FD - P9. Customer Request Management

Version Control

Version	Date	Description	Author
v.1	30.03.2017	Creation	Jeremie Seabra
v.2	13.04.2022	Update	Anne Gilles
v.3	26.08.2022	Update due to CCCME-5915 : warnings related Questionnaire response time	Sebastien ROUXEL

Reference Documents

folder 03. Business Rules & Queues

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

1. Functional Process

Process Overview

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

Definition & use cases

Definition

There are 2 types of customer requests:

- **Standard customer requests**
    - A customer request represents one or more demand(s) from a customer related to one or several areas (e.g. logistics, packaging, documentation, training, technical support, regulatory compliance)
- **Special customer requests**
    - Special Customer Requests process deals with managing requests coming from the customer that deviate from Solvay GBU standard offering (e.g. product specifications, way of handling quality system, shipping)
- **Scope:**
    - In Scope : Standard Customer Request
    - Not in Scope: Special Customer Request
    - In Scope but not handled through Customer Request: Sample requests

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

Customer Request Registration	Prompt logging of a Customer Request after the reception with the upload of pictures and attachments. Submitting the Customer Request for approval
Approval Process	Rules for the Approval process have been implemented by each GBU where a Customer Request can be automatically approved, be assigned to a User to approve or rejected or be assigned to a group of Users.
Processing the Customer Request	After the Customer Request is approved, it is assigned to a User or a group of Users to be processed. An answer/solution will be provided on the Customer Request
Customer Communication	When the answer/solution to the Request is provided, the Communication to the client can be sent.
Customer Request Closure	When the Request has been solved and communicated to the Customer, the Customer Request can be closed.

The Customer Request Management process is divided into 5 different **Phases** and 6 different **Statuses**.

Phase	Status	Definition	Record Type
Open	Open	As soon as the Customer Request is created	Customer Request
Approval Pending	Pending Approval	When the Customer Request is submitted for approval	

Approved	Approved	Once the Approver has approved the Customer Request	
Completed	Completed	Once the Customer Request has been processed	
Closed	Closed /Stopped	When the Customer Request is closed but the process was not completed (ex. Customer is no longer requesting the current demand)	
	Closed /Answered	When the Customer Request is completed and closed	

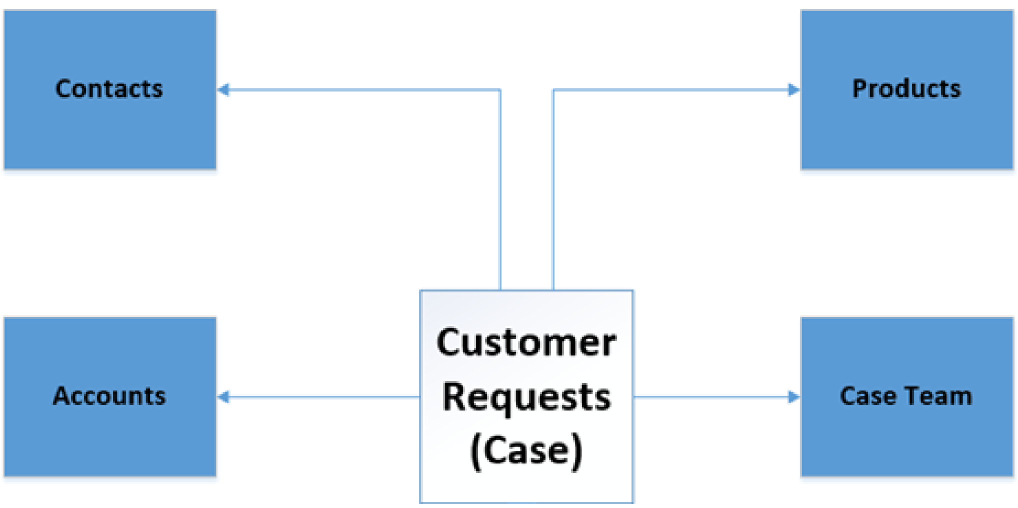
Use Cases

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

- Capture and log the customer request
- Approve/Reject the customer request
- Process and resolve the customer request
- Communicate with the customer
- Close the customer request

2. Data Model & security

Main objects



1. **Case**: Standard Salesforce Object to store and manage all general information regarding a Customer Request
2. **Accounts**: Standard Salesforce Object to manage the information about the Customer related with the Customer 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 Customer Request Process and to manage access to the Case
5. **Products**: Standard Salesforce Object to manage the Product Level 3 that is related to the Customer Request

Customer Request Security Model

Who can create?	Due to differences within GBUs, roles and responsibilities are to be executed by different entities.
Who can see?	Any user can see all the customer requests, except the Customer Requests flagged as "confidential"
Who can update?	Only users in Case Team or above role hierarchy of a user in the Case Team.
Who can delete it?	A Customer Request cannot be deleted. Only the System Administrator (SBS) can delete a Customer Request.

