FD - P7. Sample Request Management

Version Control

Version	Date	Description	Author
v.1	30.03.2017	Creation	Filipe Freitas
v.2	04.06.2018	Lightning update	Sophie Millet
v.3	20.12.2019	Samples Refactoring	Hicham Tabbak
v.4	08.02.2021	Sample Refactoring	Gonçalo Silva
v.5	13.04.2022	Approval matrix	Anne Gilles
v.6	04 Mar 2025	CCCME-9696 - Getting issue details... STATUS	MILIC-ext, Nikola

Reference Documents

folder 03. Business Rules & Queues

GBU	Business Rules and Queue Members
Aroma Performance	

Novecare	
Technology Solutions	
Oil & Gas	

0. Definitions

0.1 Sample Definition

A sample request is a case record type used to manage registration, approval, follow up and feedback about a sample product asked by a customer.

The 4 main reasons identified to create a Sample Request are:

- Quality
- Customer request
- Distribution
- Other Business purpose

0.2 Sample Components & Layout (Lightning)

Each sample is displayed with the same layout, using different components :

Component	Definition	Standard / Custom
Compact layout	Shows the most relevant information on the sample record level : • Case record type / Case number • Account (ship to) • Contact • Priority • Category / Sub-category (concatenated) • Product (level 4 usually) • Requested arrival date	Standard
Path	Highlights the process stage and guidance for sucess when expanded	Standard
Chatter, Details, Emails, Related	Standard tabs or related lists containing detailed information from the record or objects related to the record	Standard
Warnings	Gives custom warning or information about the record status according to Solvay's business rules	Custom
Case team	Lists users related to the record	Custom
Shipping information	Displays shipping address and SAP or External source information about order status	Custom

1. Functional Process

1.1 Process Overview

The Sample Management module allows to capture, log, approve, process and resolve Sample Requests. This module also enables to communicate with the Customer on progress and resolution. Additionally, in case of similar requests, a Sample Request can be cloned. The values can be edited before saving the cloned Sample or can be canceled.

1.2 Definition & use cases

Definition

There are 4 main reasons to create a Sample Request:

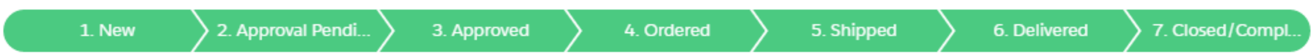
- Quality
- Customer request
- Distribution
- Business purpose

Depending on the reason it can be created from the Account (“Sold to” and “Sold to & ship to”), the Prospect, the Opportunity or the Complaint. For example when it is Distribution or Business purpose, the Sample Request should be created from the related opportunity.

Sample Request Management has 5 main steps which are as follows:

Sample Request Creation	Prompt logging of a Sample Request after reception with upload of pictures and attachments. Submitting the Sample Request for approval
Approval Process	Rules for the Approval process have been implemented by each GBU where a Sample Request can be automatically approved, be assigned to a User to approve or rejected, or be assigned to a group of Users.
Sample Request Processing	After the Sample Request is approved, it is assigned to a User, a Group of Users or a Third-Party to be processed. The Process phase can be managed on Salesforce or on other platform (SAP, Third-Party Community Portal)
Follow Up	When the process phase is managed outside Salesforce, Users are able to follow up the progressing of the Sample Request
Sample Request Closure	When the Sample has been processed, it can be closed.

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



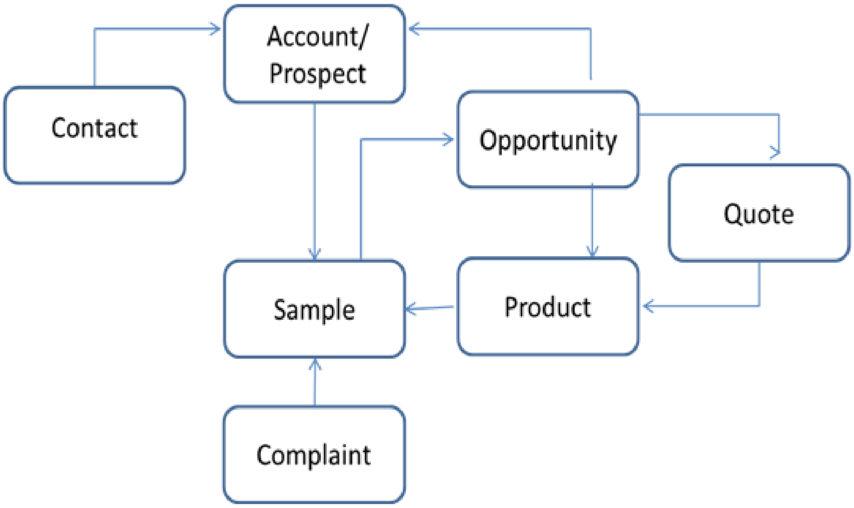
Phase	Status	Definition	Record Type
Creation	New	As soon as the Sample Request is created	Sample Request
Approval Process	Approval Process	When the Sample Request is submitted for approval	
	Approved	Once the Approver has approved the Sample Request	
	Rejected	Once the Approver has rejected the Sample Request	
Processing / Follow Up	Ordered	When a Sample order has been submitted on an external system	
	Shipped	When the Sample Request has been shipped	
	Delivered	When the Sample Request has been delivered	
Closure	Closed/Stopped	When the Sample Request is closed but the process was not completed	
	Closed	When the Sample Request is completed and closed	

Use Cases

- Registering a Sample Request
- Submit for Approval and Approve or Reject a Sample Request
- Process and Close a Sample Request

2. Data Model & security

2.1 Main objects



1. **Case**: Standard Salesforce Object to store and manage all general information regarding a Sample Request
2. **Accounts**: Standard Salesforce Object to manage the information about the Sold-to and Ship-to related with the Sample Request
3. **Contacts**: Standard Salesforce Object to manage the contact person from the Customer
4. **Case Team**: Standard Salesforce Object to manage all the actors related to the Sample Request Process and to manage accessibility to the Case

2.2 Sample Request Security Model

Who can create?	All Users are able to create a Sample Request
Who can see?	Any user can see all the Sample Requests
Who can update?	Any user can edit all the Samples Request
Who can delete?	A Sample Request cannot be deleted. Only the System Administrator (SBS) can delete a Sample Request.

3. Sample Request Custom Buttons & Features

3.1 Sample Request Assignments

Assigning a Sample Request to a User or a Group of User is to pass the responsibility to act on the Sample Request on a particular phase of the process. On Salesforce, the Sample Request 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 Business process rules**, the Sample Assignment can be performed by:

- **Manually changing the Owner** – at any time, a User with Access to a Sample 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 Sample criteria, to allow the System to automatically change the Ownership of a Sample request to a specific User or a Queue when the Status changes

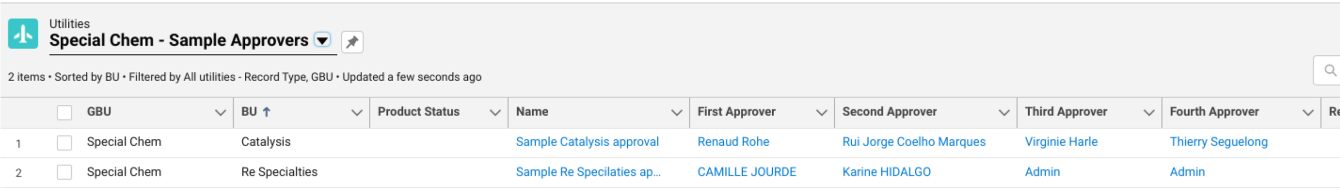
The Sample Request Actors are managed on the Case Team section on the Sample Request Layout page. The Users are added to the Case Team i) manually by a User or ii) automatically by the System when they are the new Owners of a Sample Request. When the Users are added automatically to the Case Team, they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

3.2 Sample Request Approval Process

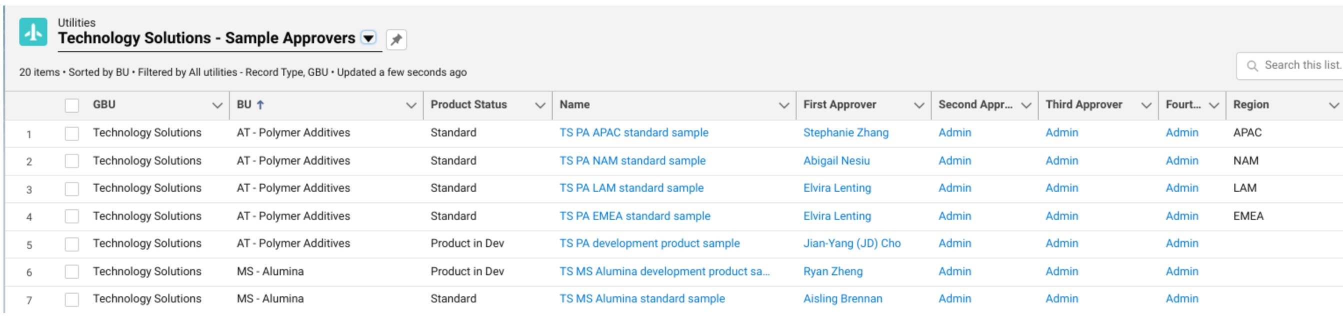
After the registration phase is completed by the User and all the information related to the Sample Request is provided (General Information, Description, Accounts and Contacts, and Attachments), the Sample Request must be manually submitted by the User to be approved by clicking on the '**Submit for Approval**' button. Based on System Rules and **GBU business Rule**s, a Sample Request can be:

- **automatically approved** - the Status will be automatically changed to **Approved** and the Sample Request will be assigned to the User or Group of Users responsible for the Processing

- **assigned to be approved** - the Status is changed to **Pending Approved** and the User or Group of Users responsible for approving the Sample Request will be notified.
- For GBU Special Chem and Technology Solutions we set up a Sample approval matrix based on Utilities object so allow GBU data steward to maintain by themselves most frequent changes in approvers (Karine Hidlago remains approver for BU catalysis defined in standard approval process because we have only 4 possible approvers in the matrix)

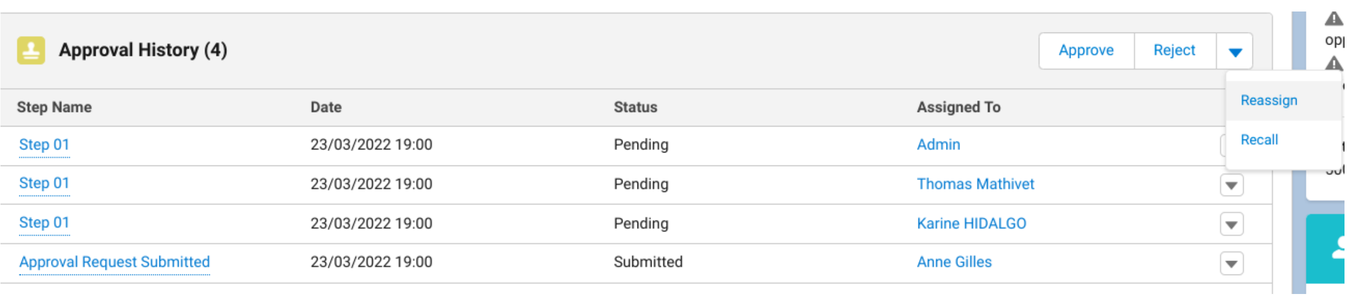

Utilities
Special Chem - Sample Approvers
2 items • Sorted by BU • Filtered by All utilities - Record Type, GBU • Updated a few seconds ago

	GBU	BU	Product Status	Name	First Approver	Second Approver	Third Approver	Fourth Approver	Re
1	Special Chem	Catalysis		Sample Catalysis approval	Renaud Rohe	Rui Jorge Coelho Marques	Virginie Harle	Thierry Seguelong	
2	Special Chem	Re Specialties		Sample Re Specilaties ap...	CAMILLE JOURDE	Karine HIDALGO	Admin	Admin	


Utilities
Technology Solutions - Sample Approvers
20 items • Sorted by BU • Filtered by All utilities - Record Type, GBU • Updated a few seconds ago

	GBU	BU	Product Status	Name	First Approver	Second Appr...	Third Approver	Fourt...	Region
1	Technology Solutions	AT - Polymer Additives	Standard	TS PA APAC standard sample	Stephanie Zhang	Admin	Admin	Admin	APAC
2	Technology Solutions	AT - Polymer Additives	Standard	TS PA NAM standard sample	Abigail Nesiu	Admin	Admin	Admin	NAM
3	Technology Solutions	AT - Polymer Additives	Standard	TS PA LAM standard sample	Elvira Lenting	Admin	Admin	Admin	LAM
4	Technology Solutions	AT - Polymer Additives	Standard	TS PA EMEA standard sample	Elvira Lenting	Admin	Admin	Admin	EMEA
5	Technology Solutions	AT - Polymer Additives	Product in Dev	TS PA development product sample	Jian-Yang (JD) Cho	Admin	Admin	Admin	
6	Technology Solutions	MS - Alumina	Product in Dev	TS MS Alumina development product sa...	Ryan Zheng	Admin	Admin	Admin	
7	Technology Solutions	MS - Alumina	Standard	TS MS Alumina standard sample	Aisling Brennan	Admin	Admin	Admin	

During the approval process, the Sample Request will be frozen until it is “Approved” or “Rejected” in status = Pending Approval . Approver or GBU data steward can Approve / reject or Reassign to another approver or Recall if need to modify the sample request.


Approval History (4)
Approve Reject
Reassign
Recall

Step Name	Date	Status	Assigned To
Step 01	23/03/2022 19:00	Pending	Admin
Step 01	23/03/2022 19:00	Pending	Thomas Mathivet
Step 01	23/03/2022 19:00	Pending	Karine HIDALGO
Approval Request Submitted	23/03/2022 19:00	Submitted	Anne Gilles

If additional information is needed before the approval of the Sample Request, it can be recalled with a comment “Additional Information Required". Once the information has been delivered, the request can be submitted for approval again.

