Customer Request: Create a customer request

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Overview

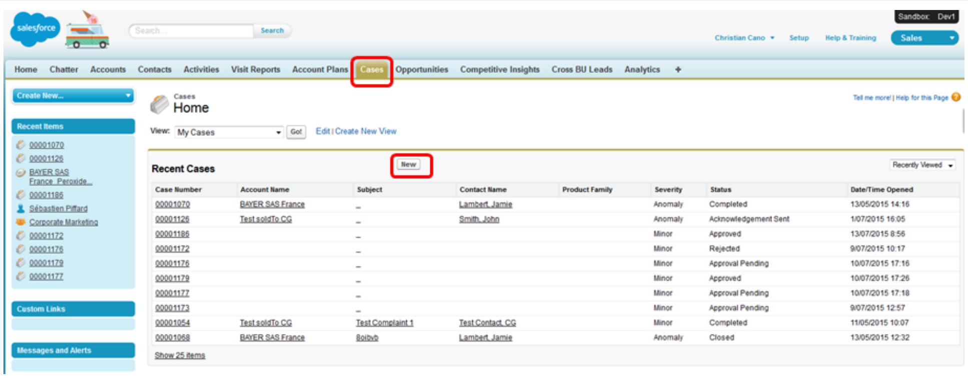
In this section, you will find information about how to create a customer request in SalesForce.

Concerned profiles:

ALL

Step By Step

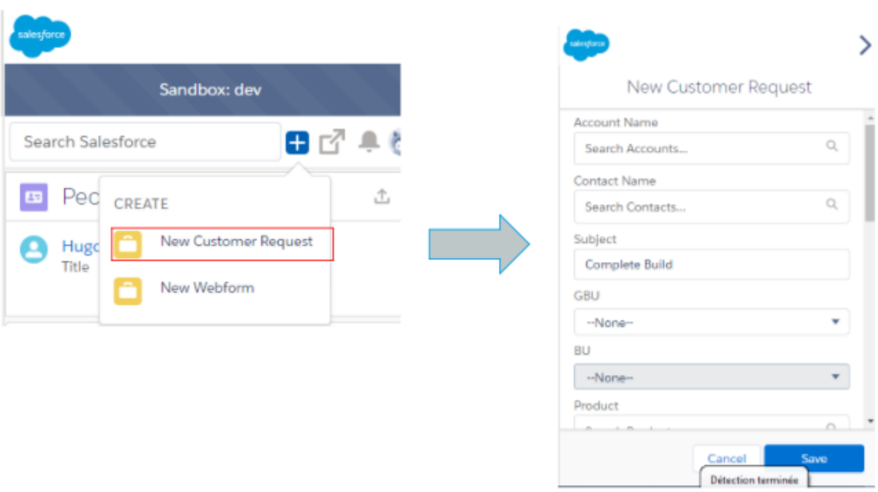
New Case Creation



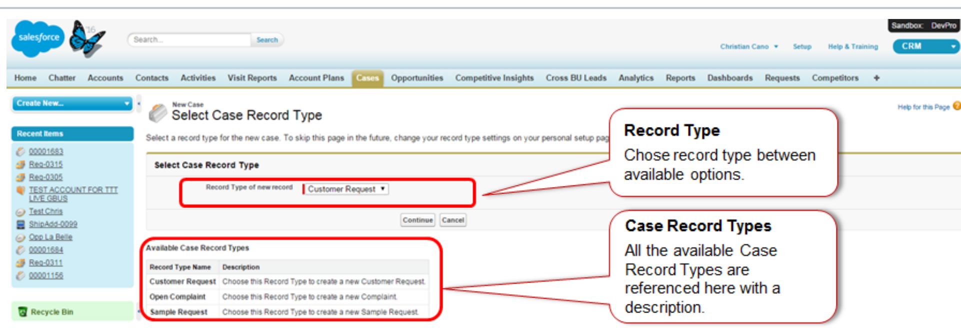
- When creating a new Customer Request the user needs to choose between the different types of Cases that exist.

