

18. Customer Specific Requirement

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Overview

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Customer Specific Requirement process aims to log, follow, and manage the Customer Specific Requirement life cycle.

This process has 3 main phases:

- 1. Registration
- 2. Assessment
- 3. Implementation



Concerned profiles:

SALES MGR / DIR

SALES REPS

TECH. TEAM & SALES DEV.

CUSTOMER SERVICE & CS MANAGER

SUPPLY CHAIN & QUALITY

STRATEGIC MARKETING

CORPORATE SALES & MARKETING

DATA STEWARD / ADMIN

OR "

ALL"

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 - Status automatically changed to "Under Implementation" after approval
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 - Input the Customer Satisfaction feedback and Close the case
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Added Value

CSR Process in CORE CRM solution will provide you a single place to:

User Stories

- Mary Wants to register a Customer Specific Requirement.
- John receives a notification to approve a CSR

- Register Customer Specific Requirements
- Assign responsibilities for each phase
- Follow the CSR life Cycle
- Find the history of all the key dates and persons involved in a SCR
- Have a broader vision on your Customers needs

- Frank receives a notification to Assess the Feasibility of a request.
- Peter receives a notification to approve the implementation of a CSR.
- Frank receives a notification to implement the request
- The CSR is now live

Step-By-Step

Step 1 - User wants to Register a Customer Specific Requirement.

SALES REP

Select the Record Type

a - On Cases Tab, click on button New
b - On Case Record Type selection page select Customer Specific Requirement

Fill the required information

a - The user can now fill all the required information

b - Beside the main shipping site, additional shipping sites to which this CSR will be relevant can be added.

a - The logged CSR is on Registrati on phase b - A Warning message is displayed to remember the user that it will not be able to submit this requireme nt for approval before adding a related product on the related list c - Additional informatio n about the Account is automatic ally fetched (SAP codes and Customer Classificat ion)

Automatically displays "# of Related Products" on Related list

a - The user mouses over the Customer Request Products related list and adds all the products to which this CSR will be relevant
b - After the products have been added they can be seen on the Related List
c - The "# of Related Products" field automatically calculates and displays the number of products on the related list

Customer Request Products

No records to display

Warning: Before submitting for approval, you must add at least one Product on the 'Customer Request Products' related list.

Case Information

EditDeleteCloneSubmit for Approval

Customer Request Products

New Customer Request Product

Customer Request Products Help

Action	Product	Level	Application/End Use	Created Date
Edit Del	5-BROMOSUAMACOL	Level 4	NUTRITIONAL FLAVOUR	22-09-2017
Edit Del	4-HYDROXY-3-METHOXYMANDELIC ACID 25KG B	Level 5	ANTIOXIDANT FOR FOOD	22-09-2017

Customer Classification

A

Contact Name

[John Doe](#)

GBU

Aroma Performance

BU

Aroma Ingredients

Type

Product specifications

Sub-Type

Regulatory Related

No

Subject

[Test Product 1 Specifications](#)

Case Origin

[Inbound call](#)

Received Date

22-09-2017

Requested Resolution Date

01-12-2017

Originator

[Jeremie Seabra](#)

Product

[Test Product 1](#)

of Related Products

2

Manufacturing Plant Code

[ZZEH](#)

Shipping Site Code

[AFA](#)

Related List

a - Customer Request Products - List of Products to which this CSR will apply to

b - Case Account Associations - List of Accounts to which this CSR will apply to.

c - Case Team - Persons involved in this CSR and respective role

d - Approval History - Historic of approval decisions regarding this CSR

e - Case History - Historic of important changes on the CSR

Related Lists

a

Customer Request Products

[New Customer Request Product](#)

[Customer Request Products Help](#)

No records to display

b

Case Account Associations

[New Case Account Association](#)

[Case Account Associations Help](#)

No records to display

c

 Case Team

[Update Case Team Members](#)

[Case Team Help](#)

No records to display

d

Approval History

[Submit for Approval](#)