3.3 Email notifications

An email is sent automatically to notify a group of users, triggered by :

- Changing a Sample request status, to the case team
- Approving a Sample Request, for processor and CSR
- Approving a Sample Request, for third party user
- When the sample is updated with the tracking number (Case - Sample Request - Shipping Notification flow)
- When the sample is shipped (Case - Send Communication Screen flow with the template), it's a manual communication triggered when using the "Send Communication" button. The button becomes available when the sample status is Ordered and remains available on the forwarding statuses.

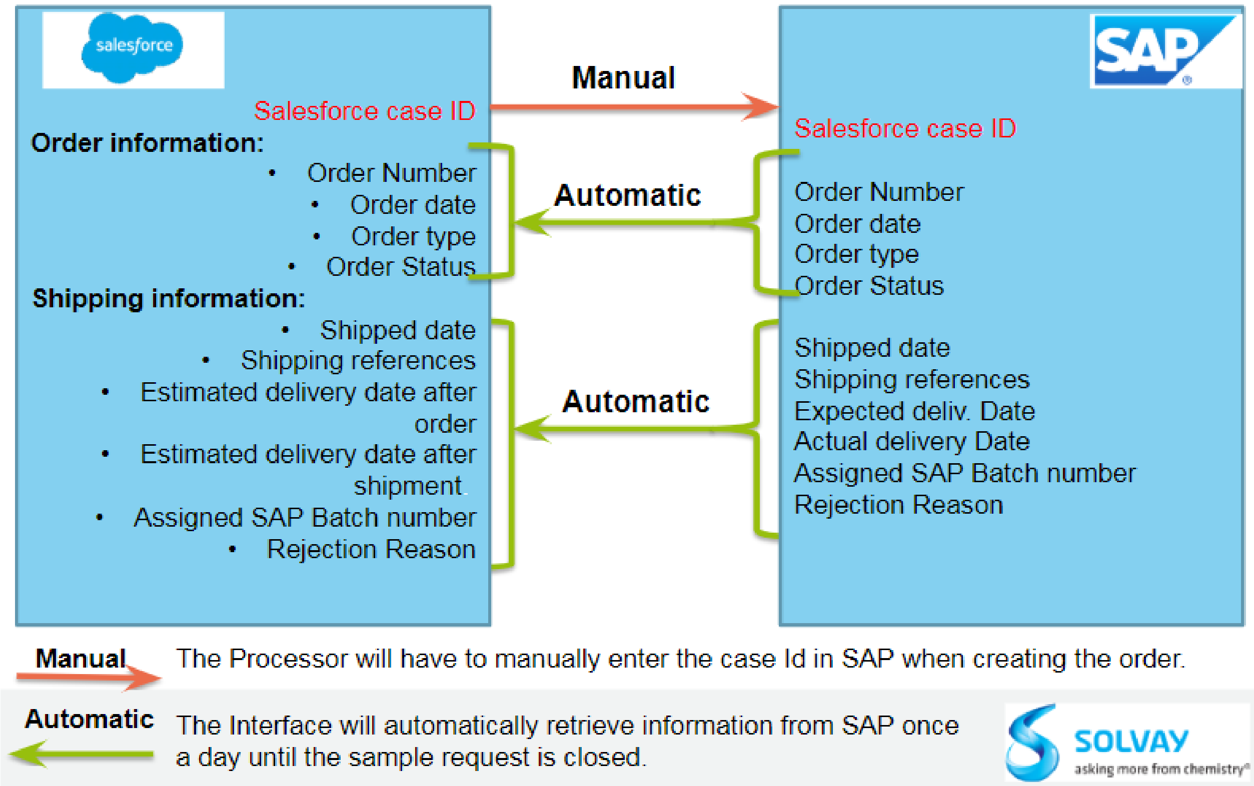
Each notification trigger have a group of Solvay Contacts (Salesforce or not Salesforce Users) that are receiving a notification email and this email is displayed in the Activity History section.

Notification mails are triggered manually, by approval rules, workflow rules, process builder or Apex code. More information in this file

This is a list of Novecare email alerts sent to all the users (internal and external):

3.4 SAP Interface

For the GBUs that manage the Sample Request on SAP by submitting a new Sample Order, an Interface has been implemented to allow users to follow up the progress of the Sample directly on Salesforce. After a Sample Request is approved and assigned to the CSR in charge of this step, the User should create the Order in SAP and add the Salesforce Case ID in the SAP form. This will allow the SAP to provide the information related to the Ordering, Shipping and Delivery to the Sample record on Salesforce.



NOVECARE - MSP community There is a specific interface for Novecare GBU that creates the Sample automatically in SAP. This Samples need to be Approved, with requested arrival date in the future and Clamecy (7512) Shipping Site.

Sample Integration SFDC/SAP Order creation

3.5 Third-Parties

3.5.1 Direct integration (CMC)

Solvay works globally with a number of Third-Party providers that manage the Processing phase of the process - Ordering, Shipping and Delivering.

The Processing phase managed by a Third-Party can be interfaced bi-directionally:

- Sending information of a new approved Sample to be processed
- Receiving information regarding the different Status of the Sample Requested

The third-party will be responsible to provide information on the following fields:

- Order date (date when the third-party receives the Sample request)
- Shipping date
- Delivery date
- Delivered volume
- Batch number
- Tracking number
- Carrier partner name

Functional design & technical infromation for Core CRM with CMC integration

CMC Core CRM Technical specifications (Technical contact at CMC: chrisdoris@chemicalmarketing.com

Process for STREM GBU Technology Solutions

3.5.2 Third party not integrated (also exist Community Portal but not used today)

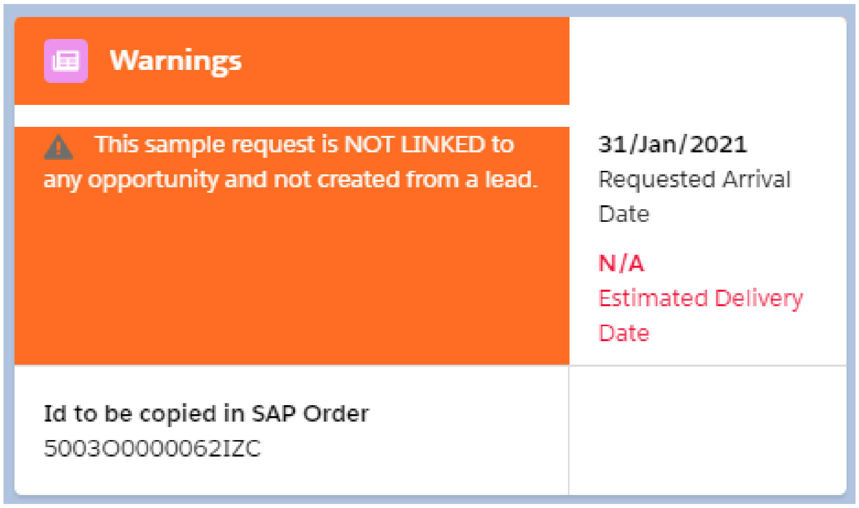
For **GBU Aroma Performance** , the Third Party is receiving a specific email notification with all details to process the sample when status = Approved, then the Customer service representative must manually maintain the shipping information in order to make status moving forward.

For the GBUs that use Third-Parties to manage the Processing Phase of the Sample Request Process, there is a Community Portal where the Third-Party can log in and manage the Sample assigned to the Third-Party directly on the Salesforce platform.

This will allow the communication between Solvay and the Third-Party much more efficient and productive. Please find here the link to the Third-Party Community Portal documentation

3.6 Warning component

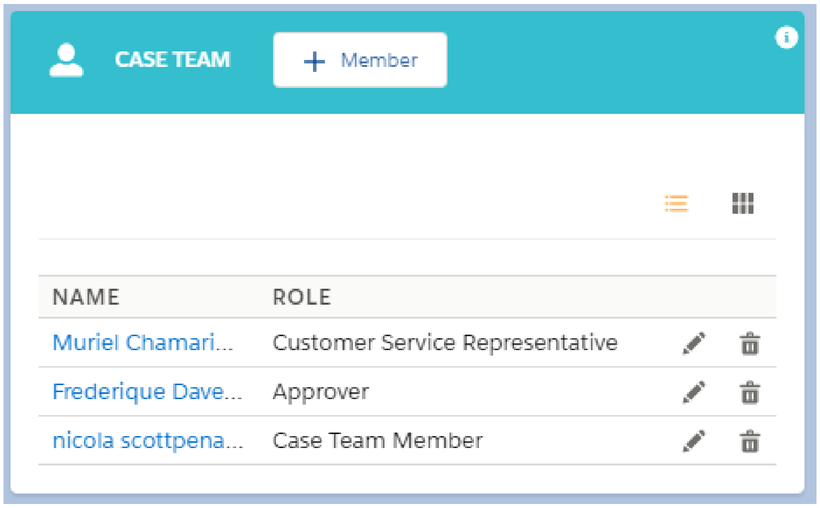
This component aims at giving custom warning and information to the user :



If there is no warning, the left-top part of the component is colored in green. If there is a warning, the left-top part of the component is colored in red. Possible warnings : • Warning if no SAP order information (=Order Number is empty) AND no manual order information (=Manual Order Date (No SAP order) is empty) • SLA: Based on Custom Setting "SLA Notification" values, display warning if the sample request is on the current status for too long. (not used yet by any GBU) • Warning if not linked to any Opportunity and not created from a Lead	If estimated delivery date > requested arrival date, the font of the field label is red If estimated delivery date <= requested arrival date, the font of the field label is black
Information: ID to be copied to SAP Order (current record ID)	Button directing to GDrive process folder

3.7 Case team

This component aims at managing the case team membership of users :

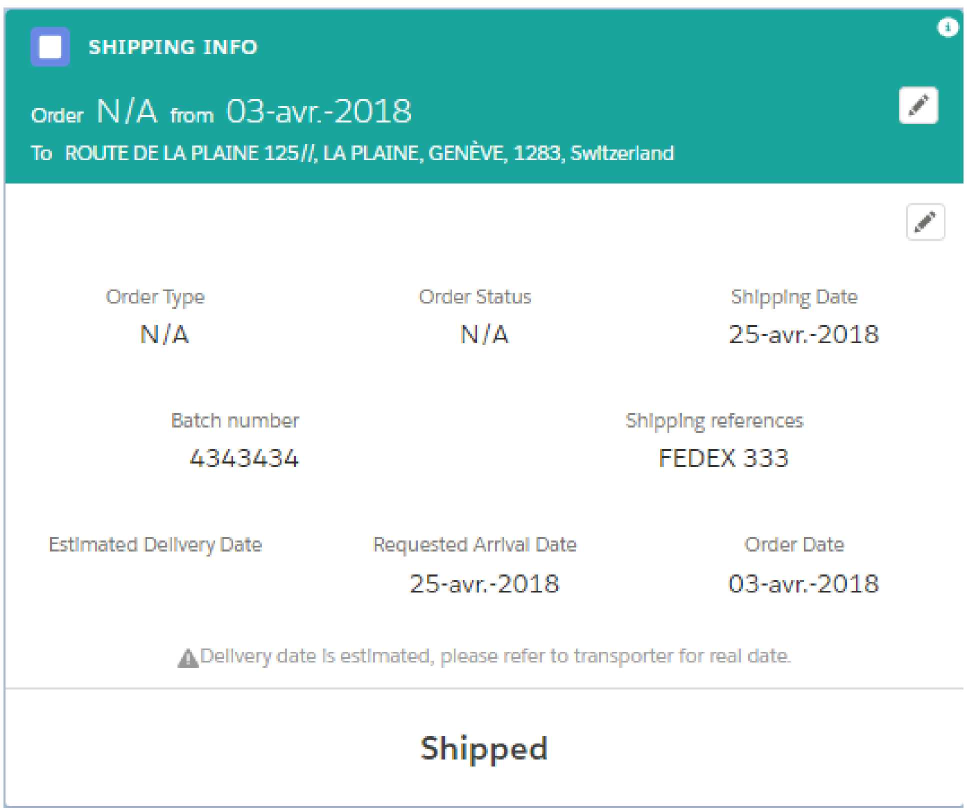


Any user accessing the case may add a new case team member to the case, using the button "+Member" on the top of the component.

Case team members are listed (Tile view - List view) with user information. When edited, only the role of the user may be changed.

3.8 Shipping information

This component aims at managing shipping address (where to deliver the sample once shipped) and order information coming from SAP/external source:



3.8.1 Shipping address

This component allows to edit the shipping address (usually entered during creation process). The address is editable until an order has been placed in SAP.

Depending on the address type, the system will prompt the user to edit only relevant fields :

- if Address type is "Ship to", editable field is: Ship to account
- if Address type is "Contact", editable fields are: Ship to account, Contact name

- if Address type is "Manual", ensure the Ship-to and the Contact Name field are blank. Editable fields are : Shipping name, Shipping address 1, Shipping address 2, Shipping city, Shipping zip code, Shipping country, Shipping State, Shipping Contact name / Address, Shipping Contact Phone, Shipping Contact Email, Additional shipping information, CSR comments

3.8.2 Order information

Order information is usually interfaced with SAP, but it could happen that information is entered manually by the user (or an external source as a 3rd party)

Fields on the component are either fields manually entered or populated by SAP: the controlling field is the "order number". Once the sample has been processed as an SAP order (order number is filled in SFDC), the order information is not editable anymore.

