

SpP Sample

Reference Documents

[Functional document](#) (2019)

[KT document](#) (2021)

FAQ

A sample request is a **paid or free-of-charge** product shipment to be sent to a customer for **demonstration and/or evaluation** purposes.

The Sales manager creates a Sample record and add the product to send to the customer. **Only one** product can be added per sample request : user must use "**Clone**" button to send another product to the same customer (no need to fill again creation form).

1- For all Samples except **Chimie Plus** : when the product is added, the user has to click on "Submit" to request approval. If the sample requires an approval Approver is defined based on sample type (since ECCO project new routing matrix "[Local empowerment](#)" also used for Quotes (Team cluster and ECCO Region) :

- Experimental Products: (PM as approver)
- Externally Sourced (Chimie-Plus): Regional Manager as approver
- Commercial Products: Regional r as approver
- Molded Article: Regional Manager as approver

When Sample request is approved, a case is created for the CSR (Customer Service representative who will create SAP order) . When the case has been managed, the CSR closes the case, then the sample's status is automatically changed to "**Sample sent - closed**".

2- For **Chimie Plus** samples, please refer to the related Q&A as the process is a bit different.

All details are on the functional document.

They are samples managed by **Chimie Plus**. When the type is "Externally Sourced (Chimie-Plus)", if the user submits the request, [this contact](#) will receive an email (copy-paste the ID in production to see the email address used in real conditions).

To change the e.mail , update the following contact in Production:

<https://solway-spp-crm.lightning.force.com/lightning/r/Contact/0036000001JqFoOAAV/view>

Contact

Mr. Dummy Contact

Job Title

External Sample Request handler

Account Name

[CHIMIE-PLUS LABORATOIRES](#)

Phone (2)

+33 4 74 67 42 45

Email

contact@chimieplus.fr

Contact Owner

 [Grazia Meroni](#)

Details

Chatter

Business

Service

Related

NPS Survey Results

▼ Contact Information

Contact Owner

 [Grazia Meroni](#)

Professional Title

Name

Mr. Dummy Contact

Middle Name

Full Name (Local Language)

Account Name

[CHIMIE-PLUS LABORATOIRES](#)

Department

Logistic

Department Details

Mobile

Phone

+33 4 74 67 42 45

Other Phone

Preferred Language

Do Not Call

☐

Email

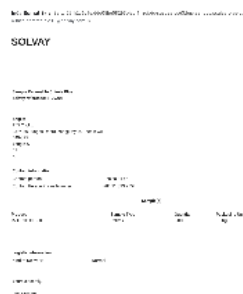
contact@chimieplus.fr

Fax

+33 4 74 67 42 51

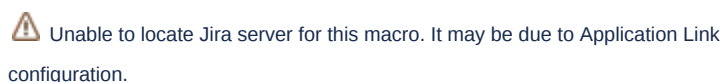
Reports To

The "Submit" button can't be used for this type of Sample. The user must use button "Send External Sample Request to Chimie-Plus". A window will open and this email will be sent to Chimie Plus (with no attachment):



Refer to the "Samples" section on the Product page.

- If "yes" is the value for "Sample Approval needed", the sample will have to be approved.
- If "no" is selected instead, no approval is required and a case will automatically be created for the CSR .
The approver for "Experimental Products" is the Product Manager and for other Regional Manager see in Evolution request:



Depending on the value selected in "Type", the list of Products displayed is different.

If the type is "Experimental products" for example, the product availability will have to be "Developmental". Please refer to the functional document (slide 5).

Users have to ask the GBU Data Steward (Sarah Chatten) if they want to cancel a sample request. The status will be changed to "Request canceled". On desktop, the button used to add a product is a custom component. It only displays products linked to the correct type of sample, etc. This component cannot be used on the mobile version.

As it is not available in mobile, users go to sample, related, sample product, add new sample product and they are redirected to the sample product layout. On this layout, the field is "read only" because we don't want users to select products from there (we need they use the component). As admin users, we can update this field because at the profile level, we have the permission to edit "read only" fields.