[Approval History Help](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: 2nd round of approval	14-09-2017 9:45	Approved	Jeremie Seatoja	Jeremie Seatoja	ok	 Approved
Step: Approver	14-09-2017 9:40	Approved	Isabelle VISOZ	Jeremie Seatoja		 Approved
	14-09-2017 9:39	Approved	Fanny Miesse	Jeremie Seatoja		
	14-09-2017 9:39	Approved	Marcia Rodier	Jeremie Seatoja		
Approval Request Submitted	14-09-2017 9:39	Submitted	Jeremie Seatoja	Jeremie Seatoja		

[Show more...](#) | [Go to list...](#)

e

Case History

[Case History Help](#)

Date	User	Connection	Action
14-09-2017 9:45	Jeremie Seatoja		Record unlocked.
14-09-2017 9:40	Jeremie Seatoja		Changed Status from Approval Pending to Validated .
			Record locked.
14-09-2017 9:39	Jeremie Seatoja		Changed Status from Under Assessment to Approval Pending .
			Record locked.

[Show more...](#) | [Go to list...](#)

Submit for approval

a - The user is now able to submit for approval
b - After submitting for approval, the CSR is locked on status 'Pending Pre-Approval'
c - The CSR will remain locked until someone, according to each GBU rules, approves or rejects the requirement.

Customer Request Products (2) | Case Team (2) | Case Account Associations (2) | Case History (2) | Approval History (2)

Case Detail Edit Delete Clone Submit for Approval **a**

1. Registration 2. Assessment 3. Implementation 4. Active

Case Information

b Case Owner [Jeremie Seabra \[Change\]](#)
Status Pending Pre-Approval
Priority Medium

Approval History Recall Approval Request Approval History Help ?

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Pre Approver (Pending for first approval)						
Reassign Approve / Reject	24-09-2017 21:58	Pending	CSR - Pre-Approval Group	CSR - Pre-Approval Group	c	Pending
Approval Request Submitted						

Step 2 - John receives a Notification to approve a CSR

SUPPLY CHAIN & QUALITY

Status automatically changed to "Under assessment" after approval

Approve/Reject Approval Request

Case Number 00029587
Case Owner [Jeremie Seabra](#)
Subject Test Product 1 Specifications
Initial Description Customer would need that Test Product 1 had different specification regarding a certain property.
Comments

a Approve Reject Cancel

b Case Owner [CSR Assessment Team \[Change\]](#)
Status Under Assessment
Priority Medium

a - John clicks on the link provide on the email notification and, after reviewing the information provided by Mary, he decides to pre-approve the CSR.

b - After being approved the Status is automatically changed to 'Under Assessment' and assigned to the the person responsible for the assessment phase, according to each GBU rules.

NOTE : At any point during the process the CSR can be rejected, by clicking on the button 'Close Case' and selecting the status 'Closed - Rejected'

Step 3 - Frank receives a notification to assess the feasibility of a request.

Writes Global Feasibility Conclusion comments after approved

a - Frank clicks on the link provide on the email notification and, after reviewing the information provided by Mary, he starts the Assessment process, contacting all persons responsible for each part of the assessment.
b - After receiving feedback from all involved parties Frank writes his Global Feasibility Conclusion Comments.

a			
▼ Feasibility (Analytical)			
Lab. Capable of Measuring Specification	Yes	Estimated Laboratory Costs	EUR 0,00
External Laboratory Needed	No	Comments for Analytical Feasibility	Requirement doable, at no cost
▼ Feasibility (Industrial)			
Prod Capable of Meeting Requirements	Yes	Estimated Production Costs	100.000,00
		Comments for Industrial Feasibility	Some adaptations on the Production chain will have to be made
▼ Feasibility (Supply-Chain)			
Implies MTO instead of MTS	No	Estimated impact on lead time(x of days)	5
Will have Impact on Stock Levels	Yes	Estimated Supply-Chain Costs	EUR 50.000,00
HSE Impacts	No	Comments for Supply Chain feasibility	Will cause some delays and stock issues
▼ Global Feasibility Conclusion			
Plant Feasibility Completed Date	22-09-2017 22:05	Total Estimated Costs	EUR 150.000,00
Plant Feasibility Conclusion	Yes	b Global Feasibility Conclusion Comments	Costs and Impacts are very low compared to potential benefits

Final Submit for approval

a - Frank can now submit the CSR for a final approval.

b - By doing so the status moves automatically to status 'Approval Pending', and the persons responsible to approve the CSR are notified.

