

# 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.

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### Step By Step

#### New Case Creation

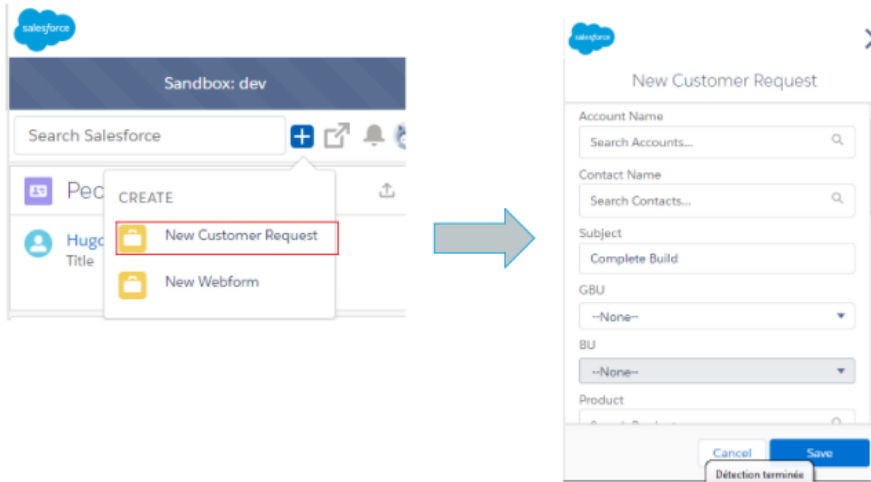
The screenshot shows the Salesforce interface for the 'Cases' page. The 'Cases' tab is selected in the top navigation bar. On the left sidebar, the 'Create New...' button is highlighted. In the main content area, the 'Recent Cases' table is visible, and a 'New Case' button is highlighted in red above the table. The table contains the following data:

Case Number	Account Name	Subject	Contact Name	Product Family	Severity	Status	Date/Time Opened
00001070	BAYER SAS France	-	Lambert_Jamie		Anomaly	Completed	13/05/2015 14:16
00001126	TestLab04Ts.CG	-	Smith_John		Anomaly	Acknowledgement Sent	10/07/2015 18:05
00001168	-	-	-	-	Minor	Approved	13/07/2015 8:56
00001172	-	-	-	-	Minor	Rejected	9/07/2015 10:17
00001176	-	-	-	-	Minor	Approval Pending	10/07/2015 17:16
00001178	-	-	-	-	Minor	Approved	10/07/2015 17:26
00001177	-	-	-	-	Minor	Approval Pending	10/07/2015 17:18
00001173	-	-	-	-	Minor	Approval Pending	9/07/2015 12:57
00001054	TestLab04Ts.CG	Test Complaint 1	Test Contact.CG		Minor	Completed	11/05/2015 10:07
00001058	BAYER SAS France	Boibb	Lambert_Jamie		Anomaly	Closed	13/05/2015 12:32

• 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.



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

The screenshot shows the Salesforce 'New Case' page. The main heading is 'Select Case Record Type'. Below the heading, there is a dropdown menu for 'Record Type of new record' which is currently set to 'Customer Request'. A callout box points to this dropdown with the text: 'Record Type Chose record type between available options.' Below the dropdown is a table titled 'Available Case Record Types' with the following data:

Record Type Name	Description
Customer Request	Choose this Record Type to create a new Customer Request.
Open Complaint	Choose this Record Type to create a new Complaint.
Sample Request	Choose this Record Type to create a new Sample Request.

A second callout box points to the table with the text: 'Case Record Types All the available Case Record Types are referenced here with a description.'

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

• H e h a s t h e c h o i c e b e t w e e n C o m p l a i n t , S a m p l e R e q u e s t a n d C u s t o m e r R e q u e s t .

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

## Case Information

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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

The screenshot shows a 'Case Information' form. A red rounded rectangle highlights the following fields: Account Name (text input), Subject (text input), GBU (dropdown menu with '-None-' selected), BU (dropdown menu with '-None-' selected), Product Family (text input), Type (dropdown menu with '-None-' selected), and Sub-Type (dropdown menu with '-None-' selected). Other visible fields include Status (Open), Final communication Sent (checkbox), Received Date (12/01/2016), Estimated Resolution Date (12/01/2016), Requested Resolution Date (12/01/2016), Severity (Medium), Case Origin (Inbound email), and Confidential (checkbox).



Additional Accounts can be added to the Accounts related list.

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**-Sub-type**  
:  
More granular 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

The screenshot shows a 'Case Information' form with various fields. A red box highlights the 'Received Date', 'Estimated Resolution Date', and 'Requested Resolution Date' fields, all of which are populated with the date '13-09-2016'. Other fields include 'Account Name' (TEST FF), 'Subject' (Customer Request), 'GBU' (Novicare), 'BU' (Agro), 'Type' (Labels (Eccocert/Ecolabels)), 'Sub-Type' (-None-), 'Originator' (Filipe Freitas), 'Case Owner' (Filipe Freitas), 'Status' (Open), 'Priority' (Medium), and 'GBU Customer Segmentation' (IGBU-46317).



