

C2M.v2.7.CCB

3.4.3.3 Process Customer Request For Literature and Forms

Creation Date: November 18, 2010

Last Updated: February 11, 2020

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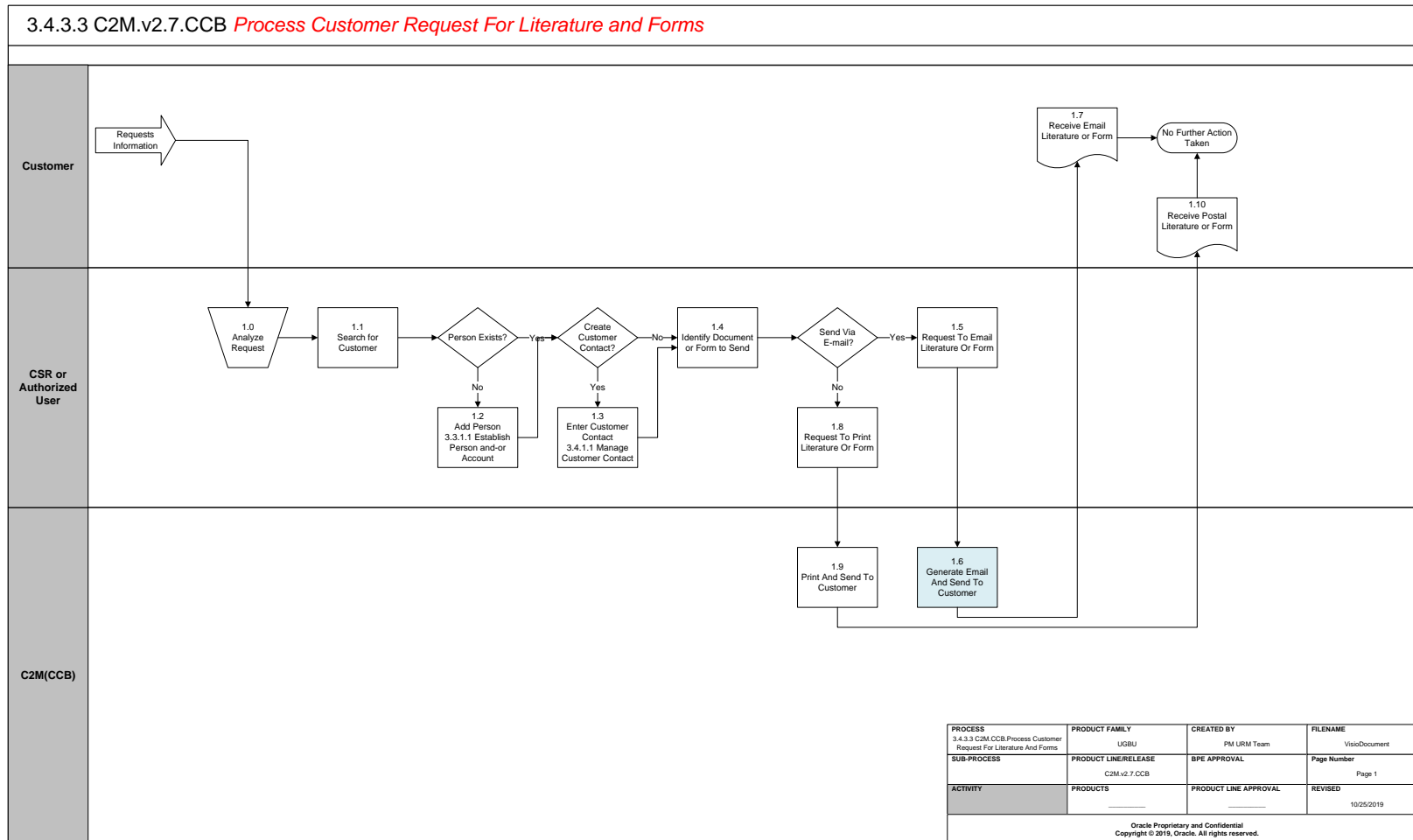
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Brief Description

Business Process: 3.4.3.3 C2M.CCB.Process Customer Request For Literature And Forms
Process Type: Sub Process
Parent Process: 3.4 C2M.CCB.Manage Customer Relationship
Sibling Processes: 3.4.1.1 C2M.CCB.Manage Customer Contact

This process takes place, when a customer requests or needs some information in the format of literature or a form. We now provide a fast and effective way for a CSR or Authorized to deliver that information using the new Literature Request zone.

