

Sample Management (including new simplified process for Novecare)

Project documentation is available [here](#)

Model file (to know what are the existing defined standards and how form will be pre populated) is accessible [here](#).

Most frequent reason is that the flow PRODUCT to be shipped to that COUNTRY doesn't exist yet (we extracted 1year and a half of history it has to be checked manually as a new flow setup, addressing compliance and product stewardship topics.

(Key users) You can check what flows similar already existing which can help you through the awesome table : <https://awesome-table.com/-LtAi8l2rSdoyG0uX7UE/view>

SBS Support can check in CRM Utility list view named [Sample Novecare Model file](#)

Model is under the ownership of marketing managers (Eric Leroy, Sel AVCI, Eddy Bungee, Antoine Viellard, Ku Min Teo, Julie Catteau-Mollet) , so the first step should be to agree with them. Model is managed globally at product level for product sensitivity, and standard sample size, then at product x region level for things like storing strategy, shipping plants... Model is available here : <https://awesome-table.com/-Lp8a7byC7WkJRjK5mgZ/view> then declined on all flows existing at product x country level and loaded in SFDC by product and country of delivery.

Flows existing in the model are listed here : <https://awesome-table.com/-LtAi8l2rSdoyG0uX7UE/view> , then once agreement is made, for go live period, excel file uploaded into core CRM via functionality Google connector by JB Cercueil or P.Accardi or A.Anjos (Data stewards) .

Keep in mind that exceptions are still manageable at case level (automatisms are pre-filling the case but nothing prevent any user to modify determined values during the specification step).

Sales area (Sales organisation + Distribution Channel + Division) will soon be populated automatically from CSR / Account manager determination, but meanwhile user must fill them in before submit for approval.

It can happen that in Sales Force, a sample request has been created for a customer A, but you know that in parallel, you are going to receive the corresponding order from the customer requesting you to use the global account as sold-to.

No problem, in SAP, create the order as required by your customer and add the corresponding SFDC ID. It won't change the account in sales force. Only order and delivery informations are updated by the interface.

It has to be copy/paste as « Purchase order no. » in SAP, in the « Order Data » tab, in the « Ship-to party » section.

You also need to select the « Purchase order type » as « SFDC ».

You can also open the following document [Sample - SAP update](#)

Yes, it's possible.

In this case, you have to manage one line per sales force sample and to indicate on each line the corresponding sales force ID. The order header has to remain empty.

The case contact is linked to the account, if you want to search for a contact from another account you have to click on "Show all results".

It depends off the error message but it means that a value doesn't exist.

It should concern the fields "Sold to Account", "Resolution Site Code", "Product" or "Contact Name".

To be sure, click on the lookup. If the search doesn't find any value, it means that it doesn't exist.