Customer Communication](#)
- [Complaint: Close a complaint](#)
- [Complaint: Related Lists](#)
- [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