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

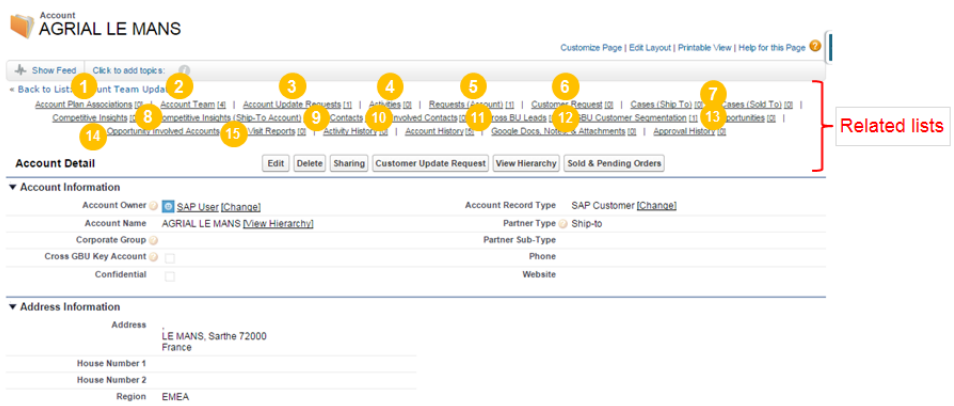
An "Account" can have different "types" depending on the nature of the relationship between this account and Solvay Group

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

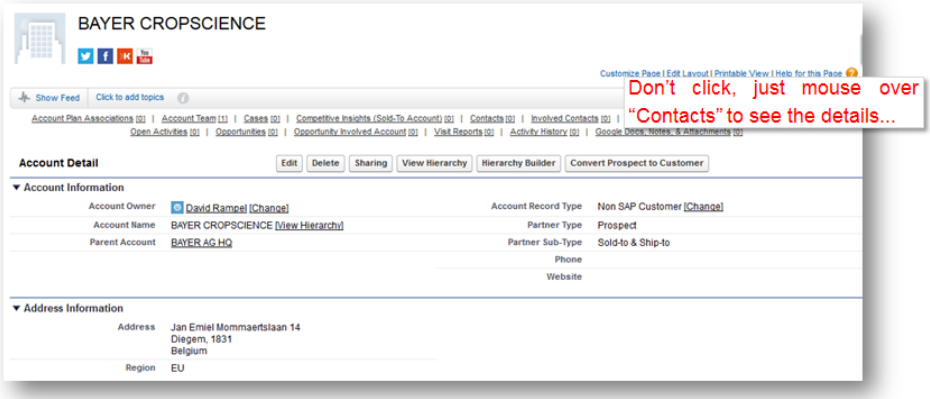
1. Account Plans (Strategy)	6. Requests coming from the customer	11. Potential sale shared cross BU
2. Team involved on the account	7. Sample and Complaints	12. Specific GBU information on the customer
3. Updates performed on the customer	8. Information about the competitor of the account	13. Sales Opportunities 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



Other information available in the account page:

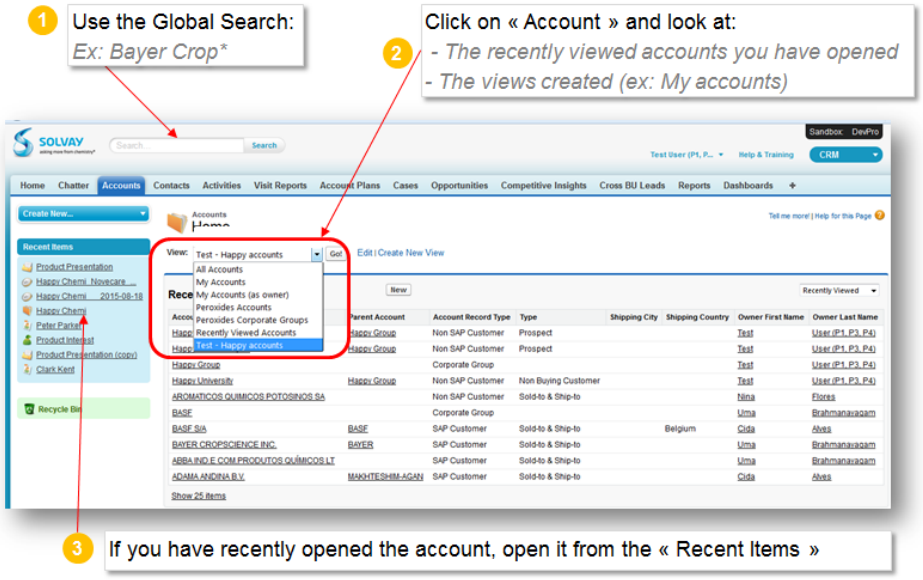
•Address & Local Address (Address in local Language)
•Order Book (Sold and Pending orders) > Synchronized from SAP
•Invoice Overdue > Synchronized from SAP
•Incoterms and Payment terms > Synchronized from SAP

