18. Customer Specific Requirement

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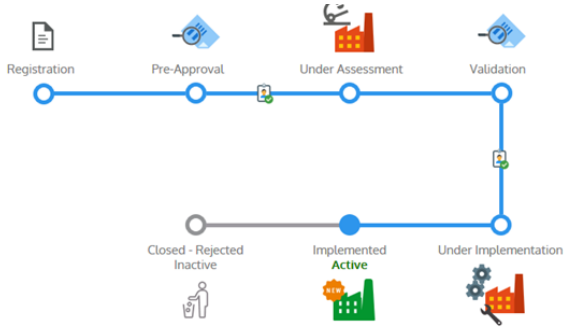
Managing Customer Needs

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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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

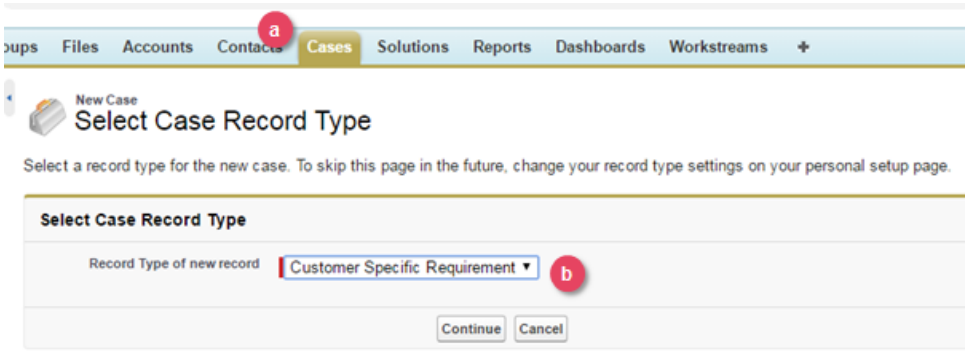
Step-By-Step

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

SALES REP

Select the Record Type

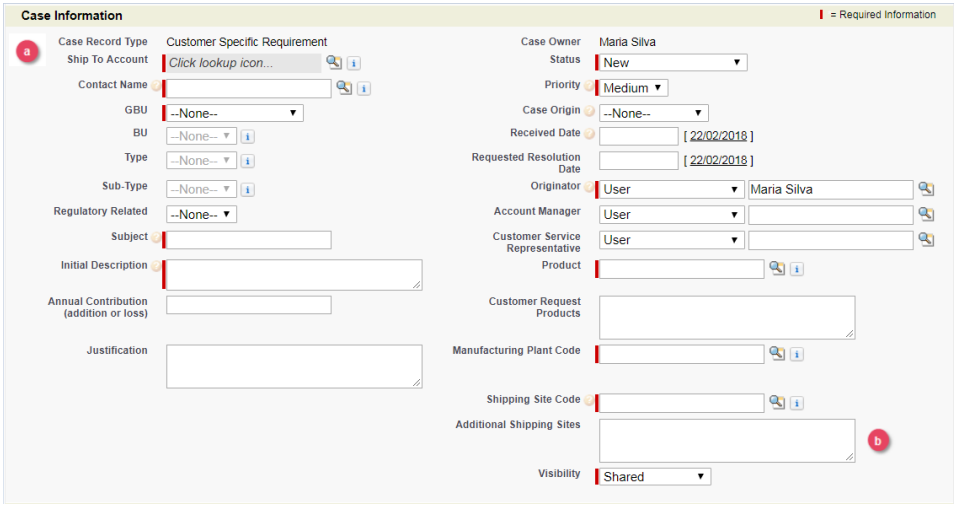
a - On Cases Tab, click on button New
b - On Case Record Type selection page select Customer Specific Requirement