3. Customer Request Custom Buttons & Features

Custom Buttons

"Send Final Communication" Button

In the Processing phase, the User responsible for the communication to the Customer must send Communication Email to the Client with the Proposed Customer Response. The user can send the email by clicking on the “Send Final Communication” button. In addition to the predefined Contact, the user can also input any valid email address as CC, select the Language of the Template, and select the Attachments the User wants to send to the Client.

"Clone Customer Request" Button

At any phase of the Customer Request Process, Users are able to Clone Customer Requests to save time on the registration phase. This will open a new Customer Request form already populated with the information from the initial Request.

Features

Customer Request Assignments

Assigning a Customer Request to a User or a Group of User is to pass the responsibility to act on the Customer Request on a particular phase of the process. On Salesforce, the Customer 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 Customer Requests with the same criteria).

Based on each GBU own process and rules, the Customer Request Assignment can be performed by:

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

The Customer Request Actors are managed on the Case Team section on the Customer 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 Customer Request. When the Users are added automatically to the Case Team, they are added with the correct Role based on the current Customer Request Management Phase.

Customer Request Approval Process

After the registration phase is completed by the User and all the information related to the Customer Request is provided (General Information, Description, Accounts and Contacts, and Attachments), the Customer 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 Rules, a Customer Request can be:

- **automatically approved** - the Status will be automatically changed to **Approved** and the Customer 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 Customer Request will be notified.

During the approval process, the customer request will be frozen until it is “Approved” or “Rejected”.

Approval History Recall Approval Request Approval History Help

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Customer Request Approval step1 (Pending for first approval)						Pending
Reassign | Approve / Reject	5/11/2015 17:01	Pending	Christian Cano	Christian Cano		
Reassign | Approve / Reject	5/11/2015 17:01	Pending	Ashish Tiwari	Ashish Tiwari		
Reassign | Approve / Reject	5/11/2015 17:01	Pending	Naveen Singh	Naveen Singh		
Approval Request Submitted						
	5/11/2015 17:01	Submitted	Christian Cano	Christian Cano		

If additional information is needed before the approval of the customer 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.

Customer Request Notifications

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

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

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

Note: Here is the list of customer request notifications that Novecare is affected by.

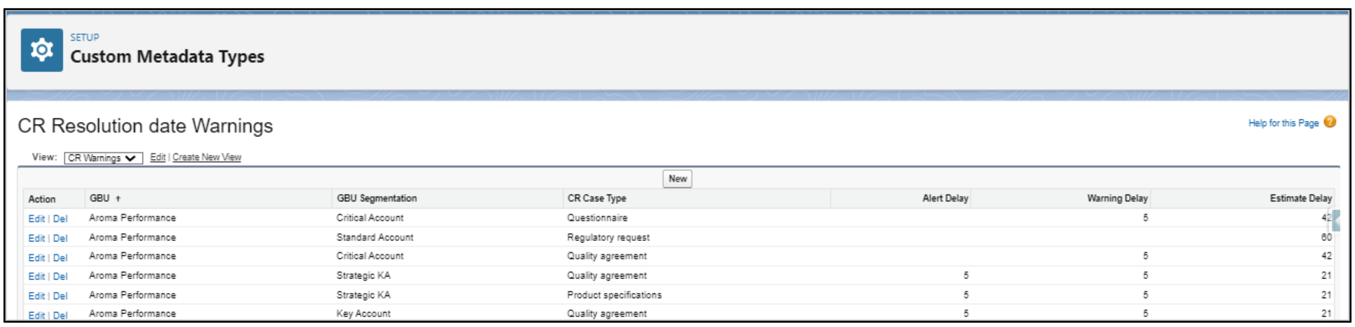
4. Specific Rules & Automation

Configuration of the process for the estimated resolution date (v3)

The configuration is done in the custom meta data type : CR Resolution date Warning