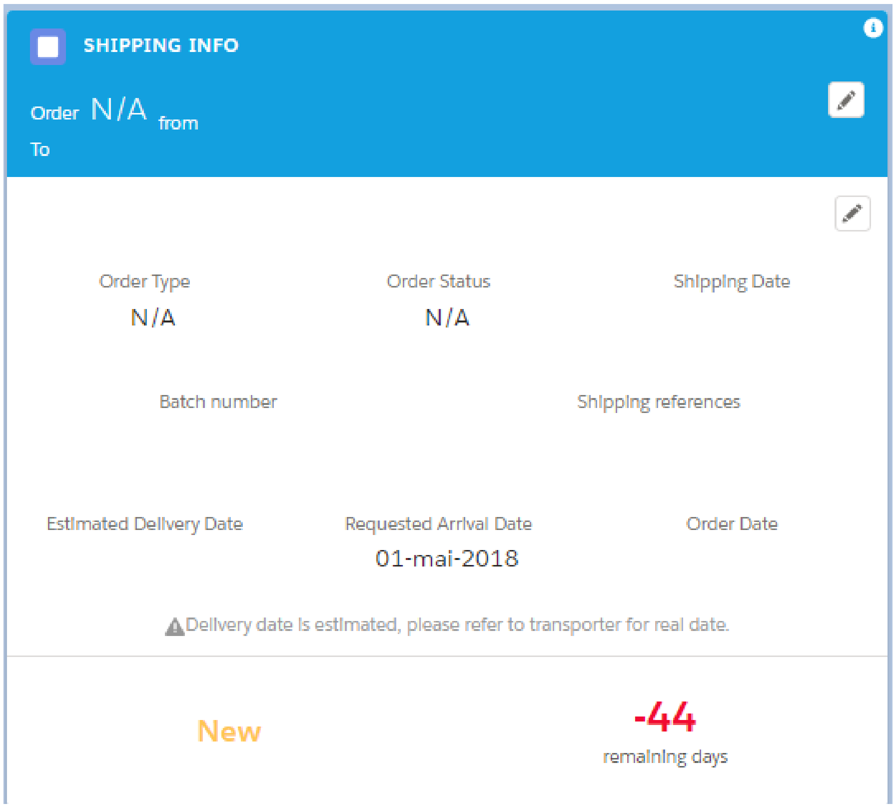
If order information is populated from SAP, there is a logo displayed on the component :

Field (displayed)	Record field name (source SAP)	Record field name (non SAP)
Order number	Order number	n.a.
Order date	Order date (SAP)	Manual Order Date (No SAP order)
Order type	Order type	n.a.
Order status	Order status	n.a.
Batch number	Assigned SAP Batch number (SAP)	Batch number
Shipping date	Shipped date (SAP)	Manual shipping date (No SAP order)
Shipping references	Shipping references (SAP)	Carrier partner name / Tracking number
Estimated Delivery Date	Estimated Delivery date after shipment (SAP) **or, if not available,** Estimated Delivery date after order (SAP)	Manual Delivery Date (No SAP)
Requested arrival date	Requested arrival date	

The color of the component header changes against the status of the sample request.

Until the order is shipped, there is an information about the number of remaining days before the requested arrival date :

- If the number of remaining days is positive, the font color is black
- If the number of remaining days is negative (delay in the sample order or shipping), the font color is red



4. Specific Rules & Automation

4.1 Sample Request Registration

In order to create a new Sample Request, on the Case tab, the user needs to click on the “New” button, select the Sample Request record type and click on “Continue”. Additionally, Sample Requests can be found in a related list on the Account page from which the user can see all existing Sample Requests that this Account is the Ship-to or the Ship-to, as well as creating a new one. When creating a Sample Request from this related list on the Account page, the record type is by default “Sample Request” and the Account is automatically populated in the Account Name field.

When the user creates a Sample Request, the information related to i) Sold-To and General information, ii) Shipping and iii) Product should be provided.

4.1.1 Case Information

Field	Definition
Sold To Account	Sold To Customer related with the Sample Request
Customer Classification	Classification of the Sold To Customer defined on the GBU Customer Segmentation. Automatically calculated by the system based on the Sold-To and GBU/BU selected
Contact /Demander	Contact from the Sold To requesting the Sample Request
Opportunity	Automatically populated if the Sample Request is created from an Opportunity
Initial Description	Description of the Sample Request
Subject	General Topic of the Sample Request
Category	Business Category related to the Sample Request.
Sub-Category	Business Sub-Category is related to the Sample Request. The values available are related to the Category Selected.
Region	Region of the Sold-to Address. Automatically calculated by the System
Sub Region	Sub Region of the Sold-to Address, based on each GBU Sub Regions. Automatically calculated by the System
Case Record Type	Type of Case. Always "Sample Request"

Id to be copied in SAP Order	Salesforce Id that Users responsible for processing the Sample Request on SAP should transport for the ERP System when creating an Order related to the Sample Request. Automatically created by the System
Case Number	Salesforce Case Number automatically created by the System
Status	Sample Request Status
Follow-up date Reminder	Date after the Closure of a Sample Request when a Task will be automatically created for the User to remind that a Business Follow Up with the Customer should be done
Priority	Business Priority with which the Sample Request should be processed (High, Medium, Low)
GBU	GBU related to the Sample Request
BU	BU related to the Sample Request and to the GBU selected
Date/Time Opened	Time that the Sample Request has been created on the System. Automatically populated by the System
Case Owner	User (Solvay or Third-Party User) or Group of Users responsible to act on the Sample Request on a given Type.
CSR	Solvay User that should be responsible for the processing of the Sample Request
Account Manager	Solvay User that is the Account Manager
Visibility	This field is visible on the Sample Request as read-only The system automatically copies the Visibility from the related opportunity

4.1.2 Shipping Information

When creating a Sample Request, the information related to where the Sample should be shipped is mandatory. There are three types of addresses that can be provided when registering a Sample on the System:

1. Ship-to Address: the Sample Request will be shipped to the address of the Ship-to selected
2. Contact Address: the Sample Request will be shipped to the address of the Contact selected
3. Manual Address: the Sample Request will be shipped to an address provided directly on the Sample Requests that are not related to any Ship-to or Contact register on the System

Field	Definition
Address Type	Type of Address to where the Sample Request should be shipped: Ship-To, Contact, or Manual
Ship To Account	Ship-To Customer to where the Sample should be shipped. Mandatory if the Type of Address selected is Ship-To or Contact. Must be empty if the Type of Address selected is Manual.
Contact	Ship-To Contact that should be responsible for receiving the Sample Request. Mandatory if the Type of Address selected is Ship-To or Contact. Must be empty if the Type of Address selected is Manual.
Shipping name	Name of the Entity to whom the Sample Request should be shipped if the Address Type is Manual. Mandatory if the Type of Address selected is Manual. Must be empty if the Type of Address selected is Ship-To or Contact.
Shipping Address fields	Address to where the Sample Request should be shipped if the Address Type is Manual. Mandatory if the Type of Address selected is Manual. Must be empty if the Type of Address selected is Ship-To or Contact.
Shipping Contact name	Contact that should be responsible for receiving the Sample Request if the Address Type is Manual. Mandatory if the Type of Address selected is Manual. Must be empty if the Type of Address selected is Ship-To or Contact.
Additional shipping information	Additional Information related to the Shipping
CSR Comments	Additional Comments from the CSR

4.1.3 Product Information

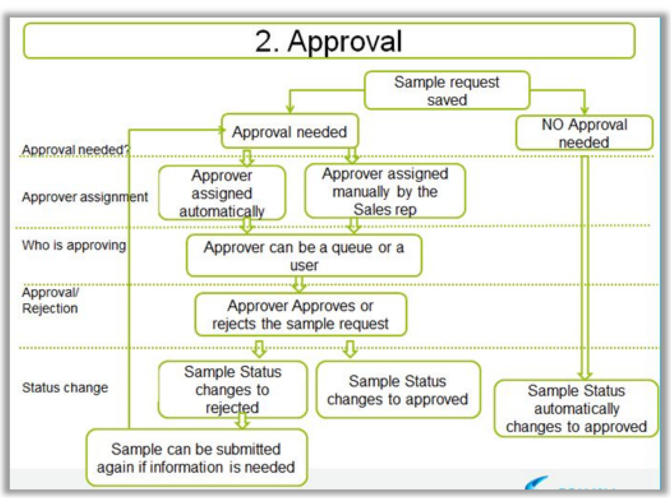
When creating a Sample Request, the information of the Product related to the Sample is mandatory. The main information required is the Product Level 4 or Level 5 related to the Sample Request. For situations that the Product is not yet created on the Product Catalogue, Users will be able to select a GBU Dummy Product and will need to provide a Product Label to identify the Product.

A sample request is linked to only one product (possibility to clone a sample request if multiple products are requested).

Field	Definition
Product	Product Level 4 or Level 5 from the Salesforce Product Catalogue. The products available are filtered by the GBU selected
Product Label	Product Label mandatory in case the Product select is a Dummy or a Product in Development
Packaging	Type of Packaging of the Sample Request
Requested arrival date	Date that was requested by the Customer to receive the Sample Request
Requested Volume	Sample Requested Volume
Unit of Measure	Sample Requested Volume Unit of Measure
Shipping Site Code	Plant that should ship the Goods
Manufacturing Plant	Plant that should manufacture the Goods
Batch number requested	Number of the Batch request
Product comments /specification	Details about the Product and Product Specification
Third-Party	Third-Party Account that should be responsible by the Processing Phase
Third-Party Contact	Contact from the Third-Party Account that should be responsible by the Processing Phase. Automatically populated if the Third-Party selected only has one Contact registered.
Free of charge	A checkbox indicating that the Sample should not be charged to the Customer. Is true by default.
Pricing comments	Comments regarding the pricing of the Sample Request
Case Currency	Case Currency. By default, the Currency of the User logged in.
Sample Unit Price	Unit Selling Price
Export sample	Checkbox indicates that the Sample is for exporting
Shipping Cost	Costs related to the Shipping of the Sample

4.2 Approval Process

As detailed in the Approval Process section above, users must at all times submit manually a Sample Request for approval after all the relevant information is provided regarding the Sample Request.



When an approval is requested by the GBU the status is changed to **Pending Approval** and the User or Group of Users responsible for the approval are notified. When the Sample Request is approved, the status is changed to **Approved**.

4.3 Process/Follow Up the Sample Request

Once the Sample Request is approved, it should be assigned to the Users or group of Users responsible for processing, meaning Ordering, Shipping and Delivery a Sample Request. This assignment can be done i) automatically by the System based on each GBU rules or ii) manually by the Approver if there is no rules implemented. For the Cases that the rules have been implemented, there are three possibilities of assignment of the Sample Request to be processed:

1. CSR: the CSR User selected on the creation of the Sample Request will be responsible for processing the Sample. The CSR can manage the progress directly on Salesforce or registering an Order in SAP and follow up the progress in Salesforce.*
2. Plants: for some GBUs, the Sample Request are automatically assigned to a Plant Team based on the Plant selected on the registration of the Sample Request
3. Third-Party User: for the GBUs that have onboarding a Third-Party to the Sample Third-Party Community Portal, the Sample Request will be automatically assigned to the Third-Party User that will be able to manage the progress directly on the portal

*If the Sample Request is processed by a Third Party that has not been onboarded on the Sample Community Portal, the CSR of the sample will manually update CRM with Shipping and Delivery information taken from the 3rd party website as it is done today.

In order to manage the progress of a Sample Request, different Users will be using different sections of Sample Request Process:

1. For GBUs not using SAP to manage Orders related to Sample Request, the User responsible for the Processing should manually provide the information on the **Other order and Shipping information** section. On this section, the User should provide the Order, Shipping and Delivery Dates and can provide more information related to logistics.
2. For GBUs using SAP to manage Orders, the information on the SAP Shipping information section will be automatically populated from SAP once the Order is created on the ERP System with the Sample Salesforce ID.
3. For GBUs using Third-Party that has been onboarded on the Sample Portal, the Third-Party users will be able to manage the Order, Shipping and Delivery Dates directly on the Portal and that information will be automatically populated on the **Other order and Shipping information** section.

4.3.1 Other order and Shipping information

Section to be manually filled in when there is no Sample Order manage in SAP or automatically field in when the Sample should be managed in the Third-Party Community Portal

Field	Definition
Manual Order Date (No SAP order)	Date that the Sample Request was ordered
Manual Shipping Date (No SAP order)	Date that the Sample Request was shipped
Manual Delivery Date (No SAP order)	Date that the Sample Request was delivered. This date can be real or estimated based on each GBU process
Real delivered volume	The Sample Volume that was delivered to the Customer
Batch Number	Batch Number
Tracking Number	Tracking Number from the Logistic Company

4.3.2 SAP Shipping information

Section to be automatically filled in when there is a Sample Order manage in SAP.

Field	Definition
Order Number	SAP Order Number
Order Type	Type of Order
Order Date	Date that the Sample Request was ordered
Order Status	SAP Order Status
Shipping References	Shipping References
Shipped Date	Date that the Sample Request was shipped
Assigned SAP Batch number	Assigned SAP Batch number
Estimated delivery date after order	Estimated date that the Sample Request was delivered. Information available after the Sample was ordered

Estimated delivery date after shipment	Estimated date that the Sample Request was delivered. Information available after the Sample was shipped

On the Processing/Follow Up Phase, the Status are automatically changed by the System based on the Dates provided either on the Other order and Shipping information section or the SAP Shipping information section:

- Status is automatically changed to **Ordered** on the date selected on the Manual Order Date (No SAP order) or Order Date fields
- Status is automatically changed to **Shipped** on the date selected on the Manual Shipping Date (No SAP order) or Shipped Date fields
- Status is automatically changed to **Delivered** on the date selected on the Manual Delivery Date (No SAP order) or Estimated delivery date after order fields

4.4 Closure

Once the sample request is processed it should be closed in order to avoid having open requests in the reports and list views. Samples that were managed by a Third-Party on the Sample Community Portal are assigned to the CSR automatically after the Status is changed to Delivered for Closing.

There are two processes to Close a Sample Request:

- The sample request can be closed automatically once customer feedback has been entered and the field Approved by Customer is populated. In this case and once the sample request is closed no field can be updated anymore. The only action available is to clone the sample request.
- The sample request can be closed manually if the user knows that the customer feedback will be entered after a while. In that case, the sample request will be closed but customer feedback fields only will be editable after closure.
    - As manual closure is allowed and customer feedback is not mandatory, we need to make sure that the Sample request is followed up. To do so, a check box "to be followed" has been created and defaulted to "check". It will be unchecked by CSR if needed. But if it is checked and closed then an automatic task will be created and assigned to the owner of the creator request to remind him that he has to complete the customer feedback

Any User assigned to the case team can close the Sample Request by clicking on the "Close" button. This redirects the User to the closure page where the status will be by default **Close/Completed**, meaning that the Sample Request was completed. If the Sample Request was Rejected or has not completed the process, the Status can be changed to **Closed/Stopped**.

