SpP Sample

Reference Documents

Functional document (2019)

KT document (2021)

FAQ

A sample request is a **paid or free-of-charge** product shipment to be sent to a customer for **demonstration and/or evaluation** purposes.

The Sales manager creates a Sample record and add the product to send to the customer. **Only one** product can be added per sample request : user must use "**Clone"** button to send another product to the same customer (no need to fill again creation form).

1- For all Samples except **Chimie Plus** : when the product is added, the user has to click on "Submit" to request approval. If the sample requires an approval Approver is defined based on sample type (since ECCO project new routing matrix "Local empowerment" also used for Quotes (Team cluster and ECCO Region) :

- Experimental Products: (PM as approver)
- Externally Sourced (Chimie-Plus): Regional Manager as approver
- Commercial Products: Regional r as approver
- Molded Article: Regional Manager as approver

When Sample request is approved, a case is created for the CSR (Customer Service representative who will create SAP order) . When the case has been managed, the CSR closes the case, then the sample's status is automatically changed to "**Sample sent - closed"**.

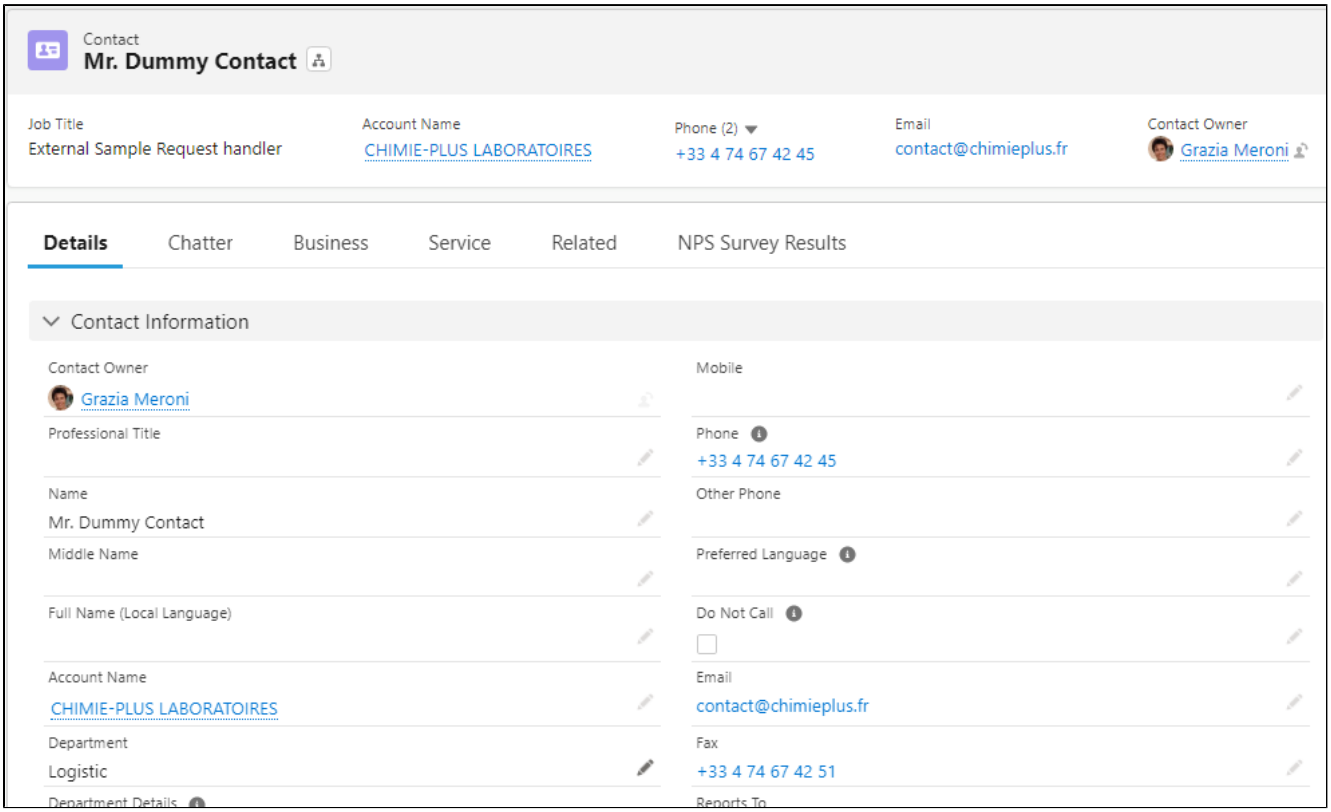
2- For **Chimie Plus** samples, please refer to the related Q&A as the process is a bit different.