Field	description
GBU	Define The GBU for which the configuration is done
GBU segmentation	Define the GBU Customer segmentation for which the configuration is done
CR case Type	Define the CR type (Questionnaire, ..) for which the configuration is done. this value should be a value of the Picklist Type.
Estimate Delay	define the number of days to add to the creation date of the CR to calculate the Estimated resolution date
Warning Delay	define the numbers of days before the estimated resolution date to display a warning on the page The warning is displayed if : Current date > (Estimated resolution date - Warning Delays)
Alert Delay	Define the numbers of days before the estimated resolution date to send an alert email (CR Alert Email template) the alert is sent if : Current date > (Estimated resolution date - alert Delays)

For instance



SETUP
Custom Metadata Types

CR Resolution date Warnings

Help for this Page

View: CR Warnings Edit | Create New View

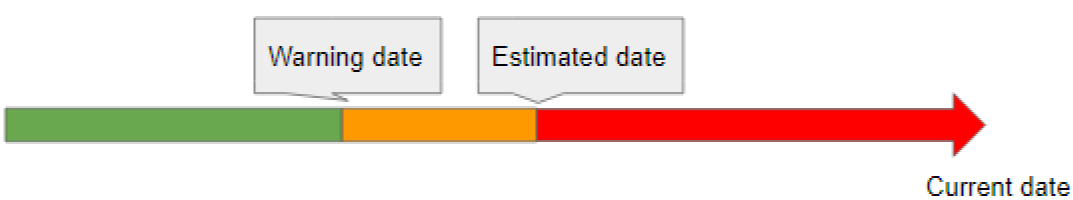
New

Action	GBU ↑	GBU Segmentation	CR Case Type	Alert Delay	Warning Delay	Estimate Delay
Edit | Del	Aroma Performance	Critical Account	Questionnaire		5	42
Edit | Del	Aroma Performance	Standard Account	Regulatory request			60
Edit | Del	Aroma Performance	Critical Account	Quality agreement		5	42
Edit | Del	Aroma Performance	Strategic KA	Quality agreement	5	5	21
Edit | Del	Aroma Performance	Strategic KA	Product specifications	5	5	21
Edit | Del	Aroma Performance	Key Account	Quality agreement	5	5	21

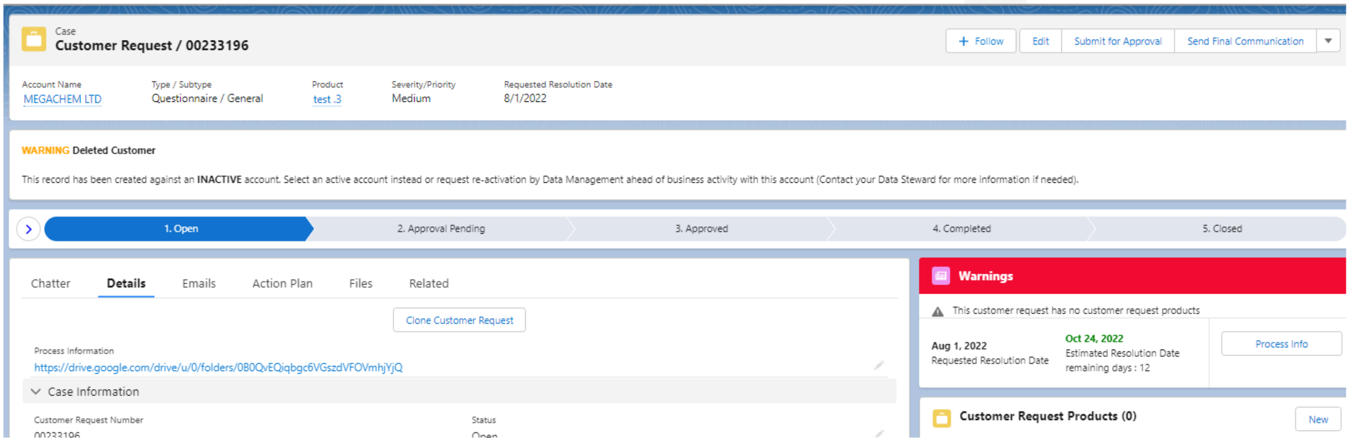
- If there is no line for a a GBU, the estimated resolution date is calculated by the Code *(see SLV8_CaseManagement_CR and the method updateFieldsOnInsertOrUpdate)* and there is no alert and the warning is displayed if Estimated Resolution date > Requested Resolution date
- If the GBU segmentation is blank , the Configuration will be applied for all GBU customer segmentation
- If the CR Case Type is blank, the Configuration will be applied for all CR Case Type

the configuration is designed in the GBU excel file :   (see References document): tab Customer Request Warnings