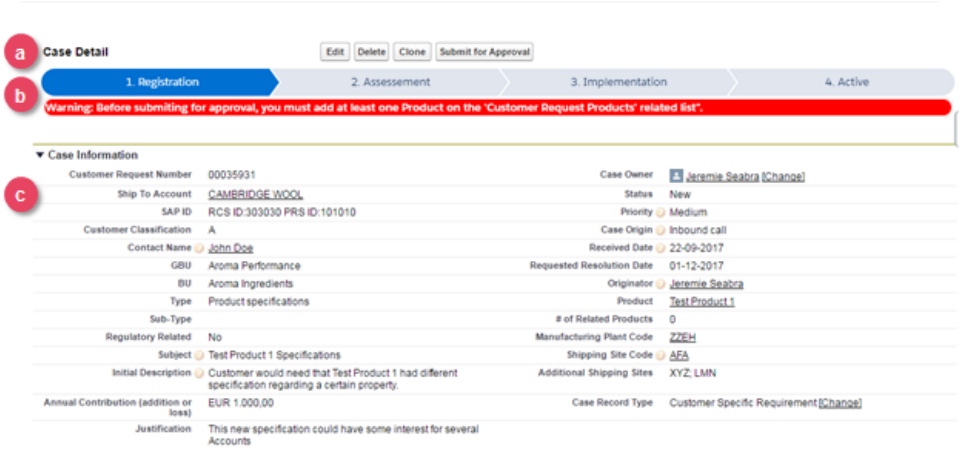
Fill the required information

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.

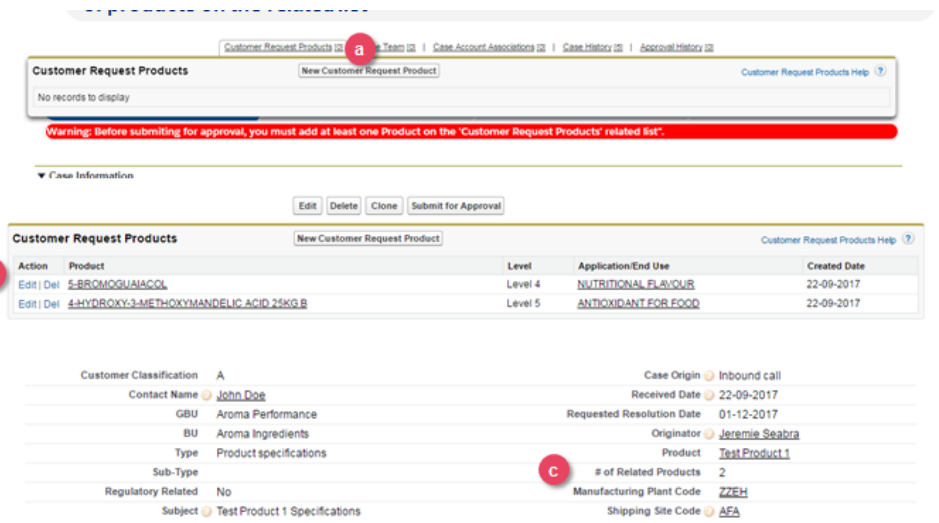


Add a related product on the related list



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)