#### 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**

:  
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(Mandatory).

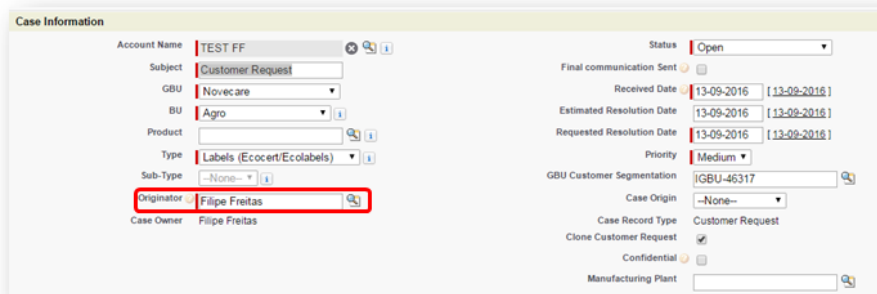
**-Estimated Resolution Date**

: 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.



The screenshot shows a 'Case Information' form with the following fields and values:

Field	Value
Account Name	TEST FF
Subject	Customer Request
GBU	Novicare
BU	Agro
Product	Labels (Eccert/Ecolabels)
Type	Labels (Eccert/Ecolabels)
Sub-Type	-None-
Originator	Filipe Freitas
Case Owner	Filipe Freitas
Status	Open
Final communication Sent	<input type="checkbox"/>
Received Date	13-09-2016 (13-09-2016)
Estimated Resolution Date	13-09-2016 (13-09-2016)
Requested Resolution Date	13-09-2016 (13-09-2016)
Priority	Medium
GBU Customer Segmentation	GBU-46317
Case Origin	-None-
Case Record Type	Customer Request
Clone Customer Request	<input checked="" type="checkbox"/>
Confidential	<input type="checkbox"/>
Manufacturing Plant	

Each Customer Request can be linked to assigns. The different assigns 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 GBURule

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**.



Status | Open ▼


Received Date | [ 12/01/2016 ]

Estimated Resolution Date | [ 12/01/2016 ]

**Severity** | Medium ▼

Case Origin | Inbound email ▼

Type |   

Confidential 

2

The definition of these severity values is the following:

Severity*	Definition
High	<ul style="list-style-type: none"> <li>– According to GBU's customer segmentation, servicing level<sup>1</sup> or commercial agreement defined with the customer</li> <li>– Emergency requests (i.e. critical impact on customer's processes<sup>2</sup> and/or lead-time is critical for the customer)</li> </ul>
Medium <sup>3</sup>	<ul style="list-style-type: none"> <li>– According to GBU's standard answer lead-time, GBU's customer segmentation, servicing level or commercial agreement defined with the customer</li> </ul>
Low	<ul style="list-style-type: none"> <li>– According to GBU's customer segmentation, servicing level or commercial agreement defined with the customer</li> <li>– Any open question from the customer with <u>no commitment in terms of timing</u> (i.e. "nice-to-have" requests, general questions related to documentation, surveys, ...)</li> </ul>

\*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.

<sup>1</sup>The servicing model represents how the GBUs address customer / segment needs

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

<sup>3</sup>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**.

The screenshot shows a 'Case Information' form with the following details:

- Account Name: TEST FF
- Subject: Customer Request
- GBU: Novecare
- BU: Agro
- Product: Labels (Eccocert/Ecolabels)
- Type: Labels (Eccocert/Ecolabels)
- Sub-Type: --None--
- Originator: Filipe Freitas
- Case Owner: Filipe Freitas
- Status: Open
- Received Date: 13-09-2016
- Estimated Resolution Date: 13-09-2016
- Requested Resolution Date: 13-09-2016
- Priority: Medium
- GBU Customer Segmentation: IGBU-46317
- Case Origin: --None--
- Case Record Type: Customer Request
- Clone Customer Request:
- Confidential:  (highlighted with a red box)
- Manufacturing Plant: [Empty field]