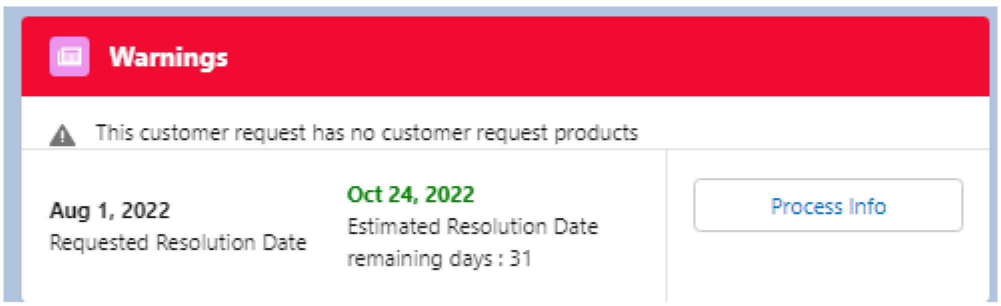
Color Coding



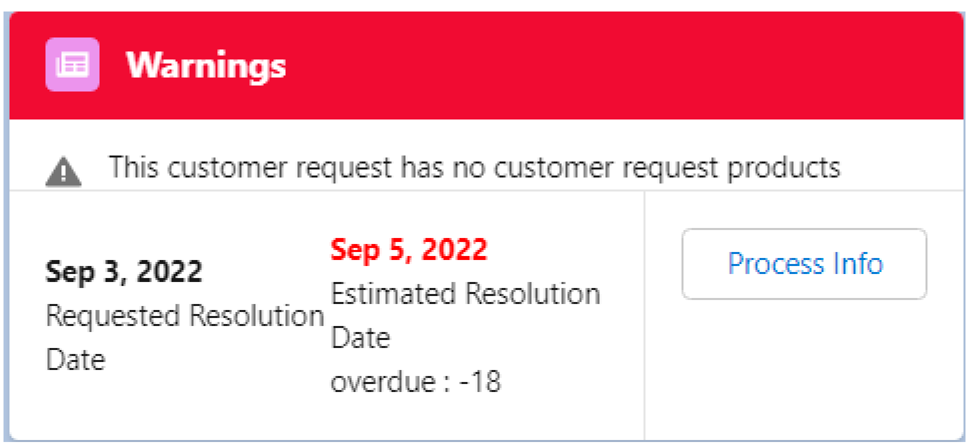
the warning is display on the right of the page (LWC : Customer Request Warning and Case base warning)



- Display when the estimated resolution date > current date



- Display when the estimated resolution date < current date



Customer Request Registration

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

When the user creates a Customer Request, he/she has the ability to register the following information:

Case Information

Field	Definition	

Customer Request Number	Customer Request reference automatically assigned by the System	
Account Name	Main Customer related to the Customer Request	
Partner Type	Customer Partner Type automatically calculated by the System	
GBU Customer Classification	GBU Customer Classification automatically calculated by the System	
Subject		
GBU	GBU related to the Customer Request	
BU	BU related to the Customer Request	
Product	Product Level 3 related to the Customer Request	
Type	Type of Customer Request defined by GBU	
Sub-Type	Sub-Type of Customer Request defined by GBU related to the Type selected	
Originator	Solvay Agent that initiate the Customer Request	
Case Owner	User or a Group of User that is responsible to act on the Customer Request on a particular phase of the process	
Notified	Specific User that needs to be notified on the Processing phase.	
Status	Indicates in which status the Customer Request currently is	
Final communication Sent	Flag that indicates that the Final Customer Communication has been sent. Automatically populated by the System when the email is sent by the User	
Received Date	Date that the Customer Request has been received	
Estimated Resolution Date	Date estimated that the Customer Request will be completed Note: this field may be automatically calculated for GBUs that provided the calculation rules	
Requested Resolution Date	Date that the Customer has requested that the Customer Request should be completed	
Priority	Customer Request priority defined by the Agent (High, Medium, Low)	
Case Origin	Original Channel of the Customer Request (Inbound email, Inbound Call, Mail shot, Teleconference, Face to Face, Website)	
Case Record Type	Case Record Type.	
Clone Customer Request	Indicates if the Customer Request has been created based on an existing Customer Request. Automatically populated by the System	
Confidential	Indicates if the Customer Request visibility should be confidential, meaning that only the Current Owner, the Case Team Members and the Users above on the Role Hierarchy are able to see the Record	
Manufacturing Plant	Plant that should be responsible for the processing of the Customer Request	

