

# Sample: Create a Sample

## Overview

In this section, you will find information about:

- How to create a sample.
- Which fields are mandatory
- How to select a product

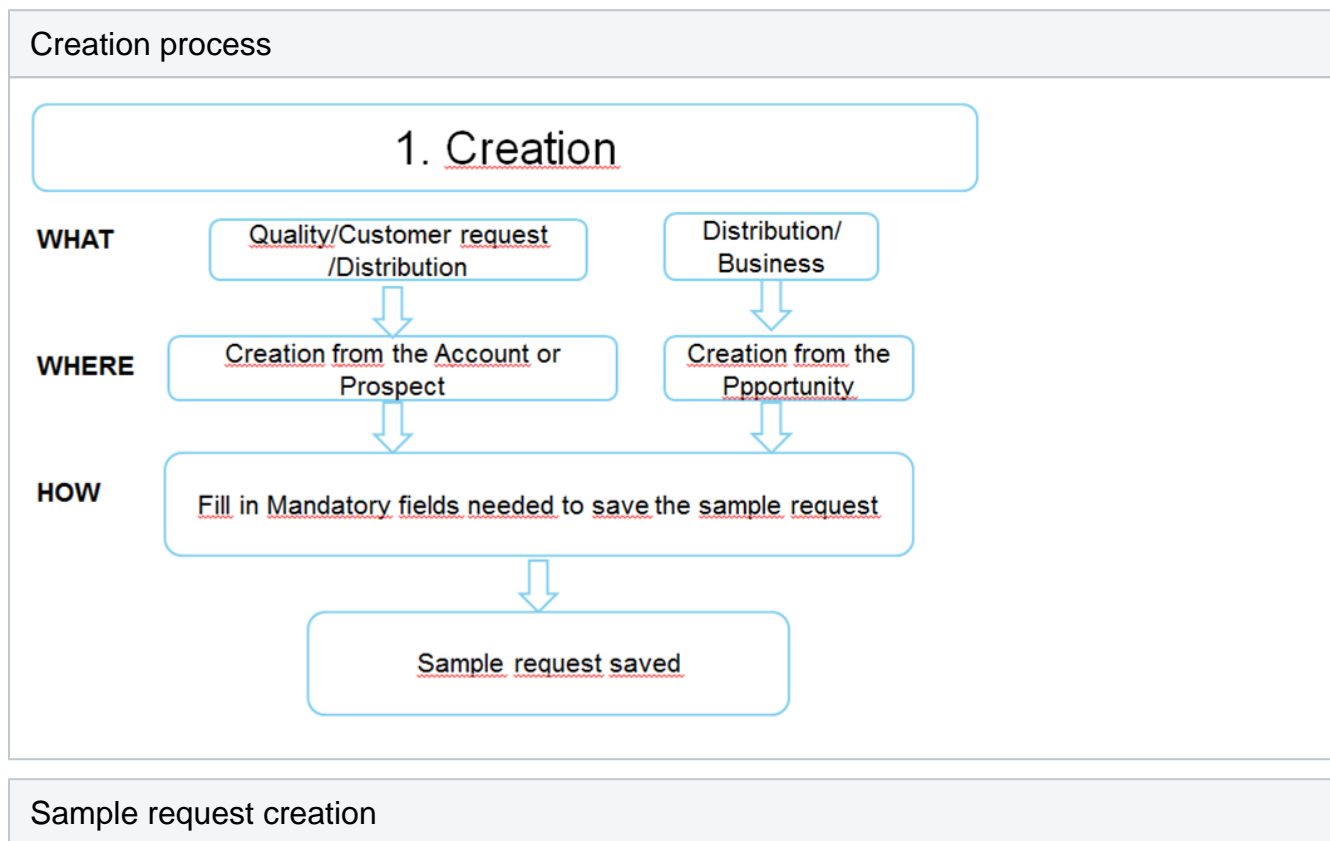
**Concerned profiles:**

Sales - Customer Service - Supply Chain

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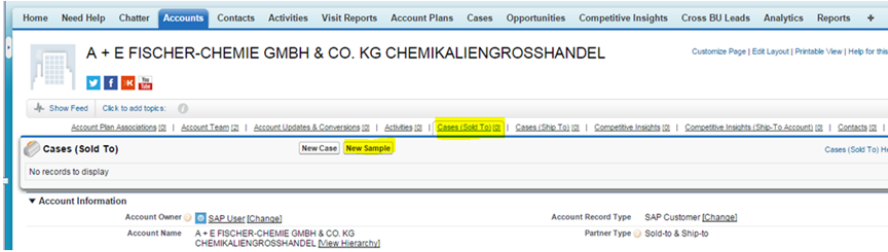
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## Step By Step

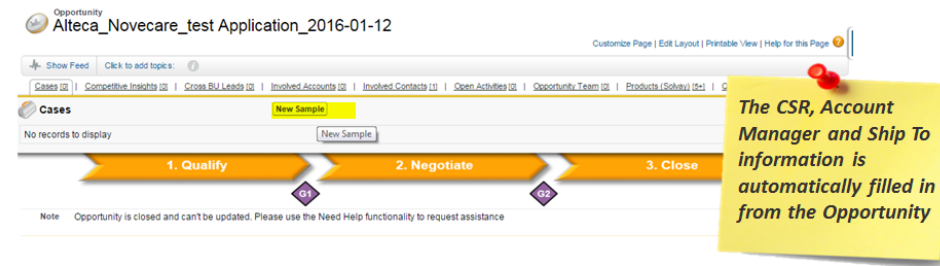


**Creation of the sample request can be done from:**

- The account / The prospect related list



- The opportunity related list



A Sales Rep wants to send a Sample to a Customer to show the new Product Solvay has just released and creates the Request on the system

He provides the general information about the Sample Request.