All details are on the functional document.

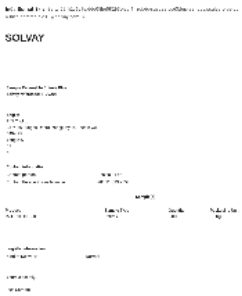
They are samples managed by **Chimie Plus**. When the type is "Externally Sourced (Chimie-Plus)", if the user submits the request, this contact will receive an email (copy-paste the ID in production to see the email address used in real conditions).

To change the e.mail , update the following contact in Production:

https://solvay-spp-crm.lightning.force.com/lightning/r/Contact/0036000001JqFoOAAV/view



The "Submit" button can't be used for this type of Sample. The user must use button "Send External Sample Request to Chimie-Plus". A window will open and this email will be sent to Chimie Plus (with no attachment):



Refer to the "Samples" section on the Product page.

- If "yes" is the value for "Sample Approval needed", the sample will have to be approved.
- If "no" is selected instead, no approval is required and a case will automatically be created for the CSR .
  The approver for "Experimental Products" is the Product Manager and for other Regional Manager see in Evolution request:

> Unable to locate Jira server for this macro. It may be due to Application Link configuration.

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Depending on the value selected in "Type", the list of Products displayed is different.

If the type is "Experimental products" for example, the product availability will have to be "Developmental". Please refer to the functional document (slide 5).
Users have to ask the GBU Data Steward (Sarah Chattin) if they want to cancel a sample request. The status will be changed to "Request canceled".
On desktop, the button used to add a product is a custom component. It only displays products linked to the correct type of sample, etc. This component cannot be used on the mobile version.

As it is not available in mobile, users go to sample, related, sample product, add new sample product and they are redirected to the sample product layout. On this layout, the field is "read only" because we don't want users to select products from there (we need they use the component). As admin users, we can update this field because at the profile level, we have the permission to edit "read only" fields.

In order to work on Sample and add a product, please ask users to not use the mobile app.

Procedure to check user rights on the sample object:

The new product creation layout should be like this:

1st column

Sample, Product

2nd column

Product Comments, Arrival Date Requested

then two sections.

- Product Sample Price (PM Recommendation) with the fields Sample Reference Price, Reference Currency, Reference UOM
- Quantity & Pricing with the fields: Sample Paid,, Requested Volume, UOM (for Volume & Price), Sample Price, Currency

After save to check that In component "sample product" should display as below.

1st column

Product

Product Comments

Estimated Delivery Date

Arrival Date (Requested)

Ship Date

Tracking No/Carrier

Sample Reference Price

Reference UOM

Reference Currency

2nd column

Sample Paid

Sample Price

UOM (for Volume & Price)

