MSP: Sample Requests

Pre-requisite

Users that have access to Regulatory Questions tile (Customer Requests):

- Profiles = MSP Customer Community Plus or CEP Partner user
- Markets = At least one Market assigned to the contact to be able search product documentation/details and create records

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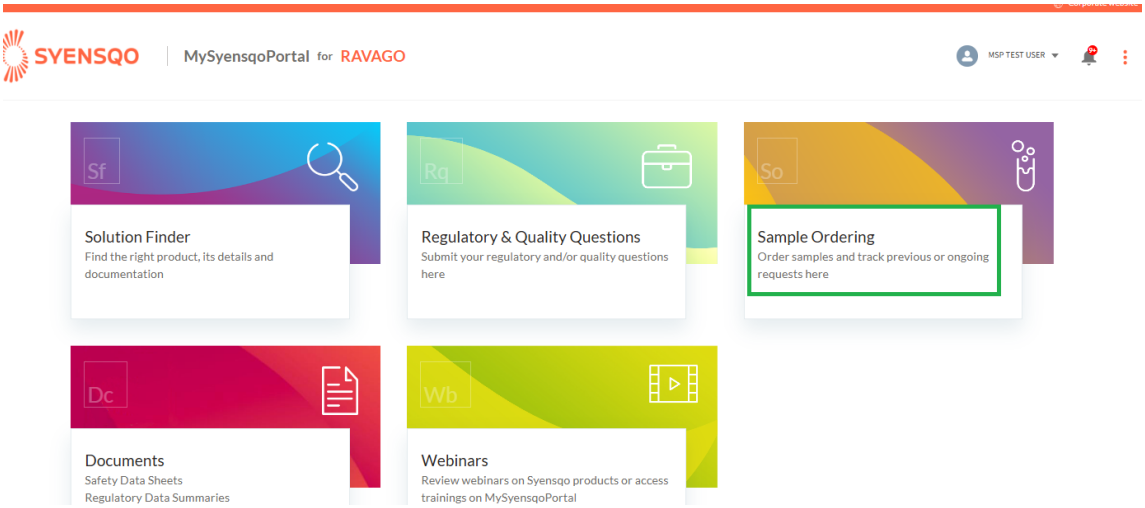
Definition

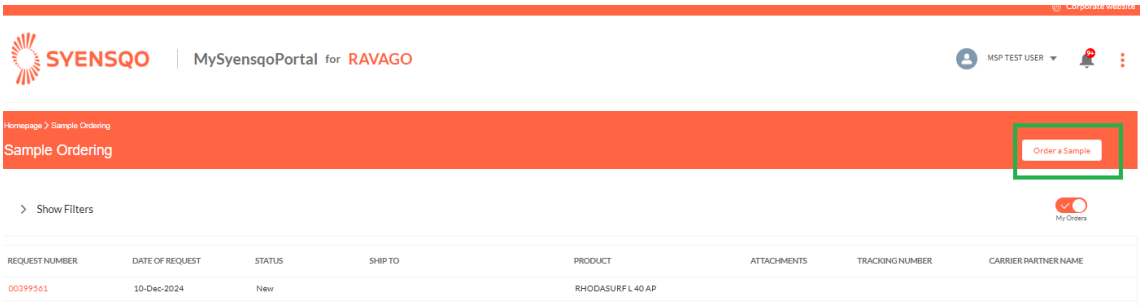
This capability allows Partners to create samples requests and see the records they have created that belong to their corporate group and were created from the portal.

Note: Customers (MSP Digital Assistant) can only search Samples created from Solution Finder while Partners (CEP Partner/MSP Customer Community Plus) can search and create Samples from both Solution Finder and Samples tile.

Accessing points

This capability can be accessed through several points in MSP detailed below :





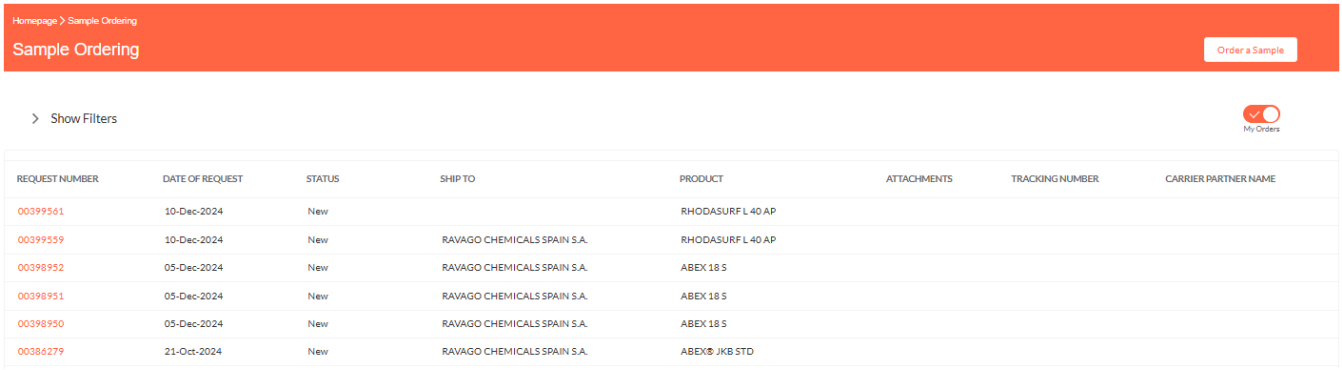
Detailed Capabilities

MSP users can access to :

- Sample requests list
- Sample request details
    - Linked to a specific sample request, comments and files attachment are available for MSP users and Syesnqo's internals to be able to discuss about the sample.

