

18. Customer Specific Requirement

18. Customer Specific Requirement



Overview

Customer Specific Requirement process aims to log, follow, and manage the Customer Specific Requirement life cycle.

This process has 3 main phases:

- 1. Registration
- 2. Assessment
- 3. Implementation



Concerned profiles:

SALES MGR / DIR

SALES REPS

TECH. TEAM & SALES DEV.

CUSTOMER SERVICE & CS MANAGER

SUPPLY CHAIN & QUALITY

STRATEGIC MARKETING

CORPORATE SALES & MARKETING

DATA STEWARD / ADMIN

OR "

ALL"

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 - Select the Record Type
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 - Add a related product on the related list
 - Automatically displays "# of Related Products" on Related list
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 - Step 3 - Frank receives a notification to assess the feasibility of a request.
 - Writes Global Feasibility Conclusion comments after approved
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 - Input the Customer Satisfaction feedback and Close the case
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Added Value

CSR Process in CORE CRM solution will provide you a single place to:

User Stories

- Mary Wants to register a Customer Specific Requirement.
- John receives a notification to approve a CSR

- Register Customer Specific Requirements
- Assign responsibilities for each phase
- Follow the CSR life Cycle
- Find the history of all the key dates and persons involved in a SCR
- Have a broader vision on your Customers needs

- Frank receives a notification to Assess the Feasibility of a request.
- Peter receives a notification to approve the implementation of a CSR.
- Frank receives a notification to implement the request
- The CSR is now live

Step-By-Step

Step 1 - User wants to Register a Customer Specific Requirement.

SALES REP

Select the Record Type

a - On Cases Tab, click on button New
b - On Case Record Type selection page select Customer Specific Requirement

Fill the required information

a - The user can now fill all the required information

b - Beside the main shipping site, additional shipping sites to which this CSR will be relevant can be added.

Add a related product on the related list

a - The logged CSR is on Registration phase
b - A Warning message is displayed to remember the user that it will not be able to submit this requirement for approval before adding a related product on the related list
c - Additional information about the Account is automatically fetched (SAP codes and Customer Classification)

Case Detail

EditDeleteCloneSubmit for Approval

1. Registration

2. Assessment

3. Implementation

4. Active

Warning: Before submitting for approval, you must add at least one Product on the 'Customer Request Products' related list.

▼ Case Information

Customer Request Number	00035931	Case Owner	Jeremie Seabra (Change)
Ship To Account	CAMBRIDGE WOOL	Status	New
SAP ID	RCS ID:303030 PRS ID:101010	Priority	Medium
Customer Classification	A	Case Origin	Inbound call
Contact Name	John Doe	Received Date	22-09-2017
GBU	Aroma Performance	Requested Resolution Date	01-12-2017
BU	Aroma Ingredients	Originator	Jeremie Seabra
Type	Product specifications	Product	Test Product 1
Sub-Type		# of Related Products	0
Regulatory Related	No	Manufacturing Plant Code	ZZEH
Subject	Test Product 1 Specifications	Shipping Site Code	AFS
Initial Description	Customer would need that Test Product 1 had different specification regarding a certain property.	Additional Shipping Sites	XYZ LMN
Annual Contribution (addition or loss)	EUR 1,000.00	Case Record Type	Customer Specific Requirement (Change)
Justification	This new specification could have some interest for several Accounts		

Automatically displays "# of Related Products" on Related list

a - The user mouses over the Customer Request Products related list and adds all the products to which this CSR will be relevant
b - After the products have been added they can be seen on the Related List
c - The "# of Related Products" field automatically calculates and displays the number of products on the related list

Customer Request Products

No records to display

Warning: Before submitting for approval, you must add at least one Product on the 'Customer Request Products' related list.

Case Information

EditDeleteCloneSubmit for Approval

Customer Request Products

New Customer Request Product

Customer Request Products Help

Action	Product	Level	Application/End Use	Created Date
Edit Del	5-BROMOSUAMACOL	Level 4	NUTRITIONAL FLAVOUR	22-09-2017
Edit Del	4-HYDROXY-3-METHOXYMANDELIC ACID 25KG B	Level 5	ANTIOXIDANT FOR FOOD	22-09-2017

Customer Classification

A

Case Origin

Inbound call

Contact Name

[John Doe](#)

Received Date

22-09-2017

GBU

Aroma Performance

Requested Resolution Date

01-12-2017

BU

Aroma Ingredients

Originator

[Jeremie Seabra](#)

Type

Product specifications

Product

[Test Product 1](#)

Sub-Type

of Related Products

2

Regulatory Related

No

Manufacturing Plant Code

[ZZEH](#)

Subject

[Test Product 1 Specifications](#)

Shipping Site Code

[AFA](#)

Related List

a - Customer Request Products - List of Products to which this CSR will apply to

b - Case Account Associations - List of Accounts to which this CSR will apply to.