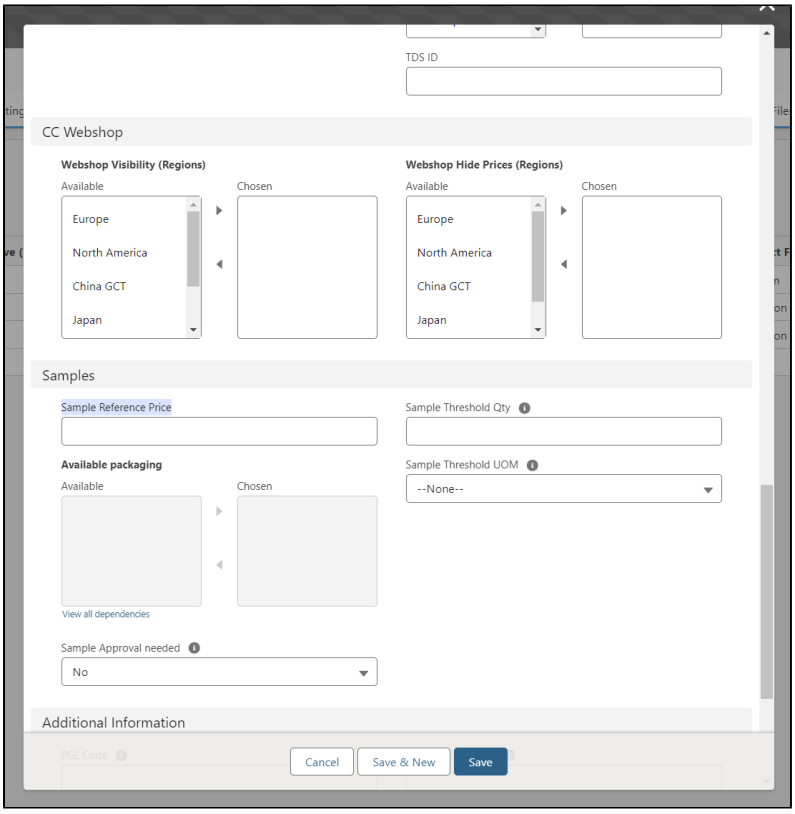
Requested Volume

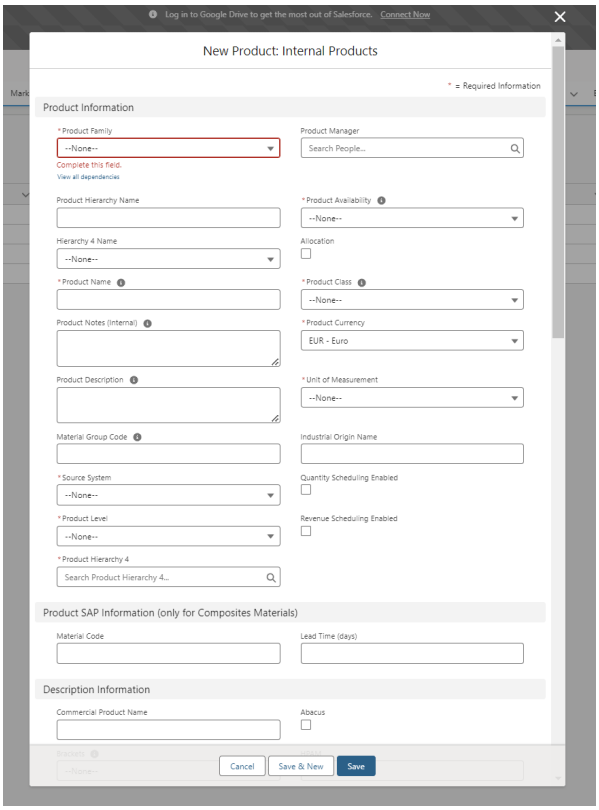
Note: Component layout where Type= Commercial Product

Reference link to implementation requirement:

> **Unable to locate Jira server for this macro. It may be due to Application Link configuration.**

- **Excerpt: An error shows when a user tries to save a Product record without first filling in a value to the “Sample Reference Price” field (as seen in the below images).**



