

# FD - P6. Complaint Management

- [Version Control](#)
- [Reference Documents](#)
- [1. Functional Process](#)
  - [Process Overview](#)
  - [Definition & use cases](#)
    - [Definition](#)
    - [Use Cases](#)
    - [Flow](#)
- [2. Data Model & security](#)
  - [Main objects](#)
  - [Complaint Security Model](#)
- [3. Complaint Custom Buttons & Features](#)
  - [Custom Buttons](#)
    - ["Send Acknowledge Mail" Button](#)
    - ["Send Customer Response" Button](#)
    - ["Generate 8D Report" Button](#)
    - ["Send Internal Communication" Button](#)
    - ["Send Email" Button](#)
  - [Features](#)
    - [Complaint SAP Interface](#)
    - [Complaint Assignments](#)
    - [Complaint Notifications \(v3\)](#)
      - [Focus on the Communication Step](#)
    - [Lead time management \[V.3\]](#)
- [4. Specific Rules & Automation](#)
  - [Complaint Registration](#)
    - [Case Information](#)
    - [Complaint Timeline Stream](#)
    - [Complaint Description](#)
    - [Customer Contact Information](#)
    - [Order Information](#)
    - [Containment/Immediate Actions](#)
    - [Communicate Complaint Acknowledgement to Customer](#)
  - [Under Investigation](#)
    - [Investigation](#)
    - [Root Cause](#)
    - [Corrective Action Plan Development and Implementation](#)
    - [Recurrence Prevention & Effectiveness Verification](#)
  - [Under Review](#)
    - [Proposal Customer Response](#)
  - [Customer Communication](#)
  - [Complaint Closure](#)
  - [Integration with Gensuite](#)
    - [Rules detail](#)
    - [Fields to be sent to Gensuite](#)
    - [Update task: Fields to be updated in salesforce](#)
    - [Closing task: fields to be updated in salesforce](#)
    - [List of fields on task record](#)

## Version Control

| Version | Date       | Description                                                                                                                                                                                              | Author           |
|---------|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| v.1     | 30.03.2017 | Creation                                                                                                                                                                                                 | Jeremie Seabra   |
| v.1     | 01.03.2021 | Update                                                                                                                                                                                                   | Gonçalo Silva    |
| v.2     | 13.04.2021 | Update                                                                                                                                                                                                   | Anne Gilles      |
| v.3     | 17.10.2022 | <ul style="list-style-type: none"><li>▪ <a href="#">CCME-5419</a> : review the lead time management</li><li>▪ <a href="#">CCME_5914</a> : add stakes follow up with warnings and alert emails.</li></ul> | Sébastien Rouxel |

## Reference Documents

folder [03. Business Rules & Queues](#)

| GBU                  | Business Rules and Queue Members |
|----------------------|----------------------------------|
| Aroma Performance    |                                  |
| Novecare             |                                  |
| Technology Solutions |                                  |
| Oil & Gas            |                                  |

# 1. Functional Process

## Process Overview

The Complaint Management module allows to capture, log, track, investigate and resolve complaints. This module also enables communication with the customer on progress and resolution.

The scope of this workstream is a Complaint Management flow managed end-to-end in Salesforce which is used to:

- Capture and log the complaint
- Communicate with the customer
- Define investigation and corrective action plan
- Create, validate and send an official response to the customer
- Request customer feedback
- Close the complaint

A pull interface allows bringing automatically order information from SAP to Salesforce (SAP documentation )

- [CRM SAP Interfaces](#)

## Definition & use cases

### Definition

The Complaint Management process is divided into multiple process steps and phases, each one related to a different status. This allows not only capturing, log and tracking complaints but also to be able to assign and notify the right actors that should be involved in each step of the Complaint Management Process. Additionally, investigations and corrective actions are also logged in the system. Furthermore, this process enables communication with the customer on the progress and resolution of the Complaint.

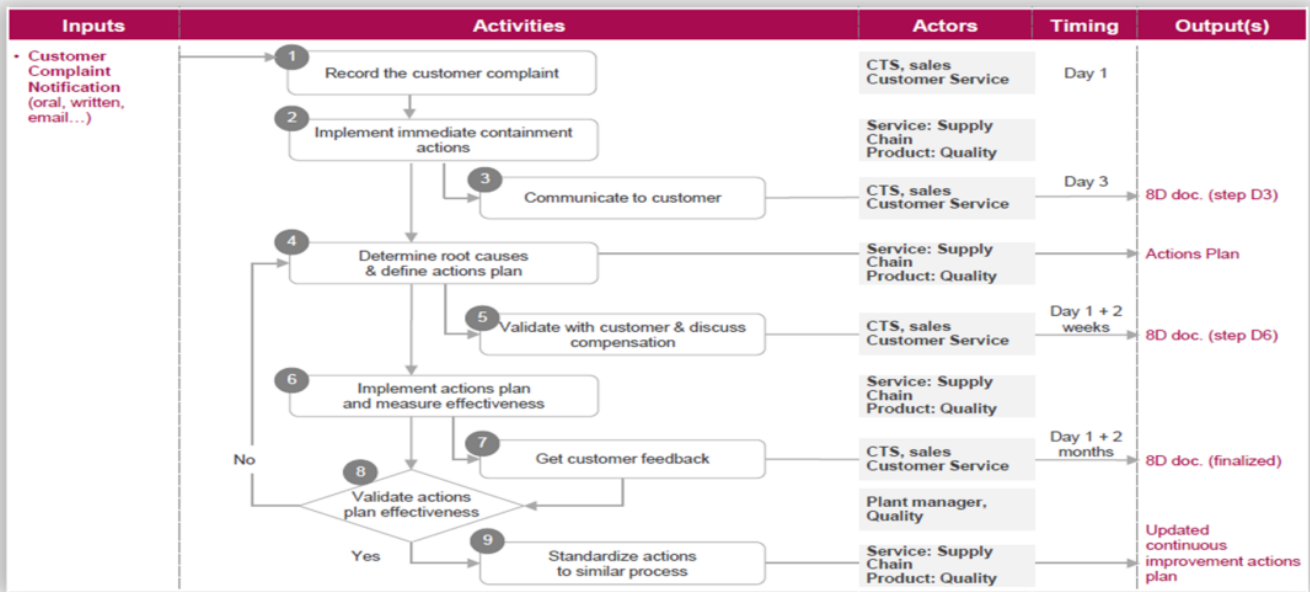
Complaint Management has 5 main steps which are as follows:

## 8.2

## Manage customers complaints

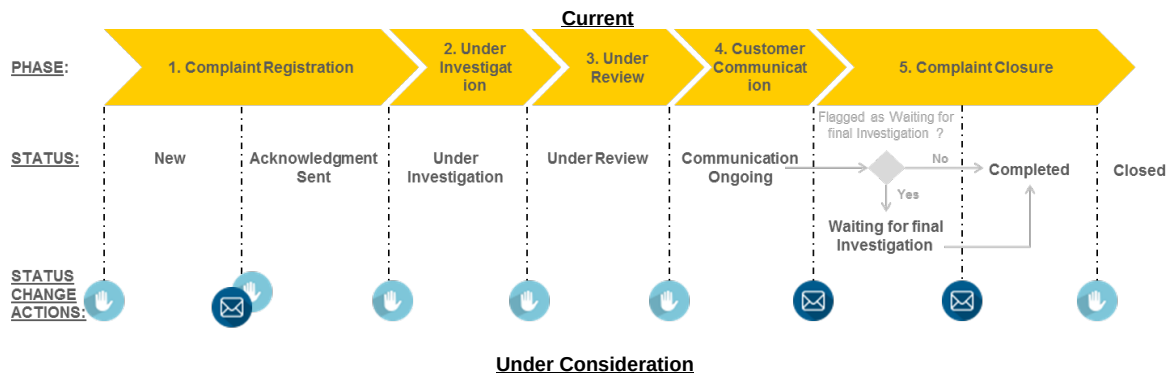
## Process flow

Owner: Global Quality Manager | Representatives: Quality and Supply chain, CTS, Sales, KAM | Arbitration: Region Director



|                                              |                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Complaint Registration                       | Log Complaint after the reception with the upload of pictures and attachments.                                                                                                                                                                                                                                   |
|                                              | Log immediate Actions tasks (if applicable) .                                                                                                                                                                                                                                                                    |
|                                              | Send Complaint Acknowledgement to the customer (this step may be bypassed for Anomalies and internal complaints).                                                                                                                                                                                                |
| Internal nvestigation Under investigation    | Investigate Complaint, evaluate Estimates Costs, Log Root causes and define Corrective action plan .Typically done by quality or supply chain. At this step, verification should be done that it is a valid Customer Complaint. This step can include the 8D approach. When done, change status to Under review. |
| Commercial Response Under review             | Review the investigation answer and formulate a commercial answer including the decision about financial compensation (typically done by an Account manager ) . Change status to Communication ongoing if must ask the CSR to send email to customer.                                                            |
| Customer Communication Communication ongoing | Provide a commercial answer to the customer and arrange financial compensation (status changes automatically to Completed when email template sent) .                                                                                                                                                            |
| Complaint Closure                            | Collect customer feedback and execute all Closure activities. or wait for additional feedback if "Waiting for final Investigation is ticked.                                                                                                                                                                     |

The Complaint Management process is divided into 5 different **Phases** and 8 different **Status**.





