MySolvayPortal

Updated: July 2022. Contact Aude.Trepier@solvay.com if you have any questions or comments.

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Purpose

This wiki aims at giving anyone within the Novecare strategy team a high level understanding of MSP to be able to manage it; solve issues & bugs; and to expand it.

The intent of this document is NOT to replicate processes or training documents already shared with our internal customers / external customers.

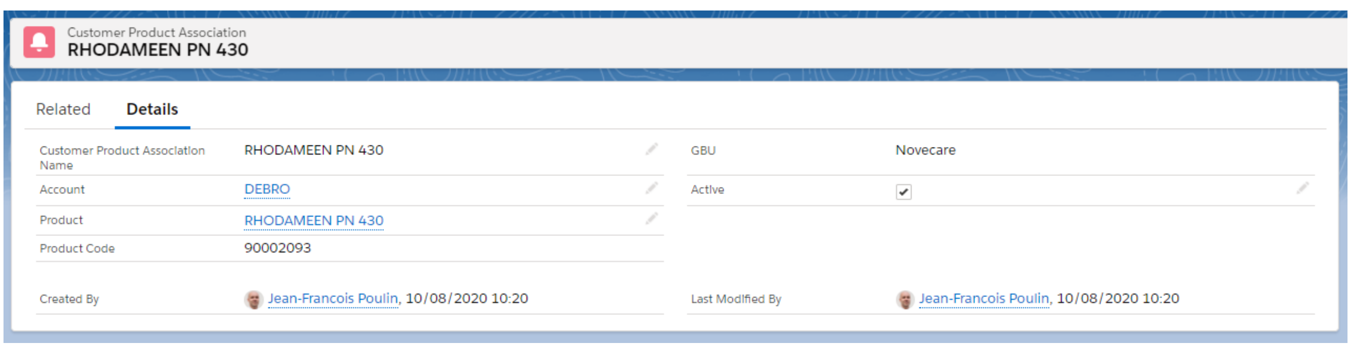
More thorough documents are available in the digital drive to understand the architecture behind MSP. These documents are sometimes referenced below.

Customer Product Association

Summary

In order to manage the visibility of products in MSP, we have created the "Customer Product Association". This concept allows us to manage what product is or isn't visible in the portal. For example, if I am an Azelis user, and Azelis doesn't purchase product X, then Product X should not be visible in the portal.

In order to give access to a product within MSP, you have to create a Customer Product Association in SFDC. These allow us to create associations between a corporate group and a product, which means a distributor can download documents for, or submit cases for any products which exist as a CPA in salesforce. See example below:



You can view the list of all existing CPAs via this report: MSP Authorized Products List

CPAs affect three things in the portal:

1. In the Customer Documents section, only documents with matching product meta data are returned in the search results. As such, distributors cannot download documents for products that are not in their CPAs. This prevents distributors from accessing regulatory documents for products they do not sell on our behalf.

2. In the Regulatory Questions and the Sample Ordering tools, where there is a product field, the CPA provides the range of options that can be searched in that field. As such, distributors cannot order a sample or submit a question for a product that is not in their CPAs. This also applies to the regulatory chatbot.
3. In the Product Finder section of the portal, users will not be able to find products that are not included in tehir CPA list.

Uploading new or updating CPAs

CPAs can be created via mass-uploads which are realised by SBS or manually when a few ad hoc products need to be added.

To perform a mass-upload, the following template must be used:

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The information necessary to perform the upload is as follows:

1. Salesforce ID Corporate Group: this information is available in the URL of the relating corporate account page. You can access it by navigating to the corporate account page in SFDC and by copying the code that appears after Account/ in the URL. See example below:

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1. Name: name of the product in analytics/SFDC (this is the product name that will appear when the user searches the product so make sure to type it accurately)
2. Corporate Group: corporate group name.
3. GBU: Novecare
4. Product Code: this code is found in analytics by selecting the product code filter.
5. Product Label: same as the product name above.
6. Material Code: this is the product level 5 sample code found in SAP. When creating the CPA you can easily find it in SFDC by searching the product name and using the code relating to the product sample material. If it doesn't exist, you can simply fill this line with 0s. However, this code is necessary if the distributor wants to order samples in EMEA. Read the sample section for more information.
7. Material Label: this is the name of the sample material that is also found in SAP. If the code doesn't exist, you can fill this field with unavailable.

Once you have completed all the required information above, you can perform the mass upload to update the CPAs and/or create new CPAs.

Uploads can be done via a Service One ticket. You can create a new tab with the name of the distributor and/or call it "New *Distributor Name* Upload" when adding new products for an existing distributor.