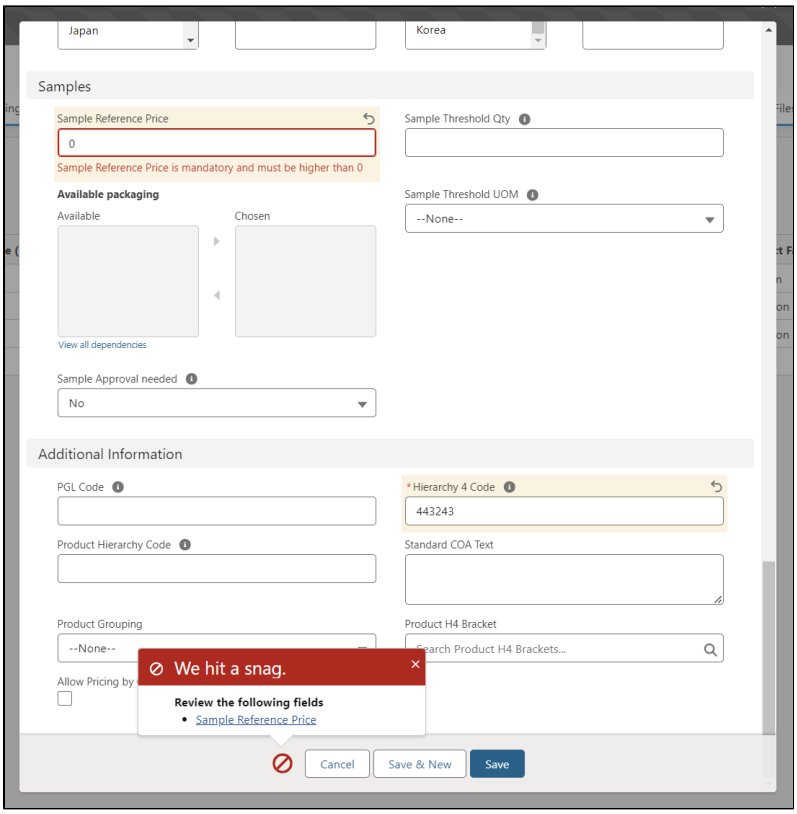


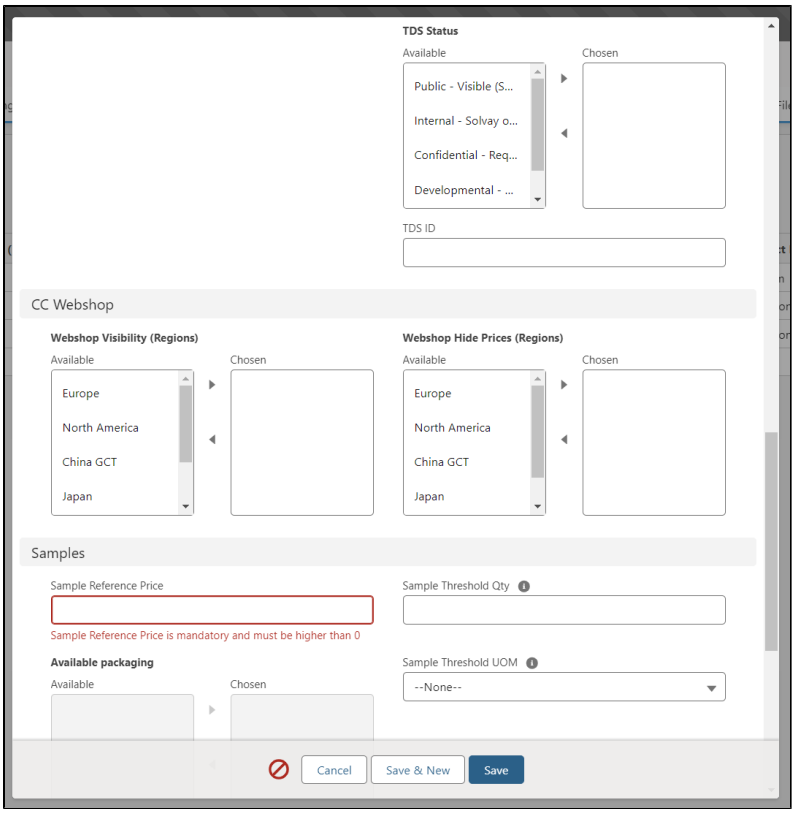
With the new process implemented, when a user creates a new Product record, under certain conditions, as per steps showcased hereunder, an error message will show on the record page, under the “Sample Reference Price” field:

1.User is a Product Manager

2.The Product the user is trying to create from scratch has “Source System = PF1” and “Product Level = Level 4” and “Sample Reference Price = 0, OR a negative value, OR no value is added to the field/empty field”

As a result of the above details, when the user tries to save the record the Product record is not successfully created and the system will return the following error: “Sample Reference Price is mandatory and must be higher than 0” below “Sample Reference Price” field (as seen in the images below).