The 8 different Statuses are defined as described in the following table. The statuses from New to Completed are associated with the '**Open Complaint**' Record Type, which allows users to access the Complaint Layout in a Read/Write mode (if the user has permission to edit the Complaint). For Complaints with Status Closed, the Record Type linked is the '**Close ReadOnly Complaint**' that will only allow Users to access the layout in reading mode (exceptionally some [Quality Managers can change some fields in closed complaints](#)).

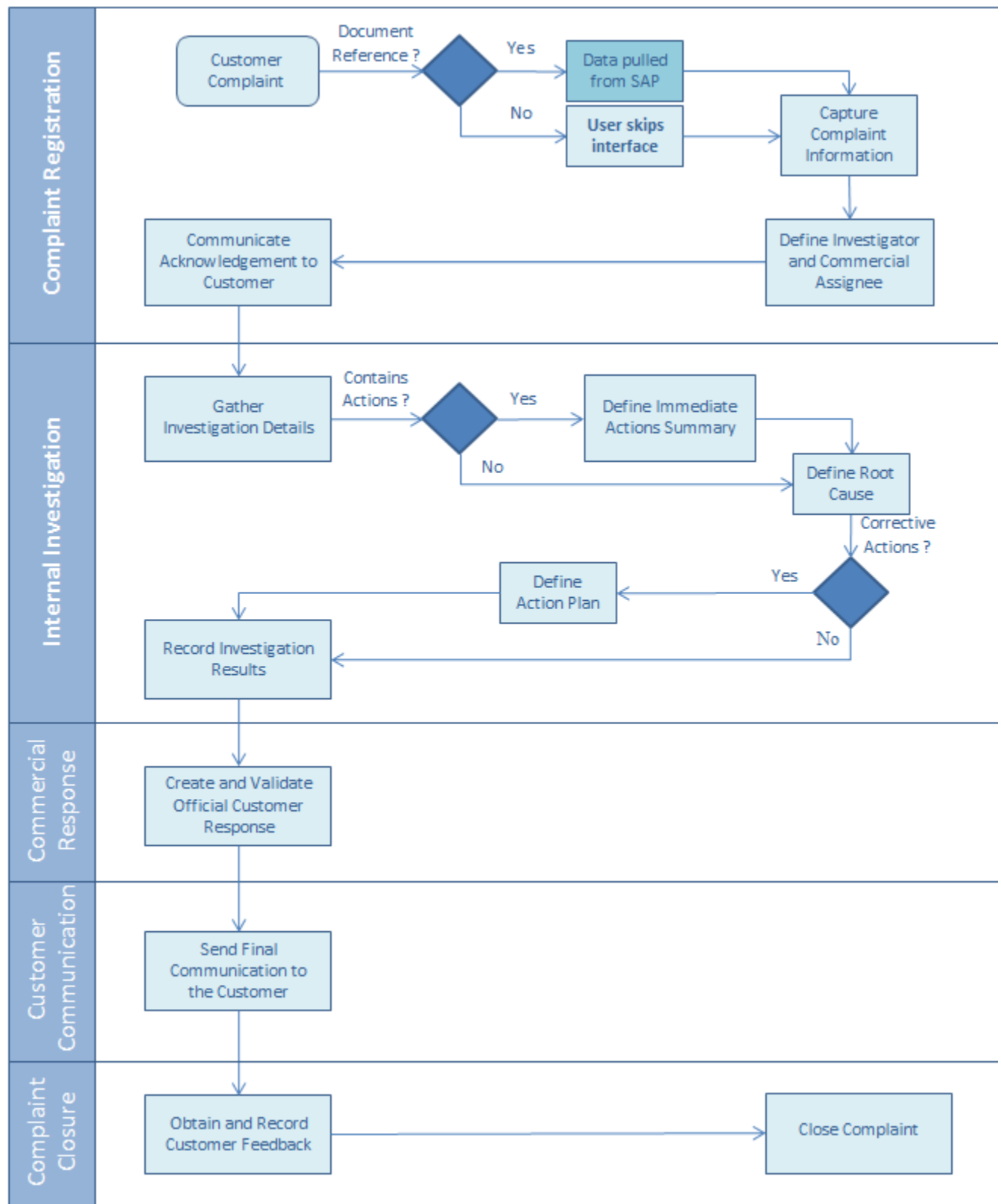
| Phase                  | Status                          | Definition                                                                                                 | Record Type    |
|------------------------|---------------------------------|------------------------------------------------------------------------------------------------------------|----------------|
| Complaint Registration | New                             | As soon as the Complaint is created and registered in the System                                           | Open Complaint |
|                        | Acknowledgement Sent            | When the acknowledgment email has been sent to the main contact of the Complaint                           |                |
| Under Investigation    | Under Investigation             | When all the Complaint information is gathered and Investigation can begin.                                |                |
| Under Review           | Under Review                    | When the Investigation has been completed and the Review and the Commercial Response Proposal can be built |                |
| Customer Communication | Communication Ongoing           | When the Final Communication to the Customer is ready to be sent                                           |                |
| Complaint Closure      | Waiting for Final Investigation | When a Communication is sent to the Customer but the agent is still waiting for more feedback              |                |
|                        | Completed                       | When the Final Communication has been sent to the Customer                                                 | Close ReadOnly |
|                        | Closed                          | When all the closure activities and tasks and the Complaint is closed                                      |                |

## Use Cases

- Registering Complaints from Customers
- Managing all the communication between Solvay Agents and Customers regarding Complaints
- Managing all Complaint process phases like Investigation and Review

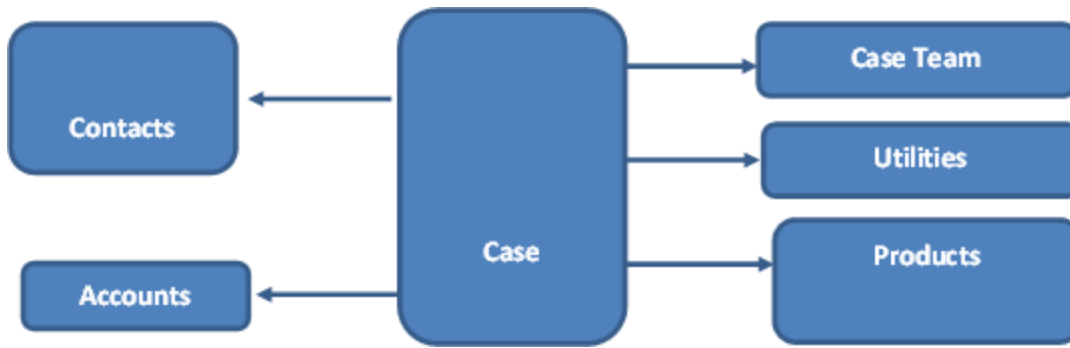
## Flow

The following Flow details the General Complaint Management Process activities for each Step that should be managed by different Actors, according to each GBU rule. These rules are based on each GBU own Business Process that should be detailed and aligned with the General Complaint Management Process below:



## 2. Data Model & security

Main objects



1. **Case:** Standard Salesforce Object to store and manage all general information regarding a Complaint
2. **Accounts:** Standard Salesforce Object to manage the information about the Ship-to and Sold-to related with the Complaint
3. **Contacts:** Standard Salesforce Object to manage the contact person from the Ship-to or Sold-to
4. **Case Team:** Standard Salesforce Object to manage all the actors related to the Complaint Process and to manage the accessibility to the Case
5. **Utilities:** Custom Object to manage the Plants related to the Complaint
6. **Products:** Standard Salesforce Object to manage the Product Level 3 that is related to the Complaint

## Complaint Security Model

|                    |                                                                                                                                                                                     |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Who can create?    | Due to differences within GBUs, roles and responsibilities are to be executed by different entities. Each GBU is responsible to determine internally who should log the complaints. |
| Who can see?       | Any user can see all the complaints, except the complaints flagged as "confidential".                                                                                               |
| Who can update?    | Only users in Case Team or above role hierarchy of a user in the Case Team.                                                                                                         |
| Who can delete it? | A Complaint cannot be deleted. Only the System Administrator (SBS) can delete a Complaint.                                                                                          |

## 3. Complaint Custom Buttons & Features

### Custom Buttons

#### "Send Acknowledge Mail" Button

On the Complaint Registration phase, the Originator must send an Acknowledge mail to the Customer. The user can send the email by clicking on the "Send Acknowledgement Mail" button. In addition to the predefined Contact, the user can also input any valid email address as CC, select the Language of the Template, and select the Attachments the User wants to send to the Client. For internal complaints there is sending customer emails is not mandatory.