CPAs can also be created directly in SFDC by using the ''customer Product Association'' navigation item. In order to do this, you must first add the navigation item via the personalization menu on the homepage:

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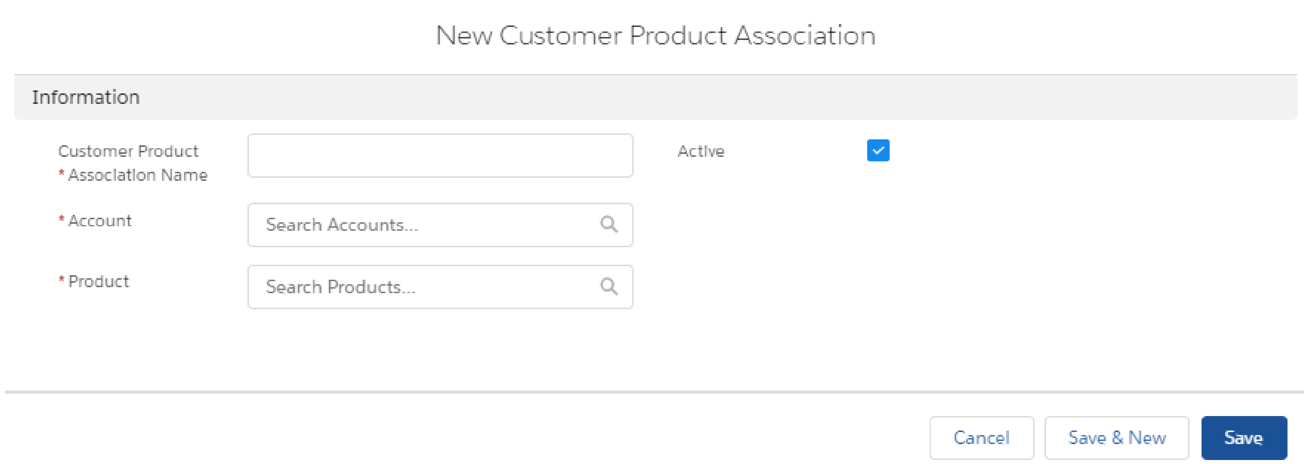
Once you are inside this application, press new to create a new ''customer-product association'' and fill in the relating form. See below.



Make sure you call the CPA by the name of the product as this is the name that will appear when the user searches a product in MSP. Link it to the right Corporate Account. The Active box is clicked by default and can be used to inactivate a CPA.

Manual CPA creation can be time consuming. It is recommended to use it only to add ad hoc products when a distributor can't find something or if a new product is created. Also please note that CPAs can be cloned. This can be an efficient way to add a new product to multiple distributor's CPAs.

Common Errors & Issues

Internal Changes to a Case Created in the Portal:

The architecture in place prevents distributors from even seeing products they shouldn't see in the portal. However, in some instances, if the CPAs are not up-to-date, the distributor might ask you to add a product to a case that is not in their CPAs.

If for example, Azelis created a Customer Request without attaching the right product, and asked you to add a product to it that wasn't in their CPA, you will get an error message in SFDC.

Solution: Create the CPA before crating a case with a product that isn't in the distributor's CPAs. If in some cases a case was created with a product that isn't part of the distriutor's CPA, you can create the CPA and refresh the case. This usually stops the product error.

Multi-GBU Products

A common source of errors in the portal is when the user picks Novecare as a GBU, but selects a product that is associated to another GBU and for which the product/corporate account association was done using the wrong GBU. In the screenshot below, the user selected a product that is both a Novecare and Coatis product.

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Solution: With the assistance of SBS you can identify the faulty CPA and modify if needed.

User Access

Summary

As mentioned above, user access is based on the CPA concept. That is, each Corporate Account has its own separate view in MSP. In other words, any Azelis user can view ALL cases submitted by his/her peers.

E.g. If I am connected as an Azelis user from the Azelis Deutschland legal entity, I can view any case that was submitted in the portal by any user who is on the corporate team of any Azelis legal entity in salesforce that has Azelis group as a corporate account. I cannot however see cases submitted by users from legal entities that do not have Azelis as a Corporate Account.

In the example below, Marco will be able to access the Azelis view in MSP, because he is attached to Azelis Deutschland, which is attached to the Azelis Corporate Group.

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All active users in MSP can be viewed via this report MSP - Active users

Creating a new user account

At the moment, access to the portal is restricted and cannot be requested automatically on the portal. As such, all accesses are created manually by SBS.