Information such as the Sold to Account and Contact, the Initial Description and the GBU and BU should be provided

He details the Shipping information:

There are 3 types of Address that can be selected and that will be displayed on the page layout and all the Emails related to Complaints:

- 1** **Ship-to:** select a Ship-to account from the system and use the Ship-to address
- 2** **Contact:** select a Ship-to account and a Contact from the Ship-to and use the Contact address
- 3** **Manual:** don't select records from the system but use the fields on the right side of the group to manually enter the Address information

And then, he must select the Product information related to the Sample request

Product selection key statement:

- When a sample is created, the product field is mandatory
- As it is mandatory, a dummy product for each GBU will be created in the product table in case the user does not find the right product or the product still does not exist. If the product selected is a dummy one, a text field is available to fill in the Product name. That product can be specified in details in the description field.
- A sample request is linked to only one product => it is possible to clone a sample request if multiple products are requested
- This product field can contain several levels of products depending on GBU
- All GBUs can chose to filter the lookup results on the level, name, description and so on in order to make the search easy and fast.
- Once the Product is selected, the level above (parent) will appear in a separate field to have the product hierarchy

The Sales rep can add more information to the Samples Request after registering it, such as Attach Document, Tasks and manage the Case Team for the Request

### Mandatory fields for all GBUs

Mandatory fields	Always mandatory	Prefilled	GBU
Sold to Account	Yes	If created from an Account, or an Opportunity (field of Sold To Account)	All
Contact demander	Yes	No	All
GBU	Yes	If created from an Opportunity	All
BU	Yes	If created from an Opportunity	All
Account manager	Yes	No	All
Ship to account or Shipping address	Yes	No	All
Product	Yes	No but filtered by GBU	All
Requested arrival date	Yes	No	All
Requested volume	Yes	No	All
Unit of measure	Yes	No	All
Currency	Yes	Yes, from the user page	All

### Select the Ship Address information

There are three types of Address that can be selected and that will be displayed on the Page Layout and all the Emails related to Complaints:

- Ship-to: Select a Ship-to account from the system and use the Ship-to address
- Contact: Select a Ship-to account and a Contact from the Ship-to address
- Manual: Don't select records from the system but use the fields on the right side of the group to manually enter the Address information

The screenshot shows a 'Shipping Information' form with the following fields and callouts:

- 1**: Callout pointing to the 'Ship To Account' dropdown menu.
- 2**: Callout pointing to the 'Contact Name' dropdown menu.
- 3**: Callout pointing to the 'Shipping name' text input field.

Other fields in the form include: 'Address Type' (dropdown), 'Shipping address 1', 'Shipping address 2', 'Shipping city', 'Shipping zip code', 'Shipping country' (dropdown), 'Shipping Contact name/addressee', 'Shipping Contact Phone', 'Shipping Contact Email', 'Additional shipping information', and 'CSR comments'. A red box highlights the 'Address Type' dropdown menu.

### Product selection

- When a sample request is created, the product field is mandatory.
- As it is mandatory a dummy product for each GBU will be created in the product table in case the user does not find the right product or the product still selected is a dummy one, a text field is available to fill in the Product name. That product can be specified in details in the description field.
- A sample request is linked to only one product (possibility to clone a sample request if multiple products are requested).
- This product field can contain several levels of products depending on GBU.
- All GBUs can chose to filter the lookup results on the level, name, description and so on in order to make the search easy and fast.
- Once the Product is selected, the level above (parent) will appear in a separate field to have the product hierarchy.

## Case Team

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**Case Team** [Update Case Team Members](#) [Case Team Help ?](#)

No records to display

**Annual History** [Detail Annual History](#) [Annual History Help ?](#)

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Related articles

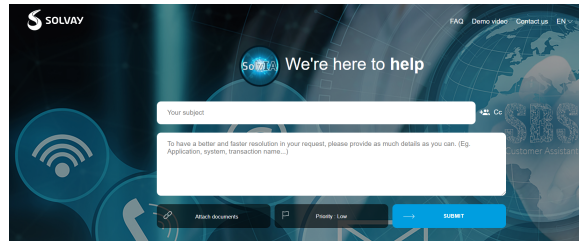
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Need help?

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- [Sample: Approval Process](#)
- [Sample: Processing the Sample](#)
- [Sample: Follow up actions and Closure](#)

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/>



The image shows a screenshot of the Solvia Freshdesk ticket creation interface. The page has a dark blue background with a globe and various icons. At the top left is the Solvia logo. The main heading is "We're here to help". Below this is a "Your subject" input field. Underneath is a larger text area with a placeholder: "To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)". At the bottom, there are several controls: "Attach Accounts" with a plus icon, a "Priority" dropdown menu currently set to "Low", and a blue "SUBMIT" button.

*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*