

Customer Request: Introduction

Overview

In this section, you will find information about:

- The types of customer requests
- The process steps
- The process flow


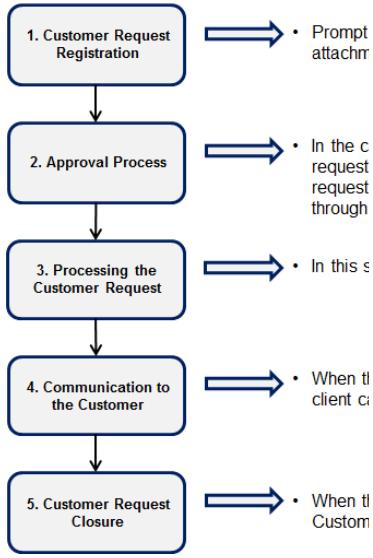
Concerned profiles:

Sales - Customer Service - Supply Chain & Production

Step By Step

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Introduction	Process Steps
<div style="text-align: right; margin-bottom: 10px;">  </div> <ul style="list-style-type: none"> • Standard Customer Request <ul style="list-style-type: none"> - A customer request represents one or more demand(s)¹ from a customer related to one or several areas (e.g. questionnaires, product performance, agreements, regulatory compliance) • Complaints <ul style="list-style-type: none"> - Customer Complaint process deals with managing issues coming from the customer that are related to quality issues on orders or samples (e.g. delivery issues, product issues, packaging issues, documentation issues) • Customer Specific Request <ul style="list-style-type: none"> - Special Customer Requests process deals with managing requests coming from the customer that <u>deviate</u> from Solvay GBU standard offering (e.g. product specifications, way of handling quality system, shipping) • Sample request <ul style="list-style-type: none"> - Sample Requests process deals with managing product sample requests coming from the customer (e.g. Evaluation, New end use, New product, Product change, R&D request) 	 <pre> graph TD A[1. Customer Request Registration] --> B[2. Approval Process] B --> C[3. Processing the Customer Request] C --> D[4. Communication to the Customer] D --> E[5. Customer Request Closure] </pre> <ul style="list-style-type: none"> • Prompt attachm • In the c request through • In this s • When ti client c • When ti Custom
<h3>Process Flow</h3>	<h3>Sample Request vs Customer Request</h3>

The Customer Requests module is divided into 5 different steps and 9 different Statuses.



The Status order is as follows:

- **Open:** As soon as the Customer Request is created
- **Pending Approval:** When the Customer Request is submitted for approval
- **Approved:** Once the Approver has approved the Customer Request
- **Rejected:** When the Approver has rejected the Customer Request
- **Completed:** Once the Customer Request has been processed
- **Closed/Stopped:** When the Customer Request is closed but the process was not completed (ex: Customer is no longer requesting the current demand)
- **Closed/Answered:** When the Customer Request is completed and closed

Status Completed and Closed/Answered are new from **Winter 17' Release**

These different steps are sub-divided into the following sections on the Customer Request page:

- Case information
- Customer Contact Information
- Description
- Resolution
- Closure

Changing the Status of the Customer Request is a manual process for the following Status:

- **Close/Stopped**
- **Close/Completed**

Nevertheless, for the other Status, the values are automatically updated:

- **Open:** Default status after creation of a Customer Request
- **Pending Approval:** Automatically updated when the Customer Request is submitted for approval
- **Approved:** Automatically updated when the Approver approves the Customer Request OR when the user creating the Customer Request has a Salesrep profile
- **Rejected:** Automatically updated when the Approver rejects the Customer Request
- **Resolved:** Automatically updated when the fields Resolution Date and Resolution are populated

Customer Request Notification => **NEW R5 feature**

The automatic notification rules for Customer Request allow to notify users when it changes status, according to GBU specific rules.

- **The new Owner** - if your GBU has implemented rules and the owner is changed automatically to a specific User or to a Queue, the new Owners will received the Notification Email
- **The Case Team** - all Case Team Members, independent of their Role will receive the Notification Email
- **Solvay Contacts on Notification Rules** - group of users that are selected to be notified when the Status is changed

•**Sample Requests** are done directly in Case using the Sample Request functionality. No Customer Request is created for it.
•**Customer Requests** and Sample Requests are separated processes and no Customer Request is created for a Sample Request.

What is not a Customer Request

- Customer Requests, Customer Specific Requests, Sample Requests are separated processes and no Customer Request is created for a Sample Request neither for a Customer Specific Request.
- Sample Requests or Customer Specific Requests are done directly in Case using the Sample Request or Customer Specific Requests functionality.



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Related articles

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- [Customer Request: Approval Process](#)
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- [Customer Request: Final Communication](#)
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Need help?

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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