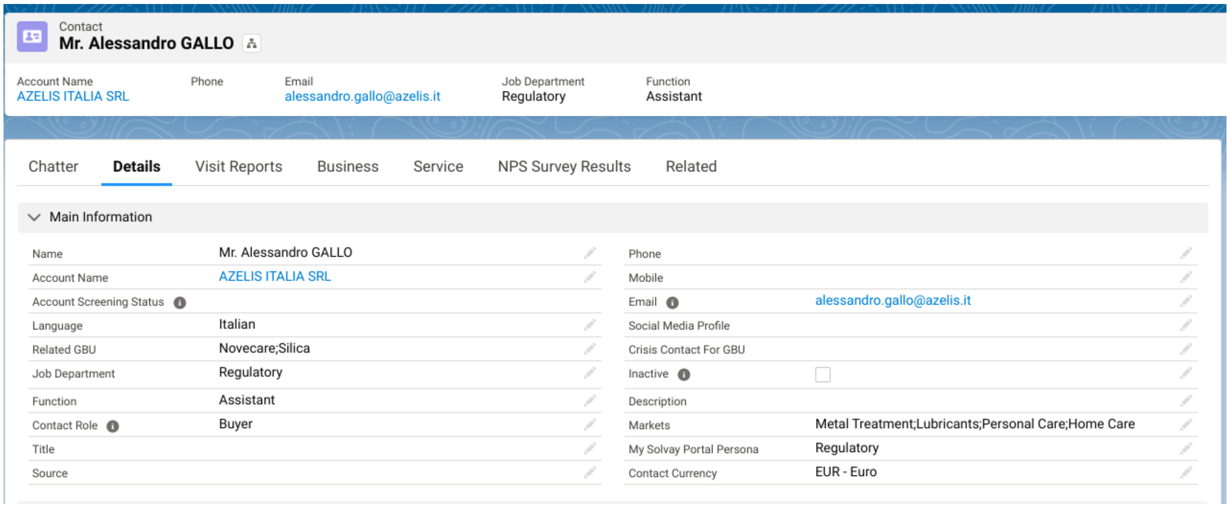
In order to be granted access rights a user must exist in SFDC as a contact. It is that existing contact that can be turned into a partner user in the portal. Therefore, the first step to create a new user is to verify whether the user exists in SFDC.

If they do, make sure their information is accurate i.e. name, email address, and that they are attached to the right account.

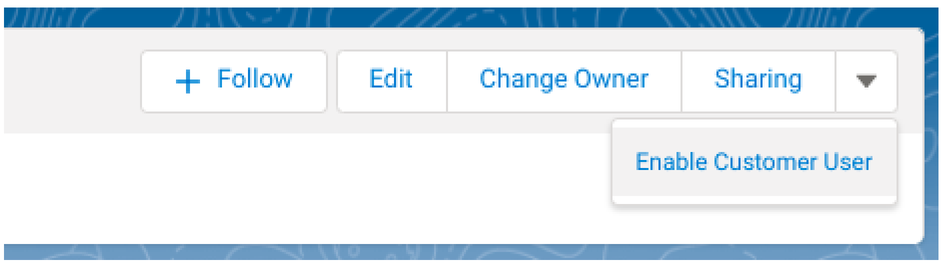
If they do no exist, you will need the following info to create a new account:

1. Their Full Name
2. Legal Entity Name / Country
3. Email address
4. Role i.e. Normal or Regulatory User
5. Information on what markets should be visible in the product finder

Once you have collected all of the above information, you can create the contact in SFDC. At creation you'll just need to put in the email name, language, entity, and to add the GBU and the role of the contact. Please not that the GBU, language, and the contact role have no impact on the user account. After creation, you will need to add two things: 1) Select the My Solvay Portal Persona: Is the user regulatory or just a distributor user. The only difference here is that regulatory users can submit regulatory questions, distributors cannot. 2) You will have to manually add markets that will be visible in the solution finder. In order to do so I recommend you speak to the marketing teams of the market. As of January 2022, only Industrial and HPC have their marekts available here. Other markets will be added in the next few months.



