

# Customer Requests: Related Lists

## Overview

In this section, you will find information about:

- Account association
- Customer Request Contact
- Customer Request Product
- Open Activities
- Activity history
- How to attach documents

Concerned profiles:

ALL

## Table of content

- [Step By Step](#)
  - [Case Account Associations](#)
  - [Case Customer Contacts](#)
  - [Customer Request Products](#)
  - [Open Activities](#)
  - [Activity History](#)
  - [Case Team](#)
  - [Case Comment](#)
  - [Case History](#)
  - [Google Docs & Attachments](#)
- [Related articles](#)
- [Need help?](#)

## Step By Step

### Case Account Associations

•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 |
|--------------------------------------------|--------------------------|--------------|
| <a href="#">Edit</a> / <a href="#">Del</a> | <a href="#">Prospect</a> | 7/12/2015    |

•In order to add an Additional Account, David goes on the Case Account Associations related list, clicks on the “New Case Account Association” button, selects an Account from the lookup field and clicks on Save.

Case Account Association Edit

New Case Account Association

Help for this Page

Save Save & New Cancel

Information

Case

Account

Required Information

Save Save & New Cancel

•The Account is added to the Case Account Association related list.

Case Account Associations

New Case Account Association

Case Account Associations Help

| Action                                     | Account                  | Created Date |
|--------------------------------------------|--------------------------|--------------|
| <a href="#">Edit</a> / <a href="#">Del</a> | <a href="#">Prospect</a> | 7/12/2015    |
| <a href="#">Edit</a> / <a href="#">Del</a> | <a href="#">Prospect</a> | 7/12/2015    |

### Case Customer Contacts

•Furthermore, David can **add Additional Contacts** using the Contacts related list.

Case Customer Contacts

New Case Customer Contact

Case Customer Contacts Help

No records to display

•In order to add an Additional Contact, David goes on the Contact related list, clicks on the “New Contact” button, selects a Contact from the lookup field and clicks on Save.

Case Customer Contact Edit

New Case Customer Contact

Help for this Page

Save Save & New Cancel

Information

Case

Contact

Required Information

Save Save & New Cancel

•The Contact is added to the Contact related list.

Case Customer Contacts

New Case Customer Contact

Case Customer Contacts Help

| Action              | Case Customer Contact: Name | Contact Name | Contact Role | First Name | Email                |
|---------------------|-----------------------------|--------------|--------------|------------|----------------------|
| <a href="#">Del</a> | <a href="#">R-0022</a>      | Nikola Tesla |              | Nikola     | test2430331@test.com |

## Customer Request Products

- Now that the Customer Request is saved, David can **add Products** using the Products related list.

Customer Request Products New Customer Request Product

No records to display

- In order to add a Product, David goes on the Customer Request Products related list, clicks on the "New Customer Request Product" button, selects a Product from the lookup field and clicks on Save.

Customer Request Product Edit Save Save & New Cancel Help for this Page

Information Required Information

Case 00003878 Product

Application/End Use Manufacturing Plant

Save Save & New Cancel

- The Product is added to the Customer Request Product related list.

| Customer Request Products <span>New Customer Request Product</span> <span>Customer Request Products Help</span> |                                |              |         |
|-----------------------------------------------------------------------------------------------------------------|--------------------------------|--------------|---------|
| Action                                                                                                          | Product                        | Created Date | Level   |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                      | 00003878                       | 1/12/2015    | Level 4 |
| <a href="#">Edit</a>   <a href="#">Del</a>                                                                      | 1-12-RODECANEDIPHOSPHONIC ACID | 7/12/2015    | Level 4 |

## Open Activities

- It is possible to assign tasks to users directly from the Customer Request and *capture* which **Process** this task is related to. These tasks have a priority, a due date, a close date and free text fields to capture the action and the result.

- To create a new task, the user *clicks* on **New Task** on the Open Activities related list.

Open Activities New Event New Task

| Action                                       | Subject           | Name              | Task | Due Date   | Status      | Priority | Assigned To    |
|----------------------------------------------|-------------------|-------------------|------|------------|-------------|----------|----------------|
| <a href="#">Edit</a>   <a href="#">Close</a> | Approval required | Christian De Jona | ✓    | 25/06/2015 | In Progress | High     | Christian Cano |

**Task Edit** Save Save & New Task Save & New Event Cancel

Task Information Required Information

Assigned To: Christian Cano Related To: Case 00001126

Subject: Name: Contact John Wayne

Due Date: [15/07/2015]

Process: --None--

Closed Date: [15/07/2015]

Action:   
Result:

Additional Information

Status: Not Started Phone: 0449973848

Priority: Normal Email: john.wayne@system.com

## Activity History

- All the activities linked to the Customer Request are monitored in this related list. These activities include:

-Tasks

-Emails

Activity History Log a Call Mail Merge Send an Email Activity History Help

No records to display

## Case Team

- Users can be *assigned* to a **Case Team**. This allows the appropriate users to have read/write access to the Customer Request if the assigned user needs help or is not able to treat the Customer Request.