For Some GBU an **Qualtrics Automatic Sample survey** (GBUs using this survey : Novceare, Peroxides, Soda Ash) is sent to the Customer requesting his feedback. In this situation, the sample will be Closed once the Customer has answered the Survey, or 2 months have passed since the Sample was delivered. See more in Automatic closure section (more details in Jira CCCME-1325 Process builder SLV10_QualtricsManagement)

4.4.1 Close Case

This section groups all the fields related to the Closure phase

Field	Definition
Status	Sample Request Status
Approved By Customer	Indicates if the Customer has approved the Sample Received
Reason not Approved	If the Sample was not approved by the Customer, the User should identify the reason.
Follow Up Date Reminder	Date when a Follow Up Task should be created and assigned to the User

Appendix

Categories and Sub-Categories

Category	Sub-Category
Quality	Change in formula
	Change production site
	Concession form (quality pbs)
	For chemicals external ref analytic by authority

Customer Request	Complaint
	Industrial test
	Internal quality customer process
	MOQ derogation
	On demand reference sample
	University & R&D center
	R&D test
	Pre-qualification
Distributor	-
Opportunity	New customer
	New end use
	New product

Follow Up Date Reminder	Date when a Follow Up Task should be created and assigned to the User

==

2019 : NOVECARE sample process simplified for SAP order creation more automated.

Link to User Training document sample process

Access to the simplified Layout:

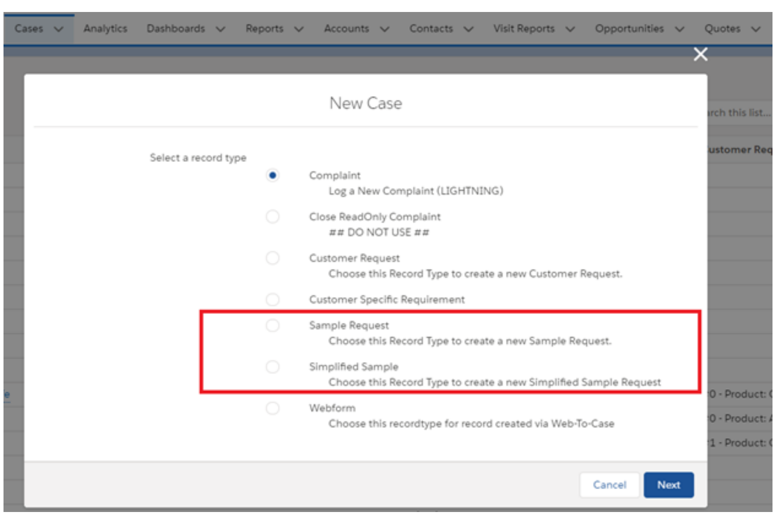
Very important all users will see both record types: Sample Request and Simplified Sample

The access to the simplified layout is based on the field multi GBU on user object

If the user has only one GBU other than Novecare, the user will be automatically redirected to the standard layout, even if he clicks on the simplified sample.

if the user has in multi GBU field only Novecare, we display automatically the simplified layout for Novecare.

If the user has multi GBU includes Novecare and other GBU, then we display pop up to select the GBU layout.



Request Entry:

Every request of sample for a commercial product should be recorded in SFDC.

- By account manager when he/she is the one getting the request from customer.

-From an opportunity

-Cloning one existing sample request (re-sampling, or when you need to send different samples to the same contact.

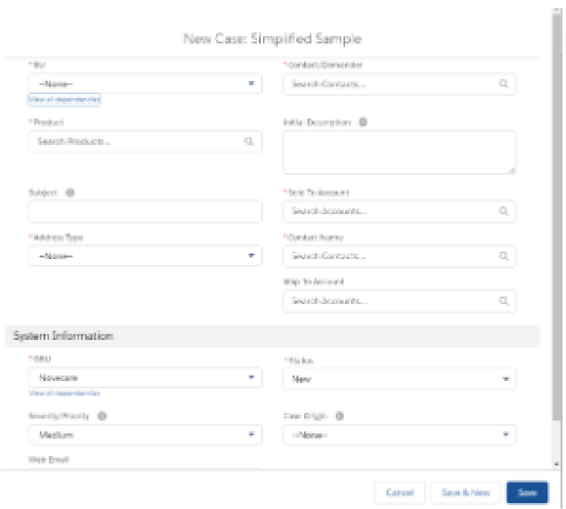
- From scratch (new sample request).

- By CSR (from leads or when asked directly by customer to CSR)
- By customer himself (My Solvay Portal)

<u>The Layout of the Simplified:</u>

Rules to be taken into account on the simplified layout:

1. Ship to account is mandatory only if the address type is account
2. Product: you can select level 4 and level 5
3. If you create a sample from opportunity: the GBU, the product, the Sold to, End-use, Category: Opportunity and Link the opportunity in the corresponding field



<u>Auto-completion of Simplified Samples:</u>

Once the Sample is created, the system will auto-complete some fields on sample: the table below explains how this automatic completion is done on the system:

Fields	HOW	Who is responsible of maintaining data
Account manager	The system looks at the BU of the sample and retrieve the corresponding Distribution Channel from Utility and then check the association ship-to account and distribution channel from Account team Member object	The account team member is a technical object updated automatically thanks to the interface from SAP
Customer Service Representative	The system looks at the BU of the sample and retrieve the corresponding Distribution Channel from Utility and then check the association ship-to account and distribution channel from Account team Member object	The account team member is a technical object updated automatically thanks to the interface from SAP
Distribution Channel	The system looks at the BU of the sample and retrieve the corresponding Distribution Channel from Utility	The account team member is a technical object updated automatically thanks to the interface from SAP
Division	The system looks at the BU of the sample and retrieve the corresponding Distribution Channel from Utility and then check the association ship to account and distribution channel from Account team Member object	The account team member is a technical object updated automatically thanks to the interface from SAP
Sales Org	The system looks at the BU of the sample and retrieve the corresponding Distribution Channel from Utility and then check the association ship to account and distribution channel from Account team Member object	The account team member is a technical object updated automatically thanks to the interface from SAP
Requested arrival date	The system is retrieving this information from the model file determined by business on utility object and record type Samples Model File based on the country of the shipping account and the product of the sample	The model file records are updated by Business thanks to Google doc for salesforce, only three users has now access to update this file: Jean Baptispte Cerceuil, Jean François Poullin and Pam Acardi

Unit of Measure	The system is retrieving this information from the model file determined by business on utility object and record type Samples Model File based on the country of the shipping account and the product of the sample	The model file records are updated by Business thanks to Google doc for salesforce, only three users has now access to update this file: Jean Baptispte Cerceuil, Jean François Poullin and Pam Acardi
Requested Quantity	The system is retrieving this information from the model file determined by business on utility object and record type Samples Model File based on the country of the shipping account and the product of the sample	The model file records are updated by Business thanks to Google doc for salesforce, only three users has now access to update this file: Jean Baptispte Cerceuil, Jean François Poullin and Pam Acardi
Shipping Site Code	The system is retrieving this information from the model file determined by business on utility object and record type Samples Model File based on the country of the shipping account and the product of the sample	The model file records are updated by Business thanks to Google doc for salesforce, only three users has now access to update this file: Jean Baptispte Cerceuil, Jean François Poullin and Pam Acardi
Manufacturing Plant Code	The system is retrieving this information from the model file determined by business on utility object and record type Samples Model File based on the country of the shipping account and the product of the sample	The model file records are updated by Business thanks to Google doc for salesforce, only three users has now access to update this file: Jean Baptispte Cerceuil, Jean François Poullin and Pam Acardi

NB: to access the model file in Salesforce, there is a list view Sample Novecare Model File

Sample Request Assignments: For Novecare the sample assignment rules are based on the ship to region and BU . The file of Novecare BUSINESS Rules Sample Management is updated with the new Queues on 28/11/2019

Sample Request Approval Process: For the new process of Sample Novecare, the samples are auto-approved after submission of the sample if :

1. Model file autocompletion fields **are not updated** (see the auto-completion fields in the chapter above)
2. If the association account and product are not designed as **blacklisted.**

If one of these criteria is not respected, the sample request must be approved by an approver.

Novecare interface CRM to SAP : Sample SAP order creation (Core) we set up an automatic Order creation in SAP , the query to select Sample requests to be sent to SAP use these crieria :

- **GBU** = Novecare
- **Distribution Channel** exists in SAP
- **Division** exists in SAP
- **Sales Org** exists in SAP
- Product exists in SA**P**
- **Shipping Site Code in this list** : 4004 (clamecy) , 8701 (Bangpoo) , 8080 (CMC) , 8098 (Levin) , 8026 (Roha) , 8091 (Zhuhai) , 8160 (Zhangiagang , 7897 (Zhenjiang)
- **Status =** Approved

How do we maintain the blacklist account vs product for Novecare Samples ?

The blacklisted Accounts and Products are available in a list maintained by Business , defining the list of Products that are blacklisted for a specific Account or Corporate group. This list is created in CRM on "GBU Customer Segmentation object" and can be edited thanks to a **Google document for salesforce feature** (3 key users are responsible for maintenance : Jean Baptiste Cerceuil, Pam Accardi & Leticia Pereira).

These lists can be updated by Data Steward directly in CRM :

- Black List PROD: https://docs.google.com/spreadsheets/d/19aNF_cArqlKiM6txnzqhY_EVK6Ow-udel9BFiIi7t-A/edit#gid=0
- Corporate PROD: https://docs.google.com/spreadsheets/d/1Lwlxi9dGMBZtjkqIXcyetityDdxgJnK5SMUJ18zqu0k/edit#gid=0

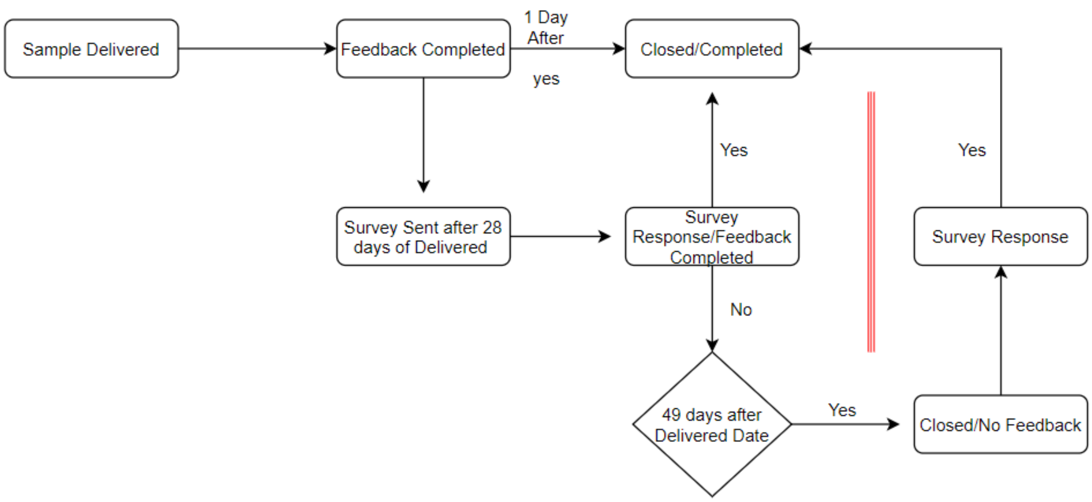
The approvers lists is maintained directly by Data steward from UTILITY object (link to the list view of the approvers by BU and Region https://solvay-crm.lightning.force.com/lightning/o/SLV_Utility__c/list?filterName=00B1p000005OhpFEAS

Notification Management:

- Notification each time status is updated : only sent to Account Manager and Customer Sservice Representative.
- Notification when the status of the sample has not been updated after two days: sent to sample request's owner
- Notification wehn the status = approved: sent to the shipping center of the sample, the list view of the Novecare shipping plant for sample (responsible for processing sample request)
- The shipping center members are defined by Business with the object Email Mapping Rules: https://solvay-crm.lightning.force.com/lightning/o/SLV4_EmailMappingRule__c/list?filterName=00B1p000005OgSjEAK

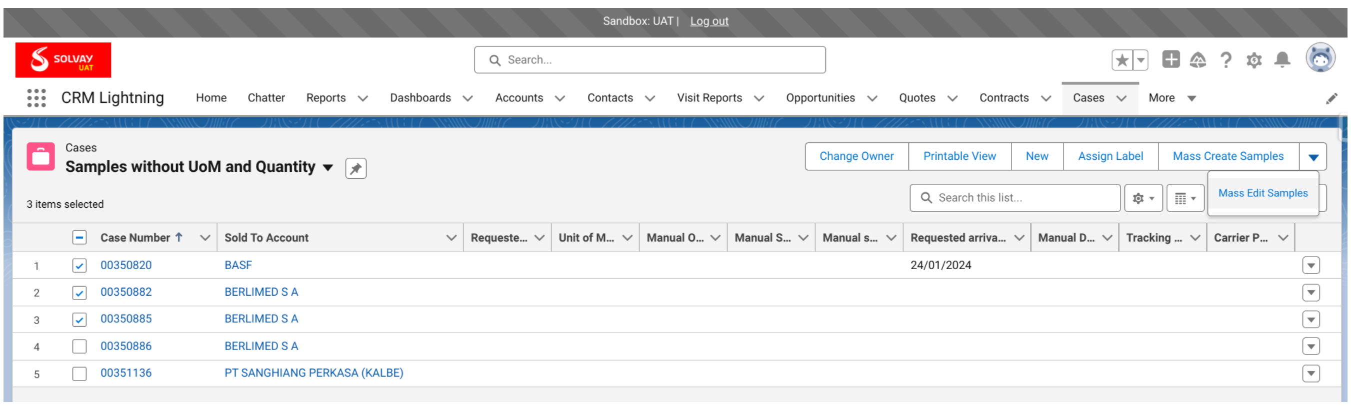
Automatic Closure:

1. If customer feedback has been provided samples are closed as Closed/Completed.
2. If customer feedback has not been provided samples are closed as Closed/No Feedback,

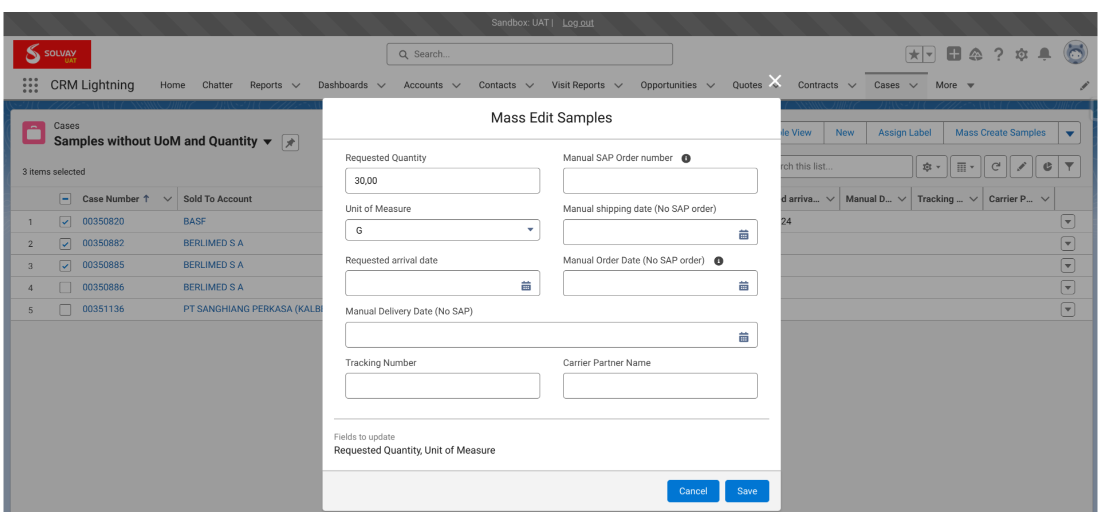


For Novecare GBU the simplified samples are created without UoM and quantity. There is the list view "Samples without UOM and Quantity" that shows the sample records created through the Simplified Sample process, without quantity and unit of measurement. This list view is only visible for Novecare users and is shared with Novecare public groups restricted and non-restricted users.