#### "Send Customer Response" Button

On the Under Review or Communication phase, the User responsible should send a Communication Email to the Client with the Proposed Customer Response detailed on the Review phase or with a different response. The user can send the email by clicking on the "Send Customer Response" button. In addition to the predefined Contact, the user can also input any valid email address as CC, select the Language of the Template, and select the Attachments the User wants to send to the Client. For internal complaints there is sending customer emails is not mandatory.

(v3) This button is also the only way to send back the Complaint to "under Investigation" status if the check box "Waiting for Final investigation" is ticked".

#### "Generate 8D Report" Button

At any phase of the Complaint Process, Users are able to generate an 8D Report, based on the information detailed on the Complaint. The user can generate the 8D Report by clicking on the "Generate 8D Report" button, select the Language of the Template and check and change the information available. In the end, the User should click on the "Save Attachment" button and an MS Word document is saved with the information detailed.

#### "Send Internal Communication" Button

At any phase of the Complaint process, Users are able to send internal communications to their colleagues.

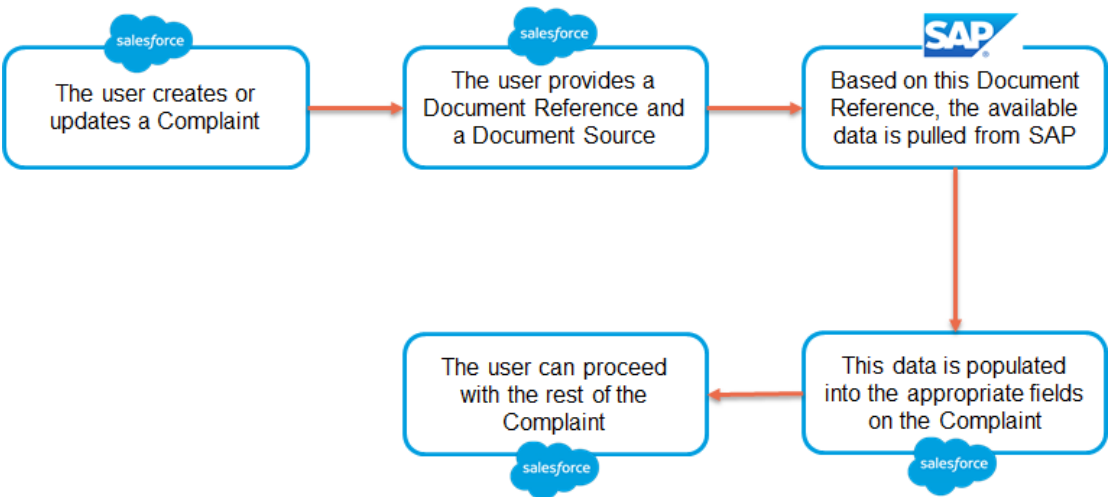
"Send Email" Button

At any phase of the Complaint process, Users are able to send external communications to the customer without triggering any status change.

Features

Complaint SAP Interface

An interface exists between SAP and Salesforce to gather transactional data from Sales Order, Outbound Delivery, or Shipment Numbers (Document Reference) from SAP to Salesforce. The frequency of the pull is on-demand as the pull happens when a user creates or updates a Complaint with a Document Reference.



Complaint Assignments

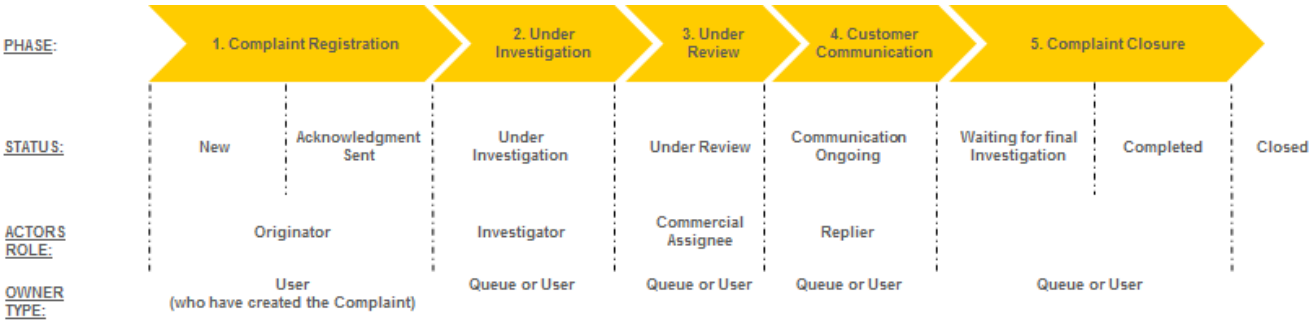
Assigning a Complaint to a User or a Group of User is to pass the responsibility to act on the Complaint on a particular phase of the process. On Salesforce, the Complaint Assignment is based on the field **Case Owner**.

A Case Owner can be a **User** (Solvay employee with a Salesforce license) or a **Queue** (a group of Users that should be part of a team to handle Complaints with the same criteria).

Based on each [GBU own process and rules](#), the Complaint Assignment can be performed by:

- **Manually changing the Owner** – at any time, a User with Access to a Complaint can click the button **Change** next to the current owner and select a new User/Queue to be the new Owner
- **Manually choosing the actors** – on the creation (from the fields Originator, Investigator\* and Commercial Assignee\*) or at any time (from the Case Team section) Users are able to select the future actors. The Owner will be changed then automatically based the change of the Status
- **Automatically selecting the actors** – the GBU has provided the rules, based on Complaint criteria, to allow the system to automatically change the Ownership of a Complaint to a specific User or a Queue when the Status changes

The Complaint Actors are managed on the Case Team section on the Complaint Layout page. The Users are added to the Case Team i) manually by a User or ii) automatically by the System when they are the new Owners of a Complaint. When the Users are added automatically to the Case Team, they are added with the correct Role based on the current Complaint Management Phase



**Example:** For a Complaint for the GBU Novecare and the Complaint Region EMEA, a rule has been implemented to assign the Complaint to the User John Doe when the Status is changed to Under Review. When the Status is changed, John Doe is automatically the new Owner and also added to the Case Team with the Role Investigator.

Complaint Notifications (v3)

On each step of the Complaint Management Process, a set of Solvay personalities (Salesforce or not Salesforce Users) needs to be notified that a new Complaint has now moved to a specific Status in order to act (Complaint Owners) or to be informed.

On each Status change, an email is sent from Salesforce to a group of users, based on System Rules and [GBU Rules](#) that should be stored and displayed in the Activity History Section of a Complaint. There are four types of Addressees on the Complaint Notification Email when the Status is changed:

- The new Owner – if your GBU has implemented assignment rules and the owner is changed automatically to a specific User or to a Queue, the new Owners will receive the Notification Email.
- The previous owner (if not a Queue) – normally the previous owner is the User that changed the Status and triggered the notification. He/she will be also notified to ensure that the correct Owner has been assigned
- The Case Team – all Case Team Members, independent of their Role will receive the Notification Email
- Solvay Contacts on Notification Rules – group of contacts (not necessary Salesforce Users) that are selected to be notified when the Status is changed based on each GBU Rules.

Note: Here is the [list of complaint notifications that Novecare is affected by](#).

