

Account: Assign an Account to a Corporate Group

Overview

In this section, you can find information about how to assign an account to a corporate group in Salesforce.

Concerned profiles:

Sales - Customer Service Representatives - Data steward (all except Supply Chain & Quality and Strategic Marketing profiles)

Step By Step

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In some cases, you may consider relate a new customer to a Corporate to include it in the Group.

- 1 To assign the customer to a Corporate Group, *open* the **customer** and *update* the Corporate Group

Account

BAYER CROPSCIENCE

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Account Detail

Edit

Convert Prospect To Customer

▼ Account Information

Account Owner

Uma Brahmanavagam [Change](#)

Account Name

BAYER CROPSCIENCE [View Hierarchy](#)

Corporate Group

BAYER

Account Record Type

Non SAP Customer [Change](#)

Partner Type

Prospect

Partner Sub-Type

Sold-to & Ship-to

Phone

Website

▼ Address Information

Address

RUE DE RANSBEEK
BRUSSELS, Bruxelles 1120
Belgium

House Number 1

315

House Number 2

Region

EMEA

2

Once the update is done, a approval is automatically submitted to the GB U Data Steward for validation. He/she will manage the validation and make sure it's reflected in the SAP systems as well.

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Account Detail Edit Convert Prospect To Customer

Account Information

Account Owner Uma Brahmanasagam Change	Account Record Type Non SAP Customer Change
Account Name BAYER CROPSCIENCE View Hierarchy	Partner Type Prospect
Corporate Group BAYER	Partner Sub-Type Sold-to & Ship-to
	Phone
	Website

Address Information

Address	RUE DE RANGBEEK BRUSSELS, Bruxelles 1120 Belgium
House Number 1	315
House Number 2	
Region	EMEA

Corporate Group Relationship Status Requested

In the "System Information" section, a field tracks the status of the relationship between the account and the Corporate Group

Step: Step 1 30/01/2016 11:20 Approved [Céline Vanvaenderen](#) [Arnaud Denewet](#) Approved by Arnaud (as admin) for testing purpose Approved

Approval Request Submitted

30/01/2016 11:16	Submitted	Test Account	Test Account
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If the association is rejected, the Corporate Group field is reset to the previous value

=> New in Winter 17' Release

Account: BAYER CROPSCIENCE

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Account Detail

Account Information

Account Owner: Uma Brahmanaswami [Change]

Account Name: BAYER CROPSCIENCE [View Hierarchy]

Corporate Group: BAYER

Account Record Type: Non SAP Customer [Change]

Partner Type: Prospect

Partner Sub-Type: Sold-to & Ship-to

Address: RUE DE RANSBEEK, BRUSSELS, Bruxelles 1120, Belgium

House Number 1: 315

House Number 2:

Region: EMEA

If the association is rejected, the Corporate Group field is reset to the previous value

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Related articles

- [Account: Corporate Group Creation](#)
- [Account: Presentation](#)
- [Account: Mass update customer segmentation](#)

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SOLVIA

We're here to help

Your subject

To have a better and faster resolution to your request, please provide as much details as you can. (Eg. Application, system, transaction name...)

Attach Accounts

Priority: Low

SUBMIT

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