**CCS**

**24B**

**3.4.3.3 Process Customer Request**

**for Literature and Forms**

Creation Date: November 18, 2010

Last Updated: January 21, 2025

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1. To update the table of contents, put the cursor anywhere in the table and press [F9]. To change the number of levels displayed, select the menu option Insert‑>Index and Tables, make sure the Table of Contents tab is active, and change the Number of Levels to a new value.

## Brief Description

**Business Process: 3.4.3.3 CCS.Process Customer Request For Literature And Forms**

**Process Type: Sub Process**

**Parent Process: 3.4 CCS.Manage Customer Relationship   
Sibling Processes: 3.4.1.1 CCS.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**](#_Business_Process_Model) **Analyze Request**

**Actor/Role:** CSR or Authorized User

**Description:**

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

[**1.1**](#_Business_Process_Model) **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**](#_Business_Process_Model) **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**](#_Business_Process_Model) **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](#_Email_Document_Template) or post. This process is provided in 3.4.1.1 Manage Customer Contact.

[**1.4**](#_Business_Process_Model) **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**](#_Business_Process_Model) **Request To Email Literature Or Form**

**Actor/Role:** CSR or Authorized User

**Description:**

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

[**1.6**](#_Business_Process_Model) **Generate Email And Send To Customer**

**Actor/Role: CCS(**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**](#_Business_Process_Model) **Receive Email Literature Or Form**

**Actor/Role:** Customer

**Description:**

Customer receives Literature or Form via email

[**1.8**](#_Business_Process_Model) **Request To Print Literature Or Form**

**Actor/Role:** CSR or Authorized User

**Description:**

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

[**1.9**](#_Business_Process_Model) **Print And Send To Customer**

**Actor/Role: CCS(**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.

[**2.0**](#_Business_Process_Model) **Receive Postal Literature Or Form**

**Actor/Role:** Customer

**Description:**

Customer receives Literature or Form through the postal service

## Test Assets related to the Current Process

| Testing Asset Sr.No | Testing Asset-Flows | No Of Data sets |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

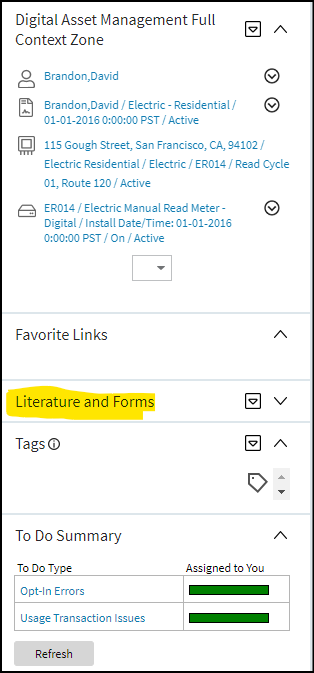
## Document Control

**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 |
| 06/24/2024 | Kunal Nerkar |  | Updated for CCS 24B |
| 07/26/2024 | Line Prado |  | Reviewed |
| 12/15/2024 | Galina Polonsky |  | Reviewed, Approved |

## Attachments:

### Literature Request Zone

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