In order to work on Sample and add a product, please ask users to not use the mobile app.

Procedure to check user rights on the sample object:

The new product creation layout should be like this:

1st column

Sample, Product

2nd column

Product Comments, Arrival Date Requested

then two sections.

- Product Sample Price (PM Recommendation) with the fields Sample Reference Price, Reference Currency, Reference UOM
- Quantity & Pricing with the fields: Sample Paid., Requested Volume, UOM (for Volume & Price), Sample Price, Currency

After save to check that In component "sample product" should display as below.

1st column

Product

Product Comments

Estimated Delivery Date
Arrival Date (Requested)
Ship Date
Tracking No/Carrier
Sample Reference Price
Reference UOM
Reference Currency

2nd column

Sample Paid
Sample Price
UOM (for Volume & Price)
Requested Volume

Note: Component layout where Type= Commercial Product

Reference link to implementation requirement:



Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- **Excerpt: An error shows when a user tries to save a Product record without first filling in a value to the “Sample Reference Price” field (as seen in the below images).**

The screenshot displays a product configuration interface. At the top, there are input fields for 'TDS ID'. Below this is the 'CC Webshop' section, which contains two region selection panels: 'Webshop Visibility (Regions)' and 'Webshop Hide Prices (Regions)'. Each panel has an 'Available' list (Europe, North America, China GCT, Japan) and a 'Chosen' list. The 'Samples' section follows, featuring a 'Sample Reference Price' input field, a 'Sample Threshold Qty' input field, and a 'Sample Threshold UOM' dropdown menu currently set to '--None--'. There is also an 'Available packaging' section with 'Available' and 'Chosen' lists, and a 'Sample Approval needed' dropdown menu set to 'No'. At the bottom, an 'Additional Information' section includes a 'PGL Code' input field and three buttons: 'Cancel', 'Save & New', and 'Save'.

Log in to Google Drive to get the most out of Salesforce. [Connect Now](#)

New Product: Internal Products

* = Required Information

Product Information

* Product Family: --None--
Complete this field.
[View all dependencies](#)

Product Manager: Search People...

Product Hierarchy Name:

Hierarchy 4 Name: --None--

* Product Name:

Product Notes (Internal):

Product Description:

Material Group Code:

* Source System: --None--

* Product Level: --None--

* Product Hierarchy 4: Search Product Hierarchy 4...

* Product Availability: --None--

Allocation: ☐

* Product Class: --None--

* Product Currency: EUR - Euro

* Unit of Measurement: --None--

Industrial Origin Name:

Quantity Scheduling Enabled: ☐

Revenue Scheduling Enabled: ☐

Product SAP Information (only for Composites Materials)

Material Code:

Lead Time (days):

Description Information

Commercial Product Name:

Abacus: ☐

Product: --None--

Cancel Save & New Save

With the new process implemented, when a user creates a new Product record, under certain conditions, as per steps showcased hereunder, an error message will show on the record page, under the “Sample Reference Price” field:

1.User is a Product Manager

2.The Product the user is trying to create from scratch has “Source System = PF1” and “Product Level = Level 4” and “Sample Reference Price = 0, OR a negative value, OR no value is added to the field/empty field”

As a result of the above details, when the user tries to save the record the Product record is not successfully created and the system will return the following error: “Sample Reference Price is mandatory and must be higher than 0” below “Sample Reference Price” field (as seen in the images below).

Japan

Korea

Samples

Sample Reference Price

0

Sample Reference Price is mandatory and must be higher than 0

Available packaging

Available

Chosen

View all dependencies

Sample Approval needed

No

Sample Threshold Qty

Sample Threshold UOM

--None--

Additional Information

PGL Code

Product Hierarchy Code

Product Grouping

--None--

Allow Pricing by

☐

*Hierarchy 4 Code

443243

Standard COA Text

Product H4 Bracket

Search Product H4 Brackets...

We hit a snag.

