

Account: Presentation

Overview

In this section, you can find information about:

- The types of accounts available in CRM and how accounts are presented (360° view)
- How to find an account and assign a GBU (GBU customer segmentation)
- The account structure & hierarchy - Corporate group & accounts
- How to create your own view

Concerned profiles:

ALL

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Step By Step

Definition and Objectives

Definition:

- Accounts are Solvay’s customers, partners and distributors
- Each account stores information such as a name, address, phone numbers and customer attributes ().
- For each account, you can link information such as opportunities, activities, cases, visit reports, notes and attachments.

Objective:

- Create a 360-degree view, cross BUs and GBUs, of an account enabling the required abilities for our sales, service and all other customer facing entities to deliver the highest quality with efficiency.

Account Types & Definitions

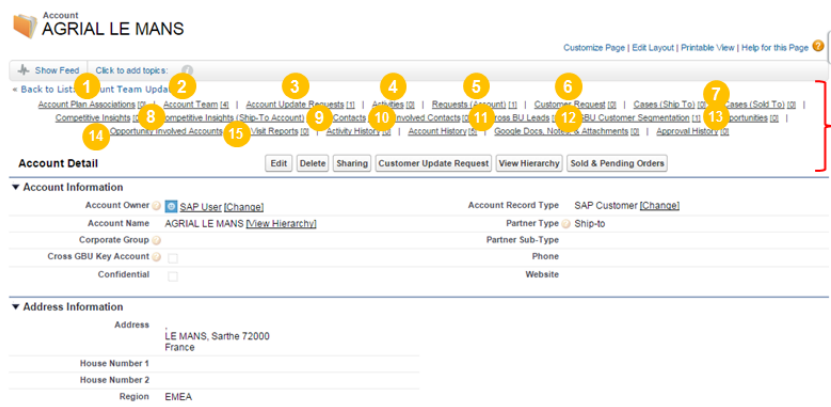
An “Account” can have different “types” depending on the nature of the relationship between this account and Solvay Group

Types of Accounts	Definitions
Corporate Group	Account specifically created for grouping accounts under one parent. Corporate Group is not interfaced with SAP
Prospect	Solvay’s potential customer (sold-to or ship-to), not yet recorded in SAP
Indirect Customer	Customer Solvay is not directly doing business with, but is buying Solvay’s products
Non Buying Entity	Account not buying products to Solvay but in relationship with Solvay (i.e. Corporate Centers, Research Centers, Universities, Laboratories, etc.)
Ship-to	SAP customer to whom Solvay is shipping the products
Sold-to & Ship-to	SAP customer to whom Solvay is selling and shipping the products
Key Account	Current or potential account who represent a major & strategic part of Solvay’s growth potential and contribution, with an important marketing stake for Solvay, being reference in the market and willing to partner with Solvay, e.g. on innovation, and a global, regional or local customer with a complex relationship to manage (historical relationship, culture, multiple influencers, ...)

Account - 360° View

Overview on the information you have on an account page

1. Account Plans (Strategy)	6. Requests coming from the customer	11. Potential sale shared cross BU
2. Team involved on the account	7. Sample and Complaints	12. Specific GBU information on the customer
3. Updates performed on the customer	8. Information about the competitor of the account	13. Sales Opportunities at the customer
4. Activities that are planned (open)	9. Contact information of the customer	14. Sales Opportunities on which the account is involved
5. Customer Creation Request in SAP	10. Contacts involved at the account level	15. Visit reports

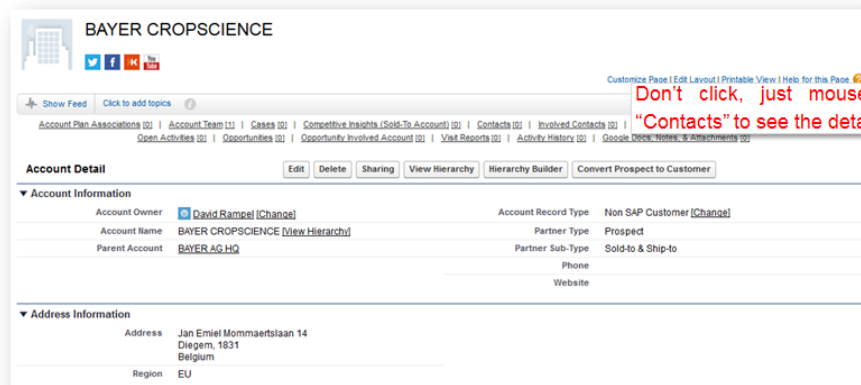


Related lists

Other information available in the account page:

- Address & Local Address (Address in local Language)
- Order Book (Sold and Pending orders) > Synchronized from SAP
- Invoice Overdue > Synchronized from SAP
- Incoterms and Payment terms > Synchronized from SAP

To view the information contained in a "Related list", simply hover on it...