•Let's follow David, working as a Customer Service Representative while he creates a new Customer Request.

- Under the Case tab, David clicks on New to create a new Customer Request.



There is another way the customer request can be created from Lightening by flowing the steps given as below.

A new button has been created on Lightening for Gmail and It allows the user to create a new customer.	
	

- David now needs to select the Record Type for the Case.

- He has the choice between Complaint, Sample Request and Customer Request.

- David selects Customer Request and clicks on Continue. This will open the Customer Request edit page.

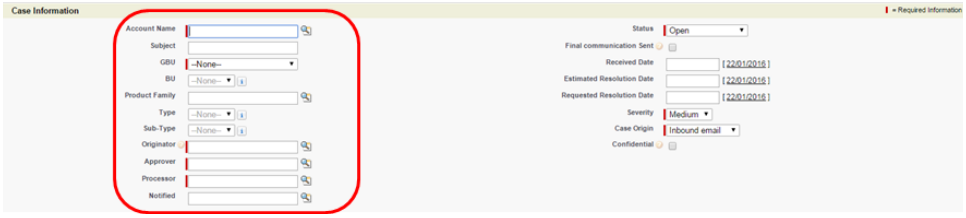
Case Information

1

Basic information needs to be populated in the Case Information section. This section contains the following fields:

-**Account Name**: Main Account (can be Ship-to, Sold-to or Corporate Group)

-**Subject**: Subject of the Request



Additional Accounts can be added to the Accounts related list.

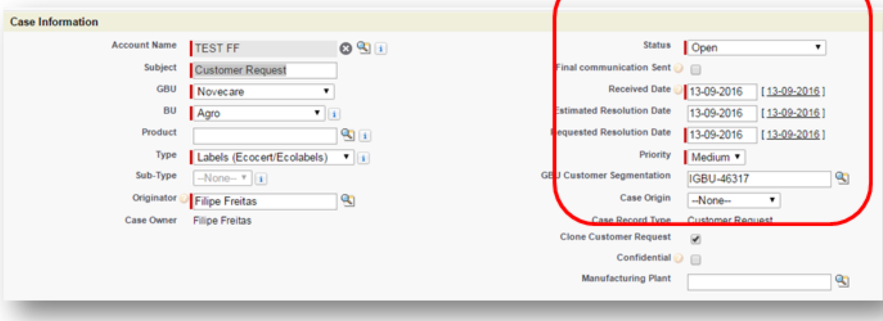
-**GBU**: GBU concerned by the Customer Request (automatically selected bases on the User GBU) **=> New Winter 17' Release** -**BU**: Business Unit of the GBU **-Product Family**: Product (level 3) -**Type**: What the Customer Request is about – GBU specific (Mandatory)

-**Sub-type**: More granuar level of Type -**Originator**: User who logged the Customer Request -**Case Owner:** User or Group of Users that are responsible to act on the Customer Request on each phase	

2

Basic information needs to be populated in the Case Information section. This section contains the following fields:

-**Status**: Open – Pending Approval – Approved – Resolved – Closed – Rejected

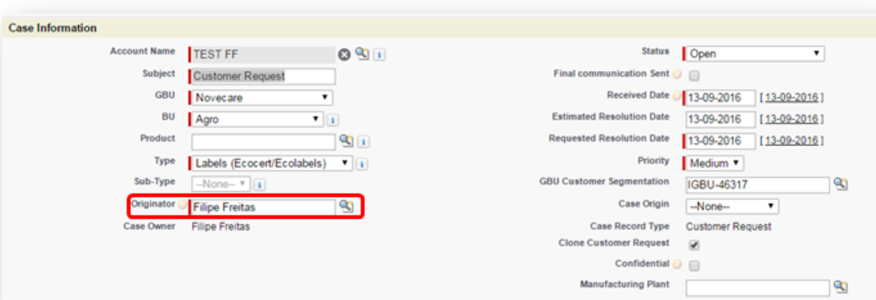


⚠ Estimated Resolution Date

Automatically filled in for some GBU based on Customer Classification and Priority for example

-**Final Communication Sent**: Checkbox that flags if Customer Communication has been sent. -**Received Date**: Date that Solvay received the Customer Request (Mandatory).