Review the following fields

- Sample Reference Price

Cancel

Save & New

Save

TDS Status

Available

Chosen

Public - Visible (S...

Internal - Solvay o...

Confidential - Req...

Developmental - ...

TDS ID

CC Webshop

Webshop Visibility (Regions)

Available

Chosen

Europe

North America

China GCT

Japan

Webshop Hide Prices (Regions)

Available

Chosen

Europe

North America

China GCT

Japan

Samples

Sample Reference Price

Sample Reference Price is mandatory and must be higher than 0

Available packaging

Available

Chosen

Sample Threshold Qty

Sample Threshold UOM

--None--

Cancel

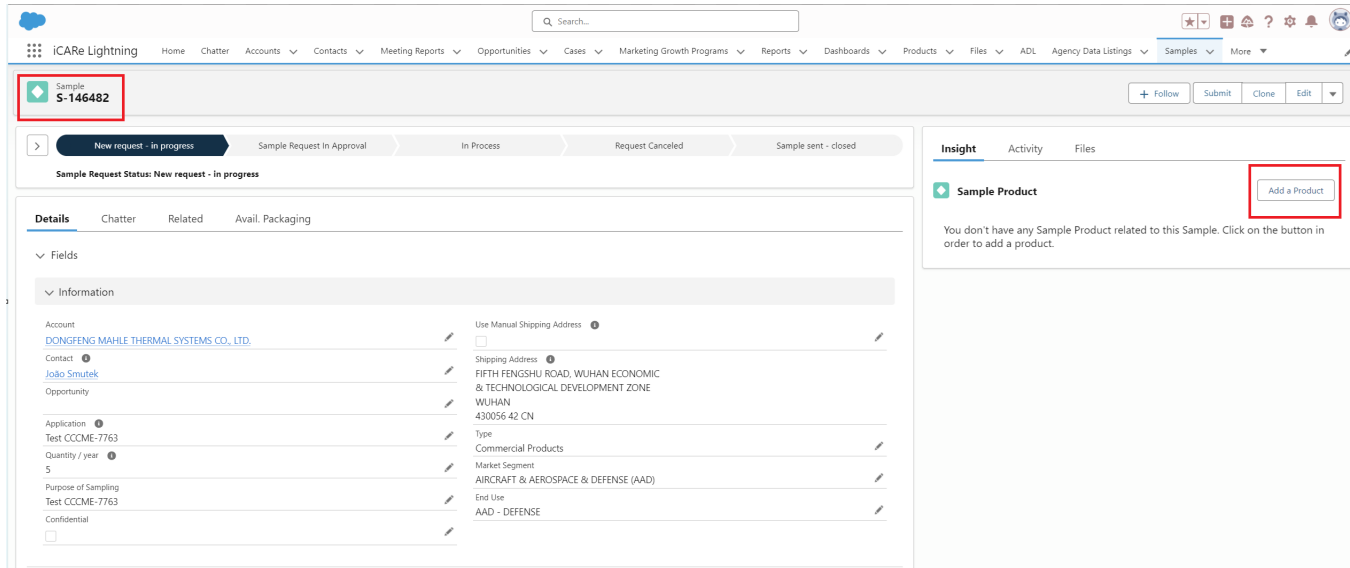
Save & New

Save

Reference link to implementation requirement:

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

- **Excerpt: An error shows when a user tries to add a Product with “Product Class = C” , on a Sample record (as seen in the below images).**



The screenshot displays the iCARE Lightning user interface. At the top, the navigation bar includes 'iCARE Lightning' and various menu items like Home, Chatter, Accounts, Contacts, Meeting Reports, Opportunities, Cases, Marketing Growth Programs, Reports, Dashboards, Products, Files, ADL, Agency Data Listings, Samples, and More. A search bar is also present. Below the navigation bar, the main content area shows a 'Sample' record with ID 'S-146482'. The status is 'New request - In progress'. The 'Details' tab is selected, showing a table of fields including Account, Contact, Opportunity, Application, Quantity, Purpose of Sampling, and Confidentiality. The 'Sample Product' section on the right has an 'Add a Product' button highlighted with a red box.

