

18. Customer Specific Requirement

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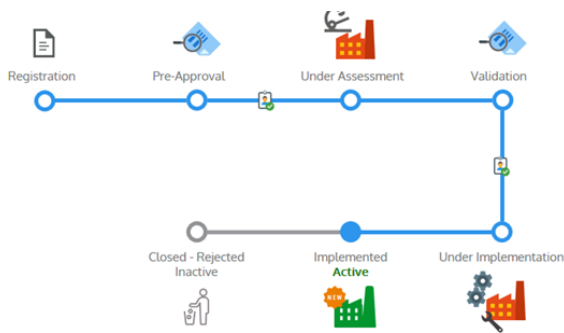
Overview

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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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18. Customer Specific Requirement

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 - Status automatically changed to "Under Implementation" after approval
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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 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.

Add a related product on the related list

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)

a Case Detail Edit Delete Clone Submit for Approval

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

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

c

▼ Case Information

| | | | |
|--|---|---------------------------|--|
| Customer Request Number | 00035931 | Case Owner | Jeremie Seabra [Change] |
| Ship To Account | CAMBRIDGE WOOL | Status | New |
| SAP ID | RCS ID:303030 PRS ID:101010 | Priority | Medium |
| Customer Classification | A | Case Origin | Inbound call |
| Contact Name | John Doe | Received Date | 01-12-2017 |
| GBU | Aroma Performance | Requested Resolution Date | 01-12-2017 |
| BU | Aroma Ingredients | Originator | Jeremie Seabra |
| Type | Product specifications | Product | Test Product 1 |
| Sub-Type | | # of Related Products | 0 |
| Regulatory Related | No | Manufacturing Plant Code | ZZEH |
| Subject | Test Product 1 Specifications | Shipping Site Code | AFA |
| Initial Description | Customer would need that Test Product 1 had different specification regarding a certain property. | Additional Shipping Sites | XYZ LMN |
| Annual Contribution (addition or loss) | EUR 1,000.00 | Case Record Type | Customer Specific Requirement [Change] |
| Justification | This new specification could have some interest for several Accounts | | |

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

The screenshot shows a web interface for 'Customer Request Products'. At the top, there are navigation tabs: 'Customer Request Products', 'Team', 'Case Account Association', 'Case History', and 'Approval History'. Below this is a header for 'Customer Request Products' with a 'New Customer Request Product' button and a 'Customer Request Products Help' link. A message states 'No records to display'. A red warning banner reads: 'Warning: Before submitting for approval, you must add at least one Product on the 'Customer Request Products' related list.' Below this is a 'Case Information' section with buttons for 'Edit', 'Delete', 'Clone', and 'Submit for Approval'. The main section is a table titled 'Customer Request Products' with columns for Action, Product, Level, Application/End Use, and Created Date. The table contains two rows: one for '5-BROMOGUAIACOL' at Level 4 and one for '4-HYDROXY-3-METHOXYMANDELIC ACID 25KG B' at Level 5. Below the table is a detailed case information form with fields for Customer Classification (A), Contact Name (John Doe), GBU (Arroma Performance), BU (Arroma 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), and Shipping Site Code (AFA).

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

Customer Classification: A
Contact Name: John Doe
GBU: Arroma Performance
BU: Arroma 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 Seabra | Jeremie Seabra | ok | Approved |
| Step: Approver | 14-09-2017 9:40 | Approved | Michelle V.SOT | Jeremie Seabra | | Approved |
| | 14-09-2017 9:39 | Approved | Fanny Missel | Jeremie Seabra | | |
| | 14-09-2017 9:39 | Approved | Marcia Rosta | Jeremie Seabra | | |
| Approval Request Submitted | 14-09-2017 9:39 | Submitted | Jeremie Seabra | Jeremie Seabra | | |

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

e Case History [Case History Help](#)

| Date | User | Connection | Action |
|-----------------|----------------|------------|---|
| 14-09-2017 9:45 | Jeremie Seabra | | Record unlocked. |
| 14-09-2017 9:40 | Jeremie Seabra | | Changed Status from Approval Pending to Validated . |
| | | | Record locked. |
| 14-09-2017 9:39 | Jeremie Seabra | | 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 | Case Team | Case Account Associations | Case History | Approval History

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

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

Case Information

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 | | Pending c |
| 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: This requirement may be very valuable

a [Approve] [Reject] [Cancel]

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

a - John clicks on the link provide on the email notificatio n and, after reviewing the informatio n provided by Mary, he decides to pre-approve the CSR.
b - After being approved the Status is automatic ally changed to 'Under Assessm ent' and assigned to the the person responsibl e for the assessme nt phase, according to each GBU rules.

NOTE : A t 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.

| | | | |
|---|------------------|--|---|
| ▼ 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(# 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 | 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 |
| BU | Aroma Intermediate | Creator | Jeremie Seabra |

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'.

The screenshot displays a CRM case record with the following sections:

- Under Implementation:** A table with fields: Implementation Completed Date (27-11-2017 10:59), Implementation Validated by Plant (No), Effective Implementation Date (28-11-2017), Analytical set up (No), Other set up (No), MoC Form (if necessary) (No), and Comments (We had some delays on the implementation due to a issue with a provider, but the implementain was still completed ahead of what was requested by the customer).
- Case Detail:** A progress bar with four stages: 1. Registration, 2. Assessment, 3. Implementation, and 4. Active. The 'Implementation' stage is currently active.
- Case Information:** A table with fields: Customer Request Number (00035931), Ship To Account (CAMBRIDGE WOOL), SAP ID (RCS ID:303030 PRS ID:101010), Customer Classification (A), Case Owner (Jeremie Saetra [Change]), Status (Implemented), Priority (Medium), and 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

The screenshot displays a user interface for managing a Customer Satisfaction (CSR) case. At the top, the 'Completion' section shows 'Customer Satisfaction' with a score of 4 and 'Customer Satisfaction Comments' as 'Very satisfied with results'. Below this, there are buttons for 'Edit', 'Delete', 'Close Case', 'Clone', and 'Submit for Approval'. The 'Close Case' button is highlighted with a red circle 'b'. The 'Case Information' section shows the 'Status' set to 'Inactive' (highlighted with a red circle 'c') and a 'Reason For Status' field containing the text 'This CSR is no longer needed for this customer'. Below the case information is a progress bar with four stages: 1. Registration, 2. Assessment, 3. Implementation, and 4. Active. At the bottom, the 'Case Information' section displays details such as 'Customer Request Number: 00035931', 'Ship To Account: CAMBRIDGE WOOL', 'SAP ID: RCS ID:303030 PRS ID:101010', 'Case Owner: Jeremie Seabra [Change]', 'Status: Inactive', and 'Priority: Medium'. The 'Status' field is highlighted with a red circle 'd'.

Related articles

For more info

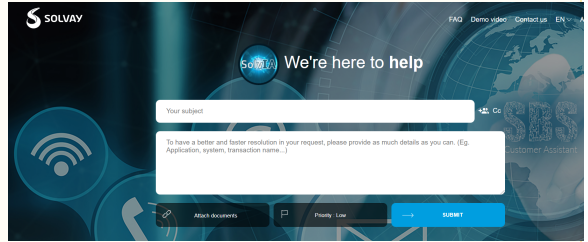
- [Training material Customer Specific Requirement - NEW](#)

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