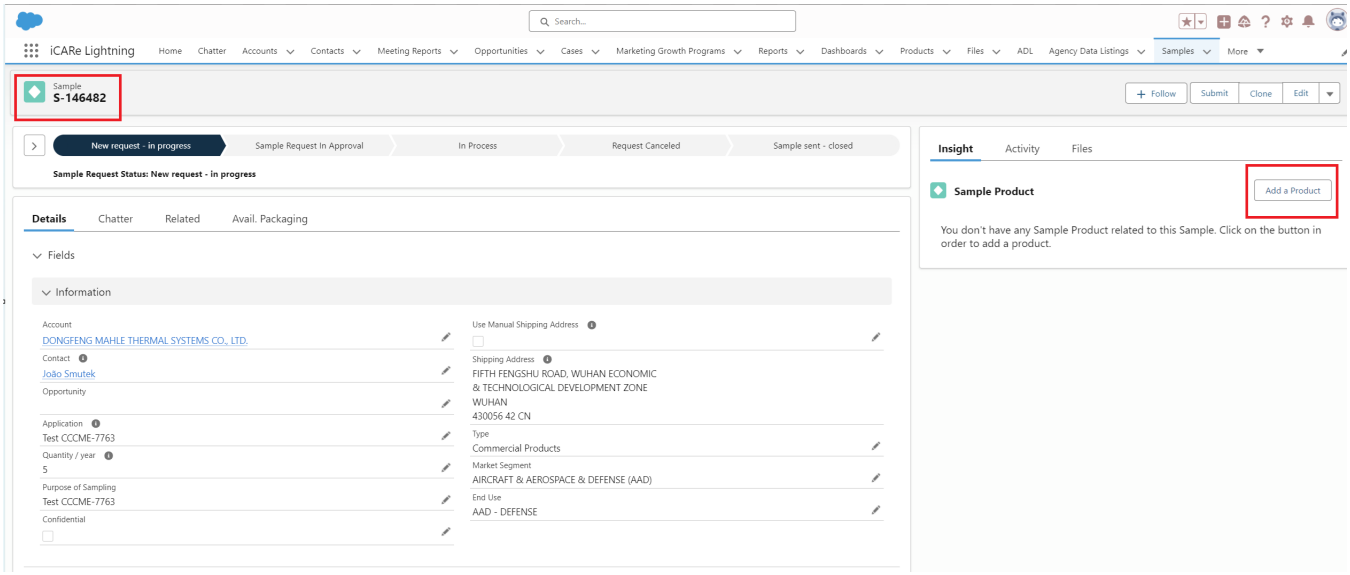

Japan
Korea
Samples
Sample Reference Price
0
Sample Reference Price is mandatory and must be higher than 0
Sample Threshold Qty
Available packaging
Available
Chosen
View all dependencies
Sample Threshold UOM
--None--
Sample Approval needed
No
Additional Information
PGL Code
* Hierarchy 4 Code
443243
Product Hierarchy Code
Standard COA Text
Product Grouping
--None--
Product H4 Bracket
Search Product H4 Brackets...
Allow Pricing by
We hit a snag.
Review the following fields
Sample Reference Price
Cancel
Save & New
Save


TDS Status
Available
Chosen
Public - Visible (S...
Internal - Solvay o...
Confidential - Req...
Developmental - ...
TDS ID
CC Webshop
Webshop Visibility (Regions)
Available
Chosen
Europe
North America
China GCT
Japan
Webshop Hide Prices (Regions)
Available
Chosen
Europe
North America
China GCT
Japan
Samples
Sample Reference Price
Sample Reference Price is mandatory and must be higher than 0
Sample Threshold Qty
Available packaging
Available
Chosen
Sample Threshold UOM
--None--
Cancel
Save & New
Save

Reference link to implementation requirement:

> ⚠ **Unable to locate Jira server for this macro. It may be due to Application Link configuration.**

- **Excerpt: An error shows when a user tries to add a Product with “Product Class = C” , on a Sample record (as seen in the below images).**



With the new process implemented, when a user tries to add a Product record on a Sample record, under certain conditions, as per steps showcased hereunder, an error message will show:

1.User is a Sample Manager

2.The Sample record the user is creating from scratch or the Sample record the user is editing, has "Sample Request Status = New Request - In Progress"

3.Once Sample record created, the user clicks the "Add a Product" button on the Sample record

4.The user adds a Product with "Product Class = C" and "Product Availability = Developmental"

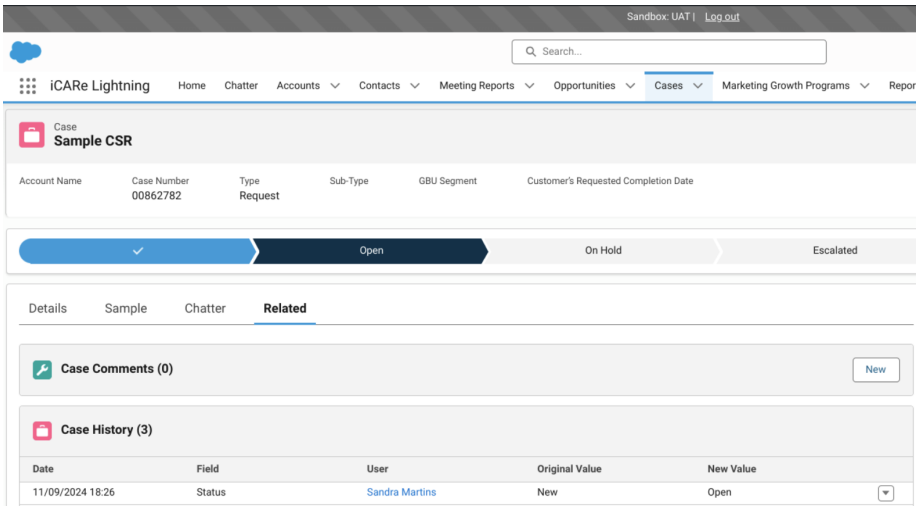
5.The user populates the required fields (in red asterix) and saves the record