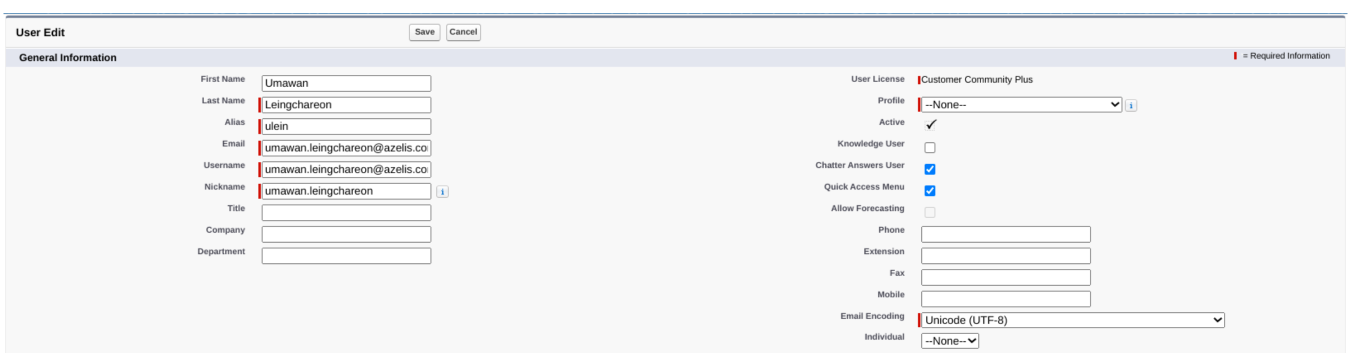
Once the contact is correctly created in SFDC. You can click the arrow on the top right of and select "Enable Customer User"

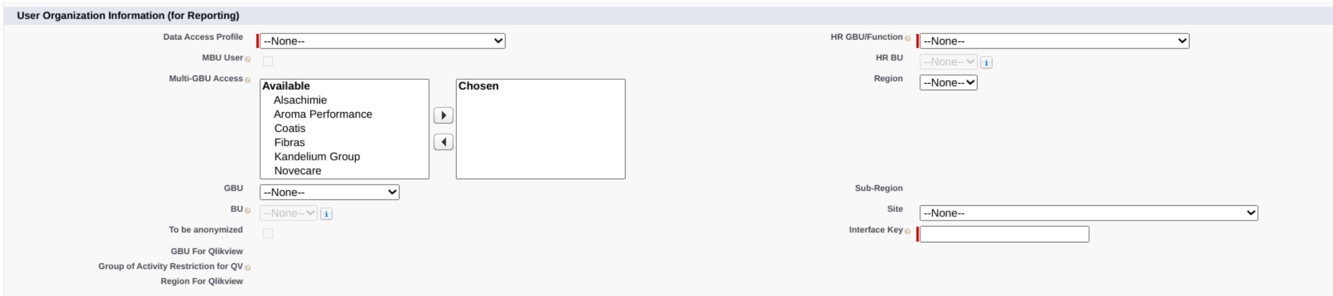


By clicking this you arrive in a new section of SFDC that will allow you to configure the account. All the fields you need to complete will be highlghted in red. Here is the list of fields you need to complete:

1. Username: in the username section you just need to add: .MSP at the end of the person's email. Please note that users cannot have their email as a username.
2. Profile: Select Customer Community Plus User. Please note that the other profile doesn't work for MSP.
3. Data Access Profile: Select "SALES"
4. Multi-GBU Access and GBU must both be set as Novecare
5. HR GBU/Function must also be set as Novecare
6. Region: Select the user's region
7. Interface Key : useless text field that MUST be completed as whatever you want. Per habit SBS is writng "dummy"

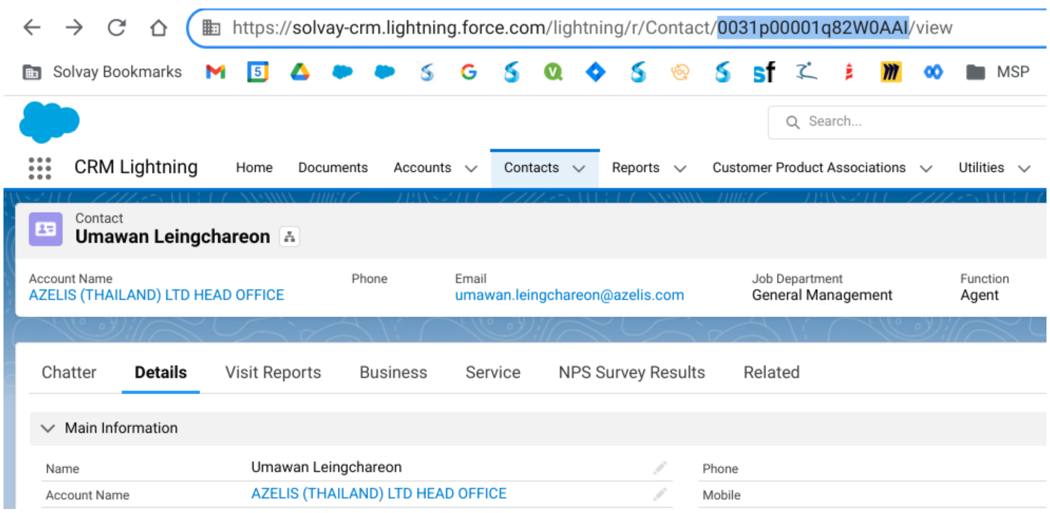
Once you're done, scroll to the bottom and press SAVE. If there are any errors the system will alert you. If not the user will receive a new user welcome email. See screenshots below for the user creation section of SFDC.