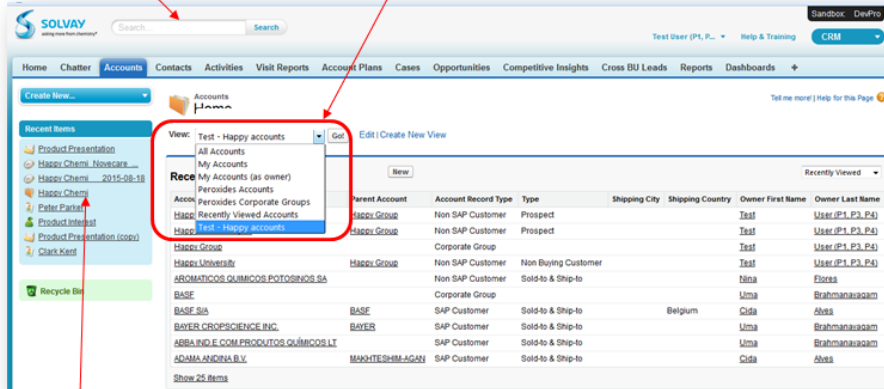


Find an account

There are several ways to find an account:

1 Use the Global Search:
Ex: Bayer Crop*

2 Click on « Account » and look at:
- The recently viewed accounts you have opened
- The views created (ex: My accounts)



3 If you have recently opened the account, open it from the « Recent Items »

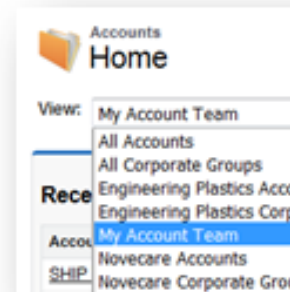
Views at your disposal

The following views are

- **All Accounts:** list all the account ownership, etc.)
- **My Account Teams:** list all the owner is automatically added user is the owner.
- **Recently Viewed Accounts:** list all the Segmentation object).
- **Novocare Accounts:** list all the Segmentation object).
- **Peroxides Accounts:** list all the Segmentation object).
- **Performance Polyamides Account Customer Segmentation object**
- **Soda Ash & Derivatives Account GBU (in the GBU Customer Segmentation)**
- **Special Chemicals Accounts:** GBU Customer Segmentation
- **Novocare Corporate Groups:** Novocare.
- **Peroxides Corporate Groups:** for Peroxides.
- **Performance Polyamides Corporate account** flagged for Performance
- **Soda Ash & Derivatives Corporate account** flagged for Soda Ash
- **Special Chemicals Corporate** flagged for Special Chemicals

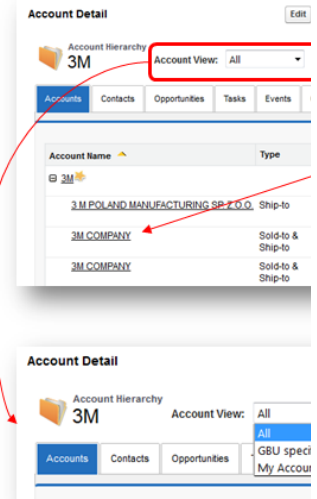
The following views are configured in the system:

- **Aroma Performance Accounts:** list all the accounts where Aroma Performance is flagged as GBU (in the GBU Customer Segmentation object)
- **Aroma Performance Corporate Groups:** list all the corporate groups that include at least one account flagged for Aroma Performance
- **Silica Accounts:** list all the accounts where Silica is flagged as GBU (in the Customer Segmentation object)
- **Silica Corporate Groups:** list all the corporate groups that include at least one account flagged for Silica



Corporate groups

Corporate groups can be used to get an overview of all accounts, contacts, opportunities logged to the accounts part of a same Group.



