

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 Plan Associations (0) | Account Team (1) | Activities (0) | Cases (Ship To) (0) | Cases (Sold To) (0) | Competitive Insights (0) | Competitive Insights (Ship To Account) (0) | Contacts (0) | Involved Contacts (0) | Cross BU Leads (0) | Customer Request (0) | QBU Customer Segmentation (0) | Opportunities (0) | Opportunity Involved Accounts (0) | Vial Reports (0) | Activity History (0) | Approval History (0) | Account History (0) | Google Docs, Notes, & Attachments (0)

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

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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.

Account
BAYER CROPSCIENCE

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Account Filter Associations (0) | Account Types (0) | Activities (0) | Cases (Ship-To) (0) | Cases (Self-To) (0) | Competitive Insights (0) | Competitive Insights (Ship-To Accounts) (0) | Contacts (0) | Involved Contacts (0) | Cross Sell Leads (0) | Customer Request (0) | GBU Customer Segmentation (0) | Opportunities (0) | Opportunities Involved Accounts (0) | VML Requests (0) | Activity History (0) | Approval Metrics (0) | Account History (0) | Google Docs, Notes, & Attachments (0)

Account Detail

Edit Convert Prospect To Customer

Account Information

Account Owner: Uma Brahmanasagam [Change]

Account Name: BAYER CROPSCIENCE [New 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 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

Approval Request Submitted

30/01/2016 11:16 Submitted Test Account Test Account

Approved

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 Brahmanasagam [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

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Related articles

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

Need help?

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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