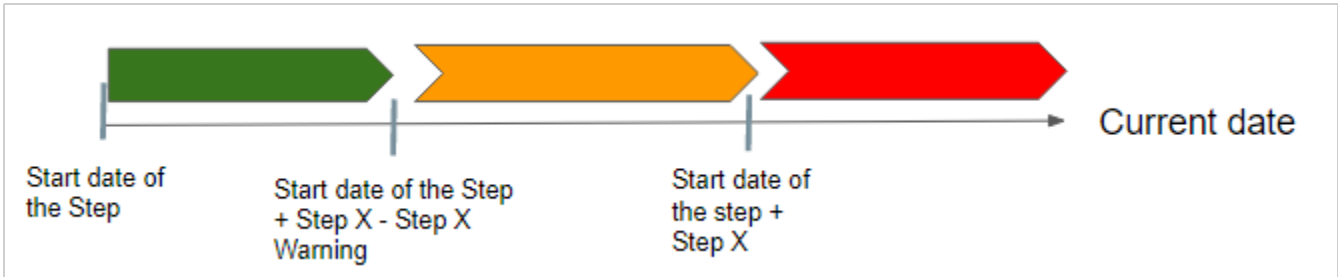
The **Reminder emails** are setup in the following way, for example for Aroma on the 5th day on the status under review **the case owner and the Manager get a reminder** to move ahead with it:

|                      | Step 1      | Step 2              | Step 3       | Step 4                | Step 5      |
|----------------------|-------------|---------------------|--------------|-----------------------|-------------|
| GBU                  | New         | Under Investigation | Under Review | Communication Ongoing | Completed   |
| Aroma                | No Reminder | No Reminder         | *4           | No Reminder           | No Reminder |
| Fibras               | 2           | 16                  | 11           | 11                    | 21          |
| Novecare             | 2           | 14                  | 5            | 5                     | No Reminder |
| Peroxides            | 2           | 16                  | 5            | No Reminder           | No Reminder |
| Silica               | 3           | 15                  | 6            | 8                     | No Reminder |
| Special Ch/Kandelium | 3           | 8                   | 7            | No Reminder           | No Reminder |
| Technology Sol.      | 2           | 9                   | 3            | 3                     | No Reminder |

(updated in

V3 see below)

For each step the user can define the Delay and the warning Delay by GBU and Customer Segmentation . the different SLA date are calculated by the system using the following custom setting in the method `SLV8_CaseManagement_Complaint.updateSLANotificationDates`



(see custom setting [SLA Notification](#))

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: All  [Edit](#) | [Create New View](#)

| Comprehensive Project Overview: Q3 2024 |  |                        |                        |                                    |       |                |       |                |       |                | Global Performance Metrics & Regional Analysis |                |       |                |  |  |  |  |  |  |  |  |  |
|-----------------------------------------|--|------------------------|------------------------|------------------------------------|-------|----------------|-------|----------------|-------|----------------|------------------------------------------------|----------------|-------|----------------|--|--|--|--|--|--|--|--|--|
| Action                                  |  | Name                   | GRU                    | GRU Segment                        | Step1 | Step 1 Warning | Step2 | Step 2 Warning | Step3 | Step 3 Warning | Step4                                          | Step 4 Warning | Step5 | Step 5 Warning |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Alpha Performance 1    | Alpha Performance      | Critical Account; Standard Account |       |                |       |                | 5     |                | 1                                              |                |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Alpha Performance      | Alpha Performance      |                                    |       |                |       |                | 3     |                | 1                                              |                |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Alpha Performance 2    | Alpha Performance      | Key Account; Strategic: KA         |       |                | 5     | 1              | 2     |                | 1                                              | 2              | 1     |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Fibras                 | Fibras                 |                                    | 1     | 15             | 10    |                | 10    |                | 10                                             |                | 20    |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Global Additional Days | Global Additional Days |                                    | 1     |                | 1     |                | 1     |                | 1                                              |                | 1     |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Kandelum Group         | Kandelum Group         |                                    | 2     |                | 7     |                | 6     |                |                                                |                |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Novocase               | Novocase               |                                    | 1     |                | 13    |                | 4     |                |                                                | 4              |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Performance Polyamides | Performance Polyamides |                                    | 2     |                | 12    |                |       |                | 1                                              |                |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Peroxides              | Peroxides              |                                    | 1     |                | 15    |                | 4     |                |                                                |                |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Silica                 | Silica                 |                                    | 2     |                | 14    |                | 5     |                |                                                | 7              |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Special Chem           | Special Chem           |                                    |       |                | 7     |                | 6     |                |                                                |                |       |                |  |  |  |  |  |  |  |  |  |
| <a href="#">Edit</a>                    |  | Technology Solutions   | Technology Solutions   |                                    | 1     |                | 8     |                | 2     |                |                                                | 2              |       |                |  |  |  |  |  |  |  |  |  |

| Column         | Description                                                                                                                                                                                                                                                                                |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name           | Unique name of the configuration                                                                                                                                                                                                                                                           |
| GBU            | name for the GBU                                                                                                                                                                                                                                                                           |
| GBU segment    | <p><b>label name of the GBU customer segment</b> (the one displayed on the GBU segment field of the complaint - <a href="#">SLV29_GBU_Account_Type_Segmentation__c</a> ). the user can specify several GBU segment separated by ;</p> <p>for instance : Key Account ; Standard Account</p> |
| Step           | <p>SLA in number of days of the STEP . it means that <math>SLA\ Date\ of\ STEP_N = Start\ date\ of\ STEP_N + STEP_N\ value + GlobalAdditionalDays(STEP_N)</math> ( API name : SLV13_CAS_SLA_Step_Notification_Date__c)</p> <p>a notification email is sent at this date</p>                |
| Step 1 Warning | <p>Number of days before the SLA date to display a warning and send a notification</p> <p>it means that <math>Warning\ date\ for\ STEP_N = SLA\ Date\ of\ STEP_N - Warning\ STEP_N</math> (API name : SLV47_Warning_Date__c )</p> <p>a warning email is sent at this date</p>              |



If there is no GBU segment defined,

- the line will be applied for all GBU customer segment
- ⚠ the warning step are not used.

The user can defined separate line for different GBU customer segmentation

- the name must be different
- the GBU is the same
- GBU segment is equal to the GBU segment desired
- ⚠ keep the line without GBU segments.

- if the step is let blank : no SLA, no warning
- if the Step is defined but not the Step x warning : the SLA is defined with a notification, but a warning is not displayed.

Each GBU can define their configuration in a new tab **Complaint SLA Notification** in their dedicated google sheet :

The warning and notification emails are sent trough the Flow [Notification when Status Exceeded](#) using the two fields.

- SLV47\_Warning\_Date\_\_c
- SLV13\_CAS\_SLA\_Step\_Notification\_Date\_\_c



## Global Additional Day

Note that a line Global additional days , adds systematically for all GBU on the STEP<sub>N</sub> a number of days to the SLA.

The system will display the SLA and the status of the SLA for each Step on which a warning is defined (with the color coding). (using the `SLV8_Case_Complaint_Warnings` Lightning component))



|                                                                                     | Definition                                                                      | information                                                                                                                                                   |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | The Step is achieved in the respect of the SLA                                  | achievement date<br>the number of won days<br>                              |
|   | The step is in progress<br>the color depend of the current date                 | the remaining days before the SLA of the number of days after the SLA<br> |
|  | as soon as the SLA is broken<br>when the Step is achieved and the SLA is broken | achievement date<br>the number of lost days                                                                                                                   |

- The achieved steps before a first communication to the customer are not updated after the first communication
- if the final investigation check box is ticked, a warning based on the "Final Investigation Expected Date" is displayed :



. This warning disappear as soon as the Final investigation Check box is unticked.

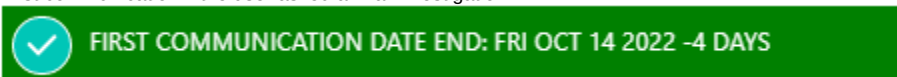
## Focus on the Communication Step

The label of this Step has two values

- Communication if the user do not asked a final investigation:



- First communication if the user asked a final investigation:



if a Final investigation is asked a warning message is display

- if the status is in Review or communication on going :