Sample request list

This list presents all open sample requests and the closed ones (if they have been closed in the current or the past year) which were created from the community and belong to the user account corporate group:



It is presented in a table with the following columns :

- Request Number
- Date of Request
- Status
- Ship To
- Product
- Attachments
- Tracking Number
- Carrier Partner Name

The list is presented in pages (10 per page)

The list can be filtered through :

- My Orders
- Request Number
- Status
- GBU
- Ship To
- Product

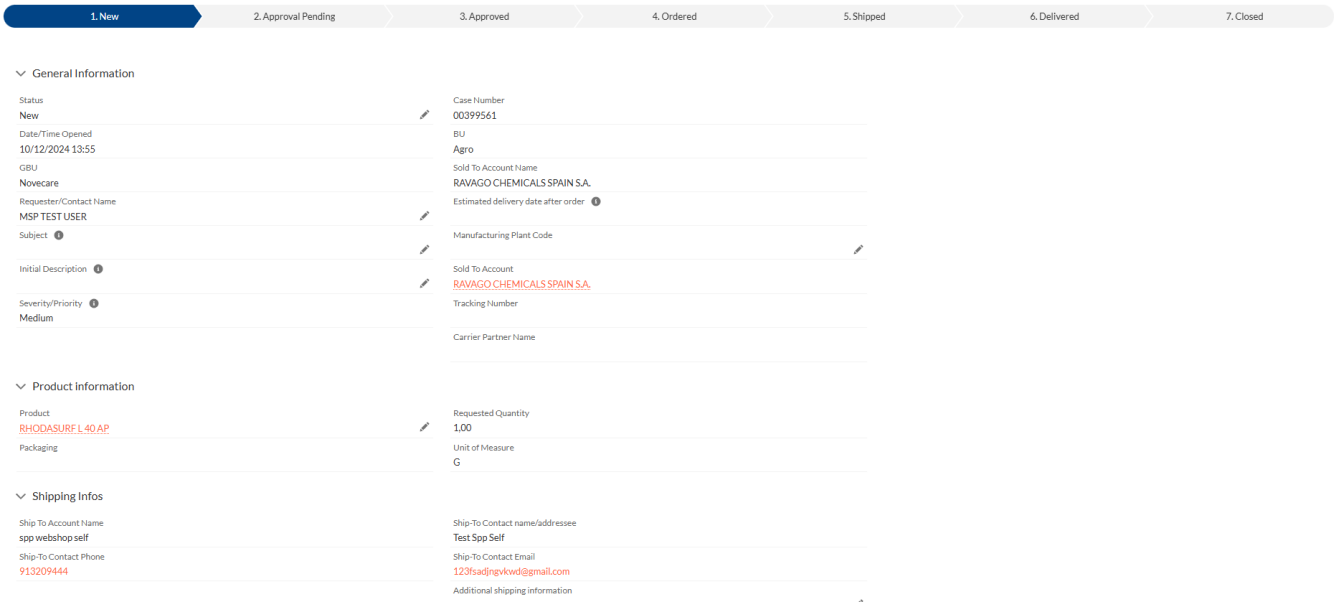
Every filter accepts multi-selections. The header of each column allows a sort.

The field Request Number is in orange. It is a link to access to details of an sample request, opening a new page.

A "Order a Sample" button allows the user to create new sample request (see Sample Request section below)

