

Add Email Mapping Rules to CSR process

Overview

Email Mapping rules for the Customer Specific Requirement process have been made available, allowing the creation of custom rules to notify additional people based on a set of criterias

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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 - II. Please follow the same process to Create/Update /Delete the Email mapping rules through Data Loader ==> Email Mapping Rules
 - a) To create, Please select the correct record type as CSR Email mapping rules.
 - b) To Update, Please click on the edit button, do the changes and save the record.
 - c) To delete, Please click on Delete button to delete the Email mapping rules.
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Step-By-Step

I. Check the template and save it

Open the Excel file attached to the Freshdesk ticket.

Click on the *EMR Create, update or Deletion* tab and check that the template is properly filled

II. Please follow the same process to Create/Update /Delete the Email mapping rules through Data Loader ==> [Email Mapping Rules](#)

a) To create, Please select the correct record type as CSR Email mapping rules.

New Email Mapping Rule

Select Email Mapping Rule Record Type

Select a record type for the new email mapping rule. To skip this page in the future, change your record type settings on your personal se

Select Email Mapping Rule Record Type

Record Type of new record

- Complaint Email Mapping Rule
- Complaint Email Mapping Rule
- Contract Email Mapping Rule
- CSR Email Mapping Rules**
- Customer Request Email Mapping Rule
- Sample Email Mapping Rule
- Visit Report Email Mapping Rule

Available Email Mapping Rule Record Types

Record Type Name	Description
Complaint Email Mapping Rule	R-2753: Record type for Complaint Email Mapping Rules
Contract Email Mapping Rule	R-2753: Record type for Contract Email Mapping Rules
CSR Email Mapping Rules	R-3365 - RecordType for CSR Email Mapping Rules
Customer Request Email Mapping Rule	R-2753: Record type for Customer Request Email Mapping Rules
Sample Email Mapping Rule	R-3138: Record type for Sample Email Mapping Rules

b) To Update, Please click on the edit button, do the changes and save the record.

Email Mapping Rule Detail [Edit](#) [Delete](#) [Clone](#)

▼ Information

Process Name	Customer Specific Requirement	Record Type	CSR Email Mapping Rules [Change]
Step	New	GBU	Aroma Performance
		BU	
		Type	
		Sub-Type	

▼ Criteria

Product Level 3	Manufacturing Plant Code
	Shipping Site Code

▼ People to alert

Email	marina.rodel@solvay.com	User First Name	Marina
		User Name	Rodel

▼ System Information

Created By	Julien Gasqueton , 22/01/2018 10:00	Last Modified By	Julien Gasqueton , 22/01/2018 10:00
Owner	Julien Gasqueton [Change]		

[Edit](#) [Delete](#) [Clone](#)

c) To delete, Please click on Delete button to delete the Email mapping rules.

Email Mapping Rule Detail [Edit](#) [Delete](#) [Clone](#)

▼ Information

Process Name	Customer Specific Requirement	Record Type	CSR Email Mapping Rules [Change]
Step	New	GBU	Aroma Performance
		BU	
		Type	
		Sub-Type	

▼ Criteria

Product Level 3	Manufacturing Plant Code
	Shipping Site Code

▼ People to alert

Email	marina.rodel@solvay.com	User First Name	Marina
		User Name	Rodel

▼ System Information

Created By	Julien Gasqueton , 22/01/2018 10:00	Last Modified By	Julien Gasqueton , 22/01/2018 10:00
Owner	Julien Gasqueton [Change]		

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