Deactivating a user account

On a monthly basis, SBS deactivates accounts that haven't been used for more than 90 days. If you need to deactivate an account, you must create a Service One ticket and specify that you need to deactivate the partner user with his/her user ID. You can retrieve the user ID on the contact's page in SFDC. See below:



License Fees

Similarly to what is available in SFDC lightning, there are two types of available licenses for partner users in MSP.

1. Partner Community Members: 14 € / Month
2. Customer Community Plus Members: 3 € / Month

There is no different between the two licenses. However, the cheaper one became available only in January 2020. We can deactivate each license and move users to the new ones, however, this can be an issue for users who have recently created a case as they will no longer be linked to it i.e. they won't receive a notification when a case they submitted is closed. Moving users should be done only when a user doesn't have any case pending in MSP.

You can see how many licenses are in use in SFDC Setup > Company Setting > Company Information > User licenses

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The Portal

Accessing the Portal

The Portal (in production) can be accessed via www.solvay.com. From the homepage, click the e-services > WebPortals > MySolvayPortal.

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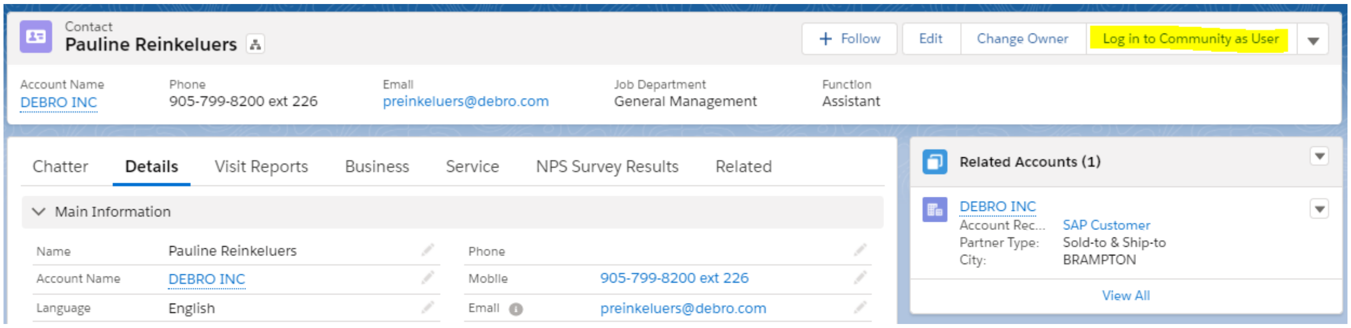
Should you need to access MSP in production, you can use the Azelis training account by contacting Jean-François Poulin, or if you have been granted access rights, you should be able to log ino as any existing user of the portal. To do this, you can navigate to a user's page in SFDC and click "Log in to Community as User". This will allow you to access the portal as a given user of any distributor.



Please note: the portal is not compatible with the Internet explorer browser. Although a user will be able to access it with this browser, they won't be able to download documents or save requests while using it. We recommend using a more recent browser version such as Microsoft Edge, Chrome, Safari, etc.

To access the UAT version of the portal, you can access the UAT version of SFDC and go to the contact page of one of the active MSP users. From there, you should be able to click ''Log in to Community as User'' (see below). This can be useful to replicate issues and errors identified by the users of a specific distributor.