Sample Request Details

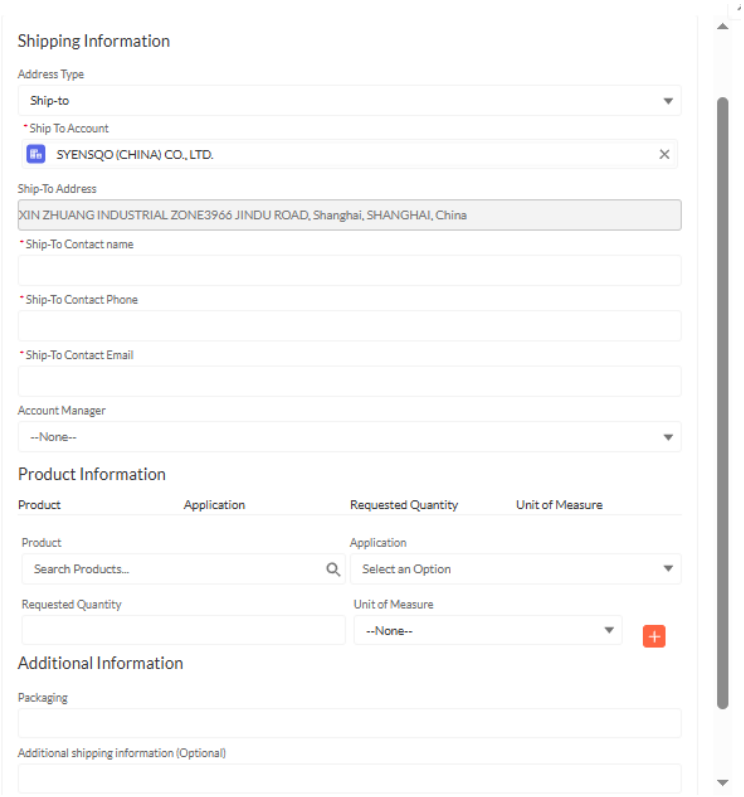
The Sample Request detail page contains the following elements :



The fields with pencil are only editable when the sample is in the New status.

Sample Request Creation

The click on "New Sample" Button on the Sample Request list page opens the following page:



Fields used for Samples creation from MSP:

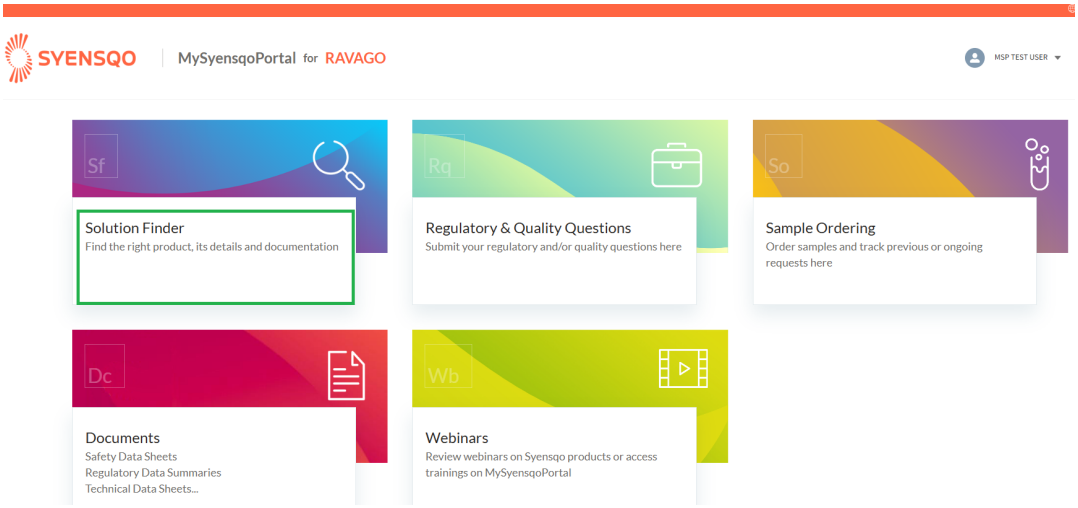
- Product *
- Application *
- Requested Quantity*
- Unit of Measure *
- Ship To Account *
- Ship To Account Address (Changes automatically according to the Account selected)

- Sold To Account (Field not available as it is automatically filled when case is created)*
- Account Manager
- Ship-To Contact name/addressee*
- Ship-To Contact Phone*
- Ship-To Contact Email*
- Packaging
- Additional shipping information

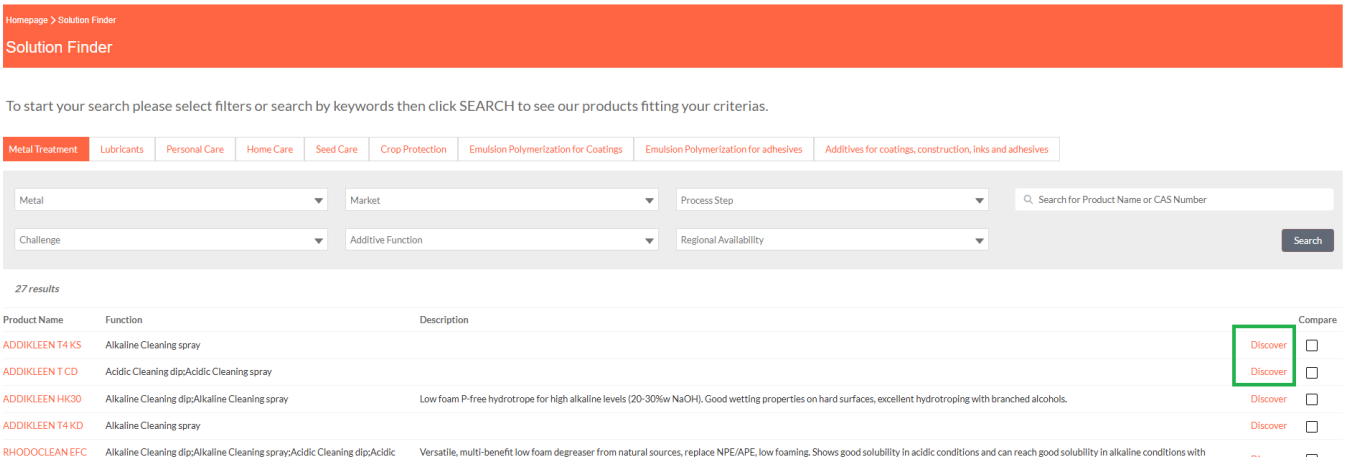
Notes:

- Clicking the + sign gives users the option to add more that one product which will create one Sample per product, this will create multiple sample records.
- ***The MSP accounts must be of Partner type 'Sold To&Ship To' because Sold to Account field in the Sample filters out 'Ship To' Partner type accounts**

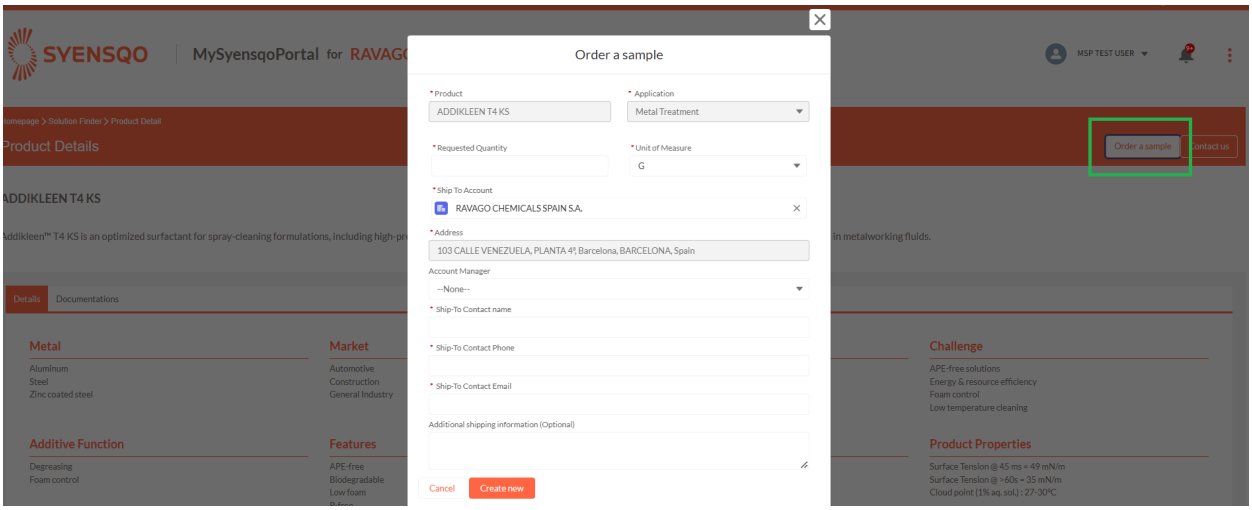
Sample Request Creation (Solution Finder)



Search for a product:



On the Product detail page there is a button 'Order a sample' to create Samples:

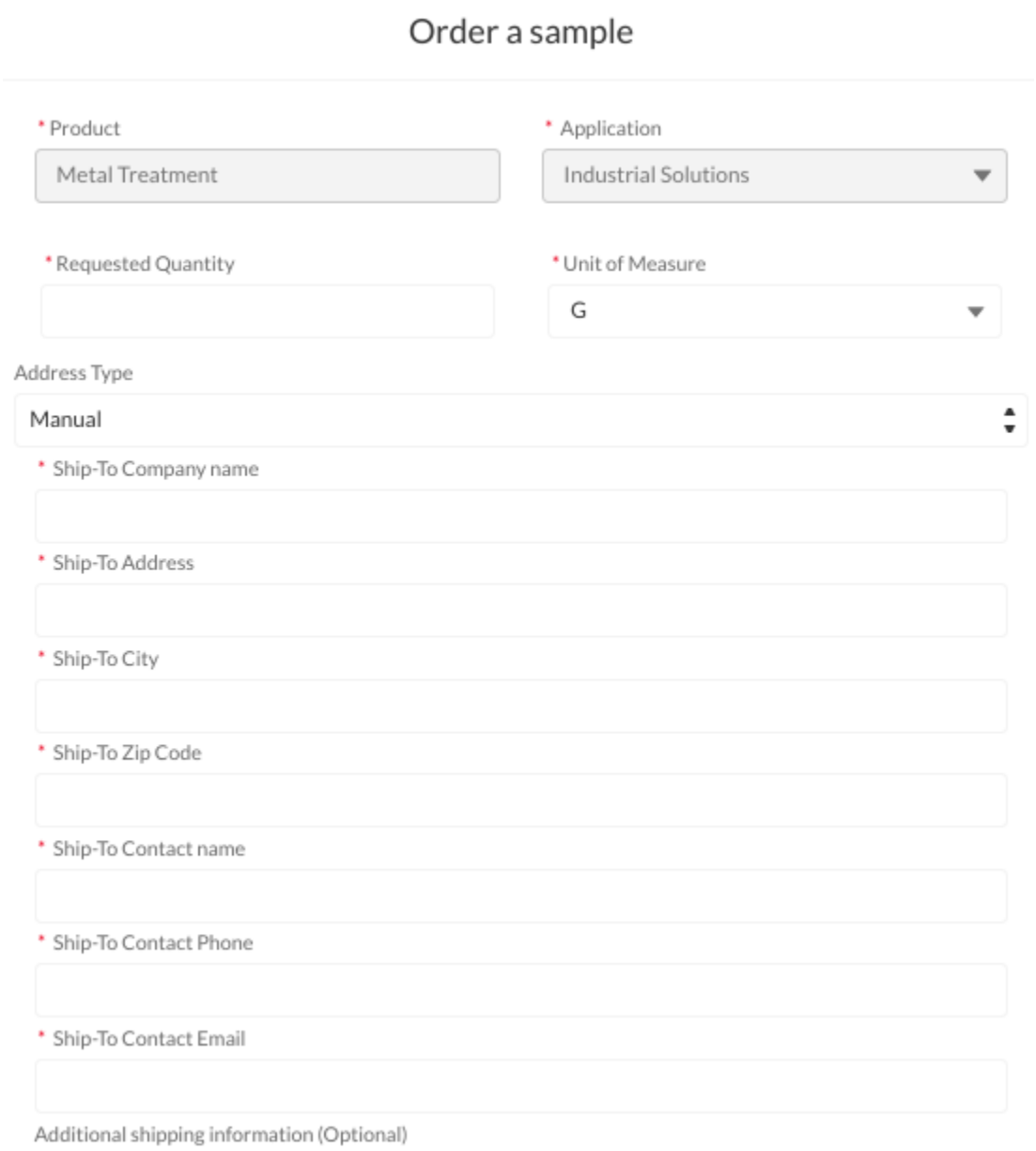


Customer fills the following fields:

- Requested Quantity*
- Unit of Measure*
- Ship to Accounts*
- Ship to Accounts Address (Changes automatically according to the Account selected)
- Ship-To Contact name*
- Ship-To Contact Phone*
- Ship-To Contact Email*
- Additional shipping information (Optional)

Sample Request Creation from APAC and NAM

Users whose account is from APAC or NAM regions have the possibility to select manual Address Type



If manual address type is selected the user has to fill in the following mandatory fields:

- Ship-To Company name
- Ship-To Address
- Ship-To City
- Ship-To Zip Code
- Ship-To Contact name
- Ship-To Contact Phone
- Ship-To Contact Email
- Additional shipping information

Once the creation validated, the sample request will be placed in a queue which can be consulted and managed by a CSR.

The CSR will have to add Sales organization information's and then submit the Sample for approval.

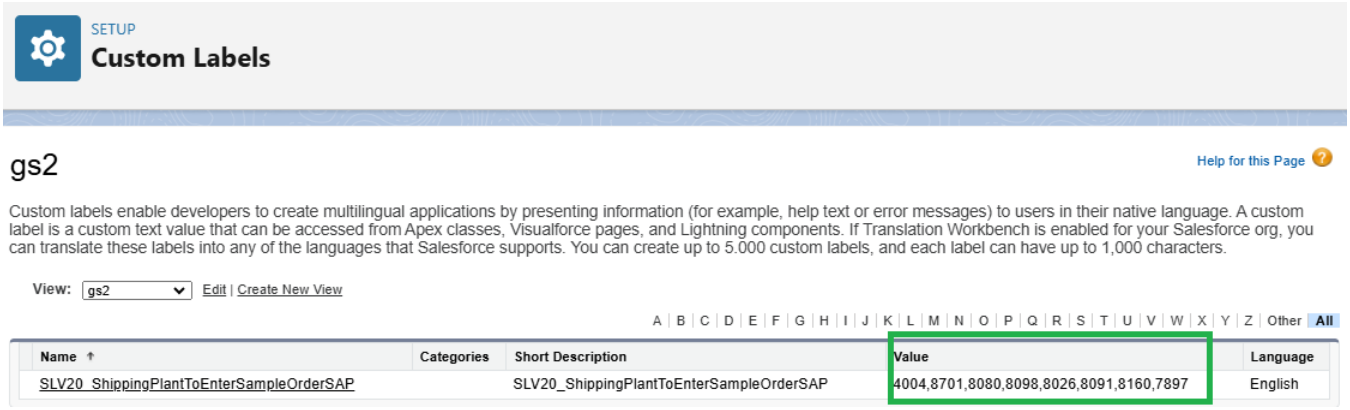
Check business rules here:

Transfer sample request created to SAP

Once a day, a batch is running. It gathers approved sample requests with SAP mandatory information (Distribution channel, Division, Sales org) and with Clamecy shipping site code and other plants in APAC (Roha, Bangpoo..) sends the grouped sample requests to SAP for orders creation. One sample request in Salesforce corresponds to one order line in SAP.