c - Case Team - Persons involved in this CSR and respective role

d - Approval History - Historic of approval decisions regarding this CSR

e - Case History - Historic of important changes on the CSR

Related Lists

a

Customer Request Products

[New Customer Request Product](#)

[Customer Request Products Help](#)

No records to display

b

Case Account Associations

[New Case Account Association](#)

[Case Account Associations Help](#)

No records to display

c

 Case Team

[Update Case Team Members](#)

[Case Team Help](#)

No records to display

d

Approval History

[Submit for Approval](#)

[Approval History Help](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: 2nd round of approval	14-09-2017 9:45	Approved	Jacques Seabra	Jacques Seabra	ok	 Approved
Step: Approver	14-09-2017 9:40	Approved	Isabelle VIGOT	Jacques Seabra		 Approved
	14-09-2017 9:39	Approved	Fanny Misse	Jacques Seabra		
	14-09-2017 9:39	Approved	Marcia Rodei	Jacques Seabra		
Approval Request Submitted	14-09-2017 9:39	Submitted	Jacques Seabra	Jacques Seabra		

[Show more...](#) | [Go to list...](#)

e

Case History

[Case History Help](#)

Date	User	Connection	Action
14-09-2017 9:45	Jacques Seabra		Record unlocked.
14-09-2017 9:40	Jacques Seabra		Changed Status from Approval Pending to Validated .
			Record locked.
14-09-2017 9:39	Jacques Seabra		Changed Status from Under Assessment to Approval Pending .
			Record locked.

[Show more...](#) | [Go to list...](#)

Submit for approval

a - The user is now able to submit for approval
b - After submitting for approval, the CSR is locked on status 'Pending Pre-Approval'
c - The CSR will remain locked until someone, according to each GBU rules, approves or rejects the requirement.

Customer Request Products (2) | Case Team (2) | Case Account Associations (2) | Case History (2) | Approval History (2)

Case Detail

Edit Delete Clone Submit for Approval **a**

1. Registration 2. Assessment 3. Implementation 4. Active

Case Information

b Case Owner [Jeremie Seabra \[Change\]](#)

Status Pending Pre-Approval

Priority Medium

Approval History [Recall Approval Request](#) [Approval History Help ?](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Pre Approver (Pending for first approval)						
Reassign Approve Reject	24-09-2017 21:58	Pending	CSR - Pre-Approval Group	CSR - Pre-Approval Group	c	Pending
Approval Request Submitted						

Step 2 - John receives a Notification to approve a CSR

SUPPLY CHAIN & QUALITY

Status automatically changed to "Under assessment" after approval

Approve/Reject Approval Request

Case Number 00029587

Case Owner [Jeremie Seabra](#)

Subject Test Product 1 Specifications

Initial Description Customer would need that Test Product 1 had different specification regarding a certain property.

Comments

a Approve Reject Cancel

b Case Owner [CSR Assessment Team \[Change\]](#)

Status Under Assessment

Priority Medium

a - John clicks on the link provide on the email notification and, after reviewing the information provided by Mary, he decides to pre-approve the CSR.

b - After being approved the Status is automatically changed to 'Under Assessment' and assigned to the the person responsible for the assessment phase, according to each GBU rules.

NOTE : At any point during the process the CSR can be rejected, by clicking on the button 'Close Case' and selecting the status 'Closed - Rejected'

Step 3 - Frank receives a notification to assess the feasibility of a request.

Writes Global Feasibility Conclusion comments after approved

a - Frank clicks on the link provide on the email notification and, after reviewing the information provided by Mary, he starts the Assessment process, contacting all persons responsible for each part of the assessment.
b - After receiving feedback from all involved parties Frank writes his Global Feasibility Conclusion Comments.

a			
▼ Feasibility (Analytical)			
Lab. Capable of Measuring Specification	Yes	Estimated Laboratory Costs	EUR 0,00
External Laboratory Needed	No	Comments for Analytical Feasibility	Requirement doable, at no cost
▼ Feasibility (Industrial)			
Prod Capable of Meeting Requirements	Yes	Estimated Production Costs	100.000,00
		Comments for Industrial Feasibility	Some adaptations on the Production chain will have to be made
▼ Feasibility (Supply-Chain)			
Implies MTO instead of MTS	No	Estimated impact on lead time(x of days)	5
Will have Impact on Stock Levels	Yes	Estimated Supply-Chain Costs	EUR 50.000,00
HSE Impacts	No	Comments for Supply Chain feasibility	Will cause some delays and stock issues
▼ Global Feasibility Conclusion			
Plant Feasibility Completed Date	22-09-2017 22:05	Total Estimated Costs	EUR 150.000,00
Plant Feasibility Conclusion	Yes	b Global Feasibility Conclusion Comments	Costs and Impacts are very low compared to potential benefits

Final Submit for approval

a - Frank can now submit the CSR for a final approval.

b - By doing so the status moves automatically to status 'Approval Pending', and the persons responsible to approve the CSR are notified.