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



Find an account

There are several ways to find an account:



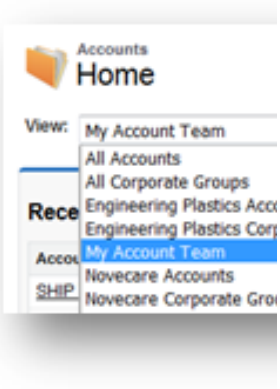
Views at your disposal

The following views a

- All Accounts: list all the accou ownership, etc.)
- My Account Teams: list all the owner is automatically added user is the owner.
- Recently Viewed Accounts: lis
- Novecare Accounts: list all the Segmentation object).
- Peroxides Accounts: list all th Segmentation object).
- Performance Polyamides Acc Customer Segmentation objec
- Soda Ash & Derivatives Acco GBU (in the GBU Customer S
- Special Chemicals Accounts: GBU Customer Segmentation
- Novecare Corporate Groups: Novecare.
- Peroxides Corporate Groups: for Peroxides.
- Performance Polyamides Cor account flagged for Performan
- Soda Ash & Derivatives Corpo account flagged for Soda Ash
- Special Chemicals Corporate flagged for Special Chemicals

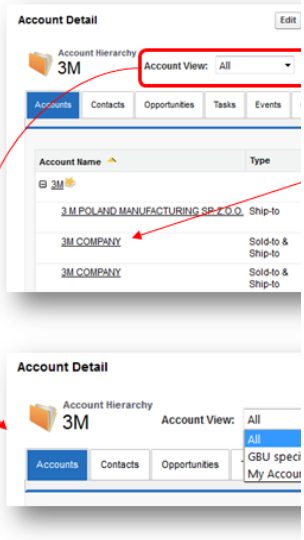
The following views are configured in the system:

- **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



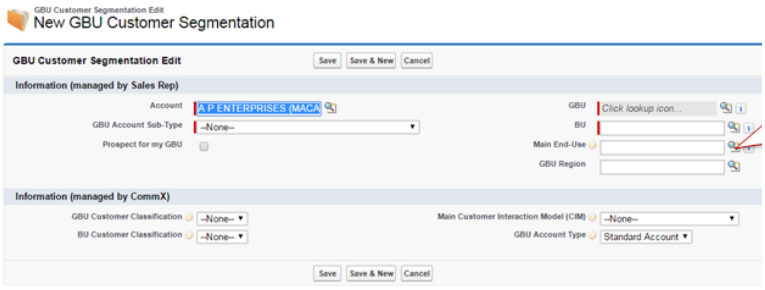
Corporate groups

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

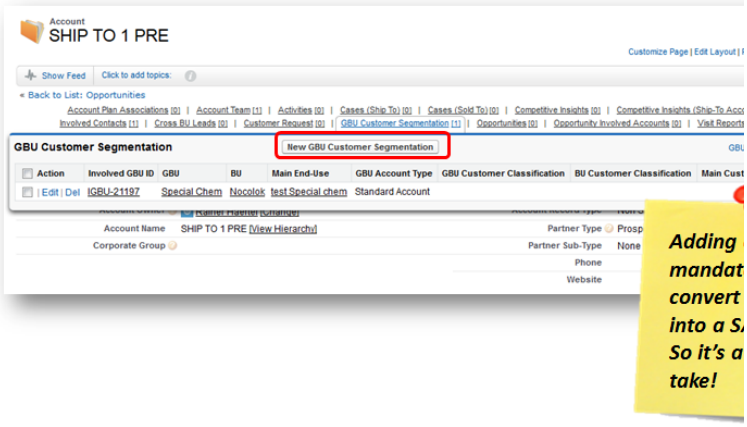
Each account can be segmented at the level of the BU or GBU thanks to the “GBU Customer Segmentation”



> **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 an a (new) account, a GBU customer segmentation must be assigned

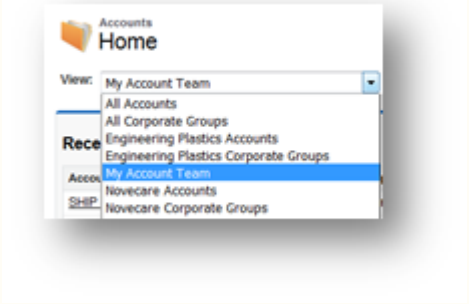
Assign a GBU Customer Segmentation to an account allows you to find the account by using the GBU specific list views, and to report on all accounts active for your GBU