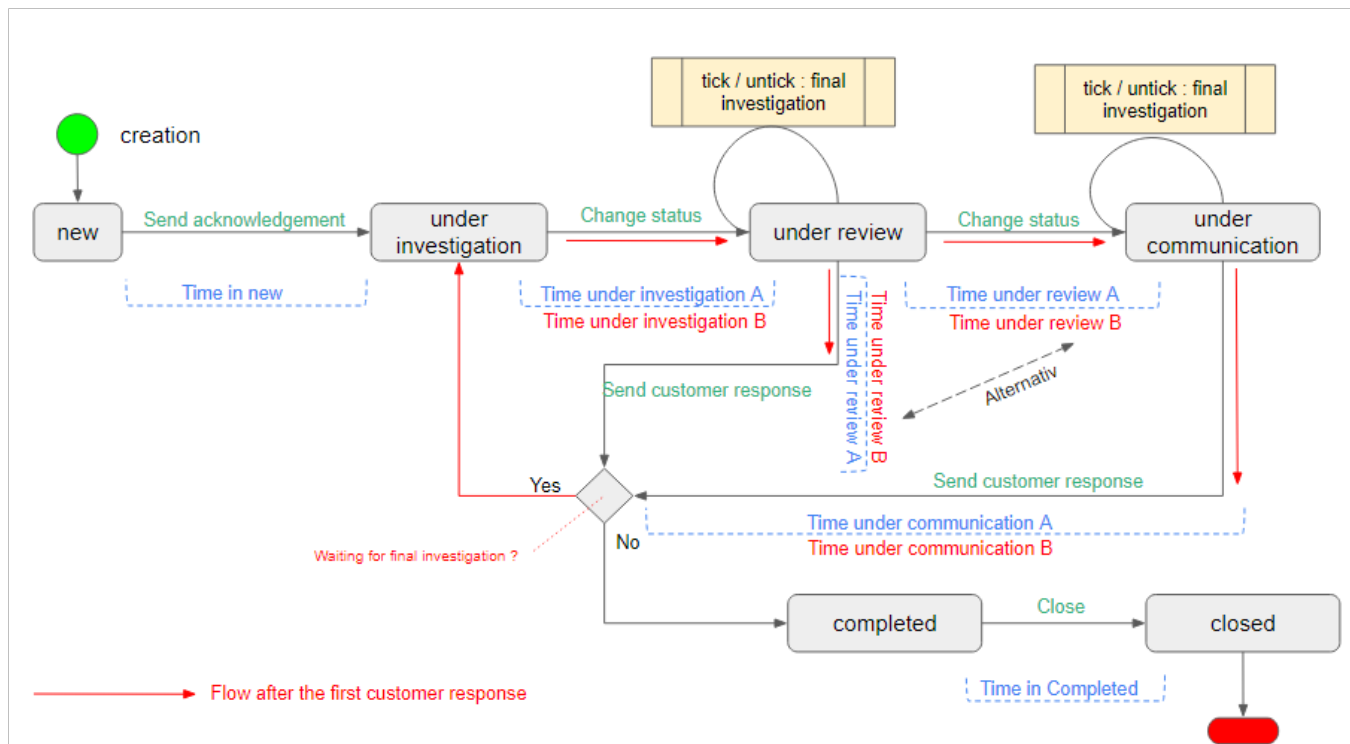
This complaint is waiting for final investigation.

- if the status is under investigation :

## Lead time management [V.3]

During the Complaint process the time spent in the different status are saved.

| Lead time | Start                              | End                                                                  | Spent time field                           | Definition                                                                                                                          |
|-----------|------------------------------------|----------------------------------------------------------------------|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| L1        | status = New                       | status = under investigations (Acknowledgement sent)                 | SLV13_CAS_Time_In_New__c                   | Time spent from the status new until the status Acknowledgement sent                                                                |
| L2a       | status = Under investigation       | status = Under review                                                | SLV13_CAS_Time_In_Under_Inv estigation__c  | time spent from the status under investigation until the status under review before the first communication                         |
| L2b       | (status = Under investigation)     | Under review (final investigation) and first communication is filled | CAS_Time_In_B_Under_Inv estigation__c      | time spent from the status under investigation until the status under review after the first communication                          |
| L3a       | Status = Under review              | Status = Communication on going <b>OR</b> the First Response is sent | SLV13_CAS_Time_In_Under_Review__c          | Time spent from the status under review until the status Communication ongoing, before the first communication                      |
| L3b       | Under review (final investigation) | status = Communication on going and first communication is filled    | CAS_Time_In_B_Under_Review__c              | Time spent from the status under review until the status Communication ongoing, after the the first communication                   |
| L4a       | Communication ongoing              | Completed <b>OR</b> the First Response is sent                       | SLV13_CAS_Time_In_Communication_Ongoing__c | time spent in the status communication on going until the first communication                                                       |
| L4        | Communication ongoing              | Customer informed                                                    | CAS_Time_In_B_Communication_Ongoing__c     | time spent in the status communication on going after the first communication                                                       |
| L5        | Completed                          | Closed                                                               | SLV13_CAS_Time_In_Completed__c             | Time spent in the status completed.                                                                                                 |
|           |                                    |                                                                      | Current_Status_Spent__c                    | Time spent on the ongoing status. it is a formula field so this field is updated each time the complaint is displayed or retrieved. |



## 4. Specific Rules & Automation

### Complaint Registration

When creating a new Complaint, the user needs to input transactional reference numbers in order to pull a set of data from SAP ECC

These fields are :

Document Source: choice between the 2 SAP systems

- WP1
- PF1

Document Type

- Sales Order Number
- Shipment Number
- Outbound Delivery Number
- Document Reference
- Item Number

In the case that the Sales Order is linked to a single Delivery, the Delivery number is pulled from SAP along with the data of the Delivery.

The user can enter the Shipment number as document reference to pull Delivery information in case of a relationship 1:1 between Shipment number and Delivery number.

For Internal complaints, the user will need to use the Outbound Delivery Number as Document Reference. The Purchase Order Number cannot be used as a Document Reference.

In the case that the user does not have any reference number, a "Skip" button allows him to create the complaint without pulling any data from SAP. Nevertheless, the user will still be able to update the document reference fields at a later stage and the data will be pulled from SAP if he does so.

All fields populated by SAP are read-only and not editable in Salesforce by the users with the exception of the Disputed Quantity, Ship to and GBU. If no SAP transaction is maintained on the Complaint, the fields should stay editable.

Once the transactional data is pulled from SAP or that the user skipped this step, he has the ability to read and/or record the following information:

## Case Information

| Field                               | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Case Owner                          | User or a Group of User that is responsible to act on the Complaint on a particular phase of the process                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| (8D) Ship To Account                | The Ship To Account related to the Complaint                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Sold To Account                     | The Sold To Account related to the Complaint                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| GBU <sup>[1]</sup>                  | GBU related to the Complaint.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| BU                                  | BU related to the Complaint                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Product                             | Represents product Level 3,4,or 5 related to the Complaint (Not the same product level filter is applied depending on the selected GBU)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Resolution Site Code <sup>[1]</sup> | Resolution Site Code                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| (8D) Originator                     | Solvay Agent that has initiate the Complaint<br><br>Note: this fields is only available on the creation of a Complaint. After this point, if the User needs to identify this actor, it needs to be managed on the Case Team.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| (8D) Investigator                   | Solvay Agent that is responsible for the Complaint investigation<br><br>Note: this fields is only available on the creation of a Complaint. After this point, if the User needs to identify this actor, it needs to be managed on the Case Team.                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| (8D) Commercial Assignee            | Solvay Agent that is responsible for reviewing the Complaint investigation and for building the Commercial Response Proposal<br><br>Note: this fields is only available on the creation of a Complaint. After this point, if the User needs to identify this actor, it needs to be managed on the Case Team.                                                                                                                                                                                                                                                                                                                                                                               |
| 8D                                  | Flag that indicates that this Customer requires a 8D Report                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Requested Sample                    | Indicates if a Sample has been requested to the Customer.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Status                              | Indicates in which status the Complaint currently is. See details <a href="#">here</a>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Severity                            | Critical - Totally unacceptable situation<br>Major - Complaint with a big impact<br>Standard - Complaint with a low impact. This is the value by default<br>Anomaly - Complaint with very low impact closed directly after registration<br><br>If the Severity is defined as "Anomaly", then the complaint should only be registered and not investigated. Mandatory fields will only be required for the registration step. No prerequisite is required for closure<br><br>Note: The 'real' name of this field is Priority, but it is renamed to Severity on all Complaint Visualforce pages. For this reason, it will still display as 'Priority' on standard pages, such as list Views. |

|                                |                                                                                                                                                                                                                                       |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Motive                         | Complaint Motive                                                                                                                                                                                                                      |
| Sub-Motive                     | Complaint Sub-Motive                                                                                                                                                                                                                  |
| Motive & Sub-motive Definition | Url to file containing Motive and Sub-motive definitions to help originator select the most accurate options                                                                                                                          |
| Confidential                   | If the Complaint is flagged as being confidential, only the Case Team members and users hierarchically above will be able to see it                                                                                                   |
| Solvay Company                 | Indicates if the Complaint is received from an internal customer (Solvay Company). This flag is only informative                                                                                                                      |
| Case Currency                  | Currency that is used for all monetary information related to the Complaint                                                                                                                                                           |
| Case Origin                    | Channel from which the Complaint was received                                                                                                                                                                                         |
| Case Record Type               | Case Record Type.                                                                                                                                                                                                                     |
| Picture taken                  | Identify if pictures of the items related to the Complaint have been taken                                                                                                                                                            |
| Inspected by an agent          | Indication if the Complaint has been inspected by an agent                                                                                                                                                                            |
| Internal Complaint             | Indicates that the Complaint should be treated as an Internal Complaint. By flagging the Complaint with this option, some steps, such as acknowledgment email, customer communication, complaint survey on completion, can be skipped |

[1] This field may be auto-populated if this information is available from SAP

## Complaint Timeline Stream

| Field                                | Definition                                                          |
|--------------------------------------|---------------------------------------------------------------------|
| Received Date                        | Effective date when the Case has been received by Solvay            |
| Waiting for final Investigation      | Indicates if the Complaint is still waiting for Final Investigation |
| Waiting for Final Investigation Date | Date when the Final Investigation is expected                       |

## Complaint Description

In this section, the initial description of the Complaint is captured

| Field               | Definition                                                            |
|---------------------|-----------------------------------------------------------------------|
| Subject             | Details the high-level subject of the Complaint                       |
| Initial Description | Customer Description of the Complaint                                 |
| Impact on Customer  | Detail the impacts that the Complaint has on the Customer complaining |

## Customer Contact Information

Multiple contacts can be maintained on the Complaint. There is a primary Contact on the Complaint page layout, in the Customer Contact information section, and the additional Contacts are maintained in the Contacts related list. When choosing a Contact, any Contact can be selected but the Recently Viewed Contacts related to the Ship-to will be the ones displayed by default.