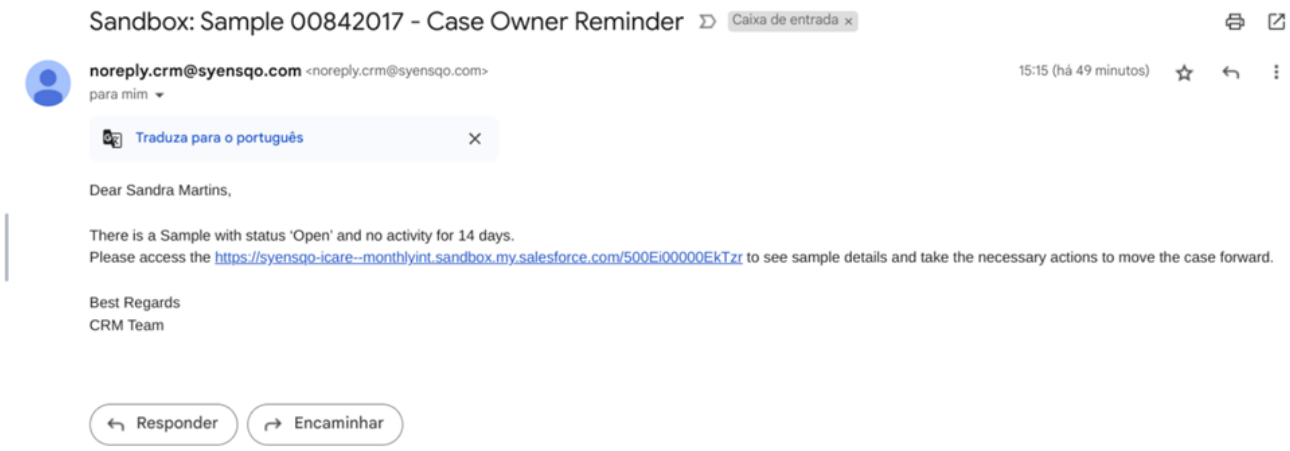
As a result of the above, the sample product cannot be saved with a Product Class C and the following error message is shown: "Product is required. Product must be active and not be of Class C"

Reference link to implementation requirement:

> ⚠ **Unable to locate Jira server for this macro. It may be due to Application Link configuration.**

Excerpt: Owner of any Sample CSR in the system, with "Status = Open", that encountered no activity for 14 days from case creation date, will receive an automated email notification.





Why the new implementation: help get a follow up and save time.

Goal: The changes aim to notify and remind a case owner that the Sample has been open for at least 14 days with no updates.

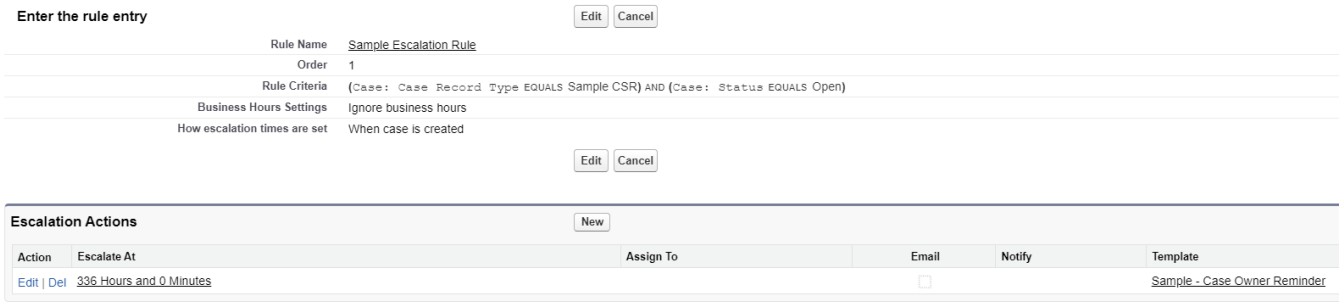
Feature Overview: After 14 days with no no activity on a Sample CSR, the case owner will receive an alert email.

