

P7. Sample Request Management

Presentation

Training Materials

Definitions & Objectives

Why managing Sample Requests in CRM brings value?

- Common process & tool for sample requests
- Automated workflow that will reduce the number of "touch-points" for fulfilling a sample request
- Continuous improvement from an internal perspective
- Keep sample requests visible – can not get lost in email or systems that are not accessed routinely
- Provide a transparent process, anyone can see at any time where a request is.
- Provide the right information at the right time to the right person.

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

- Quality
- Customer request
- Distribution
- Other 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.

- [Training presentation](#)
- [Tutorial videos](#)

Learn more by using the Interactive guides

Interactive Guides

- [Account Navigation](#)
- [Create Account](#)
- [Create Contact & Team Member](#)

Opportunity

- [Opportunity Navigation](#)
- [Create Opportunity](#)

Quote

- [Create Quote + Line Item & Generate PDF](#)

Visit Report

- [Create Visit Report + Add Contact & Team Member](#)

Cases

- [Create Complaint](#)
- [Create Sample](#)
- [Create Customer Request](#)
- [Create Customer Specific Requirement](#)

Lead

- [Lead Scoring & Navigation](#)

Process Overview

Sample management process is divided in 5 main steps:

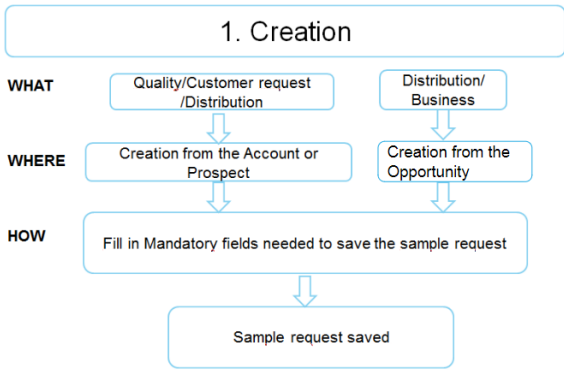
- Creation
- Approval
- Processing
- Follow up
- Closure

These steps are reflected in the tool with the following image :

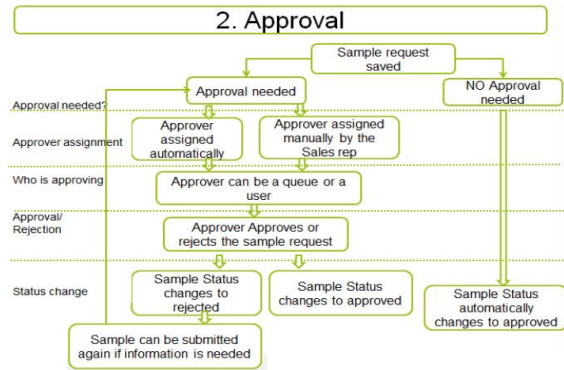


- **New:** As soon as the Sample Request is created
- **Approval Pending:** When the Sample Request is submitted for approval
- **Accepted:** Once the Approver has approved the Sample Request
- **Rejected:** Once the Approver has rejected the Sample Request
- **Ordered:** When a Sample order has been submitted on an external system
- **Shipped:** When the Sample Request has been shipped
- **Delivered:** When the Sample Request has been delivered
- **Closed/Stopped:** When the Sample Request is closed but the process was not completed
- **Closed/Answered:** When the Sample Request is completed and closed

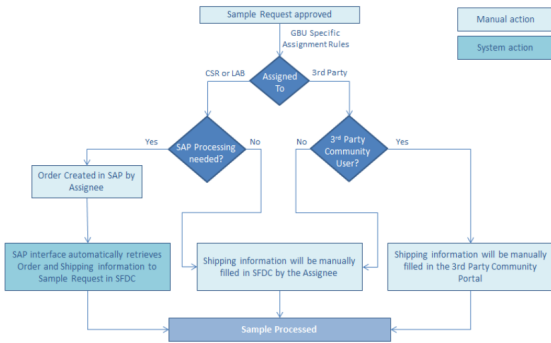
Creation



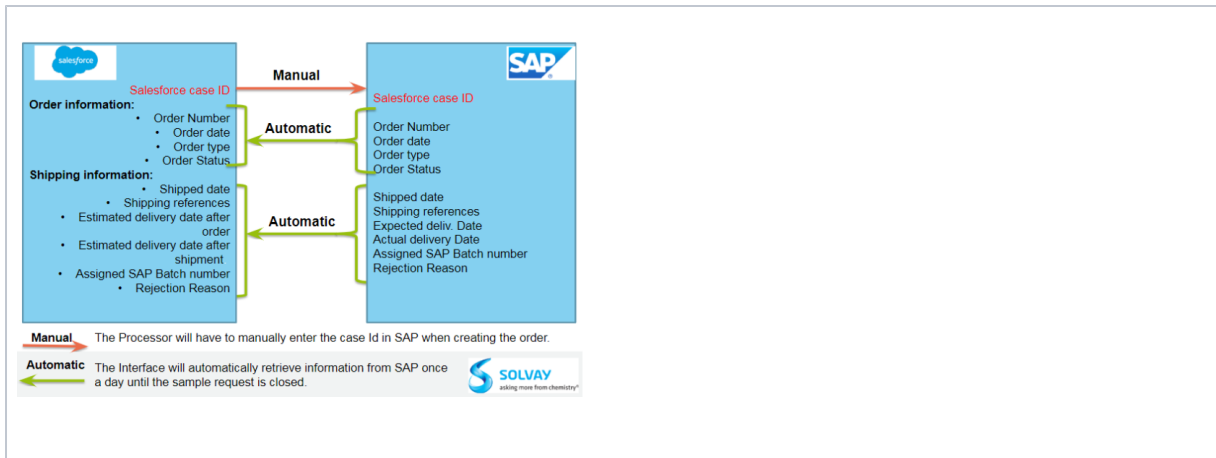
Approval



Processing



Interface with SAP



Note:

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 evolution, 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 "