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

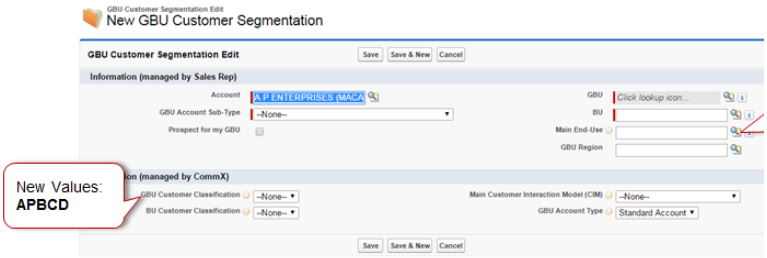


Enter now **the information for your GBU**:
•GBU/BU/Main End-Use: Select your GBU, BU and Main End-Use

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



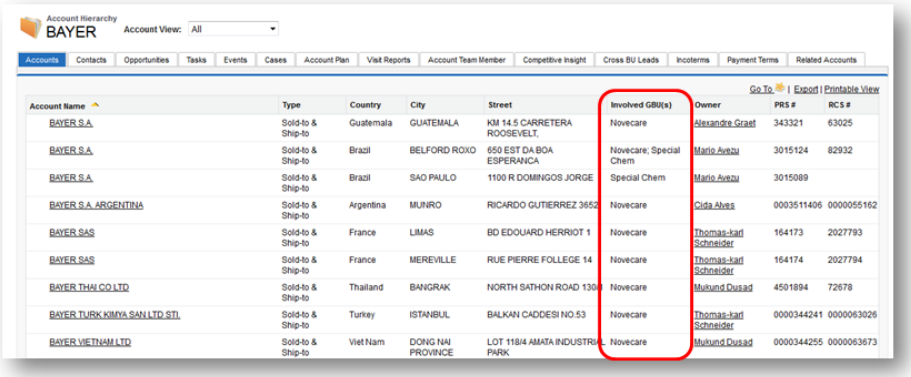
If the user is not able to find the Main End Use request, the option "Search all fields" should be selected and the GBU Name should be typed on the search in order to list all Main End Use related to the GBU



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.

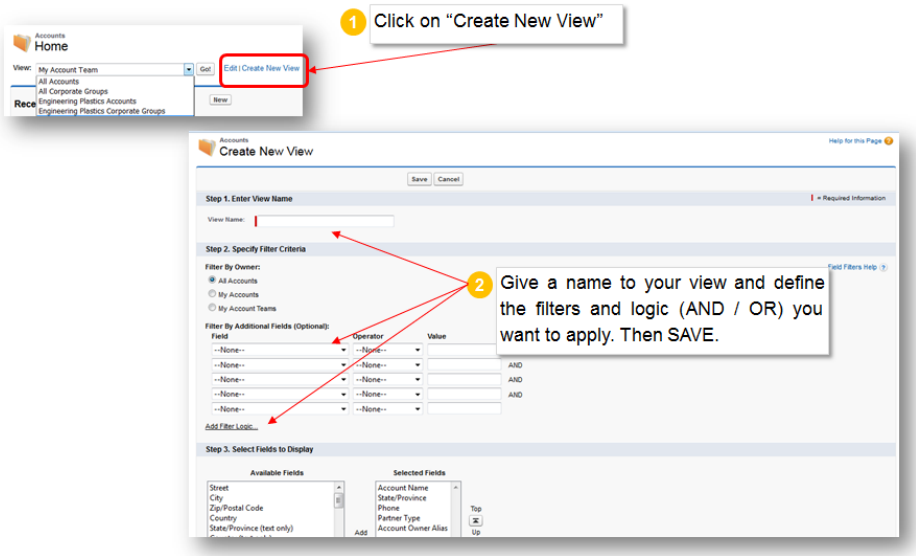


Corporate Group Hierarchy

At Corporate Group page, the full hierarchy is showed with all accounts related to it. In the

column **Involved GBU(s)**, the GBU 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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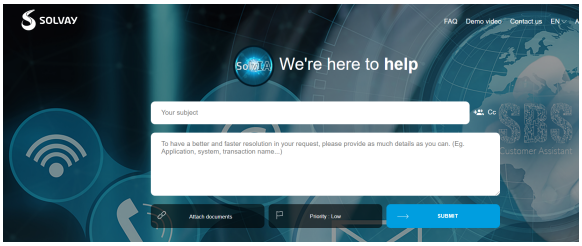
Related articles

- Account: Create a Prospect

Need help?

- 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/



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