Automatically displays "# of Related Products" on Related list

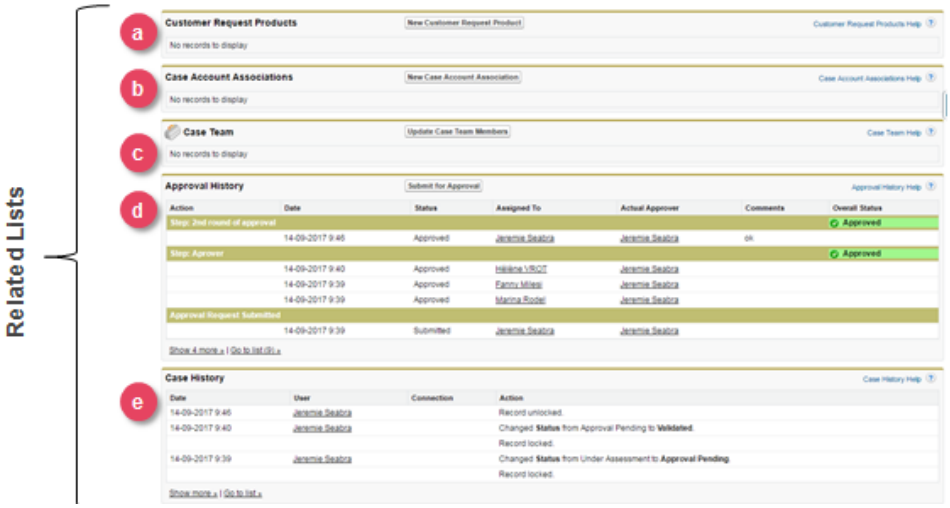


a - The user mousesover the Customer Request Products related list and adds all the products to which this CSR will be relevant
b - After the products have been added they can be seen on the Related List
c - The “# of Related Products” field automatically calculates and displays the number of products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

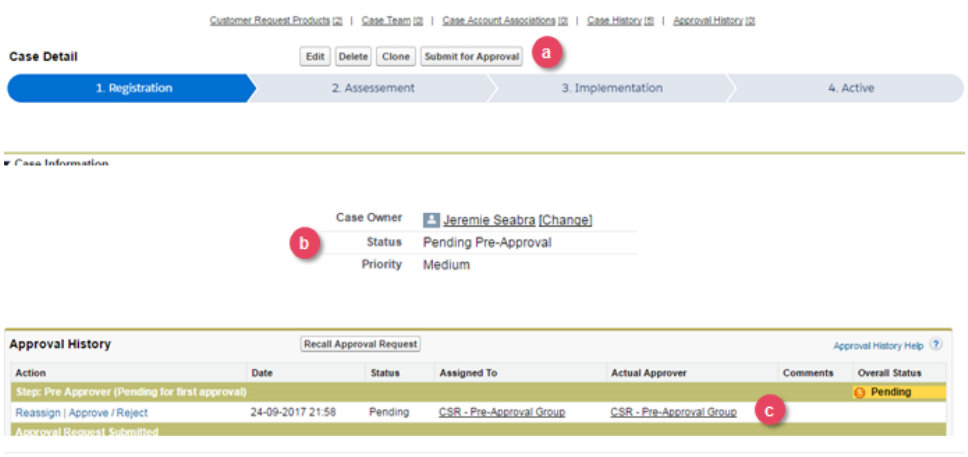
Related List

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



Submit for approval

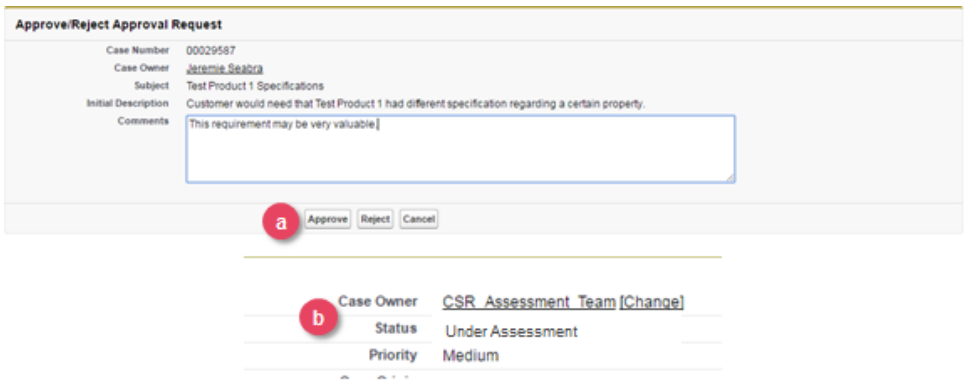


a - The user is now able to submit for approval b - After submitting for approval, the CSR is locked on status 'Pending Pre-Approval' c - The CSR will remain locked until someone, according to each GBU rules, approves or rejects the requirement.

