

Account: Corporate Group Creation

Overview

In this section, you will find information about the creation of a corporate group in Salesforce. Corporate Group is used to structure accounts and create a hierarchy of accounts in the system.

Concerned profiles:

ALL

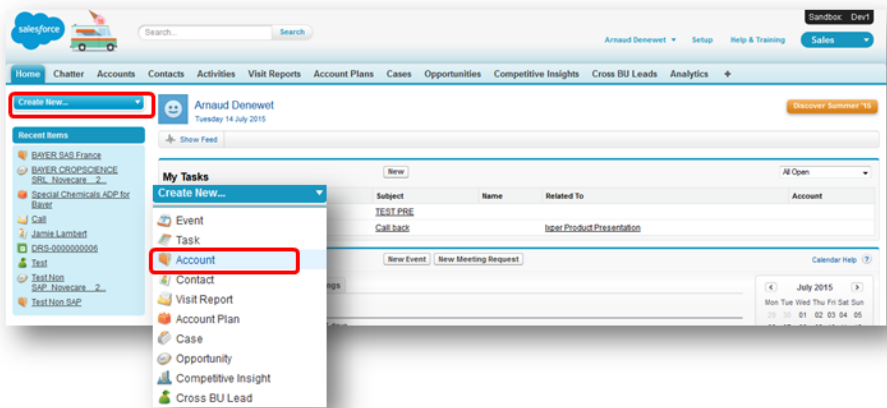
Step By Step

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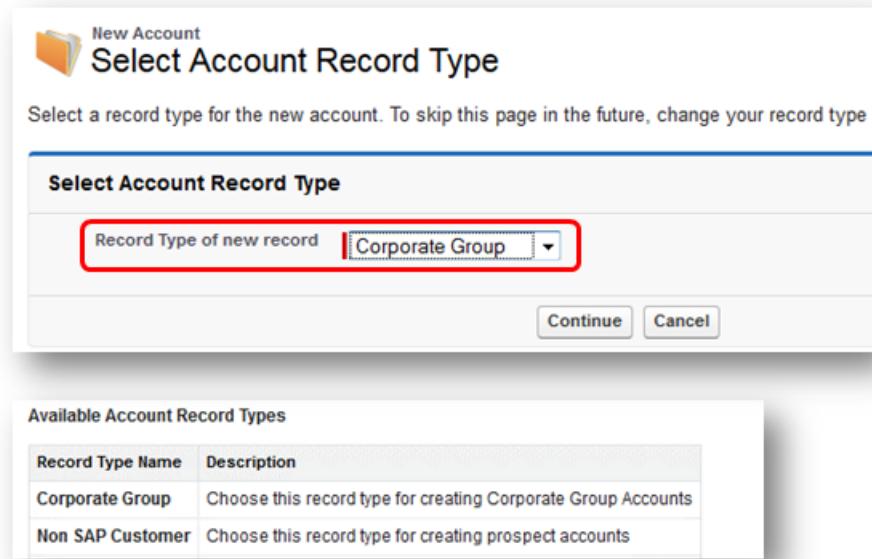
- [Step By Step](#)
- [Related articles](#)
- [Need help?](#)

Create a Corporate Group allows you to link a set of accounts to their “Mother company” (legal structure), and get a top down view on an account hierarc

To create a Corporate Group, click on **Create New...** and then click on **Account**



Select “Corporate group” from the record types proposed to you



Available Account Record Types	
Record Type Name	Description
Corporate Group	Choose this record type for creating Corporate Group Accounts
Non SAP Customer	Choose this record type for creating prospect accounts

Enter now the name of the Corporate Group (Account Name), tick the checkbox **Confirm that the 5 conditions are met**, define the creation reason and finally click on **Save**

Account Edit
New Account

Account Edit Save Save & New Cancel

Additional Information Required Information

Account Name

Criteria for Corporate Group Creation

- 1 - Must be unique in SFDC
- 2 - Must represent the legal structure of a company
- 3 - Must not be based on specific GBU criteria (eg. BASF Novicare)
- 4 - Must have multiple ship-to or sold-to linked to it
- 5 - Must have an expected annual revenue superior to 1M Eur