GBU Customer Segmentation

Each account can be segmented at the level of the BU or GBU thanks to the “GBU Customer Segmentation”

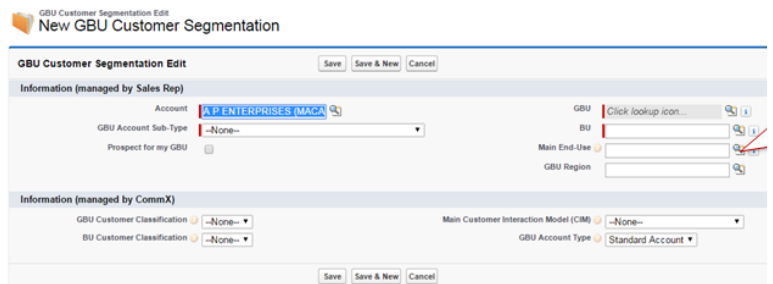


Business rule & initial data load

At go-live, the GBU Customer segmentation will be loaded based on the Sales Area available in SAP

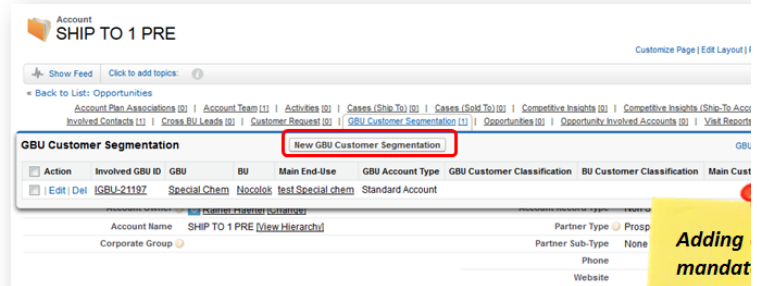
After go-live, the customer segmentation has to be managed by the Account Team Members

Nb: If you work on a (new) account, a GBU customer segmentation must be assigned



Assign a GBU Customer Segmentation to an account allows you to find the account by using the GBU specific list views, and to report on all accounts active for your GBU

To add a “GBU Customer Segmentation”, hover on GBU Customer Segmentation and click on New GBU Customer Segmentation



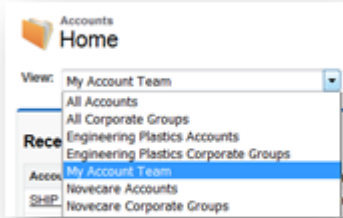
Adding mandat convert into a S. So it's a take!

Enter now **the information for your GBU:**

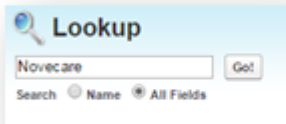
- GBU/BU/Main End-Use: Select your GBU, BU and Main End-Use



Assign a GBU Customer Segmentation to an account allows you to find the account when using the GBU specific list views



If the user is not able to find the Main End Use request, the option "Search all fields" should be selected and the GBU Name should be typed on the search in order to list all Main End Use related to the GBU



New GBU Customer Segmentation

GBU Customer Segmentation Edit

Save Save & New Cancel

Information (managed by Sales Rep)

Account: A ENTERPRISES (MCA)

GBU Account Sub-Type: --None--

Prospect for my GBU:

GBU:

BU:

Main End-Use:

GBU Region:

Information (managed by CommX)

GBU Customer Classification: --None--

BU Customer Classification: --None--

Main Customer Interaction Model (CIM): --None--

GBU Account Type: Standard Account

Save Save & New Cancel

New Values:
APBCD

Account hierarchy

Definition:

- The account hierarchy displays all the accounts part of a same "Corporate Group"
- A "Corporate Group" lists all the accounts which are part of a same "legal" entity. The Group is based on the nature of the account, not based on GBU /BU criteria, nor on business rationales.
- Can be built in the system through a "Parent account" relationship

Objective:

- The Account hierarchy allows to have a consolidated views on business interactions and to manage global consolidation and reporting at a "Corporate Group" level.

Account Hierarchy

BAYER Account View: All

Accounts Contacts Opportunities Tasks Events Cases Account Plan Visit Reports Account Team Member Competitive Insight Cross BU Leads Incoterms Payment Terms Related Accounts