If searching for a Contact that is not related to the Ship-to, the user needs to first search for the Contact and then click on "Show all results" to reveal the Contact.

The main Contact on the Complaint is by default the recipient of communications when the acknowledgment email or the final communication to the customer is sent. This can nevertheless be changed by the user.

| Field                | Definition                   |
|----------------------|------------------------------|
| Contact Name         | Name of the Customer Contact |
| Customer's Reference | Complaint Customer Reference |

## Order Information

Under this section, there is all the information in regards to the orders.

If applicable and in reference to the Sales Order Number and its Item, to the Outbound Delivery Number and its Item, or to the Shipment Number, some fields will auto-populate with data pulled out of SAP ECC. These fields are read-only if data is pulled from SAP.

| Field                                         | Definition                                                          |
|-----------------------------------------------|---------------------------------------------------------------------|
| Document Source                               | SAP Document Source (PF 1 or WV 1)                                  |
| Sales Order Number                            | Sales Order Number                                                  |
| Sales Order Item                              | Sales Order Item                                                    |
| Outbound Delivery Number                      | Outbound Delivery Number                                            |
| Outbound Delivery Item                        | Outbound Delivery Item                                              |
| Shipment Number                               | Shipment Number                                                     |
| Customer Purchase Order Number <sup>[1]</sup> | Customer Purchase Order Number                                      |
| Preceding Document <sup>[1]</sup>             | Preceding Document                                                  |
| Preceding Item <sup>[1]</sup>                 | Preceding Item                                                      |
| Subsequent Document <sup>[1]</sup>            | Subsequent Document                                                 |
| Subsequent Item <sup>[1]</sup>                | Subsequent Item                                                     |
| (8D) Material Code <sup>[1]</sup>             | (8D) Material Code                                                  |
| (8D) Material Description <sup>[1]</sup>      | (8D) Material Description                                           |
| Packaging Type <sup>[1]</sup>                 | Packaging Type (BULK or PACK)                                       |
| Shipping Site Code <sup>[1]</sup>             | Shipping Site Code                                                  |
| (8D) Shipping Site <sup>[1]</sup>             | (8D) Shipping Site                                                  |
| Goods Issued Date <sup>[1]</sup>              | Goods Issued Date                                                   |
| Requested Delivery Date <sup>[1]</sup>        | Date the client would like to receive the delivery of the goods.    |
| Actual Delivery Date <sup>[1]</sup>           | Date when the Order related to the Complaint was actually delivered |
| Carrier Partner Name <sup>[1]</sup>           | Carrier Partner Name                                                |
| Carrier SAP Reference <sup>[1]</sup>          | Carrier SAP Reference                                               |
| Equipment <sup>[1]</sup>                      | SAP information of the Equipment related to the Order               |
| Rail Car/Truck Number <sup>[1]</sup>          | Rail Car/Truck Number                                               |
| Account Manager <sup>[1]</sup>                | Account Manager in SAP                                              |

[1] This field may be auto-populated if this information is available from SAP

## Containment/Immediate Actions

This section captures the immediate actions that can/should be taken to deal with the Complaint.

| Field                          | Definition                                       |
|--------------------------------|--------------------------------------------------|
| Immediate Action Required      | Indication if the Immediate Actions are required |
| (8D) Immediate Actions Summary | Summary of the Immediate Actions                 |
| Completed Date                 | Immediate Actions Completed Date                 |

## Communicate Complaint Acknowledgement to Customer

Once the complaint is logged into the system, it is time to communicate a complaint acknowledgment to the customer. The objective of the communication is to acknowledge to the customer that the complaint has been logged correctly and that it is taken into consideration.

The user can send the email by clicking on the "Send Acknowledgement Mail" button. In addition to the main Contact (by default), the user can also input any valid email address as CC. The Account manager and the CSR, in the Case Team, are automatically put in CC. Additional users may be included in CC if the GBU provided complimentary email rules.

Additionally, the user can select any attachments from the Complaint to be sent as attachments with the email.

## Under Investigation

Once the Complaint is logged and that we have sent the acknowledgment email to the customer, the investigation process can start. In this stage, the complaint can be flagged as justified or non-justified. A justified Complaint means that the Complaint has been accepted as valid. By default, the justified field is on "yes".

the Investigator can be automatically assigned and notified by the System, based on each [GBU Rules](#).

### Investigation

Basic information that can be needed for the investigation process can be found in this section.

| Field                             | Definition                                                                                   |
|-----------------------------------|----------------------------------------------------------------------------------------------|
| Justified                         | Indicates if the Complaint is justified                                                      |
| Recurring cause                   | Indicates if this Complaint has a recurring Cause                                            |
| HSE                               | Indicates if Complaint has HSE impact (Health, Security, Environment)                        |
| Compliance                        | Indicates if Complaint has Compliance impacts                                                |
| Insurance                         | Indicates if Insurance has been informed                                                     |
| Summary of Internal Investigation | Indicates                                                                                    |
| (8D) Internal Description         | Details the Summary of Internal Investigation                                                |
| Sample Requested Date             | Date when the Sample has been requested to the Client                                        |
| Sample Received Date              | Date when the requested Sample has been received from the Client                             |
| Customer Sample Reference         | Customer Sample Reference                                                                    |
| Sample Source                     | Sample Source                                                                                |
| Estimated Costs                   | Indicates the amount of the Estimated Costs when the Complaint is on the Investigation phase |
| (8D) Non-Detection Analysis       | Summary of why the problem was not detected.                                                 |
| (8D) Impact on Other Customers    | Detail the impacts that the Complaint has on other Customers                                 |
| (8D) Impact on Other Products     | Detail the impacts that the Complaint has on other Products                                  |

### Root Cause

This section groups all the fields related to the Root Cause Analysis.

| Field                                 | Definition                                                                                                                         |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Root Cause Investigation Required     | Indicates if a Root Cause Investigation is required                                                                                |
| (8D) Root Cause Investigation Summary | Details the Root Cause Investigation Summary                                                                                       |
| Detailed Root Cause Analysis Attached | Indicates a Detailed Root Cause Analysis was attached                                                                              |
| Department                            | Department that is investigated                                                                                                    |
| Internal Comment                      | Internal Comments related to the Root Cause Investigation                                                                          |
| 5 WHY                                 | Indicates that the 5 WHY process will be used. By flagging the Complaint with this option, 5 additional fields are made available. |

### Corrective Action Plan Development and Implementation

This section groups all the fields related to the Corrective Action Plan and its implementation.

| Field                       | Definition                                                                                                                                        |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Due Date                    | Corrective Action Due Date                                                                                                                        |
| Corrective Actions Required | Indicates if the Corrective Actions are Required                                                                                                  |
| (8D) Action Plan            | Summary of the Action Plan that should be implemented. Specific Actions assigned to Users should be detailed on the Activity History Related list |

|                                |                                                                                                                                                                           |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| (8D) Lessons Learned           | Details the Lessons Learned after the Corrective Action Plan has been implemented                                                                                         |
| Supplier Claim Number          | Represents the number of the claim Solvay will reference in SAP QM (quality management) to a supplier in case of customer raw material, transportation, or carrier issue. |
| Completed Date                 | Corrective Actions Completed Date                                                                                                                                         |
| Corrective Actions Implemented | Indicates if the Corrective Actions were implemented                                                                                                                      |
| Reason Not Implemented         | Detail the Reason that the Corrective Action Plan was not implemented                                                                                                     |
| Incurred Costs                 | Cost that Solvay has become liable for                                                                                                                                    |

## Recurrence Prevention & Effectiveness Verification

This Section is where we can maintain the effectiveness of the Corrective Actions as well as how they can prevent Complaint recurrence, if applicable.

| Field                                 | Definition                                                            |
|---------------------------------------|-----------------------------------------------------------------------|
| Due Date                              | Effectiveness Verification Due Date                                   |
| Corrective Action Effective           | Indicates if the Corrective Actions were effective                    |
| (8D) Effectiveness Assessment Details | Description of the Effectiveness Assessment Details                   |
| Effectiveness Responsible             | Indicates User that is responsible for the effectiveness verification |
| Completed Date                        | Effectiveness Assessment Completed Date                               |

## Under Review

Once the investigation has been completed, or when a response needs to be sent to the Client even if the Investigation is still pending (see 6.2.4.1), the Investigator should manually change the Status to 'Under Review' to trigger the Review Phase normally by the Commercial Assignee. The Commercial Assignee can be automatically assigned and notified by the System, based on each [GBU Rules](#).