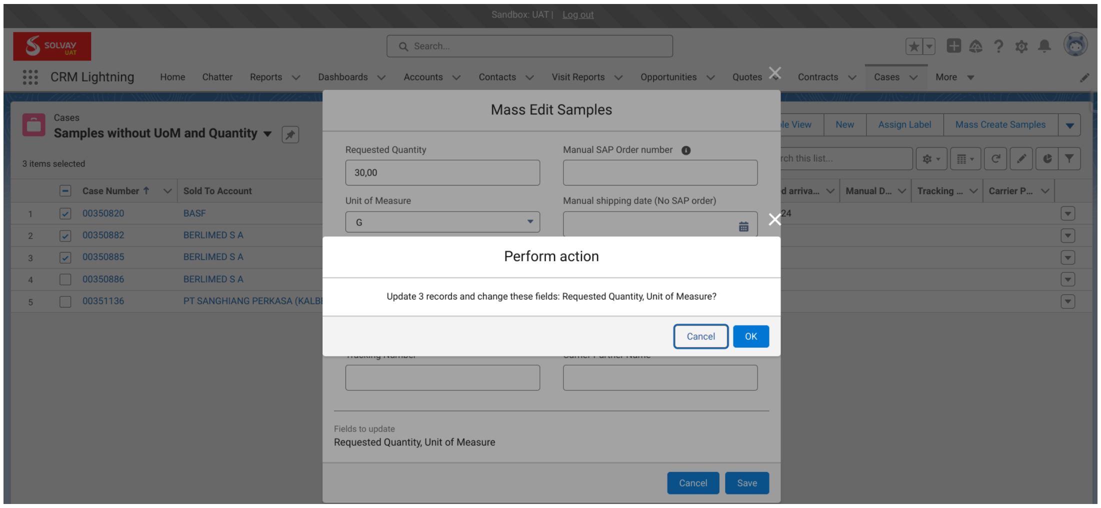
In that list view, the button named "Mass Edit Samples" is available and could be used to update the unit of measurement and quantity for several samples at the same time.



Before pressing the "Mass Edit Samples" button, select the records to be updated using the check box on the left and then add the quantity and unit of measurement.



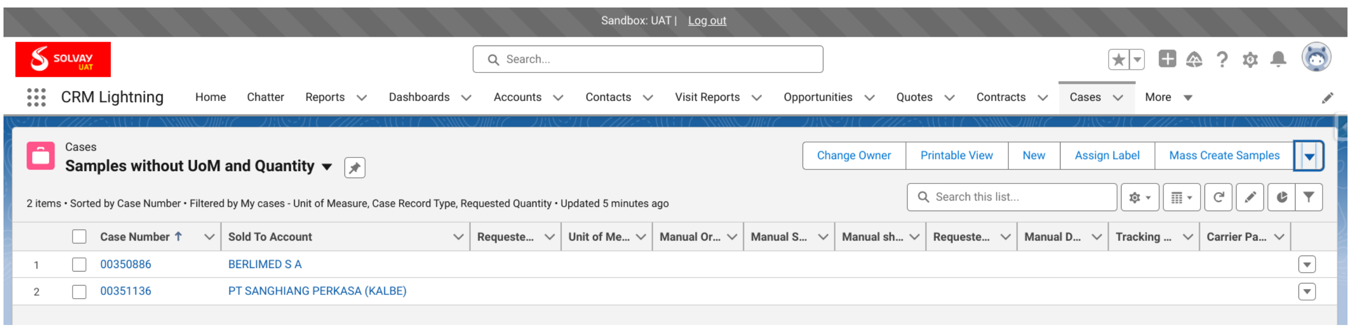
There will be a confirmation message stating the fields that will be changed.



After clicking Ok, the system will update the sample records previously selected with the quantity and unit of measure provided.

Otherwise, the system could raise an error when there is more information already missing in the sample.

When the records get the quantity and unit of measure updated, the sample records disappear from the "Samples without UOM and Quantity" related list.



Novecare is the only GBU that allows samples creation without quantity and unit of measure. For TS, Aroma and Oil & Gas, the samples cannot be saved without this information.

Important to know that **the "Mass Edit Samples" button is available for all SCO GBUs in all list views** (not possible to restrict the button for specific list views).

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2024 : Leads & Samples Project NOVECARE, TECHNOLOGY SOLUTIONS, AROMA

Create multiple samples from Account or Case

Important to know the simplified sample process remains available only for Novecare. This process did not change in the scope of the project and remains available.

The Simplified Sample process **is not available** for Aroma, TS or Oil & Gas.

Maybe it could be removed if it gets unused due to the adoption of the new Mass Samples Creation process that is described below.

The mass sample creation process from the Opportunity was not implemented now because flows do not support the change of the data that was prefilled.

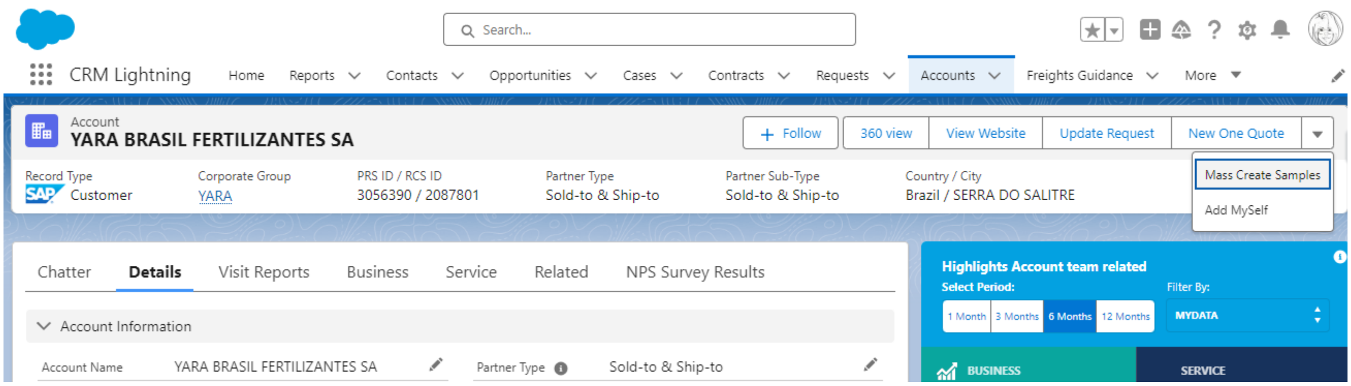
In the future, we would like to have the mass creation samples from opportunity with the products in the opportunity automatically added to the samples but with the possibility, at least, to change the quantity and the unit of measure.

The Mass Sample Creation process covers the need of creating multiple samples at the same time. As a result, several samples are created, one sample per product as of today.

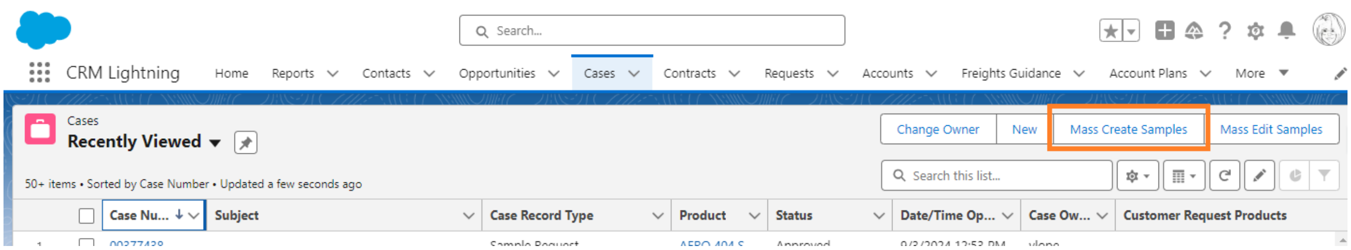
During the project we found several flow limitations that are described in **this document**.

The Mass Sample creation: process is implemented through a flow named "Case - Create Samples" and there are two ways to trigger this process:

- from the Account (Prospect (Non SAP Customer with Type = Prospect) or SAP Customer)



- from the Case tab (in any list view)



The "Mass Create Samples" button is visible for all Novecare, TS and Aroma users (all profiles) and the process has the following steps:

Step 1 - Populate the required information

The first step in the process is to populate the information required for sample request creation.

Depending on the GBU, we have different mandatory fields to create sample requests. The information introduced in the first screen like the account, contact, CSR, Account Manager, Requested Arrival Date, etc. will be the same for all the sample requests that will be created. The information entered is saved in the system and loaded when the user is moving back and forth through the process/screens.

GBU is the first information required to start the process. When the user is multi GBU user, the system will ask to manually enter the GBU.

The rule to automatically fill in or ask the GBU on sample requests is:

- user has the GBU field populated in user profile => the system fills the GBU automatically into the sample
- user has Multi GBU access including Novecare/TS/Aroma => the system will ask the user to input the GBU
- user has Multi GBU access including one of Novecare/TS/Aroma and GBU equals to Novecare/TS/Aroma => the system will ask the user to input the GBU
- user has the GBU field on the user profile empty => the system will ask the user to input the GBU

For Aroma the information to be entered in the first step of mass create sample requests is:

Field Name	Required?
GBU	yes auto-populate if the user multi GBU access is only Aroma otherwise, the system will ask the user to select the GBU manually
Sold To Account	yes

Requester/Contact	yes
Initial Description	no
Customer Service Representative	yes
Account Manager	yes
Subject	no
Initial description	no
Case origin	no
Category	yes
Sub-Category	yes
Requested Arrival Date	yes
Opportunity	no
Severity/Priority	no
Address Type	yes
Contact Name	yes
Ship-To Account	yes
Third Party	no
Third Party Contact	yes, if third party account is populated no, if the third party account is empty
Web Email	no

If Address Type is Ship-To, the address is automatically populated from Ship-to

- address is automatically populated from Ship-to
- phone and email is automatically populated from Contact

If Address Type is Contact, the address is automatically populated from Contact

- address is automatically populated from Contact
- phone and email is automatically populated from Contact

If Address Type is Manual, the following fields are mandatory and populated manually

Field Name	Required?
Ship-To Company Name	yes
Ship-To address 1	yes
Ship-To address 2	yes
Ship-To city	yes
Ship-To zip code	yes
Ship-To country	yes
Ship-To State	no
Ship-To Contact name	yes
Ship-To Contact Name/Addressee	yes
Ship-To Contact Email	yes
Ship-To Contact Phone	yes
Additional shipping information	no
CSR comments	no

Important to know

- If the third party account used by Aroma is OCTOCHEM, the system will automatically bring in Third Party Contact Ryan Cox. It is not possible to input anyone else manually.

For TS the information that could be saved in the first step of mass create sample requests is:

Field Name	Required?
BU	yes
Sold To Account	yes
Requester/Contact	yes
Customer Service Representative	yes
Account Manager	yes
Severity/Priority	no
Subject	no
Initial description	no
Requested Arrival Date	yes
Opportunity	no
Address Type	yes
Contact Name	yes
Ship-To Account	yes
Case Origin	no

If Address Type is Ship-To, the address is automatically populated from Ship-to

- address is automatically populated from Ship-to
- phone and email is automatically populated from Contact

If Address Type is Contact, the address is automatically populated from Contact

- address is automatically populated from Contact
- phone and email is automatically populated from Contact

If Address Type is Manual, the following fields are mandatory and populated manually

Field Name	Required?
Ship-To Company Name	yes
Ship-To address 1	yes
Ship-To address 2	yes
Ship-To city	yes
Ship-To zip code	yes
Ship-To country	yes
Ship-To State	no
Ship-To Contact name	yes
Ship-To Contact Name/Addressee	yes
Ship-To Contact Email	yes
Ship-To Contact Phone	yes

Additional shipping information	no
CSR comments	no

For Novecare the information that could be saved in the first step of mass create sample requests is:

Field Name	Required?
Sold To Account	yes
Requester/Contact	yes
Initial Description	no
Customer Service Representative	no
Account Manager	no
Subject	no
Initial description	no
Case origin	no
Opportunity	no
Severity/Priority	no
Contact Name	yes
Ship-To Account	yes

If Address Type is Contact, the address is automatically populated from Contact

- address is automatically populated from Contact
- phone and email is automatically populated from Contact

Step 2 - Add multiple products.