Business Process Model:



Detail Business Process Model Description

1.0 Analyze Request

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User decides what type of information the customer is seeking.

1.1 Search For Customer

Actor/Role: CSR or Authorized User

Description:

As a result of a customer request, the first step is to determine if a person exists or if a new person has to be created.

1.2 Add Person

Actor/Role: CSR or Authorized User

Description:

If a person needs to be added, the CSR or Authorized User navigates to Person Page to add information. This process is provided in 3.3.1.1 Establish Person and or Account.

1.3 Enter Customer Contact

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User creates a customer contact pertaining to the literature or form and how it was sent to the customer, [Email](#) or post. This process is provided in 3.4.1.1 Manage Customer Contact.

1.4 Identify Document Or Form To Send

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User asks customer what information or Form is needed and if he/she prefer to receive it via email or postal service.

1.5 Request To Email Literature Or Form

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User navigates to the Dashboards [Literature Request Zone](#), accesses the [Email](#) for Literature or Form.

1.6 Generate Email And Send To Customer

Actor/Role: C2M(CCB)

Description:

CSR or Authorized User generates the email and sends it on to the customer.

Configuration Required Y

Entity to Configure

Characteristic Type: CM_FILE
Portal: CI_DASHBOARD-Dashboard
Zone Type: F1_DE_SINGLE-Infor Date Explore, Single SQL
Zone: CI_DOCTDB-Literature Request

Business Object Y

Business Object

BO CI_DocumentTemplate - Document Templates

Note: Populate Option Type File Directory with spl/V230_CCB_DEMO_BLD21_LIN_ORA_WLS/splapp/billView/, (Emailing Files); Defines the default file directory in which files need to be stored to be attachable to emails.

1.7 Receive Email Literature Or Form

Actor/Role: Customer

Description:

Customer receives Literature or Form via email

1.8 Request To Print Literature Or Form

Actor/Role: CSR or Authorized User

Description:

CSR or Authorized User navigates to the Dashboards [Literature Request Zone](#) and selects the requested document in PDF format.

1.9 Print And Send To Customer

Actor/Role: C2M(CCB)

Description:

CSR or Authorized User prints the literature or form and mails it on to the customer.

Configuration Required Y

Entity to Configure

Characteristic Type: CM_FILE
Portal: CI_DASHBOARD-Dashboard
Zone Type: F1_DE_SINGLE-Infor Date Explore, Single SQL
Zone: CI_DOCTDB-Literature Request

Business Object Y

Business Object

BO CI_DocumentTemplate - Document Templates

Note: Populate Option Type File Directory with spl/tips/sampleLiterature/ - (Launching Files); Defines the default file directory in which files are stored for later online retrieval.

1.10 Receive Postal Literature Or Form

Actor/Role: Customer

Description:

Customer receives Literature or Form through the postal service

Test Documentation related to the Current Process

ID	Document Name	Test Type

Document Control

Change Record

Date	Author	Version	Change Reference
11-18-10	Geir Hedman	Draft	Create Document
11-29-10	Ayelete Lavee		Update document
11-30-10	Geir Hedman		Update Document
11-30-10	Ayelete Lavee		Update Document
12-8-10	Geir Hedman & Ayelete Lavee	Final	Update Document
12/10/2013	Dean Davis		update
03/15/2014	Galina Polonsky		Reviewed, Approved
09/07/2017	Ekta Dua		Updated word and visio to v2.6
09/22/2017	James Forman		Update for C2M
12/10/2017	Galina Polonsky		Reviewed, Approved
06/03/2019	Satya Kalavala		Updated format for v2.7

Attachments:

Literature Request Zone



Literature Request
Box.doc

Email Document Template



Email Document
Template.doc