Important: Regardless of case origin if Samples are from Novecare, approved, with the correct shipping site code and correct Distribution Channel, Sales Org and Division, then the batch will create the order in SAP, if any of this criteria fails a notification is sent to the CSR with the error message and is displayed in the warning component on the Sample.

Shipping sites used in the interface:



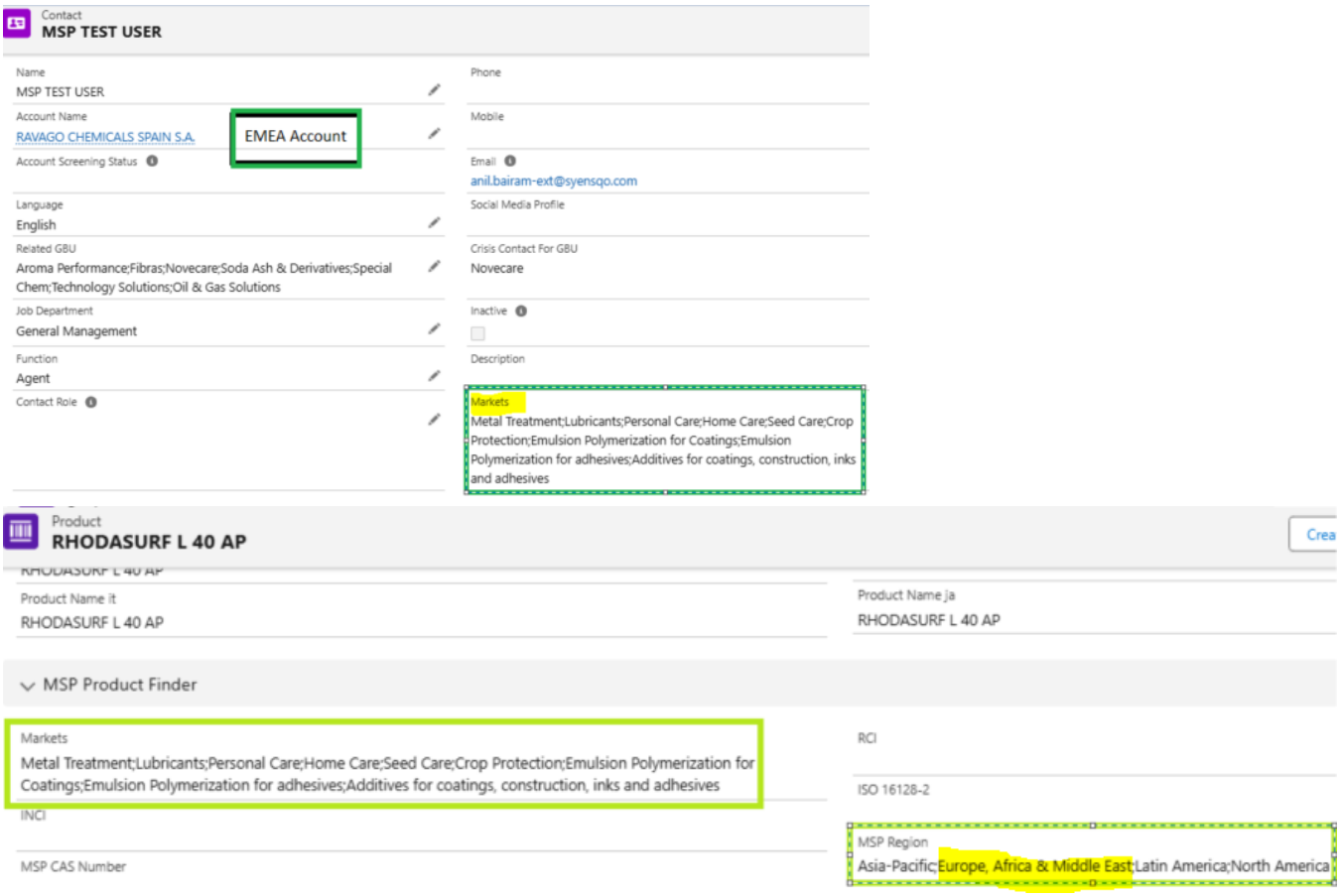
Check file Novecare Samples: SF to SAP (Tests) for more details.