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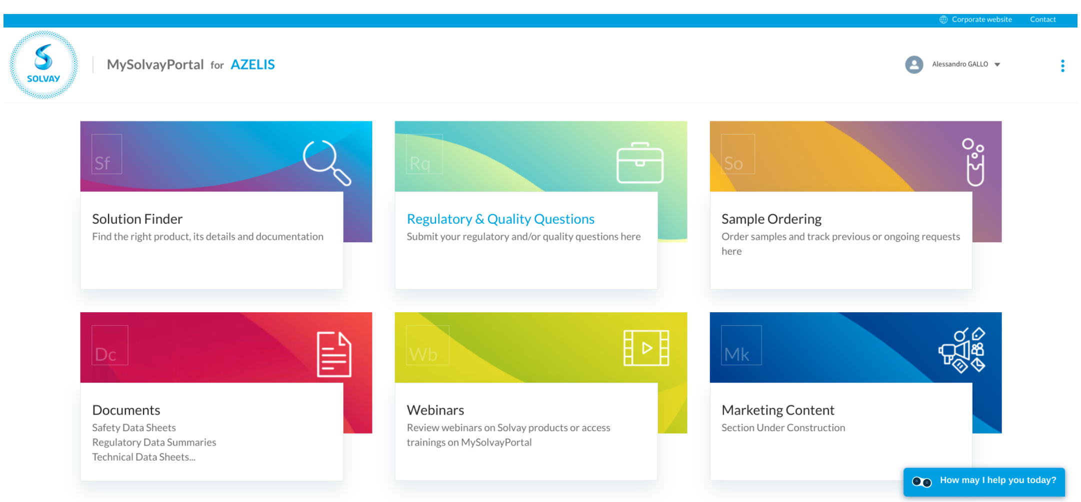
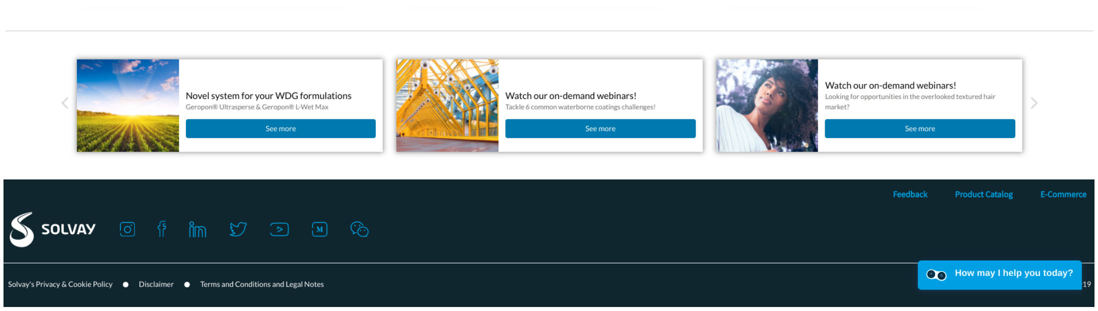
Homepage

The Homepage contains 5 main sections

1. Top Banner: contains a link to the Corporate Website (Solvay.com) and a link to the Solvay.com contact form. The use of this form is not recommended for users in case they need assistance with the portal.
2. The Solvay / MySolvayPortal Logo: is used to go to the homepage from anywhere in the platform.
3. Username: the only option available on the name is to log out. However, one's account logs out automatically after an inactive period of 2 hours.
4. The Menu on the left (•••): lists all available functionalities in the platform. These can be accessed from here, or by clicking on the tiles and/or the two blue buttons on the bottom right corner of the screen.
5. The Functionalities Tiles: These are the main features available in the platform. Click them to access their specific pages.
6. The bottom banner: contains links to Solvay policies and social media. This is in line with the Corporate Communication's standard.
7. The blue links on the bottom right corner: These links are purposely less visible than the three main tiles. The Product catalog is a link to Solvay. Com but has been left to show that this is a priority for the group. The E-Ordering button is a link to Ecommerce. If a given user email is recognized as having both a E-commerce and a MySolvayPortal account, that user can switch from MSP without having to sign back onto E-commerce.





Documents

Summary

The customer documents section is a search engine that allows users to tap directly into Solvay's document databases (Documentum and FAST). Search results are filtered to only return products that are available in the distributor's CPAs and for which the visibility is set as ''Intranet''. Confidential documents are not visible in MSP.

In order to search a document, Distributors must first pick a type of document they are looking for and filter for language or country if necessary. Then they must type the name of the product and press search. They can then download a document by pressing on the blue download arrow in the results list.

Documents available as of January 2022 are:

1. Safety Data Sheets
2. Technical Data Sheets
3. Regulatory Data Summaries
4. General Statements
5. Certificates
6. Brochures & Marketing Documents (Industrial and HPC only)

Example: Search Results

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All technical specifications for this process are documented in the MSP Customer Documents Reference Document

Manual Upload of Documents

Will be updated after AoDocs migration is completed in June 2020.

Reporting

Downloads can be monitored using the reporting capacity in SFDC. Monthly downloads can be viewed at a high level on the MSP Dashboard (see example below)

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More details on the user, document name and download date can be viewed using this report Document Downloads (see example below).