The main activity of this phase is to build a proposal for the Response that should be sent to the Customer by filling the field Commercial Response and Customer Communication.

## Proposal Customer Response

| Field                        | Definition                                                                                    |
|------------------------------|-----------------------------------------------------------------------------------------------|
| Commercial Response Proposal | Response proposal that should be sent to the customer                                         |
| Credit Note                  | Description of the Complaint from a Solvay's agent                                            |
| Credit Note Reference        | Reference of the Credit Note to be given to the Customer                                      |
| Credit Note Amount           | Reference of the Credit Note to be given to the Customer                                      |
| Compensation Required        | Indication if a Compensation is Required                                                      |
| Compensation                 | Description of the Compensation to be given to the Customer                                   |
| Compensation Amount          | Amount of the Compensation to be given to the Customer                                        |
| Other Costs                  | Other Costs besides Credit Note Amount and Compensation Amount                                |
| Supply Chain Costs           | Supply Chain Costs                                                                            |
| Lab Analysis Costs           | Lab Analysis Costs                                                                            |
| Product Destruction Costs    | Product Destruction Costs                                                                     |
| Overall Costs                | Sum of all the Costs related to the Complaint plus Credit Note Amount and Compensation Amount |

## Customer Communication

Once the Commercial Assignee has built the Commercial Response Proposal, the communication is ready to be sent to the Customer. The user responsible for the Customer Communication (Replier) can be automatically assigned and notified by the System, based on each [GBU Rules](#).

In order to send the final communication to the customer, there is a button "Send Customer Response" that will open the template of the final communication email which can be previewed and is editable.

The email of the main Contact assigned to the Complaint will automatically be populated as the recipient, and the Account manager and the CSR in the Case Team are automatically put in CC.

The 3 communication templates (acknowledgment email, final communication email and the 8D Report) are available in the following 16 languages (including simplified Chinese and traditional Chinese) :

- English
- German
- French
- Spanish
- Portuguese
- Chinese (simplified)
- Japanese
- Korean
- Italian
- Dutch
- Bulgarian
- Finnish
- Polish
- Russian
- Thai
- Chinese (traditional)

The language of the main Contact is used to determine the language in which the acknowledgment email, final communication email and the 8D Report templates will be generated. In case no language is assigned to the main Contact, the default language of the communication is set to English.

Even though the language of the communication is the one of the main Contact, the user has the possibility to select another language from a drop-down list

The “Acknowledgement Sent” and “Final Communication Sent” checkbox will only be checked if one of the recipients of the Acknowledgement Email or the Final Communication to the Customer is the main Contact on the Complaint

Once the Communication Email is sent from Salesforce, the Complaint Status is automatically changed to **Completed** or to **Waiting for Final Investigation** (see [statuses](#) )

When the Complaint is **Completed**, the section Order Information is blocked and cannot be edited.

## Complaint Closure

The [Closer actor](#) can be automatically assigned and notified by the System, based on each [GBU Rules](#).

Once the Complaint has been Completed, the agent responsible for the closure should check that all related tasks have also been Completed:

Confirm execution of financial compensation if decided

Confirm execution of all Corrective and Prevention Actions

If a complaint has the status Completed for more than 15 days and the Credit note is set to YES but no amount has been populated in Credit Note Amount, a reminder is sent to the same users as when the complaint is set to Completed. This rule is set up for GBUs Technology Solutions, and Peroxides.

However, there are mandatory steps that need to be completed in order to allow the closure of the complaint, except if the 'Severity' is defined as 'Anomaly' (no prerequisites are required for closure of Anomalies).

If the field '8D Report' is checked then the Complaint can only be closed once the 8D report is sent.

The field 'Justified', in the Investigation section, must be filled.

Customer Feedback must have been captured on the Closure section (Customer satisfaction is mandatory to be maintained but can be set as N/A in case no feedback is received from the client.)



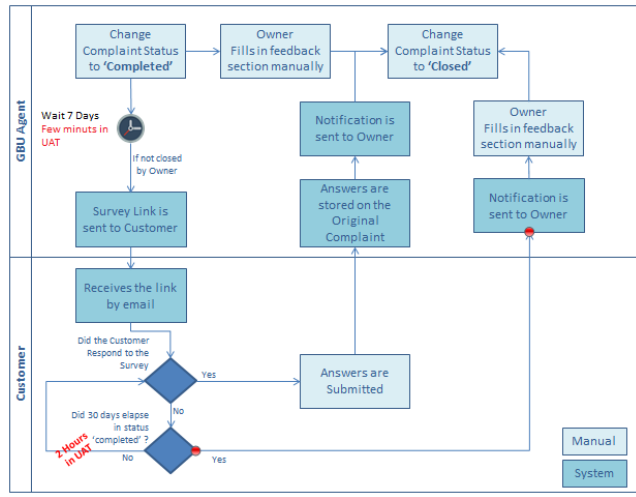
The [Qualtrics Automatic Survey \(Customer feedback\)](#) was migrated to [Salesforce Feedback Management](#) through an update of a big flow .

- 7 days after a complaint is closed, an email template containing a link to the "Customer Feedback" form will be sent to the customer (image 1)
- Once the customer completes the feedback form, the "Customer Feedback" section in the "Communication" tab is automatically updated (image 2)
- In Survey Tab you can see all surveys
- The case owner will receive the information about the Customer Feedback was sent in the 7th day of closure and 30 days after ( 38 days) he will receive another information id customer did not answer.
- Setup > Lightning Email Templates > Case Feedback folder > Complaint\_Feedback

The screenshot shows a Salesforce Case record for 'Close ReadOnly Complaint 00064354'. The case is associated with the account 'SOUTH CENTRAL POOLS DIST BALTIMORE 69'. The case details include: Description / Material Code 'BR IND \*PR 550LB 2PA P2450LB/9859', Mative / Sub-Motive 'Delivery / Equipment', Severity/Priority 'Standard', Received Date '7/2/2018', and Resolution Site 'SCHM-US /PARACHUTE CO'. The case is currently in the 'Under Investigation' stage. The 'Communication' tab is selected, showing a 'Commercial Response' section. This section includes fields for 'Credit Note', 'Credit Note Reference', 'Compensation', 'Compensation Required', 'Commercial response proposal', 'Commercial Response Proposal Date', 'First Customer Informed Date', 'Customer Informed Date', 'Quality of the Answer', 'Quality of the Problem Analysis', 'Deadlines for processing the Complaint', 'Customer Satisfaction Comments', 'Do not send automatic Survey to customer', and 'Feedback through survey'. The 'Customer Feedback' section is also visible, showing 'Quality of the Answer' (3), 'Quality of the Problem Analysis', 'Deadlines for processing the Complaint', 'Customer Feedback Date', and 'Survey Sent Date'.

blocked URL

The screenshot shows the Salesforce 'Surveys' tab. The top navigation bar includes 'CRM Lightning' and various tabs like 'Home', 'Accounts', 'Contacts', 'Cases', 'People', 'Reports', 'Dashboards', 'Visit Reports', 'Opportunities', 'Quotes', 'Contracts', 'Account Plans', 'Requests', 'Email Mapping Rules', and '360° Customer Views'. The 'Surveys' tab is selected, showing a list of surveys. The first survey is 'All Surveys'.



**Note:** The Final Communication Sent checkbox is not mandatory to close a Complaint. The reason for this is that some Complaints are closed by a phone call or without any structured communication

Once the Complaint is Closed, it is considered archived and only a System Administrator will be able to edit or reopen the closed Case. In order to make it clear that the Complaint cannot be edited once it is close, the following text appears under the flowchart when the status is Closed :

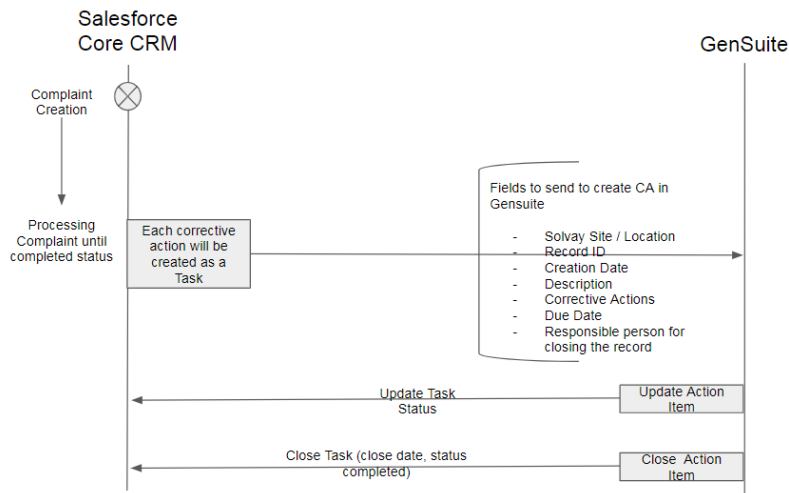
"This is a closed Case and cannot be edited. Only a System Administrator can edit a closed Case. If any changes are needed, please use the Need Help functionality to contact the Support Team."