Addresses to: Implementation applies to SpP GBU.

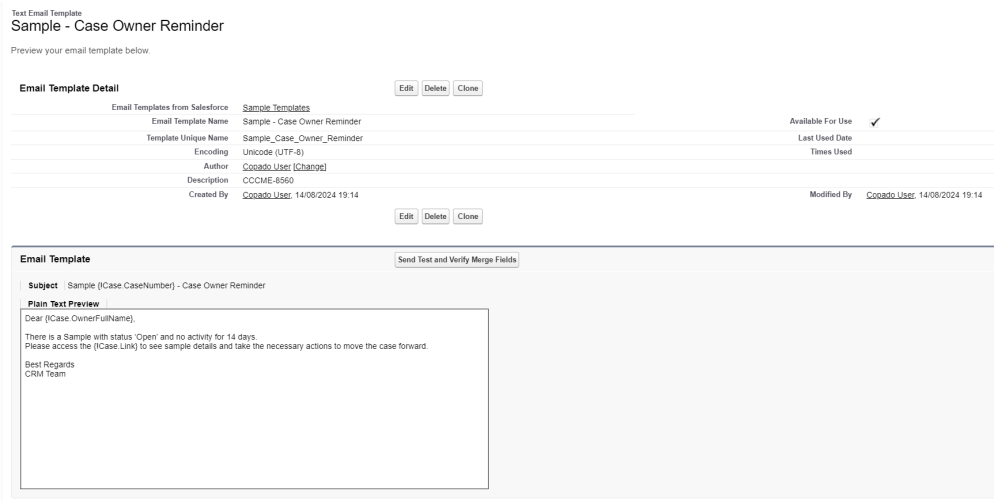
1.Current Implementation Behavior:

What's New?

- new case escalation rule "Sample Escalation Rule"



- new email template "Sample - Case Owner Reminder"



Reference link to implementation requirement: https://solvayagile.atlassian.net/browse/CCCME-8560

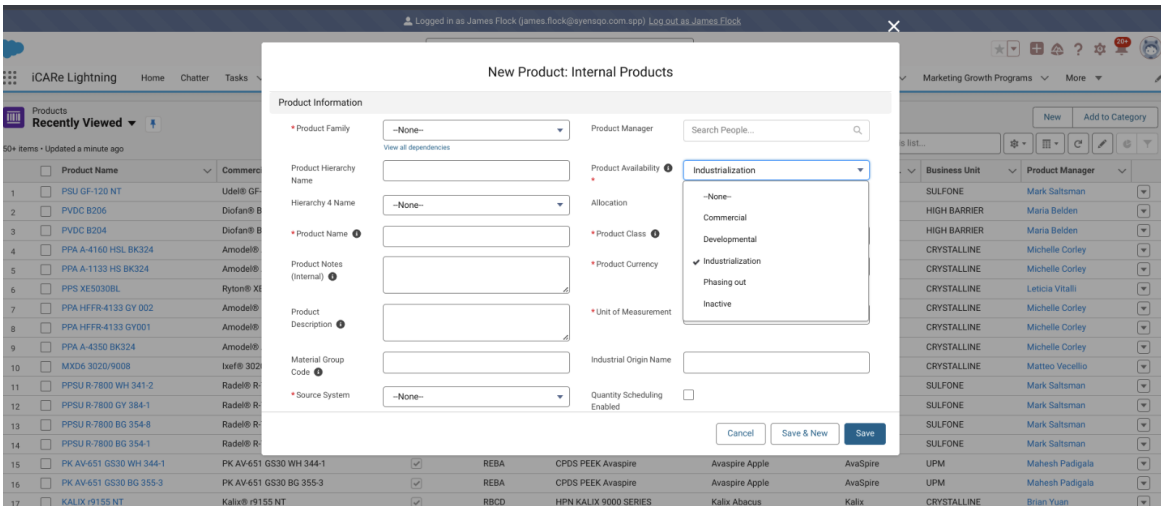
Excerpt: Products with "Product Availability = Industrialization" made available on Commercial Samples through new Product Availability value: "Industrialization".