-**Estimated Resolution Date**: Estimated date when the Customer Request will be resolved (Mandatory for some GBUs).
- Requested Resolution Date: Requested date when the Customer Request should be resolved (Mandatory).

-**Priority**: Low – Medium – High / By default on “Medium”. => Severity has now been renamed to Priority -**Case Origin:** Inbound email – Inbound call – Face to Face – Website -**Confidential**: Restrict visibility of the Customer Request.	
	

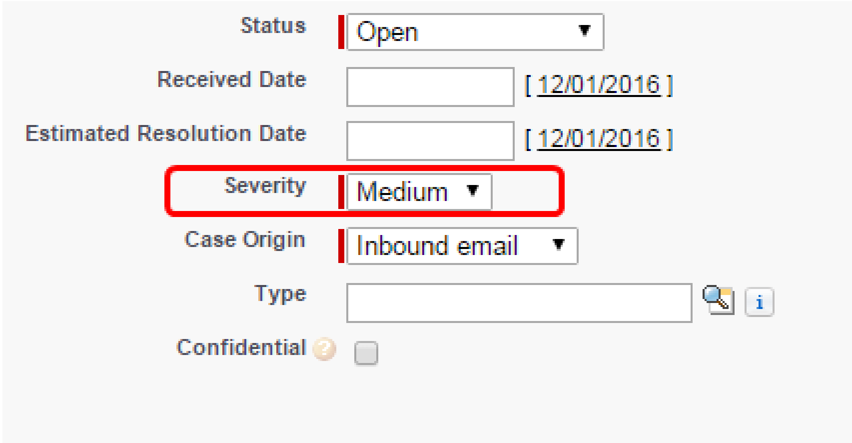
3

Each Customer Request can be linked to assignees. The different assignees are the persons in charge of one or more steps of the Customer Request process.

•David *can* **Assign** 2 different people to the Customer Request:

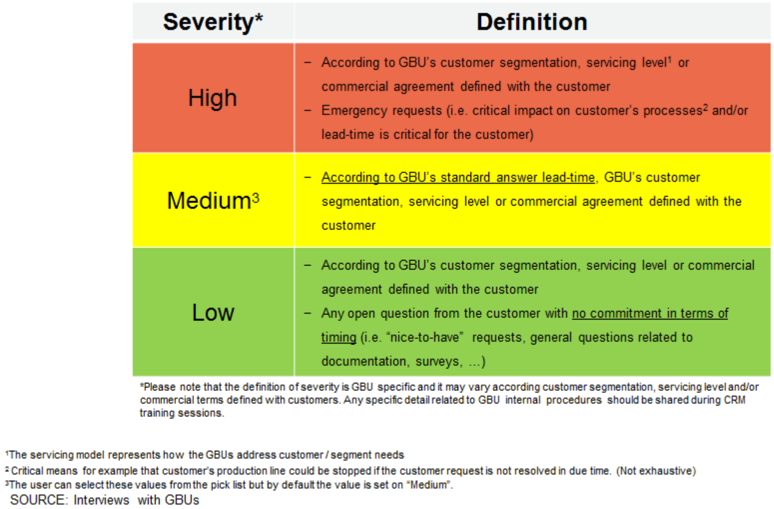
-**Originator**: The person logging the Customer Request – in our case David. -**Notified**: The person that needs to be notified of the Customer Request The Approver and the Processor will be automatically assigned by the System based on each GBU rule	

Severity

1 During the Customer Request Registration step, David needs to fill-in the Severity of the Customer Request. There are 3 types of **Severity**: - **High** - **Medium** - **Low** •The Severity is by default on the value **Medium**.	