Feedback fields:

| Field                                    | Definition                                                              |
|------------------------------------------|-------------------------------------------------------------------------|
| Quality of the Answer                    | Customer Quality of the Answer satisfaction. Values: 0, 1, 2, 3 and N/A |
| Deadlines for processing the Complaint   | Customer Deadline Satisfaction. Values: 0, 1, 2, 3 and N/A              |
| Customer Satisfaction Comments           | Customer Satisfaction Comments                                          |
| Quality of the Problem Analysis          | Customer Quality of the Problem Analysis. Values: 0, 1, 2, 3 and N/A    |
| Customer Feedback Date                   | Customer Feedback Date                                                  |
| Survey Sent Date                         | Date when survey was sent                                               |
| Do not send automatic Survey to customer | Survey will not be sent                                                 |
| Feedback through survey                  | when survey was filled by the customer                                  |

## Integration with Gensuite

For Technology Solutions, we integrated the Gensuite (corrective actions tracking system) with the core CRM (Salesforce) for automated transfer for corrective action between two systems.



## Rules detail

| Number of rules | Details                                                                                                                                                                                                                                                                                                 |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| R_01            | <ul style="list-style-type: none"> <li>The corrective actions to be sent to Gensuite should be created as a task through the related list "open activities" under the complaint record</li> </ul>                                                                                                       |
| R_02            | Prerequisites to send a corrective action to Gensuite: <ul style="list-style-type: none"> <li>Complaint must be in status "Completed"</li> <li>Complaint GBU: Technology Solutions</li> <li>Task to be created should be under process "Corrective Action"</li> <li>Task status: not started</li> </ul> |
| R_03            | <ul style="list-style-type: none"> <li>No restriction on the creation of tasks under complaint, all TS users can create tasks if they have access to the complaint record</li> </ul>                                                                                                                    |
| R_04            | <ul style="list-style-type: none"> <li>Fields to be sent to Gensuite to create corrective action and mapping with salesforce fields core CRM: (refer to the table in the slide fields to be sent to Gensuite).</li> </ul>                                                                               |
| R_05            | <ul style="list-style-type: none"> <li>Once the corrective action has been created in Gensuite, no modification of the task in Salesforce, except the update of status closure comment from Gensuite.</li> </ul>                                                                                        |
| R_06            | <ul style="list-style-type: none"> <li>Once the task is in status completed, a notification email will be sent to the originator user of the complaint.</li> </ul> NB: the Originator user is the user who creates the complaint initially, but it could be changed while the complaint is processing.  |
| R_07            | <ul style="list-style-type: none"> <li>In core CRM, there is no link between root causes and corrective actions</li> </ul>                                                                                                                                                                              |
| R_08            | <ul style="list-style-type: none"> <li>Related list on task record "Files" is not included in the integration for Gensuite</li> </ul>                                                                                                                                                                   |
| R_09            | <ul style="list-style-type: none"> <li>All tasks meet the requirement to be sent to Gensuite for all complaints for Technology Solutions will be sent to Gensuite</li> </ul>                                                                                                                            |

## Fields to be sent to Gensuite

| GenSuite                                                                    | Core CRM                                                  | Remarks |
|-----------------------------------------------------------------------------|-----------------------------------------------------------|---------|
| <ul style="list-style-type: none"> <li>SFDC ID (technical field)</li> </ul> | <ul style="list-style-type: none"> <li>Task ID</li> </ul> |         |

|                                            |                              |                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| • Description                              | • Description/<br>Email Sent |                                                                                                                                                                                                                                                                                                                                                             |
| • Created Date                             | • Task created<br>date       |                                                                                                                                                                                                                                                                                                                                                             |
| • Corrective actions                       | • Action                     |                                                                                                                                                                                                                                                                                                                                                             |
| • Due Date                                 | • Due Date                   |                                                                                                                                                                                                                                                                                                                                                             |
| • Responsible person for<br>closing record | • Salesforce<br>user         | <ul style="list-style-type: none"> <li>• No automatic assignment rules</li> <li>• Once the corrective action has been created in Gensuite, if the user is changed in Gensuite, it will not update the assigned user in Salesforce</li> </ul> <p>it's not required to be linked or aligned with the owner of the action in Gensuite (no business impact)</p> |
| • Solvay site / Location                   | • Resolution<br>site         |                                                                                                                                                                                                                                                                                                                                                             |
| • Status                                   | • Status                     | At the creation of the corrective action in Gensuite the status will be "Not Started"                                                                                                                                                                                                                                                                       |

### Update task: Fields to be updated in salesforce

| GenSuite     | Core CRM     | Remarks                                                                                                                                                                        |
|--------------|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| • St<br>atus | • St<br>atus | Once the corrective action has been created in Gensuite, the status of the task in salesforce will be "In Progress" means that the task has been created correctly in Gensuite |

### Closing task: fields to be updated in salesforce

| GenSuite      | Core CRM      | Remarks                                                                                               |
|---------------|---------------|-------------------------------------------------------------------------------------------------------|
| • Status      | • Status      | Once the corrective is completed in Gensuite, the status in salesforce will be updated to "Completed" |
| • Closed date | • Closed date |                                                                                                       |

### List of fields on task record

| Fields      | Type and details              | Remarks                                                           |
|-------------|-------------------------------|-------------------------------------------------------------------|
| Assigned to | Lookup user                   | ( by default, salesforce assigned to the user who create a task ) |
| Related to  | Lookup case                   | Is linked to the complaint record                                 |
| contact     | Lookup contact                | Is linked to the main contact selected in complaint record        |
| Subject     | Picklist<br>(mandatory field) | This field is not included in the integration with GENSUITE       |
| Due date    | Date field                    |                                                                   |

|                            |            |                                                                                                                                                                                                                                                                             |
|----------------------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Process                    | Picklist   | Investigation<br><br>Containment<br><br>Root cause<br><br>Corrective action = Only this value will be used by TS users to create task (if they select any other value the task will not be created in Gensuite)<br><br>Effectiveness and recurrence prevention<br><br>Other |
| Closed date                | date       | This field will be updated by the integration once the status is in completed                                                                                                                                                                                               |
| Assigned process           | Picklist   |                                                                                                                                                                                                                                                                             |
| Progress statement         | Text field |                                                                                                                                                                                                                                                                             |
| Action                     | Text field | This field is integrated with Gensuite                                                                                                                                                                                                                                      |
| Result                     | Text field |                                                                                                                                                                                                                                                                             |
| Status                     | picklist   | Not started: managed in the integration flow<br><br>In progress: managed in the integration flow<br><br>Completed: managed in the integration flow<br><br>Waiting on someone else: not managed in the integration flow<br><br>Deferred: not managed                         |
| Description                | Text field | This field is integrated with Gensuite                                                                                                                                                                                                                                      |
| Type                       | Read only  |                                                                                                                                                                                                                                                                             |
| Task record type           | Read only  |                                                                                                                                                                                                                                                                             |
| Created by and modified by |            | System field filled automatically                                                                                                                                                                                                                                           |

| User                                   | Last Update   |
|----------------------------------------|---------------|
| <a href="#">Jeremie Seabra-ex</a>      | 3286 days ago |
| <a href="#">GILLES, Anne</a>           | 368 days ago  |
| <a href="#">Sebastien Rouxel</a>       | 1290 days ago |
| <a href="#">Silva, Gonalo</a>         | 1860 days ago |
| <a href="#">Filipe Freitas-ex</a>      | 3286 days ago |
| <a href="#">MARTINS, Sandra Regina</a> | 394 days ago  |
| <a href="#">MARKUS, Evita</a>          | 1019 days ago |
| <a href="#">Julien Andreoli-ext</a>    | 2763 days ago |
| <a href="#">PEYTRAUD, Josiane</a>      | 2151 days ago |
| <a href="#">BRAHIM, Walid</a>          |               |
| <a href="#">KANJA-ext, Zakaria</a>     |               |
| <a href="#">NWANGWU, Daniel</a>        |               |