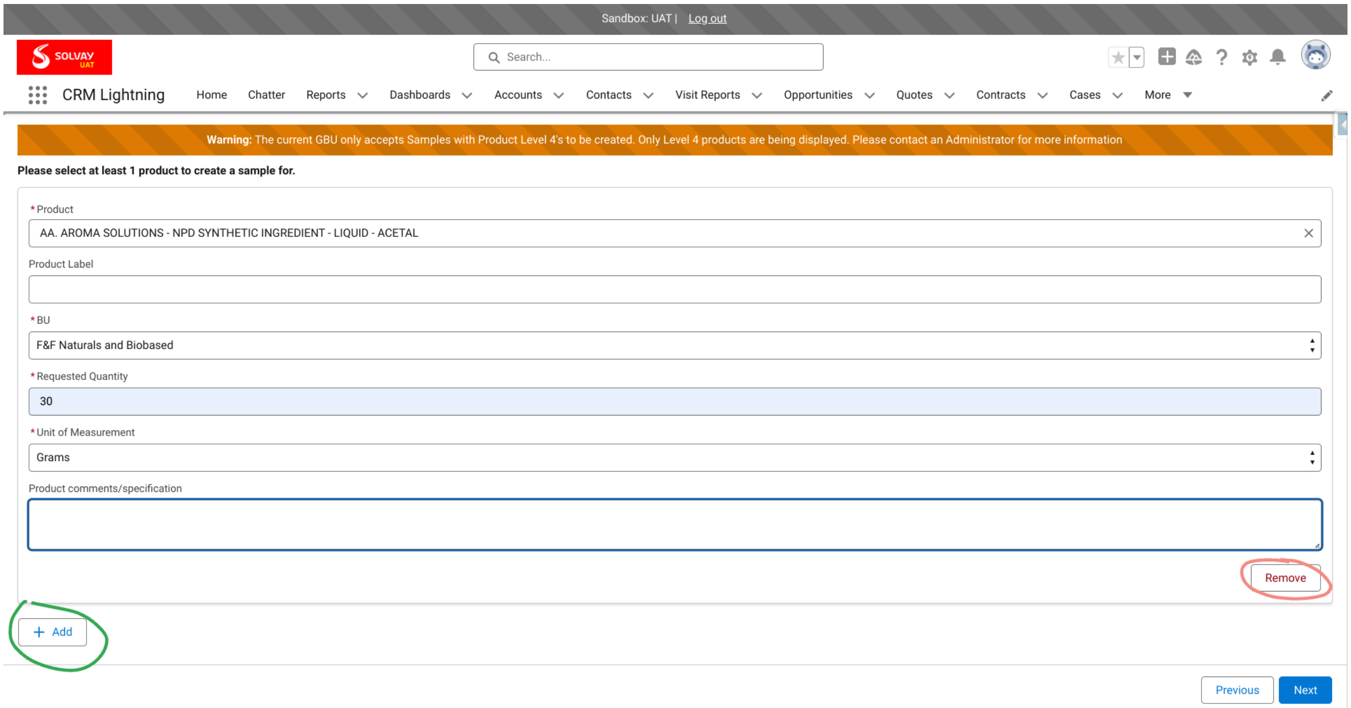
The user can search/filter the products in the product list by product name. Start typing the product name (or part of it) in the product field to find the product in the list. The list of products gets filtered by the GBU, active products and Level 4 or Level 5 depending on the GBU.

There is always a message on the top of the page to inform which products are available for the sample requests. The rule is:

- For Aroma => only Level 4 active products
- For TS => only Level 5 active products, with the keyword 'sample' in the product name
- For Novecare => only Level 4 active products, excluding *obs* keyword and only PF1 products

There is the Add button that opens a new product frame to add a new product. For every product, there is the Remove button to delete the product from the request if needed.

There is no message to alert that the product will be deleted, the product is immediately deleted.



The mass create samples process allows you to add a maximum of 30 products (Salesforce limitation for the repeater component in a flow).

There is always a message.

Products or Aroma

The list of products is filtered by Level 4 active products.

Field Name	Required?
Product	yes
Product Label	no
BU	yes
Requested Quantity	yes
Unit of Measurement	yes
Product comments/specification	no

Products for TS

The list of products is filtered by Level 5 active products, with the keyword 'sample' in the product name - TS has specific product codes for samples.

Field Name	Required?
Product	yes
Product Label	no
Requested Quantity	yes
Unit of Measurement	yes
Product comments/specification	no

Products for Novecare

The list of products is filtered by Level 4 active products, without *obs* keyword and product code doesn't contain 'z' it means only PF1 codes are allowed.

Field Name	Required?
Product	yes
Product Label	no
BU	yes
Requested Quantity	yes
Unit of Measurement	yes
Product comments/specification	no

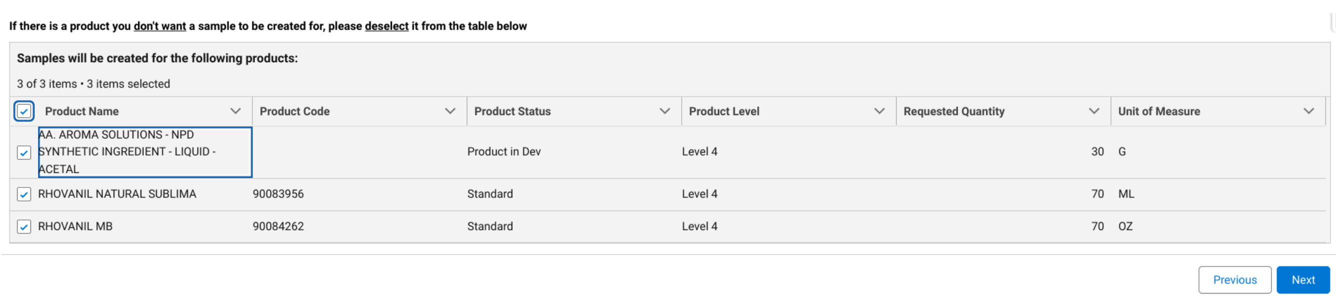
Step 3 - Overview the products, quantities and unit of measurement and confirm the ones to proceed with for the creation of sample requests.

The fields below should be visible on the screen to confirm which product sample requests will be created.

Product field
Product Name
Product Code
Product Status
Product Level
Requested Quantity
Unit of Measure

If there is a product you <u>don't want</u> a sample request to be created for, please <u>deselect</u> it from the table below.

This message alerts you to deselect one or more products to avoid creating sample requests for them. Another option is to come back by clicking on the "Previous" button and remove the products. After coming back, the products removed do not come into the overview screen again.



The information on that screen is static and cannot be changed.

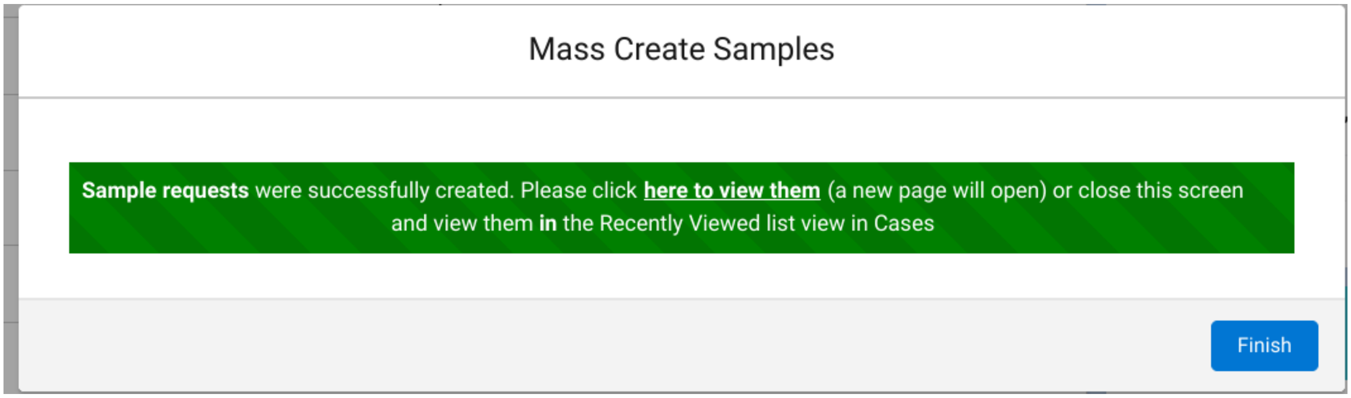
The check boxes in front of each product line are available and could be selected/unselected.

For the product lines that remain selected, the system will create the sample requests.

For unselected products, sample requests are not created.

Step 4 - Sample requests created

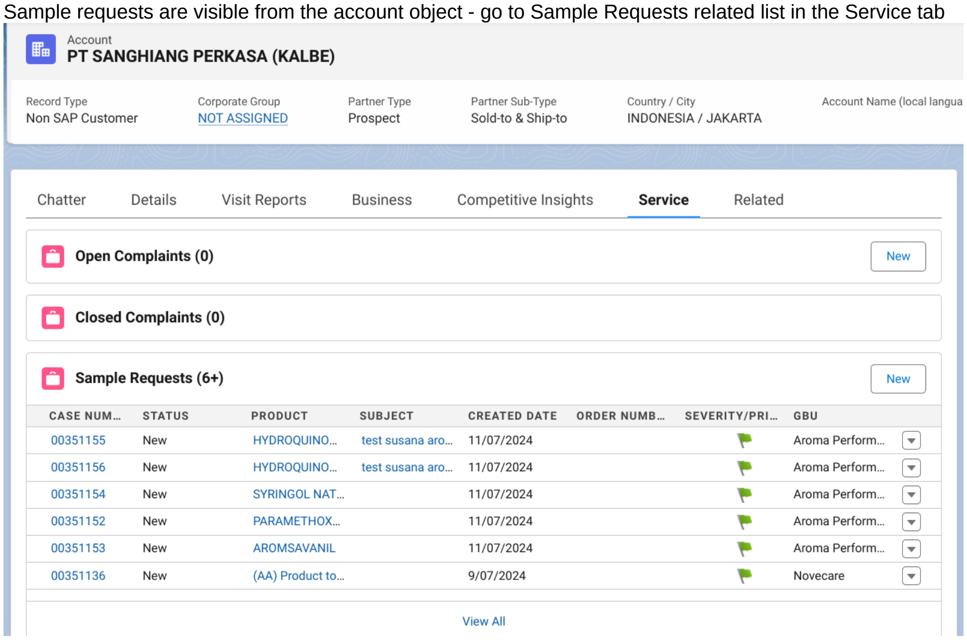
When the process finishes, the system displays a message stating that sample requests were created or an error in case something went wrong. In case of success, a green message will be displayed with a link and the Finish button.



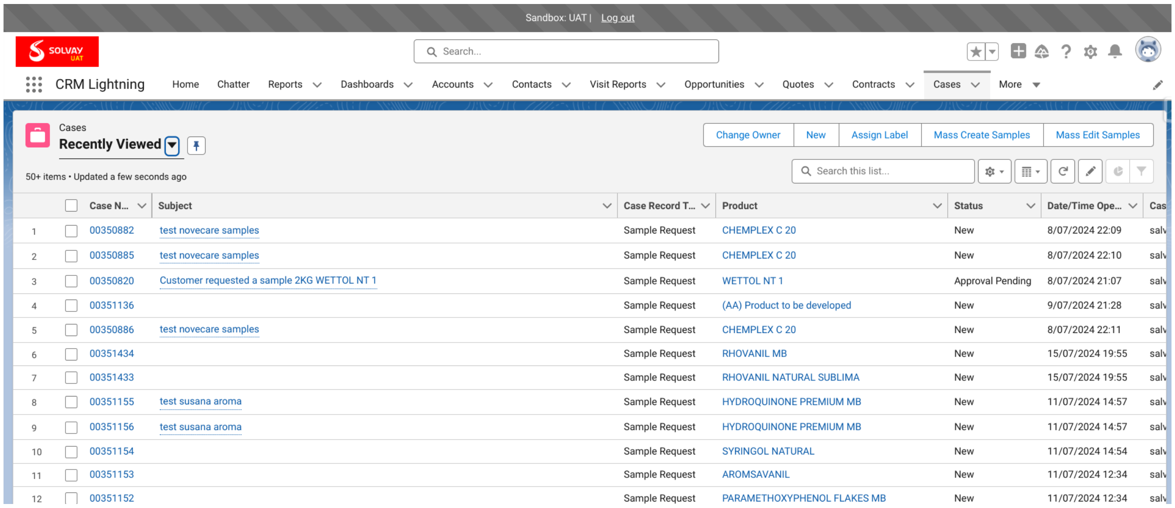
- if the Mass Create Samples started from the Account
  - when you click on Finish, the system will keep you in the account page
  - when you click on here to view them link, the system will redirect you to A - My Sample Requests (Open)
- if the Mass Create Samples started from the Case tab/Case list view
  - when you click on Finish, the system will redirect you to My Open Samples
  - when you click on here to view them link, the system will redirect you to A - My Sample Requests (Open)

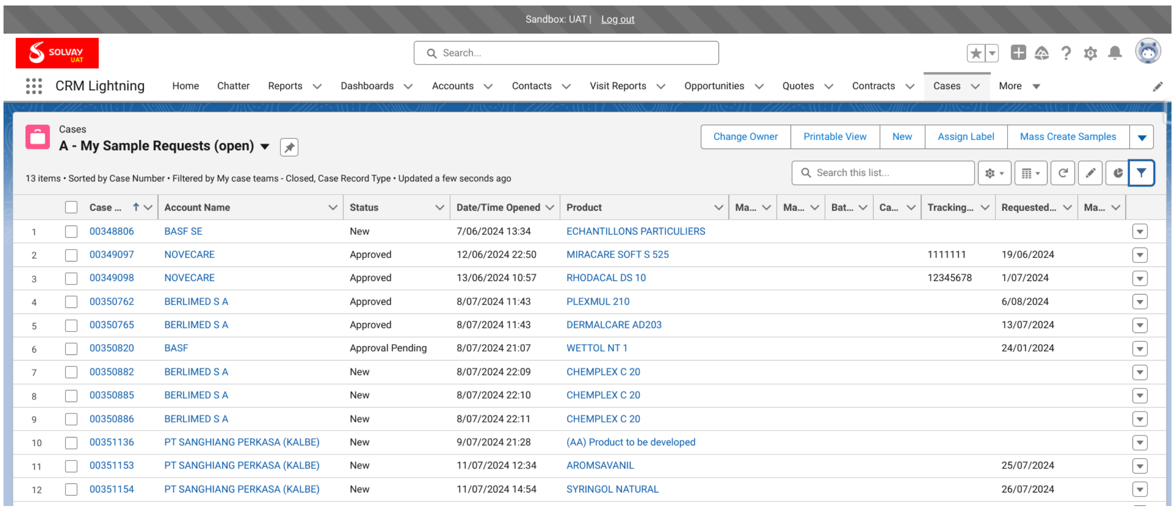
Sample requests can be found in two ways:

- Sample requests are visible from the account object - go to Sample Requests related list in the Service tab

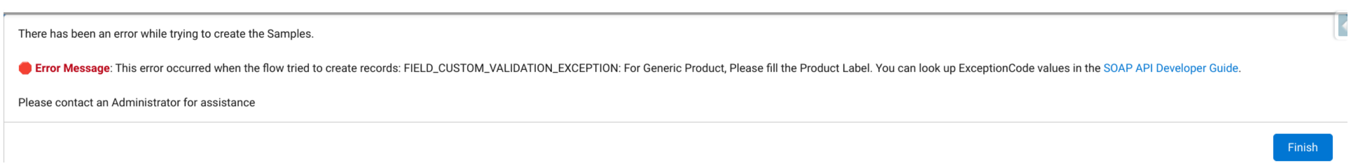


- Sample requests are visible from the Cases menu - go to the Recently Viewed list or A - My Sample Requests (Open) list





In case of an error, please open a Service One ticket related to Sample Management (CRM) with the error details. Example below:



Important to know due to flow limitations (detailed in **this document**)

- the list of products is pre-filtered by GBU, Level and active products only
- for Aroma, the third party contact list is also filtered
- the mass create samples process allows you to add a maximum of 30 products

Mass Edit multiple sample requests at the same time

All SCO GBUs (Novecare, TS, Aroma and Oil & Gas) can edit the following information in several sample requests at once using the option "Mass Edit Samples":

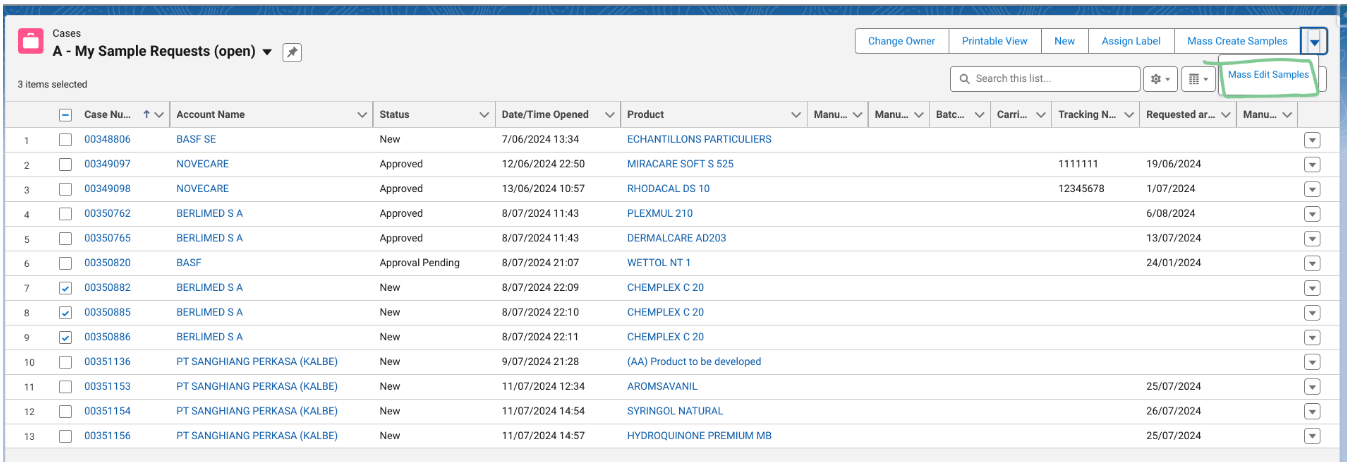
- Requested Quantity
- Unit of Measure
- Manual Order Date (No SAP order)
- Manual SAP Order number (is visible/hidden depending on the user permissions)
- Manual shipping date (No SAP order)
- Manual Delivery Date (No SAP)
- Tracking Number
- Carrier Partner Name

Anybody in the case team can mass edit sample information, however, when the sample status is New, the fields allowed to be editable are Initial Description, Owner, Additional shipping information, CSR Comments and fields in sections "Customer feedback" and "Other order and Shipping information".

The fields above are part of the "Other order and Shipping information" and can be edited in sample next stages.

The fields Requested Quantity and Unit of Measure can be edited when the Sample status is New. In the next stages the system will block updates of these fields with an error message.

The "Mass Edit Samples" button is available in the Cases tab for any list view, however, check the sample status and proceed according to the recommendation above.

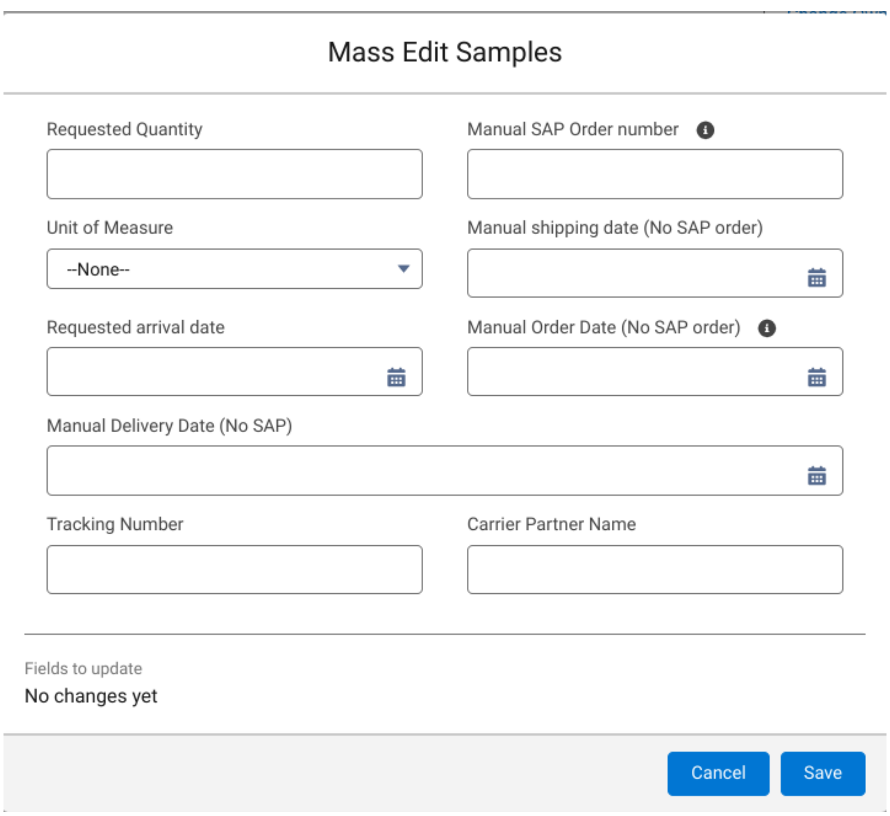


	Case Nu...	Account Name	Status	Date/Time Opened	Product	Manu...	Manu...	Batc...	Carri...	Tracking N...	Requested ar...	Manu...
1	00348806	BASF SE	New	7/06/2024 13:34	ECHANTILLONS PARTICULIERS							
2	00349097	NOVECARE	Approved	12/06/2024 22:50	MIRACARE SOFT S 525					1111111	19/06/2024	
3	00349098	NOVECARE	Approved	13/06/2024 10:57	RHODACAL DS 10					12345678	1/07/2024	
4	00350762	BERLIMED S A	Approved	8/07/2024 11:43	PLEXMUL 210						6/08/2024	
5	00350765	BERLIMED S A	Approved	8/07/2024 11:43	DERMALCARE AD203						13/07/2024	
6	00350820	BASF	Approval Pending	8/07/2024 21:07	WETTOL NT 1						24/01/2024	
7	00350882	BERLIMED S A	New	8/07/2024 22:09	CHEMPLEX C 20							
8	00350885	BERLIMED S A	New	8/07/2024 22:10	CHEMPLEX C 20							
9	00350886	BERLIMED S A	New	8/07/2024 22:11	CHEMPLEX C 20							
10	00351136	PT SANGHIANG PERKASA (KALBE)	New	9/07/2024 21:28	(AA) Product to be developed							
11	00351153	PT SANGHIANG PERKASA (KALBE)	New	11/07/2024 12:34	AROMSAVANIL						25/07/2024	
12	00351154	PT SANGHIANG PERKASA (KALBE)	New	11/07/2024 14:54	SYRINGOL NATURAL						26/07/2024	
13	00351156	PT SANGHIANG PERKASA (KALBE)	New	11/07/2024 14:57	HYDROQUINONE PREMIUM MB						25/07/2024	

We recommend you to click on the "Mass Edit Samples" button from the A - My Sample Requests (open) list view.

To update requested quantity and UOM, select Samples in the Status New.

To update order and shipping information, select Samples not in Status New or Pending Approval.



Tracking Samples linked to Opportunities

- Novecare - Samples & Opportunities
- TS - Samples & Opportunities

THE FEATURES BELOW ARE AVAILABLE FOR NOVECARE ONLY

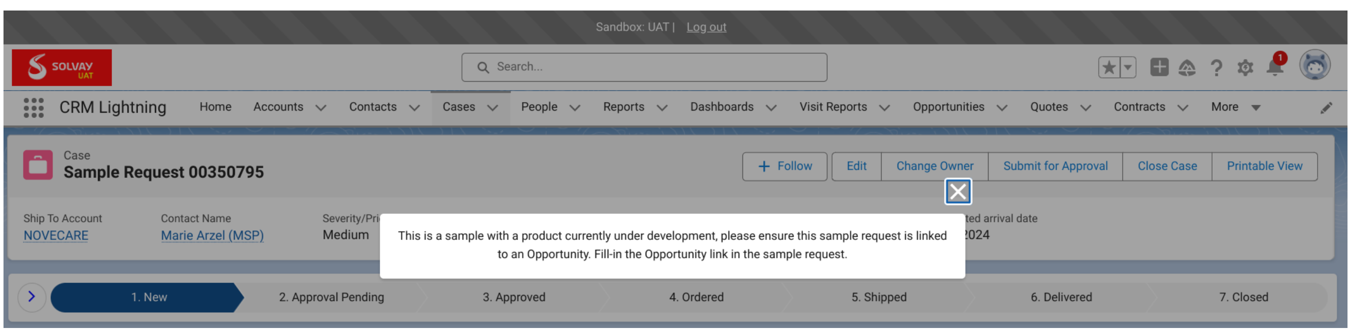
When the Sample Request is created from the Opportunity (go to an Opportunity, Service Tab, Samples related list and Click on "New"), the following fields get automatically populated in the sample request:

Sample fields coming pre-filled
Opportunity (only visible after creating the sample)
GBU (from Opportunity)
Sold-To Account (Account from Opportunity)
Ship To Account (Account from Opportunity)
Subject (Opportunity Name)
Initial Description (Opportunity Description)
Account Manager (Opportunity Owner)
End Use (Opportunity End Use)
Category (equals to Opportunity)
GBU Customer Segmentation (from the account linked to the opportunity)
Address
Case Currency (EUR)
Opportunity (only visible after creating the sample)

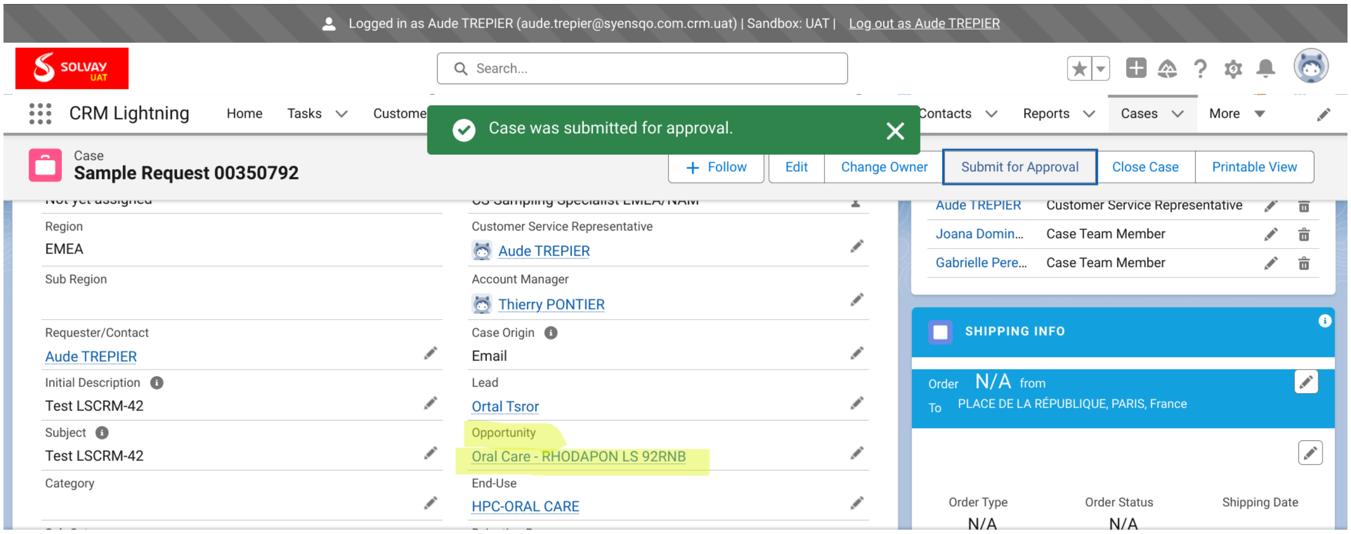
There will be a new field Opportunity Product in Sample requests that will be populated automatically by the system with the opportunity product reference, every time a sample request is created from an opportunity and includes the products from that opportunity.

