

Raising a CRM case

From your main CRMDashboard;

- Using the magnifying glass(Search box -top of the screen) search the with an (*) at the start to ensure a case is raised.

If there are no existing cases for this issue and a new case should be raised click the button (top right of the search results).

Note: we can raise multiple cases against the same order if there have been multiple issues.

Populate all relevant fields;

–(unless it is relating to a vendor only issue).

– if it relates to an order that has been shipped mark as shipped and populate the order number, if it relates to an open order mark as open.

: Populating the order number automatically populates the account, and, it also limits the options to those shown on the order.

– use the account to ensure the correct account is populated.

– List all relevant order numbers.

– auto populates to yourself, can be changed if/when required.

– brief description of issue.

– more in-depth description of the issue, can be updated and added to as a running commentary as the problem develops.

– how we fixed this issue what we have done to avoid it happening again in the future.

– pick relevant error/departments

– pick relevant breakdown.

„& can all be updated as/once problem is solved before closing the case to ensure costs are recorded accurately.

Examples of what costs to include and where;

- Unit cost of product x no. of damaged bags. Or if incorrect goods sent and not being returned the unit cost of correct goods.

- Full amount to the customer, this may be from damaged bags, good will gesture credits etc. include credits to customer.

- Any cost to us, the total unit cost of damaged bags (if cannot be claimed from haulier), good will gesture credits etc.

- Any additional cost we have passed on to the customer, this could be from demurrage or re-delivery costs etc.

the same cost can be recorded in more than one field as the totals of each will not be combined. e.g. the unit cost of product.

Example scenarios can be found at the end of this document.

Next Steps;

If you have any images relating to the case i.e. damaged bags or faulty item, please drag and drop these into the case.

If you have completed all you can do with this case, all costs have been recorded and there are no further actions required.

If you have completed all you can do with the case, all costs have been recorded and the customer requires no further action.

However, if for any reason you have further actions with the case, e.g. you have raised a claim with a carrier

Please ensure you include:

account number & SIN# in the subject.

clear instructions of what is required.

a quick description of why it is required.

Amend the date to today's date 17:00.

Populate relevant fields.

Change owner to Claire. Save and Close.

Notes:

A case cannot be closed if there is an open task. If relevant the full case should always be assigned to Claire

Credits can be raised via a return via a CRM request, but both.

Cases can be assigned to "Customer Service", someone within the customer service team will action this with

If for any reason you need to re-open a case after it has been closed for example to update costs or add further

If a non-conformance report is required, information can be populated under the non-conformance tab and populated

Claim Form

If a claim needs to be submitted to a haulier for damages, there is an editable letter headed word doc claim form

Examples of recording costs in cases;

Scenario 1 – Lost/Damaged in Transit

42 x HYT0025 to BT41 - 5 x HYT0025 damaged on arrival, customer happy to accept credit for the shortage

Product Cost - £17.30

Refund Value – £33.25

Non-Recoverable Costs - £47.26

Cost to Customer -

Scenario 2 – Admin Error

GRNHVD1000 x 28 @ £80.21 - Customer charged incorrect price of £77.50 however it's 6 months prior so v

Product Cost –

Refund Value –

Non-Recoverable costs - £75.88

Cost to Customer –

Scenario 3 – Dispatch error

PGRSOE0010 x 100 @ £3.35 – Warehouse loaded HGR0010 in error. Goods were returned and replacement

Product Cost – £3.26

Refund Value –

Non Recoverable costs – £79.26

Cost to Customer –

Scenario 4 – Faulty Product

DEI9999 x 28 – Customer complaining the salt is too wet and freezing in the hopper of their gritters. Account

Product Cost –

Refund Value – £100.00

Non Recoverable costs – £100.00

Cost to Customer -

Scenario 5 – Customer Error

DEI0025 x 40– customer failed to tell us they close at 12pm on a Friday, haulier attempted delivery at 3pm F

Product Cost –

Refund Value –

Non Recoverable costs-

Cost to Customer - £38.00

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