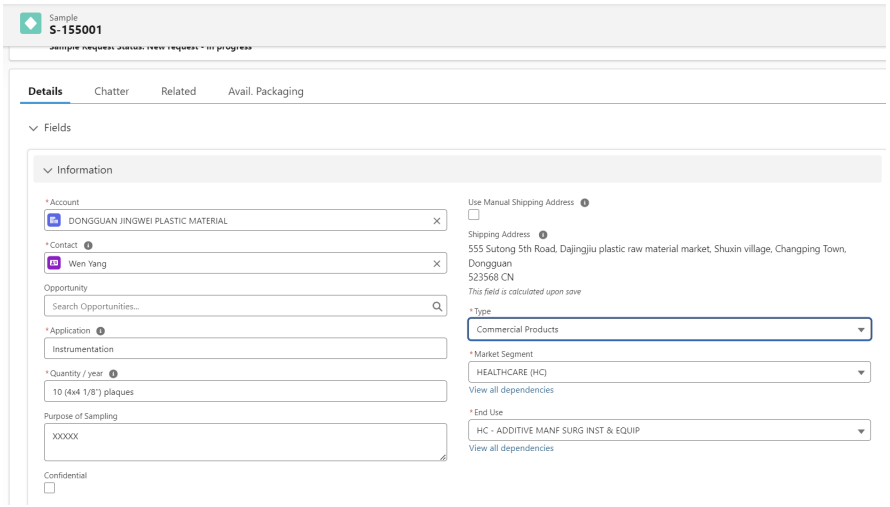
Why the new implementation: help get a follow up and save time.

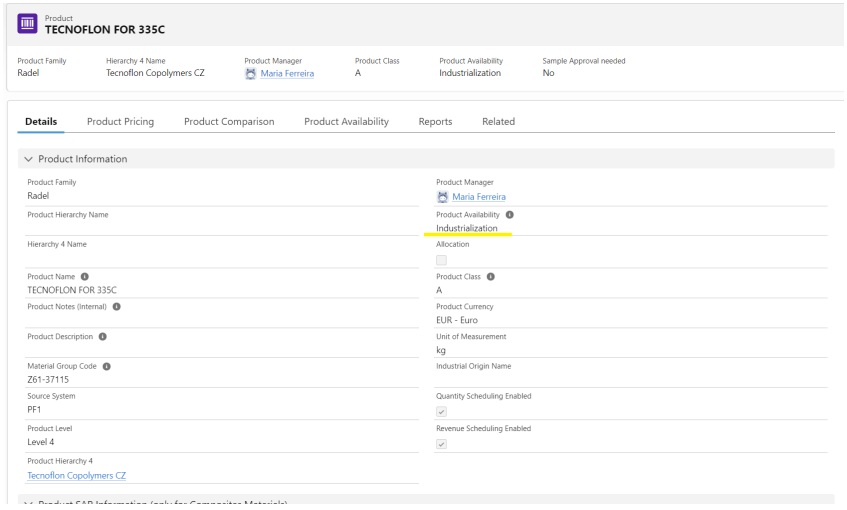
Goal: The changes aim to notify and remind a case owner that the Sample has been open for at least 14 days with no updates. The update of the feature aims to update the logic for sampling products with the new value (Industrialization).

Feature Overview: If a Sample Product has the value of Industrialization for Product Availability, the product is automatically made available to all Commercial samples.

Addresses to: Implementation applies to SpP GBU.







1.Current Implementation Behavior:

What's New?

- new Product Availability value: "Industrialization"

Reference link to implementation requirement: https://solvayagile.atlassian.net/browse/CCCME-7763

Enhancement Overview:
The enhancement involves updating the sample creation process to streamline operations and minimize errors by requiring users to select a product first. This selection determines the appropriate sample type—**Commercial** or **Experimental**—based on the product's availability. Previously, users selected the sample type before the product, leading to mismatches and confusion.

Functional Changes Implemented:

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1. **Product-First Workflow:**
    - Users must select the product before entering any additional sample details.
    - The system uses the selected product's availability to automatically determine the sample type.
2. **Sample Type Restrictions:**
    - Only products matching the selected sample type (Commercial or Experimental) are displayed for selection.
    - If a mismatch occurs (e.g., Experimental sample type but product availability is Commercial), the system updates the sample type to match the product availability automatically.
3. **Field Requirements Adjustments:**
    - Commercial Samples require basic fields only.
    - Experimental Samples mandate additional fields, such as R&D location and contact information.
4. **Preventive Validation:**
    - Users are restricted from changing the sample type after the product is selected.
    - If users attempt to edit the sample type, they are alerted via an error message.

Improvements Overview