With the new process implemented, when a user tries to add a Product record on a Sample record, under certain conditions, as per steps showcased hereunder, an error message will show:

1. User is a Sample Manager
2. The Sample record the user is creating from scratch or the Sample record the user is editing, has "Sample Request Status = New Request - In Progress"
3. Once Sample record created, the user clicks the "Add a Product" button on the Sample record
4. The user adds a Product with "Product Class = C" and "Product Availability = Developmental"
5. The user populates the required fields (in red asterix) and saves the record

As a result of the above, the sample product cannot be saved with a Product Class C and the following error message is shown: "Product is required. Product must be active and not be of Class C"

Reference link to implementation requirement:

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

Excerpt: Owner of any Sample CSR in the system, with "Status = Open", that encountered no activity for 14 days from case creation date, will receive an automated email notification.

Sandbox: UAT | Log out



ICARe Lightning | Home | Chatter | Accounts | Contacts | Meeting Reports | Opportunities | Cases | Marketing Growth Programs | Reports

Case

Sample CSR

Account Name	Case Number	Type	Sub-Type	GBU Segment	Customer's Requested Completion Date
	00862782	Request			

✓

Open

On Hold

Escalated

Details | Sample | Chatter | Related

 Case Comments (0)

New

 Case History (3)

Date	Field	User	Original Value	New Value
11/09/2024 18:26	Status	Sandra Martins	New	Open

Sandbox: Sample 00842017 - Case Owner Reminder

Caixa de entrada x



noreply.crm@syensqo.com <noreply.crm@syensqo.com>

15:15 (há 49 minutos)



para mim ▾



Traduza para o português



Dear Sandra Martins,

There is a Sample with status 'Open' and no activity for 14 days.

Please access the <https://syensqo-icare--monthlyint.sandbox.my.salesforce.com/500Ei00000EkTzr> to see sample details and take the necessary actions to move the case forward.

Best Regards

CRM Team

Responder

Encaminhar

Why the new implementation: help get a follow up and save time.

Goal: The changes aim to notify and remind a case owner that the Sample has been open for at least 14 days with no updates.

Feature Overview: After 14 days with no activity on a Sample CSR, the case owner will receive an alert email.

Addresses to: Implementation applies to SpP GBU.

1.Current Implementation Behavior:

What's New?

- new case escalation rule "Sample Escalation Rule"

Enter the rule entry

Edit Cancel

Rule Name	Sample Escalation Rule
Order	1
Rule Criteria	(Case: Case Record Type EQUALS Sample CSR) AND (Case: Status EQUALS Open)
Business Hours Settings	Ignore business hours
How escalation times are set	When case is created

Edit Cancel

Escalation Actions					
New					
Action	Escalate At	Assign To	Email	Notify	Template
Edit Del	336 Hours and 0 Minutes		☐		Sample - Case Owner Reminder

- new email template "Sample - Case Owner Reminder"

Text Email Template
Sample - Case Owner Reminder

Preview your email template below.

Email Template Detail

Edit Delete Close

Email Templates from Salesforce		Sample Templates			
Email Template Name	Sample - Case Owner Reminder	Available For Use	✓		
Template Unique Name	Sample_Case_Owner_Reminder	Last Used Date			
Encoding	Unicode (UTF-8)	Times Used			
Author	Cocado User (Change)				
Description	CCCME-8560				
Created By	Cocado User	14/08/2024 19:14	Modified By	Cocado User : 14/08/2024 19:14	
		Edit	Delete	Clone	

Edit Delete Close

Email Template

Send Test and Verify Merge Fields

Subject | Sample (ICase CaseNumber) - Case Owner Reminder

Plain Text Preview

Dear (ICase OwnerFullName),
There is a Sample with status 'Open' and no activity for 14 days.
Please access the (ICase Link) to see sample details and take the necessary actions to move the case forward.
Best Regards
CRM Team

Reference link to implementation requirement: <https://solvayagile.atlassian.net/browse/CCCME-8560>

Excerpt: Products with "Product Availability = Industrialization" made available on Commercial Samples through new Product Availability value: "Industrialization".