Customer Contact Information

Multiple contacts can be maintained on the Customer Request. The main Contact can be maintained under the Customer Contact Information section and additional Contacts can be maintained in the Case Customer Contacts related list.

Field	Definition
Contact Name	Main Contact related to the Customer Request

The main Contact on the customer request is by default recipient of the communication to the customer. The recipients can nevertheless be changed by the user.

Description

In this section, the initial description of the Customer Request is captured

Field	Definition
End Customer	The Final Customer is known. Note: For legal reasons, sometimes this field should not be populated
Initial Description	Customer Description of the Customer Request
Amount	Estimated Cost for Processing the Customer Request
Opportunity	Link to the Opportunity from where the Customer Request was created. Automatically populated when the Customer Request is created from the related list of an Opportunity
Material Description	Material Description of the Product selected
Customer Request Products	List of Product Level 4 and Level 5 that were added to the Customer Request. Automatically populated when a new Product is added from the related list on the Customer Request

The sections above are available on the Edit Mode of the Customer Request and should be populated by the Originator when registering a Customer Request. In order to register the Customer Request, the User should click on the 'Save' button. The Mandatory fields for registering a Customer Request are:

- Account Name
- Subject
- GBU
- BU
- Originator
- Status
- Received Date
- Estimated Resolution Date (if not automatically calculated by the System)
- Priority
- Contact Name
- Initial Description

On this Registration Phase, the Users are able to provide more information from the different related list available on the Customer Request page:

Case Customer Contacts

Additional Contacts are maintained in this related list.

Case Account Associations

On the Customer Request, a primary Customer is maintained on the page layout with the ability to maintain multiple Customers on the related list. This will allow a Customer Request to be processed for more than one Customer at the same time.

Customer Request Products

On the Customer Request is possible, but not mandatory, to detail one Product Family (Level 3) related to the Customer Request. On the Customer Request Products list is possible to add several Product Materials (Level 4 or 5) related to the Product Family selected.

All products/material are maintained in the products related list, where it’s also possible to select an Application End Use for the Products for information purpose (This information is mandatory if the GBU is “Aroma Performance”).

Case Team

Users can be assigned to a Case Team. This allows the appropriate users to have read/write access to the Customer Request as well as receive the appropriate notification emails. When a Customer request is flagged as confidential, only the users in the case team will have read/write access to the customer request.

Google Docs & Attachment related list

On this related list, both Google Docs and files from the computer can be attached.

Approval Process

As detailed in the Approval Process section above, users must at all times submit manually a Customer Request for approval after all the relevant information is provided regarding the Customer Request. When an approval is requested by the GBU the status is changed to **Pending Approval** and the User or Group of Users responsibel for the approval are notified. When the Customer Request is approved, the status is changed to **Approved**.

Process the Customer Request

Once the Customer Request is approved, the Users or group of Users responsible for processing it are notified to act on the Case. The Users will provide a description of what was done and processed on this Customer Request that should then be communicated to the Customer.

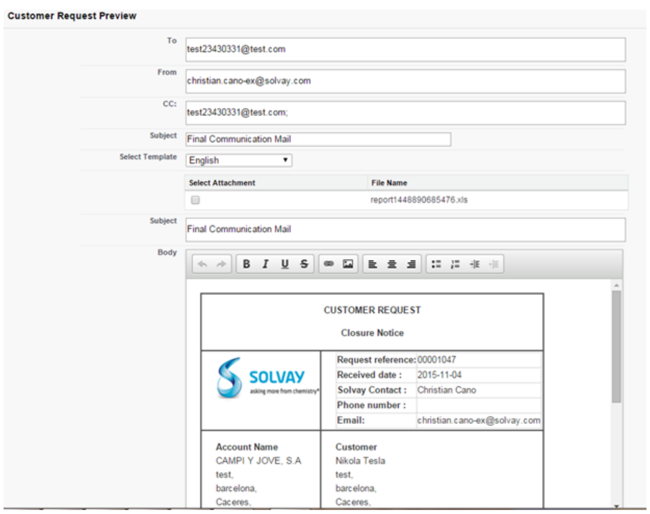
Customer Response

Detailing the Response that should be sent to the Customer.