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Customer Requests (Regulatory & Quality Questions)

Summary

The Regulatory & Quality questions module in MySolvayPortal allows users to submit a question directly in SFDC via the customer request process. Questions submitted here follow the queues and approval rules in place in SFDC and are then directed to the relevant regulatory team or the quality contacts.

Answers provided in SFDC are visible in MSP and remain available to all users of the same distributor indefinitely. Both cases created by the users in MSP and cases created by Novecare for a distributor are visible within MSP.

Question Creation

In order to submit a question, users go to the R&Q question tile and click: New. This opens up a form that, after completion, generates a case in SFDC. See form below:

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After the case has been saved, the case owner (user who submitted it) should receive an email informing her/him that his case was created with all the case information. See example below:

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Unlike CRs in SFDC, users can add a product directly in this form. However, once the form has been filled out and saved, users can still perform a few actions to add important details to the case. Actions that can be performed after creation include:

1. Add additional products

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1. Add a case comment

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1. Attach a document

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Answering a Question

Once a question has been received it should fall into an approval queue as defined by each market/region. See CR approval rules in MSP queues reference file. Once it is approved, the case goes directly to the local regulatory team.

In order to answer a question, the product stewardship team must write the answer in a dedicated field ‘’External response on webportal’’ and move the case to the completed status.

This will generate an email informing the case owner (user who created the case) that an answer has been provided in the portal.

Case Comments

Case comments can be used by both parties to further communicate on a specific case. For instance if a question received isn’t clear, Novecare users can ask the case owner for more details. On the other hand, if a user isn’t satisfied with out answer, they can ask us for mode details as well.

Case comments generate an email notification to the case owner when they are created by Novecare users, and a notification to the Novecare case team when they are created by the case owner.

Attachments

Like case comments, attachments can be used by both the users and Novecare from within SFDC. That way users can, for example, attach a questionnaire, or Novecare can answer by providing a certificate. All attachments made by Novecare to a case that is visible in the portal is visible by the users.

Case Notifications

As a recap, here is the flow of email notifications for customer requests submitted in MSP:

- Case creation: email to the user and the approvers
- Case approval: email to the product stewardship team (queue owners)
- External case comments: email to the case team
- Internal case comments: email to the user
- Case reached completed status: email to the user.

Reporting on Regulatory & Quality Questions

A high level view of the source of customer requests (MSP vs non-MSP) can be viewed in the MSP dashboard in SFDC (see example below)

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You can review the cases received in MSP into more detail by using any case reports and filtering for ‘’customer requests’’ and ‘’case origin = My Solvay Portal’’. Here is a report that lists all requests received in MSP thus far

Sample Ordering

Summary

The Sample ordering module in MSP allows users to create a sample case in SFDC directly from the portal. Once a sample order is created in SFDC, it follows the business rules/queues in place for each region/market.

The sample process varies by region: in EMEA, they can be transferred directly into SAP to create orders; APAC & LATAM prepare samples directly from the information available in SFDC; in NAM, the sample process has not yet been fully rolled out in SFDC. In the future, they will be able to roll sample orders directly from SFDC to CMC.

All relevant and more technical information on the process is documented in the MSP Sample Reference Doc.

Sample Order Creation

In order to submit a question, users Sample Ordering tile and click: New. This opens up a form that, after completion, creates a case in SFDC. Sample cases coming from SFDC don’t have specific queues or approval rules. They follow the normal process.

Customer Product Association For Sample Ordering (EMEA Specific)

As you may have noticed above, the customer-product associations contain material code and label fields. This is because sample ordering in SAP is done using the product level 5 (sample material code), but we didn’t want the users to see this when searching for a product, so we had to develop an association in SFDC between the product level 4 code and the product level 5 sample code.

In other words, MSP users see a product name when they’re ordering, but behind the scene, we are recording their order using the sample material code that is used to place the order in SAP.

Knowing that all regions don’t use the sample codes in SAP e.g. NAM region most of the time doesn’t place orders in SAP, there can be some products for which a sample code doesn’t exist. In those cases, the user will be able to place the order but you will get an error message when the order rolls from SFDC to SAP. These orders should be handled manually.

Partner Accesses

In order to place an order in the portal, users must be linked to a Sold-to account as this is the account that will be used to place the order in SFDC and in SAP.

In the example below, Vanessa was unable to order because she is a contact of Ravago Chemicals Spain S.A. which is only a Ship-to.