Go To Export Printable View

Account Name	Type	Country	City	Street	Involved GBU(s)	Owner	PRS #	RC S #
BAYER S.A.	Sold-to & Ship-to	Guatemala	GUATEMALA	KM 14.5 CARRETERA ROOSEVELT,	Novocare	Alexandre Graet	343321	63025
BAYER S.A.	Sold-to & Ship-to	Brazil	BELFORD ROXO	650 EST DA BOA ESPERANCA	Novocare, Special Chem	Mario Avazu	3015124	82932
BAYER S.A.	Sold-to & Ship-to	Brazil	SAO PAULO	1100 R DOMINGOS JORGE	Special Chem	Mario Avazu	3015089	
BAYER S.A. ARGENTINA	Sold-to & Ship-to	Argentina	MURRO	RICARDO GUTIERREZ 3655	Novocare	Cida Altes	0003511406	0000055162
BAYER SAS	Sold-to & Ship-to	France	LIMAS	BD EDOUARD HERRIOT 1	Novocare	Thomas-Karl Schneider	164173	2027793
BAYER SAS	Sold-to & Ship-to	France	MEREVILLE	RUE PIERRE FOLLEGE 14	Novocare	Thomas-Karl Schneider	164174	2027794
BAYER THAILCO LTD	Sold-to & Ship-to	Thailand	BANGRAK	NORTH SATHON ROAD 139	Novocare	Mutund Dusad	4501894	72678
BAYER TURK KIMYA SAN LTD STL	Sold-to & Ship-to	Turkey	ISTANBUL	BALKAN CADDESİ NO.53	Novocare	Thomas-Karl Schneider	0000344241	0000063026
BAYER VIETNAM LTD	Sold-to & Ship-to	Viet Nam	DONG NAI PROVINCE	LOT 118/4 AMATA INDUSTRIAL PARK	Novocare	Mutund Dusad	0000344255	0000063673

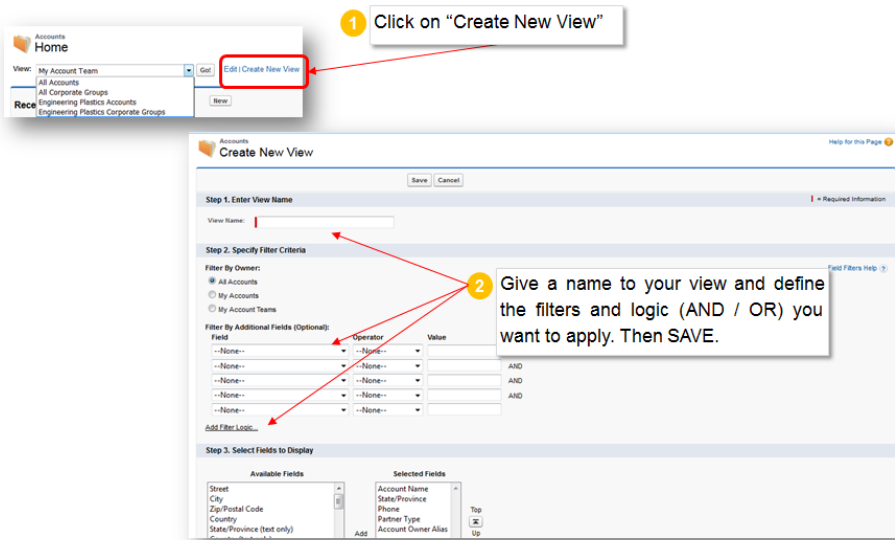
C o r p o r a t e G r o u p H i e r a r c h y

At C or p or at e G ro u p p a g e, th e ful l hi er ar ch y is sh o w e d wi th all ac co u nt s re lat e d to it. In th e

column
Involved
GBUs(s)
, the
GBU
U
active
on
the
account
is
available

Create your own view

If required, you can refine your perimeter by creating your own view



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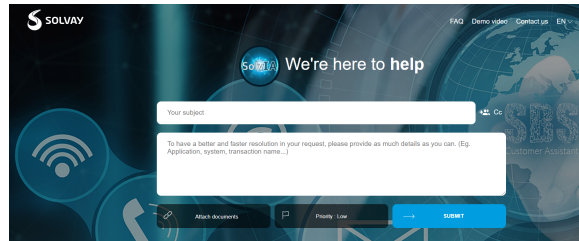
Related articles

Need help?

- [Account: Create a Prospect](#)

- Account: Convert a Prospect
- Account: Account Update
- Account: Corporate Group Creation
- Account: Assign an Account to a Corporate Group
- Account: Mass update customer segmentation
- Account: Related Account
- Account: Account Team

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>

The image shows a screenshot of the Solvia Freshdesk ticket creation page. The page has a dark blue background with a globe and various icons. At the top left is the Solvia logo. In the top right corner, there are links for 'FAQ', 'Demo video', 'Contact us', and 'EN'. The main heading is 'We're here to help'. Below this is a 'Your subject' input field. Underneath the subject field is a larger text area with a placeholder: 'To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)'. At the bottom of the form, there are three buttons: 'Attach Accounts', 'Priority Low', and '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