Field	Definition
Customer Response Proposal	Definition of the actions that were taken regarding the Customer Request that should be communicated to the Customer
Customer Response Proposal Details	More detailed information of the actions that were taken regarding the Customer Request that were taken regarding the Customer Request
Completed Date	Date that the Customer Request was completed
Time Spent	Time spent processing the Customer Request

Customer Communication

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



By default, the email of the main Contact assigned to the customer request will automatically be populated in the recipient's fields. It is possible to add any other email address to the list or in CC.

Basic information on the customer request is available in the template but it remains fully editable. Once the answer to the customer is ready, the user can send the email.

The customer request template is available in the following 16 languages (including simplified Chinese and traditional Chinese):

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

Furthermore, the language of the main Contact is used to determine the language in which the email template will be generated. In case no language is assigned to the main Contact, the default language of the communication is set to English. The user can always change the language by choosing another one in the dropdown list if needed. Attachments on the customer request can be attached to the final communication email to the customer.

Customer Request Closure

Any User assigned to the case team can close the customer request by clicking on the “Close” button. This redirects the User to the closure page where a “Comments” fields can be populated prior to closing the Customer Request. When closing a Customer Request, the status will be default **Close/Answered**, meaning that the Customer Request was completed and the Customer received a communication. If the customer request was Rejected or has not completed the process, the Status can be changed to **Closed/Stopped**.

Close Case

This section groups all the fields related to the Closure phase

Field	Definition
Comments	Closure Comments
Status	Customer Request Status
Closure Date	Date of the Closure of the Customer Request

Appendix

Estimated Resolution Date

GBU	Definition
EP	GBU Customer Segmentation: Account Type = Standard Account - 15 Days
	GBU Customer Segmentation: Account Type = Key Account - 10 days
Aroma Performance	Account: Partner Type = Prospect - 1 month
	Account: Partner Type Prospect AND GBU Customer Segmentation: Classification = A/B - 1 month
	Account: Partner Type Prospect AND GBU Customer Segmentation: Classification = C - 2 months

Type and Sub-Type

GBU	Type	Sub-Type
Aroma Performance	Questionnaire	General Sustainable development/Environmental/Social/Ethical
	Product specifications	
	Regulatory request	
Coatis	Audit	
	MSDS / SDS / FDS	
	Reach questions	
	Regulatory Questions	
	Questionnaire	General Sustainable development/Environmental/Social/Ethical
	Product specifications	

	Certificates	
	Technical Request	Moldflow/MMI Others Sinterline Testing
	Other	
Fibras	MSDS / SDS / FDS	
	Questionnaire	General Sustainable development/Environmental/Social/Ethical
	Agreement	
	Price	
	Freight	
	Publicity	
	Technical Request	Moldflow/MMI Others Process Improvement Product Improvement Sinterline Testing
	Certificates	Domestic Homologation External Homologation
	Other	
Novecare	Regulatory	Raw Material Questionnaire (RMQ) Regulatory Questions
	Quality	Additional tests Analytical Methods/Technical Issues Audit Requests Certificate/Questionnaire Shelf life extension TDS
PolyTechnyl	Specific Service Request	Technical Request

	Product Regulatory certificates	Halogen declaration IMDS MSDS/SDS/FDS Others REACH RohS Tox / Ecotox
	Customer agreements	Commercial contract Logistic/SC agreement Others Quality agreement
	Product Performance data	PDS/TDS Product specifications Specific data or report
	Questionnaires & Questions	Env./Social/Ethical General purpose Others Regulatory Sustainable Development
Solvay Energy Services	Invoice	Claim Duplicate Request Explanation Incorrect/Missing Data Others Taxes
	Distributor Service Request	Data Transmission Grid connection Inception and Termination Intervention related to electricity meter device Others Quality of electricity
	Tariff optimisation	
	Other	
Special Chem	Quality Agreement	
	Other	
Silica	Questionnaire	General Sustainable development/Environmental/Social/Ethical

	MSDS / SDS - PDS / SRDS	
	Certificates	
	Regulatory Documents	
	Technical Request (Silica)	
	Silab	Specific Standard