Step 2 - John receives a Notification to approve a CSR

SUPPLY CHAIN & QUALITY

Status automatically changed to" Under assessment " after approval

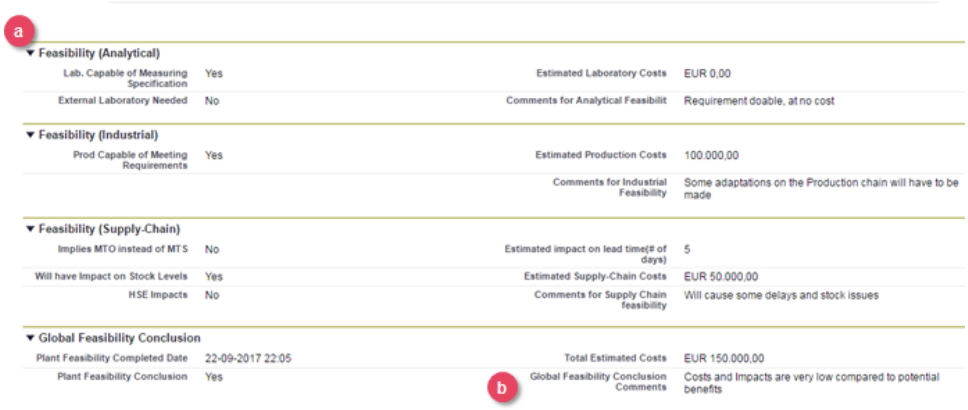


a - John clicks on the link provide on the email notification and, after reviewing the information provided by Mary, he decides to pre-approve the CSR. b - After being approved the Status is automatically changed to ‘Under Assessment’ and assigned to the the person responsible for the assessment phase, 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

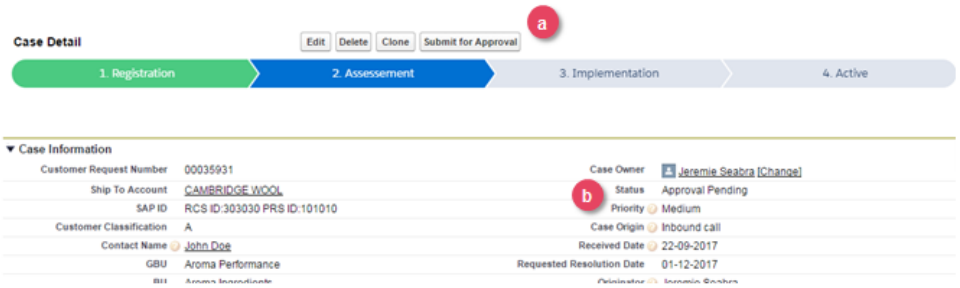
a - Frank clicks on the link provide on the email notification and, after reviewing the information provided by Mary, he starts the Assessment process, contacting all persons responsible for each part of the assessment.
b - After receiving feedback from all involved parties Frank writes his Global Feasibility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



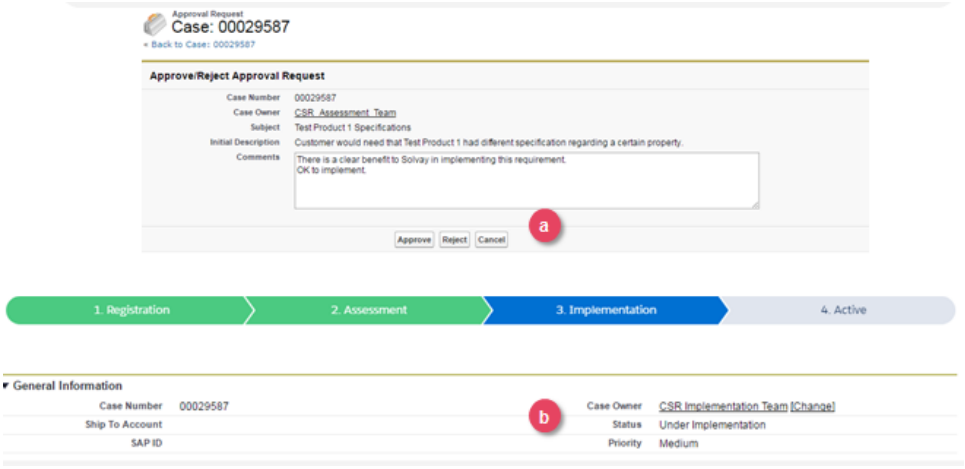
Final Submit for approval

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.