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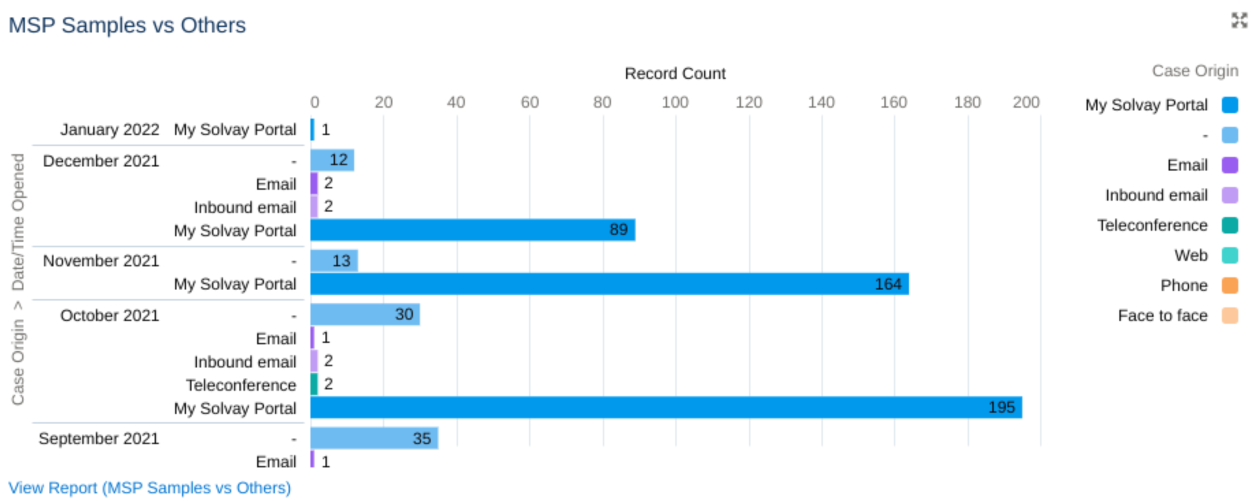
Reporting on Sample Ordering

A high level view of the sample ordering statistics can be viewed in the MSP dashboard in SFDC (see example below)



You can review the cases received in MSP into more detail by using any case reports and filtering for ''sample ordering'' and ''case origin = My Solvay Portal''.

Solution Finder

Summary

The Solution Finder was released in 2022. At first it was supposed to be tested only with the market's smaller and prospective accounts, but after a few months we decided it would be useful for distributors as well. The solution finder is a tool, a bit like the product atalog, but with more criteria selection for finding a product. This tool is developed by the marketing teams of the markets. This feature is not our responsibility.

The tool works like the rest of the portal. It is based on the selected markets on the user's contact info. And products are blocked when they are not part of the corporate group CPA. Users can use the filters to find a product, to compare it with another. Once they click a product, they can:

1. View product details
2. View formulations related to the product
3. Download any customer documents available for that product.

Webinars

The webinars application is used to display video resources for the distributors. These include webinars that were held in the past but can be rewatched here, and recorded training on how to use MSP.

Videos can be added to this page by using the utilities application in SFDC. In order to add or remove content from it, please follow the instructions below:

- Add the utilities navigation item to your homepage:

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- Click ''NEW'' to add a new item, and select ''Community Content''

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- Fill in the form by providing the following info:
  - the URL of the video you want to show
  - the URL to the picture that will appear on the banner
  - Select the ''Webinar'' collection
  - Fill in the Text Content as you would like the text under the video to appear
  - Tick the ''Is Active'' box to display or untick to remove from the list of visible webinars
  - Finally, you can select the ordering system (the order in which each video should appear on the website)

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Marketing Banner

The marketing banner in MSP is used to promote Novecare products and inform our distributors of upcoming webinars we might organize or trade shows we might attend. It appears on the right side of the homepage.

Items in banner can be added by using the utilities application in SFDC. In order to add or remove content from it, please follow the instructions below:

- Add the utilities navigation item to your homepage:

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- Click ''NEW'' to add a new item, and select ''Community Content''

blocked URL

- Fill in the form by providing the following info:
  - the URL to the website where users clicking the banner should be redirected
  - the URL to the picture that will appear on the banner
  - Select the ''Banner'' collection
  - Fill in the Text Content as you would like the text in the banner to appear
  - Select Active to display or inactive to remove from banner
  - and select the ordering system (the order in which it should appear on the website)

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If you would like to remove an old banner, you can simply find it in the utilities details page (see below), click it to open it and untick the ''Is active'' box to remove from the homepage.