

Customer Request: Approval Process

Overview

In this section, you will find information about the approval process.

Concerned profiles:

ALL

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Step By Step

Process

•After all the information related to a Customer Request, not only the information on the Page layout but also the information on the related lists, the Customer Request should be submitted for Approval. To Submit for Approval, Users need always to click the **"Submit for Approval"** button.

Approval History

Submit for Approval

Approval History Help

No records to display

•If the Submitter is a Salesrep or from the GBU PePol, the Customer Request will be automatically Approved. Else, the Customer Request status will be changed to **Pending Approval**. During the Approval process, the Customer Request will be frozen until it is **Approved** or **Rejected**.

•Each GBU have its own rules to assign User or Group of Users for approval :

- Current customer request owner must manually Submit for approval to active defined business rule : Approver is choosen manually :

Choose Approver

Send to Next Approver

Cancel

This record requires additional approval. The name of the next step is Approval of each Manager

Your administrator has specified that you must manually choose who the next approver should be. Specify a user in the box below, then click Send to Next Approver.

Next Approver

Send to Next Approver

Cancel

Automatically assign the Approver based on Criteria from the Customer Request

Recall the Approval Request

•If additional information is needed before the Approval of the Customer Request, it can be recalled with a comment. Once the information has been delivered, the Request can be submitted for Approval again

Approval History

Recall Approval Request

Approval History Help

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Customer Request Approval step (Pending for first approval)						Pending
Reassign / Approve / Reject	21/01/2016 15:33	Pending	John Smith	John Smith		
Approval Request Submitted	21/01/2016 15:33	Submitted	Christian Cano	Christian Cano		

•When the Customer Request is Approved, the Status will automatically be changed to Approved

Next process step

•As David *submitted* the Customer Request for Approval, the **Status** is changed to **Pending Approval** and the User or Group of Users that have been a notified by email that an action needs to be taken.

The screenshot displays the Salesforce Customer Request interface. At the top, the case number 00003880 is shown. Below it, a progress bar indicates the status: 1. Open, 2. Approval Pending (highlighted), 3. Approved, 4. Completed, and 5. Closed. The Case Information section includes fields for Customer Request Number, Account Name, Partner Type, Customer Classification, Subject, GBU, BU, Product, Type, Sub-Type, Originator, Case Owner, Final communication, Received Date, Estimated Resolution Date, Requested Resolution Date, Priority, GBU Customer Segmentation, Case Origin, Case Record Type, Case Request, and Confidential. The Approval History section shows a table with columns: Action, Date, Status, Assigned To, Actual Approver, Comments, and Overall Status. The table contains three rows: 'Step: Other Region Not Sales Rep (Pending for first approval)', 'Reassign / Approve / Reject', and 'Approval Request Submitted'.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Other Region Not Sales Rep (Pending for first approval)						Pending
Reassign / Approve / Reject	13-09-2016 16:45	Pending	AP-C_Req_Proc - Asia Toll_Quest_N6	P-C_Req_Proc - Asia Toll_Quest_N6		
Approval Request Submitted	13-09-2016 16:45	Submitted	Elise Freitas	Elise Freitas		

•Let's follow **John**, working as a Sales Representative and member of a Queue that has been assigned as Approver by his GBU rules, while he complet

Approver notification

•In order to get to the Customer Request page, John 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] and requires your approval. 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]

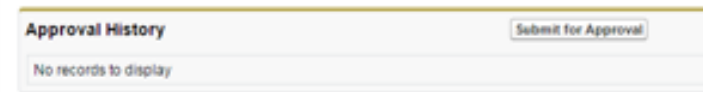
Description
[DESCRIPTION]
Request Description
[REQUEST DESCRIPTION]

THIS IS AN AUTOMATED MESSAGE - Please do not reply

Assignee Notification

As defined previously, David was assigned as **Originator** and **Notified** any required user about the Customer Request. In addition the business rules defined will automatically assign the Approver and the Processor as User or Group of Users. These different assignees will have the ownership at deferent status to peform actions on the Customer Request.

Once David has created the **Customer Request** and submitted it for Approval, the **Status** is updated to **Pending Approval**.



Approval History Submit for Approval

No records to display

Base on David GBU's rules, the Approver for this Customer Request is a Queue. A notification flow sends an email to all Queue members informing them that the status was changed and that further action is needed. The routing table is the following:

Status	Pending Approval	Approved	Resolved	Closed	Rejected
Recipient	User or Queue	- User or Queue - Notified	Notified		Originator

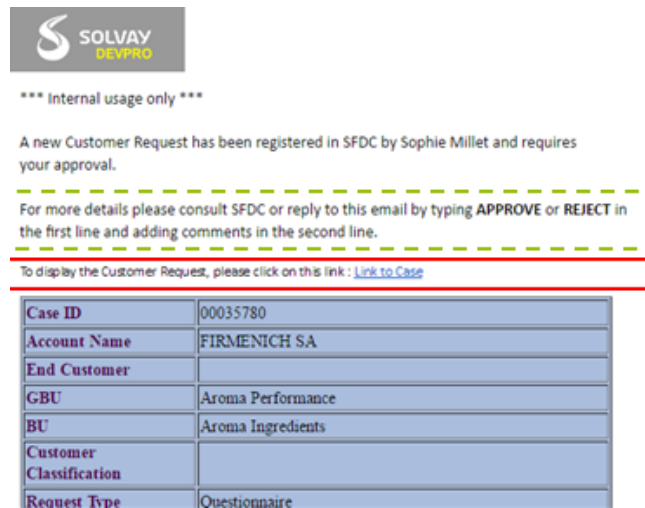
These notifications are meant for users who need to **take action** on the Customer Request. Other users can always consult the Customer Request or the Reports if they need information on a Customer Request.

Well Done David! The Customer Request is created and submitted and submitted for Approval and a notification has been sent to the Approver (John) to inform him that he needs to approve or reject the Customer Request.

John Receive a Notification Email to Approve

In order to get to the Customer Request page, John can either

- find the customer Request on the case object
- simply click on the customer request link in the notification email,
- **answer directly by email using the wording <<APPROVE >> or << REJECT>>**



S SOLVAY DEVPRO

*** Internal usage only ***

A new Customer Request has been registered in SFDC by Sophie Millet and requires your approval.

For more details please consult SFDC or reply to this email by typing **APPROVE** or **REJECT** in the first line and adding comments in the second line.

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

Case ID	00035780
Account Name	FIRMENICH SA
End Customer	
GBU	Aroma Performance
BU	Aroma Ingredients
Customer Classification	
Request Type	Questionnaire

Approving the Customer Request

After Reviewing the Customer Request , John approves it.

- If John didnot answer directly by email,

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Once John opens the Customer Request, he can scroll down to the Approval History related list and click **Approve** or **Reject** it.

Approval History [Recall Approval Request](#) [Approval History Help](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Customer Request Approval step1 (Pending for first approval)						
Keasigh Approve / Reject	21/01/2016 15:33	Pending	John Smith	John Smith		Pending
Approval Request Submitted						
	21/01/2016 15:33	Submitted	Christian Cano	Christian Cano		

Approval Request Case: 00001131 [Help for this Page](#)

Approve/Reject Approval Request

Case Number: 00001131
Case Owner: [Ashutosh Singh](#)
Comments:

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Related articles

- [Customer Request: Introduction](#)
- [Customer Request: Create a customer request](#)
- [Customer Request: Processing the Customer Request](#)
- [Customer Request: Final Communication](#)
- [Customer Request Closure](#)
- [Customer Requests: Related Lists](#)

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Your subject

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)

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