Confirm that the 5 conditions are met ☐

Creation Reason

System Information

Corporate Group Status New PRS ID

Corporate Group BASF RCS ID

Save Save & New Cancel

Done! The Corporate Group is now created in Salesforce

BASF

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Back to List: Profiles Approval History (2)

Account Detail Unlock Record Edit Delete

Account Information

Alert

Alert: Your Corporate Group has not been approved yet and therefore is not usable in Salesforce. To make it validated and usable, please scroll down to the bottom of the page and click on the button "Submit for approval" in the related list "Approval History"

Account Hierarchy BASF

Accounts Contacts Opportunities Tasks Events Cases Contracts Account Team Member Visit Reports

Go To Export Printable View

Account Name BASF

Additional Information

Account Name BASF View Hierarchy

Cross GBU Key Account No

Involved GBU(s)

Involved BUs

Created By Arnaud Denewet 19/01/2016 14:00 Last Modified By Arnaud Denewet 19/01/2016 14:00

Corporate Group Status New PRS ID

RCS ID

Once the Corporate Group is created, an automatic approval request is sent to Sales & Marketing for approving the new Corporate Group. During this period, Corporate Group is locked and can't be used in other part of the system.

- The status of the approval is visible on the Corporate group page :

Approval History Recall Approval Request Approval History Help ?

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Corporate Group Creation Approval (Pending for first approval)						
Reassign Approve / Reject	24/09/2015 15:55	Pending	Amaud Denewet	Amaud Denewet		Pending
Reassign Approve / Reject	24/09/2015 15:55	Pending	Sabina Stojova	Sabina Stojova		
Approval Request Submitted						
	24/09/2015 15:55	Submitted	Amaud Denewet	Amaud Denewet		

Once the Corporate Group is validated, you can link accounts to it by using the "Parent Account" field

Bayer AG HQ Customize Page | Edit Layout | Printable View | Help for this Page ?

Show Feed Click to add topics

Back to List: Custom Object Definitions

Account Detail Edit Delete Sharing

Account Hierarchy
Bayer AG HQ

Accounts Contacts Opportunities Tasks Events Cases Related Account (Related Account)

Go To Build Hierarchy Export Printable View

Account Name	Account Name	Type	Owner	Street	City	Country	PRS ID
Bayer AG HQ	Bayer AG HQ	Corporate Group	David Rampel			Belgium	

Page 1 of 1 1 item total

Sales & Marketing will receive an email notification, will review the request, and accept or decline it by clicking on Approve / Reject

Approval History Recall Approval Request Approval History Help ?

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Step: Corporate Group Creation Approval (Pending for first approval)						
Reassign Approve / Reject	24/09/2015 15:55	Pending	Amaud Denewet	Amaud Denewet		Pending
Reassign Approve / Reject	24/09/2015 15:55	Pending	Sabina Stojova	Sabina Stojova		
Approval Request Submitted						
	24/09/2015 15:55	Submitted	Amaud Denewet	Amaud Denewet		

Comments can be added before clicking on Approve or Reject



he Corporate Group creation is validated, status is updated to "Validated" and Corporate Group can be us

Approve/Reject Approval Request

Account Name

Bayer

Account Owner

Arnaud Denwest

Account Record Type

Corporate Group

Comments

Approve

Reject

Cancel

ed in the system as a parent Accountant. By default all the Corporate Group's loaded data go - li

view will be on status "Validated". If the Corporate Group creation is rejected, status is updated to "Rejected" and

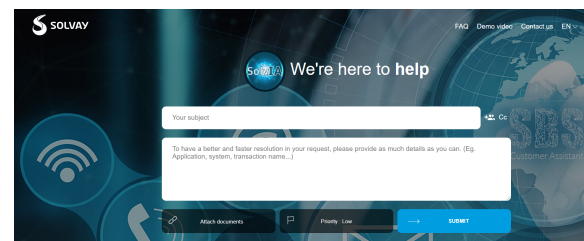
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Related articles

- [Account: Presentation](#)
- [Account: Assign an Account to a Corporate Group](#)
- [Account: Create a Prospect](#)

Need help?

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