2

The definition of these severity values is the following:



Severity*	Definition
High	– According to GBU's customer segmentation, servicing level[1] or commercial agreement defined with the customer – Emergency requests (i.e. critical impact on customer's processes[2] and/or lead-time is critical for the customer)
Medium[3]	– According to GBU's standard answer lead-time, GBU's customer segmentation, servicing level or commercial agreement defined with the customer
Low	– According to GBU's customer segmentation, servicing level or commercial agreement defined with the customer – Any open question from the customer with no commitment in terms of timing (i.e. "nice-to-have" requests, general questions related to documentation, surveys, …)

*Please note that the definition of severity is GBU specific and it may vary according customer segmentation, servicing level and/or commercial terms defined with customers. Any specific detail related to GBU internal procedures should be shared during CRM training sessions.

[1]The servicing model represents how the GBUs address customer / segment needs

[2] Critical means for example that customer's production line could be stopped if the customer request is not resolved in due time. (Not exhaustive)

[3]The user can select these values from the pick list but by default the value is set on "Medium".

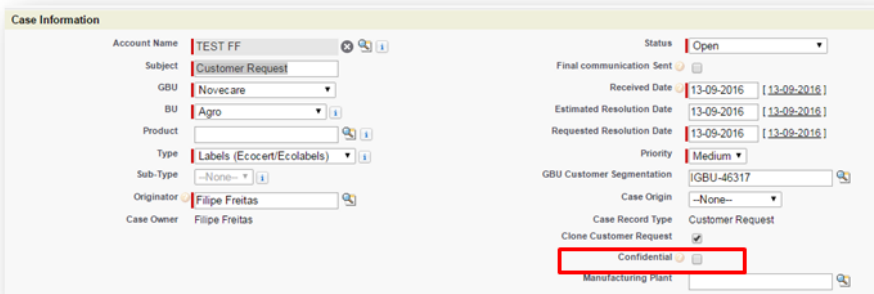
SOURCE: Interviews with GBUs

Customer Request Visibility

Customer Requests have 2 visibility options to manage confidential cases

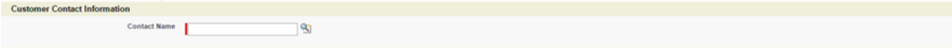
•Visible: the Customer Request is visible by everyone (by default)

•Confidential: By ticking the box "Confidential", user make the Customer Request accessible only to the **Owner** (User or Queue), the **Approver** and the **Case Team**.



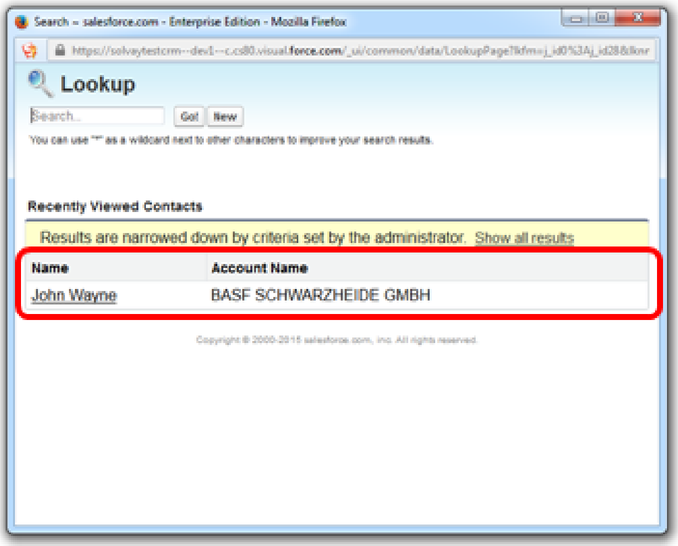
Customer Contact Information

1 Multiple contacts can be maintained on the Customer Request. David can maintain a main Contact and has the possibility to add **Additional Conta**
the Customer Request is saved.