- The assignees (Originator, Approver, Processor and Notified) are automatically added to the Case Team.

•When a Customer Request is *flagged* as **confidential**, only the users in the Case Team will have read-only or read/write access to the Customer Request depending on their profiles.

| Case Team                |                |             |             |                                 |
|--------------------------|----------------|-------------|-------------|---------------------------------|
| Update Case Team Members |                |             |             |                                 |
| Action                   | Team Member    | Member Role | Case Access | Modified By                     |
| Remove                   | David Ramel    | Read/Write  | Read/Write  | Christian Cano 15/07/2015 19:52 |
| Remove                   | Christian Cano | Read/Write  | Read/Write  | Christian Cano 15/07/2015 19:52 |
| Remove                   | John Smith     | Read/Write  | Read/Write  | Christian Cano 15/07/2015 19:52 |
| Remove                   | Laurie Clark   | Read/Write  | Read/Write  | Christian Cano 15/07/2015 19:52 |

## Case Comment

•This related list can be used to provide an overall comment on the Customer Request.

| Case Comments |                                                                                     |
|---------------|-------------------------------------------------------------------------------------|
| New           |                                                                                     |
| Action        | Comments                                                                            |
| Edit   Delete | Christian Cano Tue Jul 14 09:07:55 GMT 2015<br>The investigation part is completed. |

## Case History

•Changes made to the Customer Request are tracked in this related list.

•This allows to better understand who did what and when.

| Case History        |                |                                                                  |
|---------------------|----------------|------------------------------------------------------------------|
| Date                | User           | Action                                                           |
| 2015-07-15 19:39:47 | Christian Cano | Changed Contact from John Smith to John Wayne.                   |
|                     |                | Changed Contact from 0032500001kQW5A42 to 0032500001kvhXAAQ.     |
| 2015-07-15 17:37:41 | Christian Cano | Changed Status from Under Investigation to Under Review.         |
| 2015-07-15 16:09:30 | Christian Cano | Changed Status from Acknowledgement Sent to Under Investigation. |
|                     |                | Changed Severity from Anomaly to Minor.                          |
| 2015-07-15 15:58:42 | Christian Cano | Changed Status from Under Investigation to Acknowledgement Sent. |
| 2015-07-15 15:47:27 | Christian Cano | Changed Status from Acknowledgement Sent to Under Investigation. |
| 2015-07-02 18:08:52 | Christian Cano | Changed Status from New to Acknowledgement Sent.                 |
| 2015-07-02 17:18:52 | Christian Cano | Changed Severity from Minor to Anomaly.                          |
| 2015-07-01 16:05:11 | Christian Cano | Created.                                                         |
|                     |                | Changed Owner (Assignment) from Christian Cano to NoveCare.      |

Show More

## Google Docs & Attachments

•Documents can be attached to the Customer Request in 2 different ways

-Add Google Doc: add an existing document from its Google Drive URL

Google Docs & Attachments

Add Google Doc | Attach File

No records to display

Add Existing Google Doc

00001021

Add Existing Google Doc

Save | Cancel

Add an existing Google Doc to 00001021

Google Doc Name |

Google Doc URL |

Take me to Google Docs

Save | Cancel

Add Google Doc  
Select a name for your Document and fulfill the URL.

[Back to the top](#)

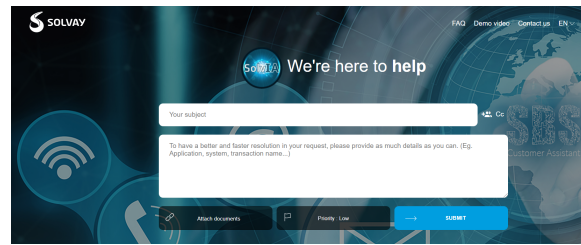
## Related articles

- [Customer Request: Introduction](#)
- [Customer Request: Create a customer request](#)
- [Customer Request: Approval Process](#)
- [Customer Request: Processing the Customer Request](#)
- [Customer Request: Final Communication](#)
- [Customer Request Closure](#)

## 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/>

- [Activity: Create my business calendar](#)



The screenshot shows the SOLVAY support portal. At the top left is the SOLVAY logo. At the top right are links for FAQ, Demo video, Contact us, and EN. The main heading is "We're here to help" with a SOLVAY logo icon. Below this is a "Your subject" input field. A note below the field says: "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 left is an "Attach documents" button with a paper icon. At the bottom right is a "Priority: Low" dropdown menu 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*