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

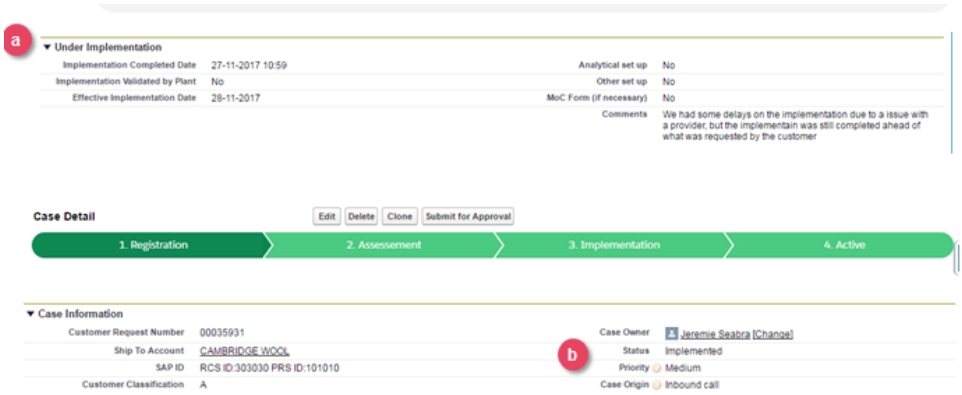
Status automatically changed to "Under Implementation" after approval a - Peter clicks on the link provide on the email notification and, after reviewing the information provided by Frank, he decides to Approve the CSR. b - After being approved the Status is automatically changed to 'Under Implementation' and assigned to the the person responsible for the implementation phase, according to each GBU rules.	

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'.



Step 6 - The CSR is now live

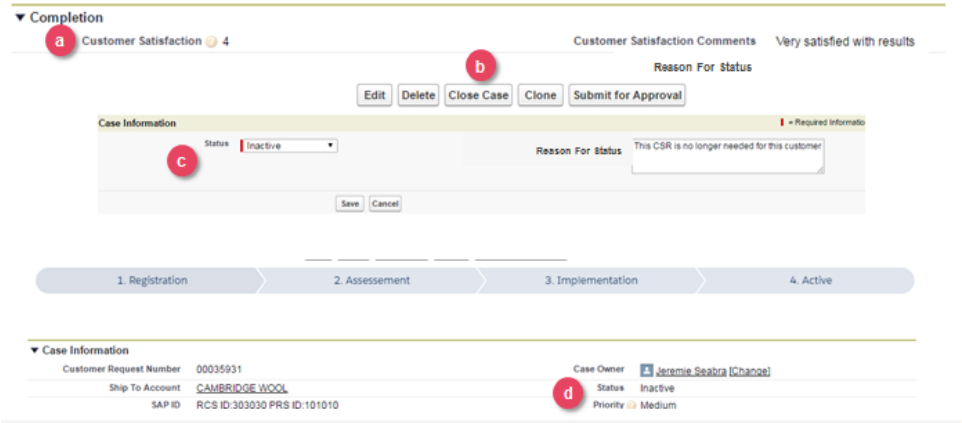
Input the Customer Satisfaction feedback and Close the case

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



Related articles

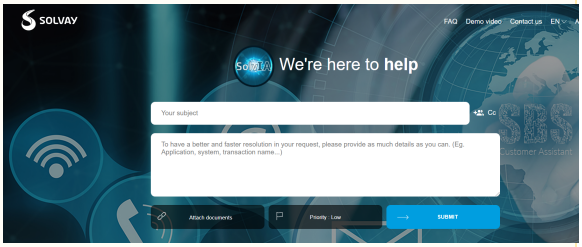
For more info

- 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/



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