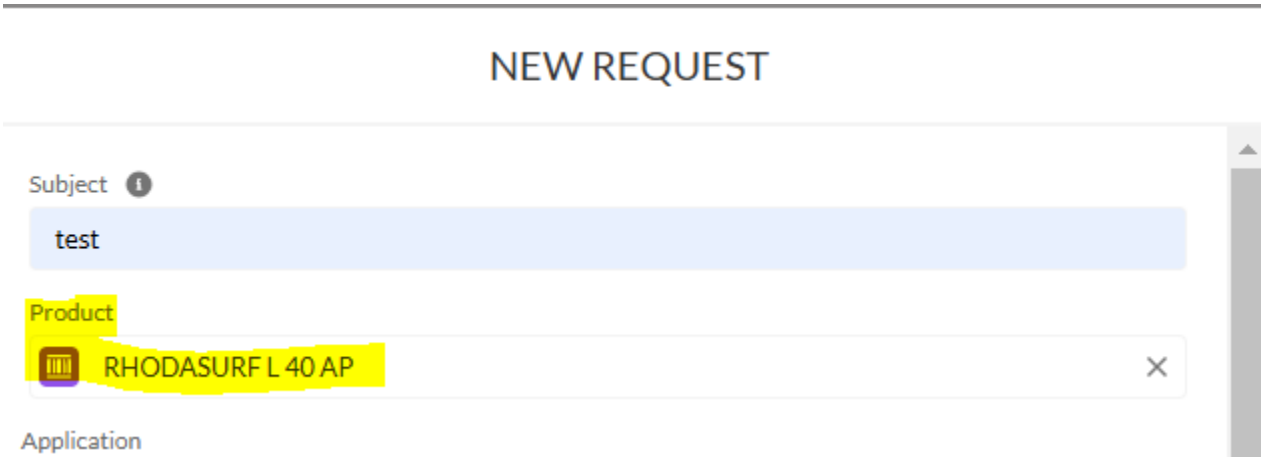
Data Model & Security

Product search visibility

Users are able to **search for products where Market is the same assigned to their contact and their account region** is included in the MSP products region.

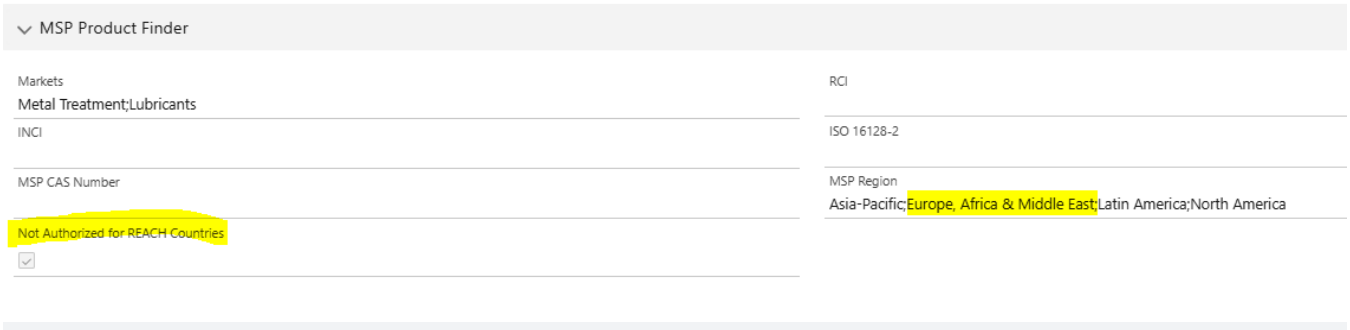
- Contact Market and Account Region = Product Market and Region