In order to track the pipeline of opportunities linked to sample requests with products in dev sent to the customers, when a sample request is created with a product status product in dev, the system is requesting to enter the related opportunity.

So, the lab manager or Sales Rep must create an opportunity and link the sample request with that opportunity. If they try to move the sample request from New to Send for Approval without an opportunity, the system will trigger the following error message:



If the opportunity is linked with the sample request, it can be submitted for approval with success.



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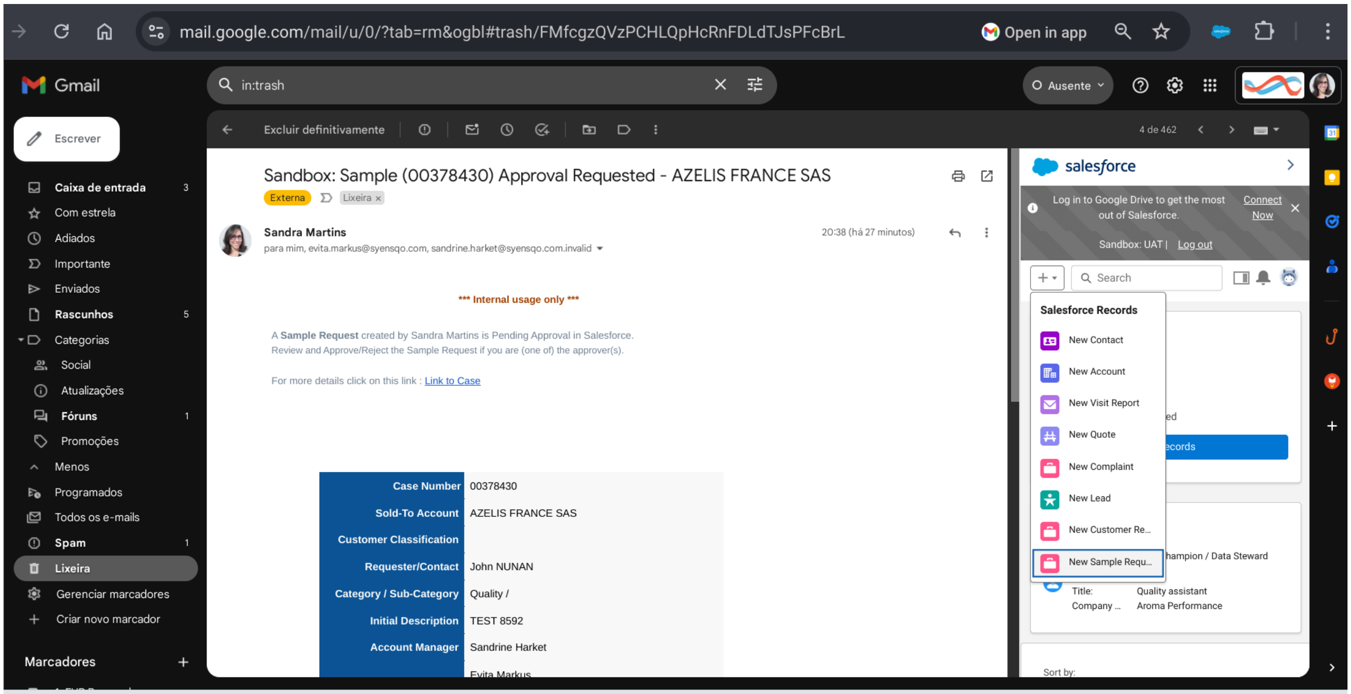
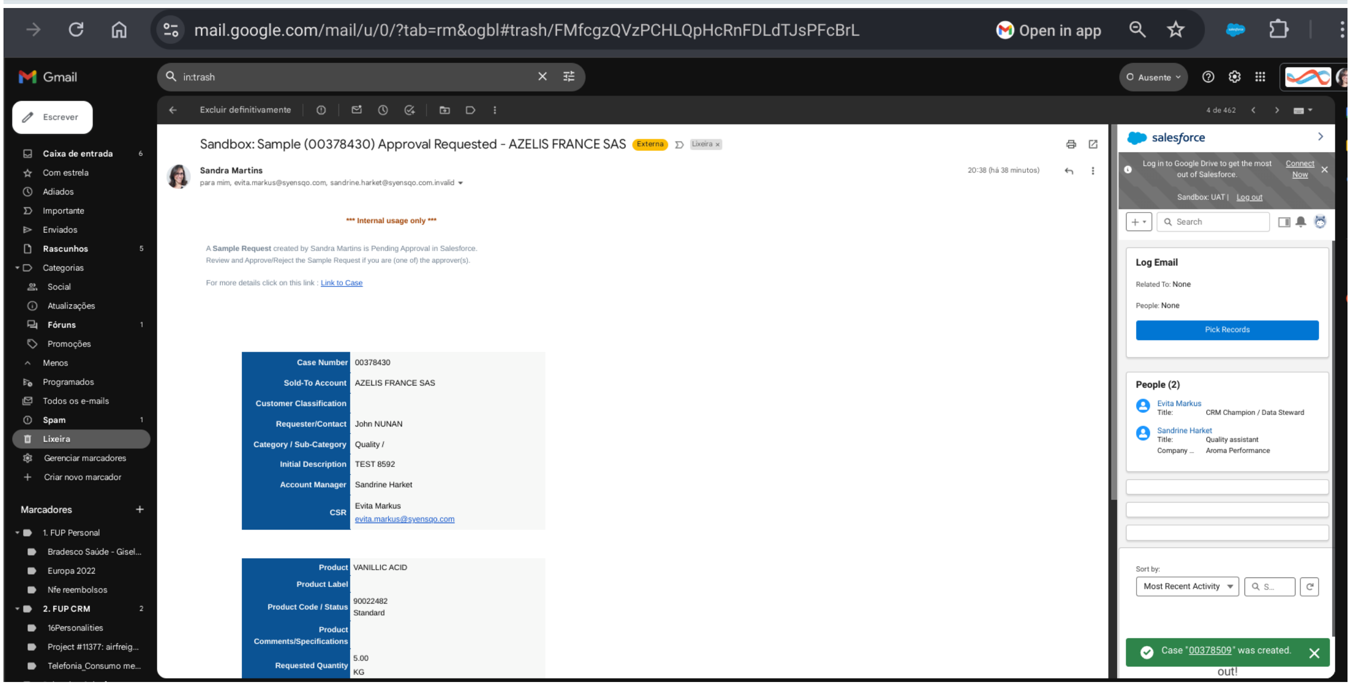
Jira transfered from L&S Project to Maintenance:

CCCME-8600 CORE **Novecare** - **Sample** : **Gmail / SFDC integration** - be able to create sample from Gmail/SFDC integration

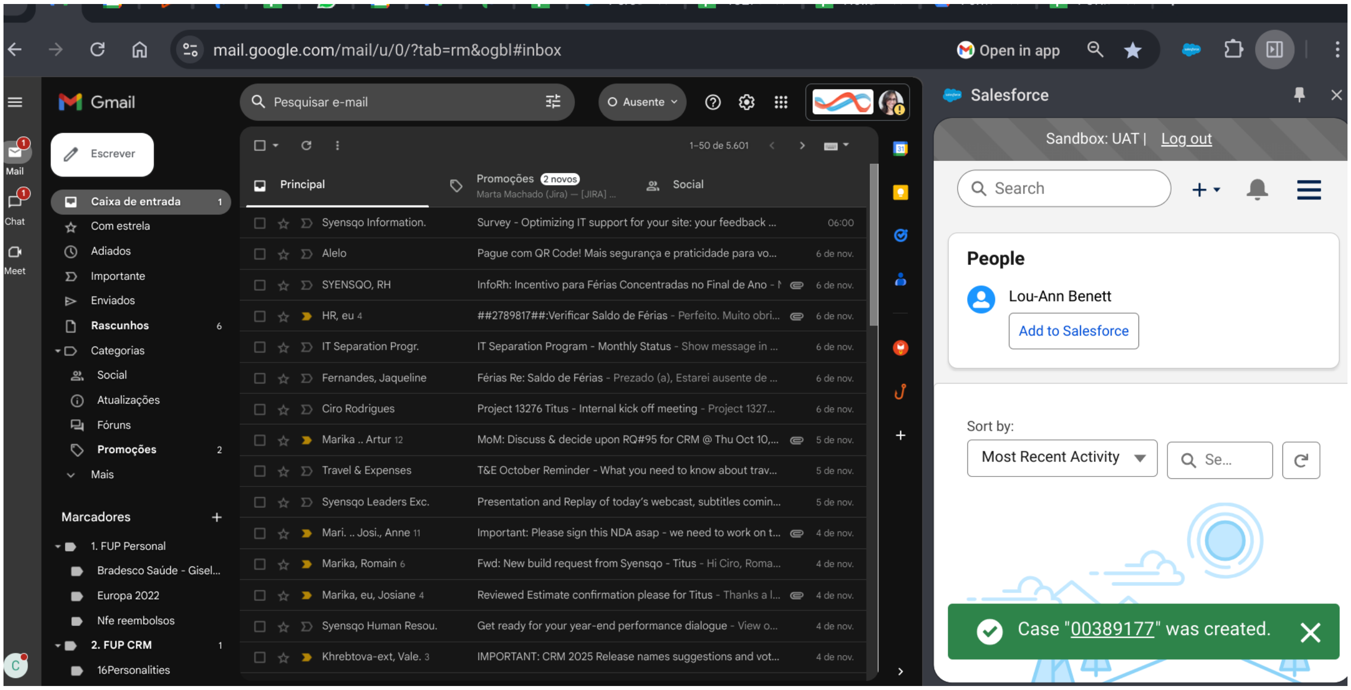
Novecare users are able to create sample requests from gmail without needing to access the system.

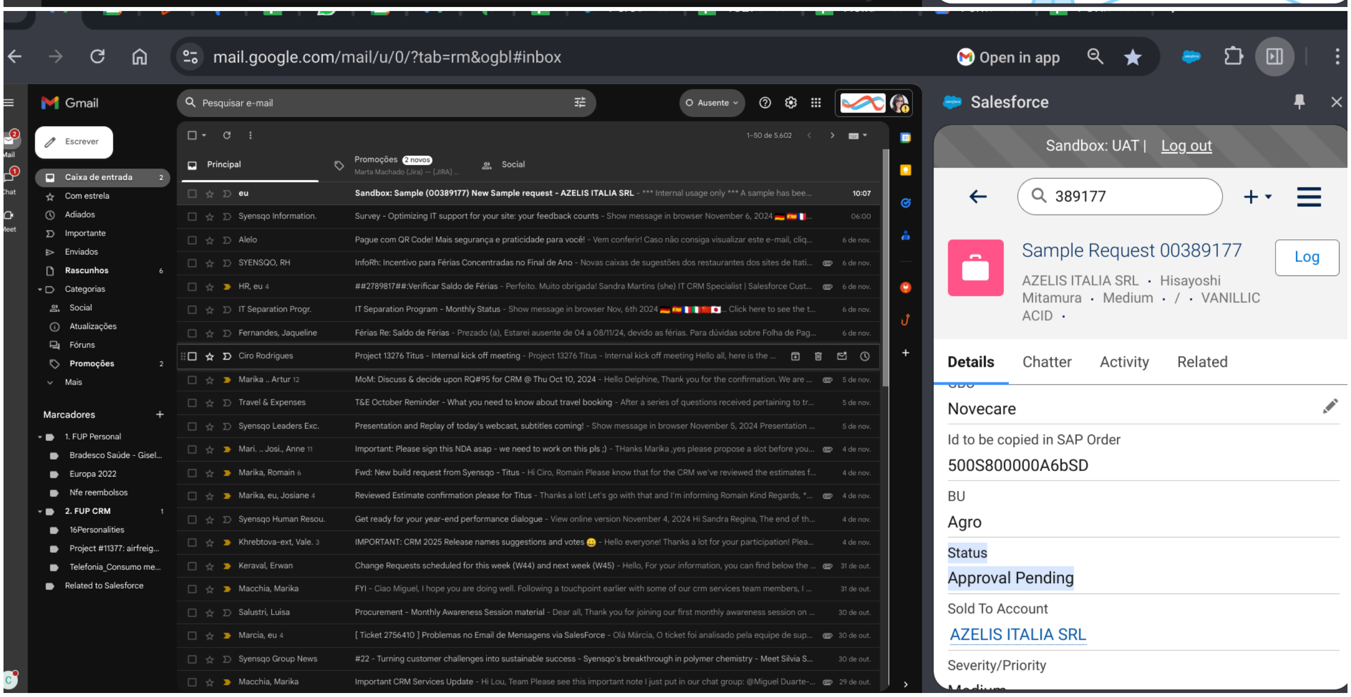




CCCME-9263 CORE **Novecare** - **Sample** : **Gmail / SFDC integration** - be able to auto 'submit for approval' samples created from Gmail/SFDC integration

Novecare users do not need to access the system to submit the sample requests created from Gmail. It will be automaticallysubmitted for approval.





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CCCME-9386 CORE - ALL SCO - Sample Management - Close case automatically after 30days

When a delivery date is added, the case status is changed to 'Delivered' and the Account Manager is notified to close the case within 30days. With this evoution, 30 days later the case is closed automatically.

The notification text was updated adding the frase: " The case will be automatically closed in 30 days from now "

Delivered - Sample (00369987) Delivered Sample Request - UNIVERSITY OF SOUT

Message Details

From: **renuka.prasad@syensqo.com.invalid**
To: evita.markus@syensqo.com Cc: renuka.prasad@syensqo.com.invalid

Follow up with customer, **within 30 days** fill customer feedback section and close the Sample Request.
The case will be automatically closed 30 days from now.

*** Internal usage only ***

A Sample Request created by Igor Ametov has been processed and Delivered.

~~Follow up with customer and fill customer feedback section, if applicable, and Close the Sample Request.~~

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