Why the new implementation: help get a follow up and save time.

Goal: The changes aim to notify and remind a case owner that the Sample has been open for at least 14 days with no updates. The update of the feature aims to update the logic for sampling products with the new value (Industrialization).

Feature Overview: If a Sample Product has the value of Industrialization for Product Availability, the product is automatically made available to all Commercial samples.

Addresses to: Implementation applies to SpP GBU.

Logged in as James Flock (james.flock@syneosoft.com.spp) Log out as James Flock

Product Information

* Product Family: --None--

Product Manager: Search People...

Product Availability: Industrialization

Product Hierarchy Name:

Allocation: --None--

Product Name: --None--

* Product Class: Commercial

Product Notes (Internal):

* Product Currency: Industrialization

Product Description:

* Unit of Measurement:

Material Group Code:

Industrial Origin Name:

* Source System: --None--

Quantity Scheduling Enabled:

Cancel Save & New Save

Sample S-155001

Describe request status: new request - in progress

Details Chatter Related Avail. Packaging

Fields

Information

* Account: DONGGUAN JINGWEI PLASTIC MATERIAL

* Contact: Wen Yang

Opportunity: Search Opportunities...

* Application: Instrumentation

* Quantity / year: 10 (4x4 1/8") plaques

Purpose of Sampling: XXXXX

Confidential:

Use Manual Shipping Address:

Shipping Address: 555 Sutong 5th Road, Dajingjiu plastic raw material market, Shuxin village, Changping Town, Dongguan 523568 CN

* Type: Commercial Products

* Market Segment: HEALTHCARE (HC)

* End Use: HC - ADDITIVE MANF SURG INST & EQUIP

Product TECNOLON FOR 335C

Product Family: Radel

Hierarchy 4 Name: Tecnolon Copolymers CZ

Product Manager: Maria Ferreira

Product Class: A

Product Availability: Industrialization

Sample Approval needed: No

Details Product Pricing Product Comparison Product Availability Reports Related

Product Information

Product Family: Radel

Product Hierarchy Name:

Hierarchy 4 Name:

Product Name: TECNOLON FOR 335C

Product Notes (Internal):

Product Description:

Material Group Code: Z61-37115

Source System: PF1

Product Level: Level 4

Product Hierarchy 4: Tecnolon Copolymers CZ

Product Manager: Maria Ferreira

Product Availability: Industrialization

Allocation:

Product Class: A

Product Currency: EUR - Euro

Unit of Measurement: kg

Industrial Origin Name:

Quantity Scheduling Enabled:

Revenue Scheduling Enabled:

1.Current Implementation Behavior:

What's New?

- new Product Availability value: "Industrialization"

Reference link to implementation requirement: <https://solvayagile.atlassian.net/browse/CCCME-7763>

Enhancement Overview:

The enhancement involves updating the sample creation process to streamline operations and minimize errors by requiring users to select a product first. This selection determines the appropriate sample type—**Commercial** or **Experimental**—based on the product's availability. Previously, users selected the sample type before the product, leading to mismatches and confusion.

Functional Changes Implemented:

blocked URL

1. Product-First Workflow:

- Users must select the product before entering any additional sample details.
- The system uses the selected product's availability to automatically determine the sample type.

2. Sample Type Restrictions:

- Only products matching the selected sample type (Commercial or Experimental) are displayed for selection.
- If a mismatch occurs (e.g., Experimental sample type but product availability is Commercial), the system updates the sample type to match the product availability automatically.

3. Field Requirements Adjustments:

- Commercial Samples require basic fields only.
- Experimental Samples mandate additional fields, such as R&D location and contact information.

4. Preventive Validation:

- Users are restricted from changing the sample type after the product is selected.
- If users attempt to edit the sample type, they are alerted via an error message.

Improvements Overview