Example

•When choosing a Contact, David can search for any Contact but the Contacts related to the Account Name will be the ones displayed by default. To sho
to the Account Name, David needs to click on “Show all results”.



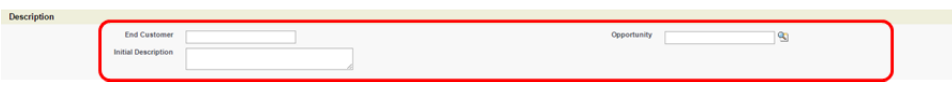
Request Description

•More detailed information on the Customer Request are populated in the Description Section. This section contains the following fields:
-**End Customer**: Final Customer (Ship-to).
-**Internal Description:** Detailed description of the Customer Request

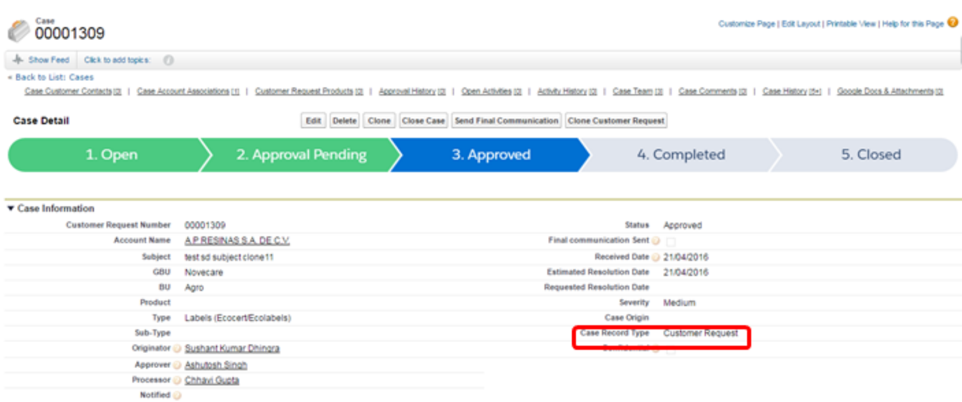
-**Opportunity**: Opportunity related to the Customer Request.

Legislation on distributor1

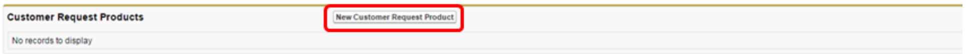
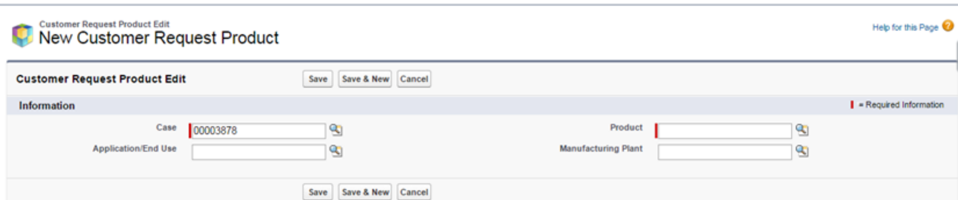
Receiving the distributor’s / end customer’s name is forbidden unless specific technical/quality support.



•Once David has populated all the relevant fields for his Customer Request, he can save it by clicking on the **Save** button.



Adding Products

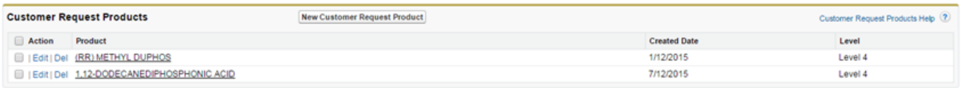
Now that the Customer Request is saved, David can add Products using the Products related list.	
In order to	

add a Product, David goes on the Customer Request Products related list, clicks on the “New Customer Request

