SpP Cases : Complaints , TRS , NCMR , CSR, Credit Note

Reference Documents
Complaint + List of root cause Complaint Training material (folder shared with Jeff & Jason) Complaint KT documentation Complaint general process : Diagram Flow1 / Diagram flow2 **NCMR** Non Conformity Material Report Training material + functional documentation (folder shared with Jeff & Jason) NCMR KT Documentation NCMR Fields specifcications & Guidance for success NCMR emails **CSR Customer Service Requests** : CSR Training material - CSR KT documentation **TRS Technical Requests System** TRS Training material and TRS KT documentation **Credit Note** Credit Note functional Design Credit Note Training material

Complaints

This error means that the **account owner** or **Primary CTD** is inactive :

- forward ticket to GBU Data Steward to update the user at Account
- when inactive user has been replaced, check user is able to create the complaint

The complaint's type and some other fields are used to assign the case:

- If the type is "Supply chain": case type primary + BU + plant. Please note that BU will be removed from iCare in 2021 (with ECCO project) so this logic should change.
- If the type is "Technical": product family + plant.

Users indicated on the creation form will be automatically changed by the system according to these rules.
If the account is a SKA one, then some users also are notified:

- The Sales Manager (routing matrix) and Cluster VP receive a notification.
- Users on “SKA complaint notification” public group receives a notification.

Request : the user request to update the users who are notify in case of an SKA complaint

Solution :

    - Open ICARE
    - Move to Set up menu, Public group
    - Search the SKA complaint Notification group
    - Edit the group and update the members as requested.

To learn more about the notifications, please refer to these 2 Jira:

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

Procedure to update the notified users for a complaint related to an SKA account.

Initiation

<u>Containment</u>: to find the solution. Example: change the packaging of one product if a liquid flows. It is the case owner who is managing this step.

<u>Investigation and Verification</u>: if the case owner considers the request as “not valid”, then the case is "Archived - Case Not Valid".

Resolution

Root cause: selected when the investigator found the origin of the issue.

Implementation

Verify effectiveness & prevent recurrence: we start working on a solution. Investigator has to assign an "Effectiveness auditor". He validates or not the solution.

About the status:

- Closed - Awaiting CA Verification: after 50 days, a notification is sent to the case owner. Technically, it will be indicated “Closed” on the path but it will be needed to change the status from “Verify Effectiveness” to “Prevent Recurrence”.
- Prevent Recurrence: open the tab “Closed”.

Closed

Is customer communication required?

- If no : Closed - No further communication = no communication sent.
- If yes: Closed - Final Customer Communication.

If the complaint is open but without activity: the Process Owner receives a notification within 3 days.
A notification also is sent to all case teams each 6 hours (12am, 6am, 12pm and 6pm).
No! If someone manually changes the status on the "Details" page, it is required to change it back so the system can correctly works. When working on tickets related to complaints, please be careful and check the history. If you notice that one step is missing, it means that someone changed the status manually. Example: you can't just close a complaint. Steps before have to be completed.

in order to address a corrective action identified during a quality audit, we need to activate an email notification reminder to following recipients based on the **Effectiveness assessment date** specified within the complaint case.

now on Corrective implementation Tab - Implement Corrective Action, the user need to filled the **Planned Assessment Date** and **Effectiveness Auditor** to move forward on the next step **'Verify Effectiveness & Prevent Recurrence**

The flow Effectiveness Status sends an email when the complaint move to assessment stage , and, if the Assessment date is not filled after **5 days** (at the effectivenss_Days_After field), then another email is sent.

The effectivenss_Days_After is calculated using a custom metadata Case_Effectiveness_Date and the field Number of Days with the formula : Planned_Assessment_Date__c + Effectiveness_Date.Number_of_Days

The email template : Case Status Effectiveness (with email alert : Assessment date) send a reminder to the owner , the case investigator and and effectiveness Auditor

(see JIRA SCME-3021)

NCMR : Non Conformity Material Report

NCMR is not a complaint and never related to a customer . It is ony internal quality process to track Product non conformity (SpP was using obsolete DB Lotus Notes to register NCMR, other GBUs are using Gensuite or other applications).

- **Transition Project NCMR organization**
- **Demo NCMR in CRM**
- **Functional Design**

Process owner : Jason Loe (backup Andrew Liguoni)
NCMR has Status **"Open "** only during creation, status will automatically change to "**Containment", then** all statuses are changed manually by user , normally only 2 different persons are involved in this process and are part of site Quality team : originator/investigator and case manager who verifies prior to close NCMR)

Order information is entered by any user at creation but only few users having permission set can modify .

Planned Completion date : this date is used to generate an email notification the day after to case manager to proceed to verification and then closure.

Re-open NCMR : only Process owner / GBU data steward or Admin can re-open a NCMR : always transfer to process owner first or in absence to GBU data steward , Admin lite to do only if no other option.

Closure NCMR : only authorized users can close a NCMR (Permission set = "Permission to close NCMR") . There is another persmission set named "Ppermission to Edit NCMR" but that cannot Edit closed NCMRs , only open ones , must re-open NCMR prior to Edit .

There is a **NCMR dashboard** to follow activities .

CSR : Customer Service Request

A CSR is ...

- **Functional Design**

Process owner :
CSR has Status **"Open "**

TRS : Technical Request System

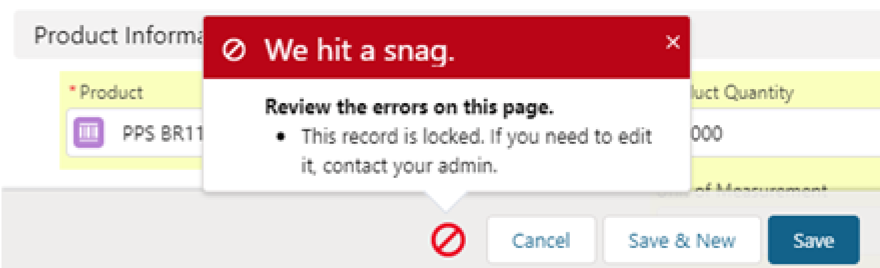
TRS is technical requests from customer.

- **Training material**

Process owner :
TRS has Status **"Open "**

Credit Note

The Account Owner or CSR (must be added in the Account Team) can create a Credit Note, but sometimes they might face the following blocking error:



This can happen because there is a pending cluster challenge that is locking the Account:

blocked URL

In this case, the best is to contact Sarah so that she can approve or reject the cluster challenge.