## Customer Contact Information

1

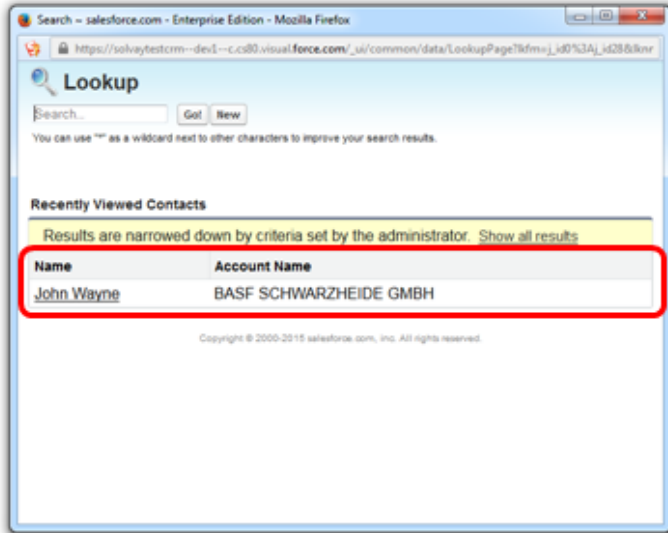
Multiple contacts can be maintained on the Customer Request. David can maintain a main Contact and has the possibility to add **Additional Contact** the Customer Request is saved.

Customer Contact Information

Contact Name

### 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 show 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.

Description

End Customer

Initial Description

Opportunity

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

Case 00001309 Customize Page | Edit Layout | Printable View | Help for this Page

Back to List: Cases

Case Customer Contacts | Case Account Associations | Customer Request Products | Approval History | Open Activities | Activity History | Case Team | Case Comments | Case History | Google Docs & Attachments

Case Detail [Edit] [Delete] [Clone] [Close Case] [Send Final Communication] [Clone Customer Request]

1. Open → 2. Approval Pending → 3. Approved → 4. Completed → 5. Closed

▼ Case Information

Customer Request Number	00001309	Status	Approved
Account Name	A.P.BEINAS S.A. DE C.V.	Final communication Sent	<input type="checkbox"/>
Subject	test sd subject clone 11	Received Date	21/04/2016
GBU	Novicare	Estimated Resolution Date	21/04/2016
BU	Agro	Requested Resolution Date	
Product		Severity	Medium
Type	Labels (Ecoert/Ecolabels)	Case Origin	
Sub-Type		Case Record Type	Customer Request
Originator	Sushant Kumar Dhinaga		
Approver	Ashutosh Singh		
Processor	Chhavi Gupta		
Notified			

## Adding Products

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Customer Request Products

New Customer Request Product

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Customer Request Product Edit  
New Customer Request Product

Help for this Page

Customer Request Product Edit

Save Save & New Cancel

Information

Required Information

Case 00003878  
Application/End Use

Product  
Manufacturing Plant

Save Save & New Cancel

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

Customer Request Products		New Customer Request Product		Customer Request Products Help ?	
Action	Product	Created Date	Level		
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<a href="#">Edit</a> <a href="#">Del</a>	1.12-DODECANEDIPHOSPHONIC ACID	7/12/2015	Level 4		

For FibraS & Coatis : when creating a customer

▼ Case Information

Customer Request Number 00048391

Account Name **ADFERT ADITIVOS IND E CON**

Partner Type Sold-to & Ship-to

Customer Classification


Subject **Customer request**

GBU Coatis

BU Phenol Chain

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

Action	Team Member	Member Role	Case Access
<a href="#">Remove</a>	<a href="#">User: Sophie Millet</a>	Originator	Read/Write
<a href="#">Remove</a>	<a href="#">User: Sandra Mori</a>	Account Manager (SAP)	Read/Write



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## Adding Additional Accounts

• 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>	20001041	7/12/2015

• In order to add an additional

**Case Account Association Edit** New Case Account Association Help for this Page ?

Case Account Association Edit Save Save & New Cancel

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Case  Account

Save Save & New Cancel

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

• Further more, David can add additional contacts using the Contact s related li st.

Case Customer Contacts New Case Customer Contact Case Customer Contacts Help ?  
No records to display

In order to add an Addi ti

Case Customer Contact Edit New Case Customer Contact Help for this Page ?  
Case Customer Contact Edit Save Save & New Cancel  
Information Case  Contact  Required Information  
Save Save & New Cancel

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Case Customer Contacts					New Case Customer Contact	Case Customer Contacts Help ?
Action	Case Customer Contact: Name	Contact Name	Contact Role	First Name	Email	
Del	B-0025	Nikola Tesla		Nikola	test2430231@test.com	

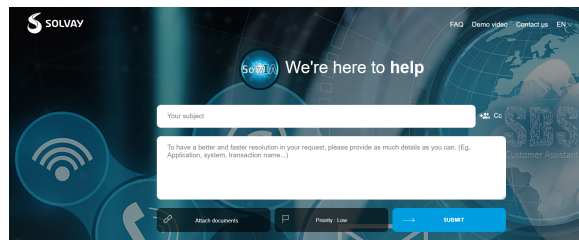
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## Related articles

- [Customer Request: Introduction](#)
- [Customer Request: Approval Process](#)
- [Customer Request: Processing the Customer Request](#)
- [Customer Request: Final Communication](#)
- [Customer Request Closure](#)
- [Customer Requests: Related Lists](#)

## 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*