Case Detail Edit Delete Clone Submit for Approval a

1. Registration → 2. Assessment → 3. Implementation → 4. Active

▼ Case Information

Customer Request Number	00035931	Case Owner	Jeremie Seabra [Change]
Ship To Account	CAMBRIDGE WOOL	Status	Approval Pending b
SAP ID	RCS ID:303030 PRS ID:101010	Priority	Medium
Customer Classification	A	Case Origin	Inbound call
Contact Name	John Doe	Received Date	22-09-2017
GBU	Aroma Performance	Requested Resolution Date	01-12-2017
BII	Armas International	Releasator	Suzanne Gauthier

Step 4 - Peter receives a notification to approve the implementation of a CSR.

Status automatically changed to "Under Implementation" after approval

a - Peter clicks on the link provided on the email notification and, after reviewing the information provided by Frank, he decides to Approve the CSR.

b - After being approved the Status is automatically changed to 'Under Implementation' and assigned to the person responsible for the implementation phase, according to each GBU rules.

Approval Request
Case: 00029587
Back to Case: 00029587

Approve/Reject Approval Request

Case Number: 00029587
Case Owner: [CSR_Assessment_Team](#)
Subject: Test Product 1 Specifications
Initial Description: Customer would need that Test Product 1 had different specification regarding a certain property.
Comments: There is a clear benefit to Solvay in implementing this requirement.
OK to implement.

Approve Reject Cancel

a

1. Registration 2. Assessment 3. Implementation 4. Active

General Information

Case Number	00029587	Case Owner	CSR Implementation Team [Change]
Ship To Account		Status	Under Implementation
SAP ID		Priority	Medium

b

Step 5 - Frank receives a notification to Implement the request

Implementation process starts

a - Frank clicks on the link provide on the email notification and starts the Implementation process, contacting all persons responsible for each part of the implementation.

b - After receiving feedback from all involved parties, and confirming that all tasks are completed, Frank moves the Status of the CSR to 'Implemented'.

a

▼ Under Implementation

Implementation Completed Date	27-11-2017 10:59	Analytical set up	No
Implementation Validated by Plant	No	Other set up	No
Effective Implementation Date	28-11-2017	MoC Form (if necessary)	No
		Comments	We had some delays on the implementation due to a issue with a provider, but the implementation was still completed ahead of what was requested by the customer

Case Detail [Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#)

1. Registration → 2. Assessment → 3. Implementation → 4. Active

▼ Case Information

Customer Request Number	00035931	Case Owner	b Jeremie Seabra [Change]
Ship To Account	CAMBRIDGE WOOL	Status	Implemented
SAP ID	RCS ID:303030 PRS ID:101010	Priority	Medium
Customer Classification	A	Case Origin	Inbound call

Step 6 - The CSR is now live

Input the Customer Satisfaction feedback and Close the case

a - Mary inputs the Customer Satisfaction feedback she received.

b - After some time, if the CSR is no longer valid, it can be deactivated by clicking on the 'Close Case' button...

c - ...and selecting the Status 'Inactive'.

d - The CSR is now Inactive

▼ Completion

a Customer Satisfaction 4

Customer Satisfaction Comments Very satisfied with results

b Reason For Status

Edit Delete Close Case Clone Submit for Approval

Case Information

c Status Inactive

Reason For Status This CSR is no longer needed for this customer

Save Cancel

1. Registration 2. Assessment 3. Implementation 4. Active

▼ Case Information

Customer Request Number	00035931	Case Owner	jeremie Seabra [Change]
Ship To Account	CAMBRIDGE WOOL	Status	Inactive
SAP ID	RCS ID:303030 PRS ID:101010	Priority	Medium

d

Related articles

For more info

- [Training material Customer Specific Requirement - NEW](#)

Need help?



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