Case Detail Edit Delete Clone Submit for Approval a

1. Registration → 2. Assessment → 3. Implementation → 4. Active

▼ Case Information

Customer Request Number	00035931	Case Owner	Jeremie Seabra [Change]
Ship To Account	CAMBRIDGE WOOL	Status	Approval Pending b
SAP ID	RCS ID:303030 PRS ID:101010	Priority	Medium
Customer Classification	A	Case Origin	Inbound call
Contact Name	John Doe	Received Date	22-09-2017
GBU	Aroma Performance	Requested Resolution Date	01-12-2017
BEI	Arrows International	Releasator	Suzanne Gauthier

Step 4 - Peter receives a notification to approve the implementation of a CSR.

Status automatically changed to "Under Implementation" after approval

a - Peter clicks on the link provided on the email notification and, after reviewing the information provided by Frank, he decides to Approve the CSR.

b - After being approved the Status is automatically changed to 'Under Implementation' and assigned to the person responsible for the implementation phase, according to each GBU rules.

Approval Request
Case: 00029587
Back to Case: 00029587

Approve/Reject Approval Request

Case Number: 00029587
Case Owner: [CSR_Assessment_Team](#)
Subject: Test Product 1 Specifications
Initial Description: Customer would need that Test Product 1 had different specification regarding a certain property.
Comments: There is a clear benefit to Solvay in implementing this requirement.
OK to implement.

Approve Reject Cancel

a

1. Registration 2. Assessment 3. Implementation 4. Active

General Information

Case Number	00029587	Case Owner	CSR Implementation Team [Change]
Ship To Account		Status	Under Implementation
SAP ID		Priority	Medium

b

Step 5 - Frank receives a notification to Implement the request

Implementation process starts

a - Frank clicks on the link provide on the email notification and starts the Implementation process, contacting all persons responsible for each part of the implementation.

b - After receiving feedback from all involved parties, and confirming that all tasks are completed, Frank moves the Status of the CSR to 'Implemented'.

a

▼ Under Implementation

Implementation Completed Date	27-11-2017 10:59	Analytical set up	No
Implementation Validated by Plant	No	Other set up	No
Effective Implementation Date	28-11-2017	MoC Form (if necessary)	No
		Comments	We had some delays on the implementation due to a issue with a provider, but the implementain was still completed ahead of what was requested by the customer

Case Detail [Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#)

1. Registration → 2. Assessment → 3. Implementation → 4. Active

▼ Case Information

Customer Request Number	00035931	Case Owner	b Jeremie Seabra [Change]
Ship To Account	CAMBRIDGE WOOL	Status	Implemented
SAP ID	RCS ID:303030 PRS ID:101010	Priority	Medium
Customer Classification	A	Case Origin	Inbound call

Step 6 - The CSR is now live

Input the Customer Satisfaction feedback and Close the case

a - Mary inputs the Customer Satisfaction feedback she received.

b - After some time, if the CSR is no longer valid, it can be deactivated by clicking on the 'Close Case' button...

c - ...and selecting the Status 'Inactive'.

d - The CSR is now Inactive

The screenshot displays a web interface for managing a Customer Satisfaction (CSR) case. At the top, under the 'Completion' section, the 'Customer Satisfaction' score is 4, and the 'Customer Satisfaction Comments' are 'Very satisfied with results'. Below this, a 'Reason For Status' section contains buttons: 'Edit', 'Delete', 'Close Case', 'Clone', and 'Submit for Approval'. A 'Case Information' section shows the 'Status' as 'Inactive' (highlighted with a red circle 'c') and a 'Reason For Status' text box containing 'This CSR is no longer needed for this customer'. A progress bar below shows four stages: 1. Registration, 2. Assessment, 3. Implementation, and 4. Active. At the bottom, the 'Case Information' section lists details: Customer Request Number 00035931, Ship To Account CAMBRIDGE WOOL, SAP ID RCS ID:303030 PRS ID:101010, Case Owner jeremie Seabra [Change], Status Inactive (highlighted with a red circle 'd'), and Priority Medium.

Related articles

For more info

- [Training material Customer Specific Requirement - NEW](#)

Need help?



Need Help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>

The screenshot shows the Solvia Freshdesk interface. At the top left is the 'S SOLVAY' logo. At the top right are links for 'FAQ', 'Demo video', 'Contact us', and a language selector 'EN'. The main heading is 'We're here to help'. Below this is a 'Your subject' input field. A note below the field reads: 'To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)'. At the bottom left is an 'Attach documents' button. At the bottom right is a 'Priority' dropdown menu set to 'Low' and a blue 'SUBMIT' button.

you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example