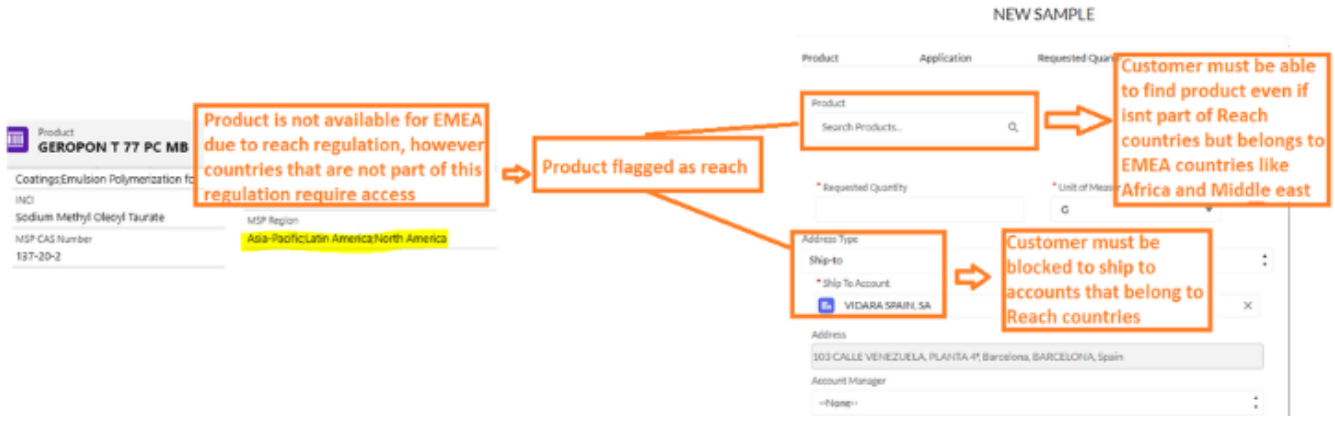




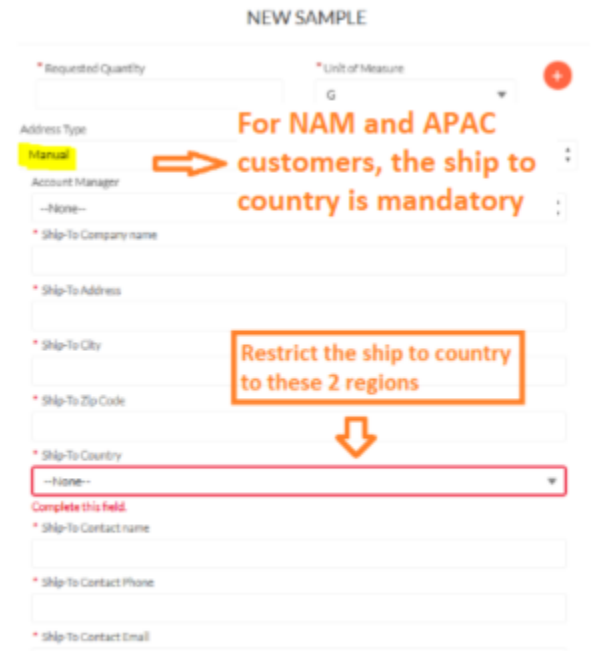
Reach Products

A customer from Middle East and Africa is able to request sample products in EMEA even if the product is not available in EU for Reach reason.
When product is flagged as 'Not Authorized for REACH Countries' reach countries cannot find the product:



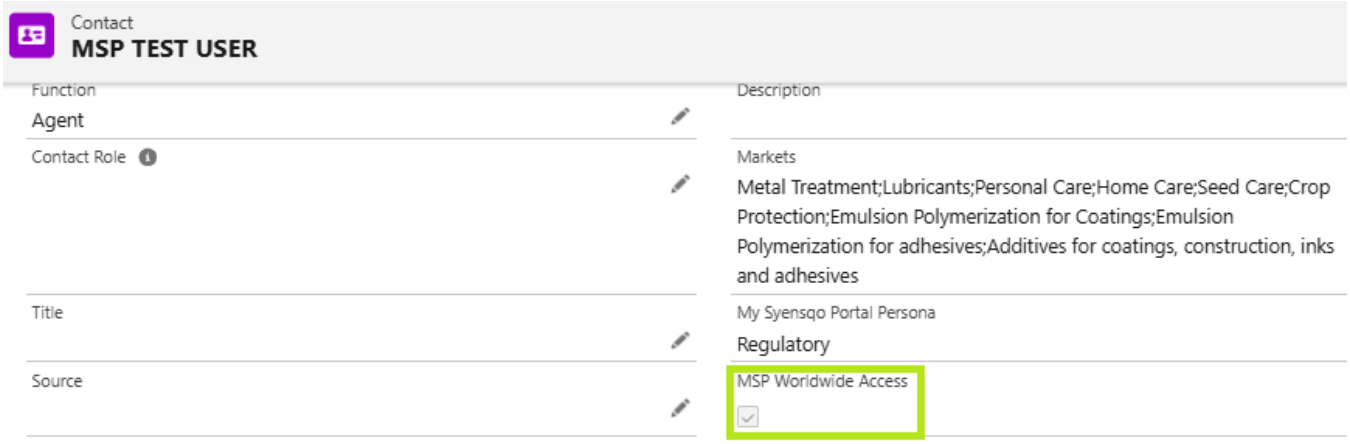


when the contact belong to NAM or APAC allows the address type to be Manual. In this case the Ship to country is restricted to only these 2 regions **t o avoid sending product that are reach to reach countries :**



Region Exception

Users with MSP Worldwide Access have access to the products of all regions as long as they have access to the Market that is assigned to the Product



Sample Shipment Restriction to Syensqo Entities in Mexico and Colombia

When the "Ship To" account is in Mexico or Colombia and the corporate group is **NOT Syensqo** we block the user from ordering samples:

Product

Search Products...

Application

Select an Option

Requested Quantity

Unit of Measure

--None--

* Ship To Account

AZELIS UK LTD

Shipping location not allowed, please contact your frontline partner.

Ship-To Address

FREDERIKSGATAN 61A 6TH FLOOR, , HELSINGFORS Colombia

Account Manager

--None--

* Ship-To Contact name

* Ship-To Contact Phone

* Ship-To Contact Email

Packaging

Additional shipping information (Optional)

Save Sample Request