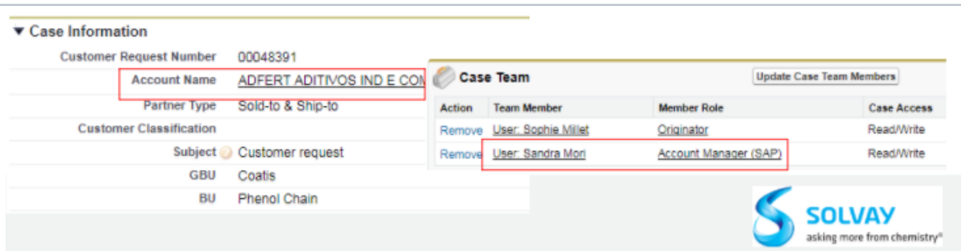
Product" button, selects a **Product** from the lookup field. David can also select an **Application or End User** and a **Man**

ufacturing Plant for this Product information purpose and clicks on Save.	

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



For Fibras & Coatis: when creating a custom



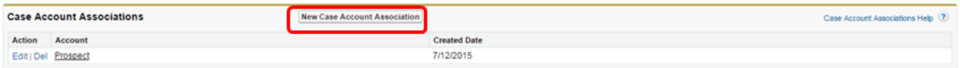
er request, trigger the update of the case team with the addition of all account managers role and all CSR rol es for the GBU (Fibras or Coatis related users) that are listed in the account's account team.

If not possibl

e, then pick only THE account manager (SAP) and the CSR (SAP), and none of them if there are many times t he same role. The , add a validation rule on the case team for Fibras & Coatis to make the Customer Request MUS

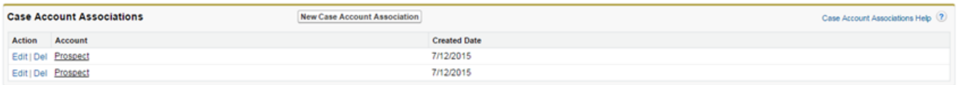
T have at least one account manager and one CSR in the case team.	

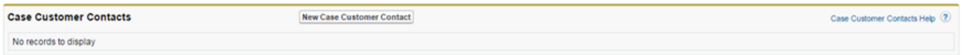
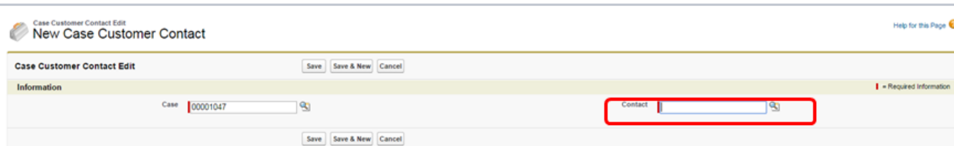
Adding Additional Accounts

• Additionally, David can *add* **Additional Accounts** using the Account related list.	
•In order to add an Additional	

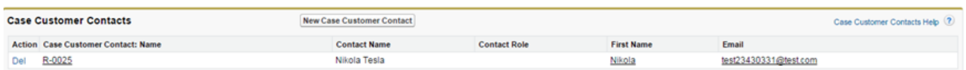
Account, David goes on the Case Account Associations related list, clicks on the “New Case Account Associ

ation” button, selects an Account from the lookup field and clicks on Save.	

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

• Furthermore, David can add **Additional Contacts** using the Contacts related list.	
In order to add an Additi	

onal 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	
The Contact is added to the Contact related list.	

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- Customer Request: Processing the Customer Request
- Customer Request: Final Communication
- Customer Request Closure
- Customer Requests: Related Lists

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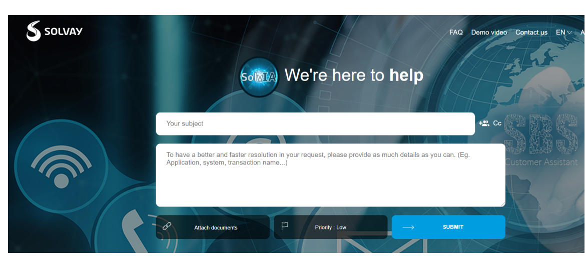

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