

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

Account

AGRIAL LE MANS

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

Show Feed

Click to add topics

Back to List

Account Team Update

Account Plan Associations

Competitive Insights

Opportunity Involved Accounts

Account Team

Competitive Insights (Ship-To Account)

Opportunity Involved Accounts

Account Update Requests

Accounts

Requests (Account)

Involved Contacts

Account History

Visit Reports

Activity History

Customer Update Request

View Hierarchy

Sold & Pending Orders

Cases (Ship-To)

Loss BU Leads

BU Customer Segmentation

Google Docs Notes & Attachments

Approval History

Cases (Sold To)

Opportunities

Related lists

Account Detail

Edit

Delete

Sharing

Customer Update Request

View Hierarchy

Sold & Pending Orders

Account Information

Account Owner

SAP User

Change

Account Record Type

SAP Customer

Change

Account Name

AGRIAL LE MANS

View Hierarchy

Partner Type

Ship-to

Corporate Group

Partner Sub-Type

Cross GBU Key Account

Phone

Confidential

Website

Address Information

Address

LE MANS, Sarthe 72000

France

House Number 1

House Number 2

Region

EMEA

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...

BAYER CROPSCIENCE

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

Show Feed

Click to add topics

Account Plan Associations

Account Team

Cases

Competitive Insights (Sold-To Accounts)

Contacts

Involved Contacts

Open Activities

Opportunities

Opportunity Involved Account

Visit Reports

Activity History

Google Docs Notes & Attachments

Account Detail

Edit

Delete

Sharing

View Hierarchy

Hierarchy Builder

Convert Prospect to Customer

Account Information

Account Owner

David Rampel

Change

Account Record Type

Non SAP Customer

Change

Account Name

BAYER CROPSCIENCE

View Hierarchy

Partner Type

Prospect

Parent Account

BAYER AG HQ

Partner Sub-Type

Sold-to & Ship-to

Phone

Website

Address Information

Address

Jan Emiel Mommaertslaan 14

Diegem, 1831

Belgium

Region

EU

Don't click, just mouse over "Contacts" to see the details...

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 »

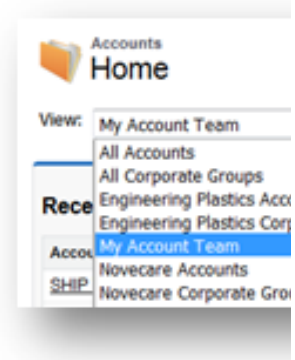
Views at your disposal

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).
- Novecare Accounts: list all the Segmentation object).
- Peroxides Accounts: list all the Segmentation object).
- Performance Polyamides Accounts: list all the Segmentation object).
- Soda Ash & Derivatives Accounts: list all the Segmentation object).
- Special Chemicals Accounts: list all the Segmentation object).
- Novecare Corporate Groups: list all the Segmentation object).
- Peroxides Corporate Groups: list all the Segmentation object).
- Performance Polyamides Corporate Groups: list all the Segmentation object).
- Soda Ash & Derivatives Corporate Groups: list all the Segmentation object).
- Special Chemicals Corporate Groups: list all the Segmentation object).

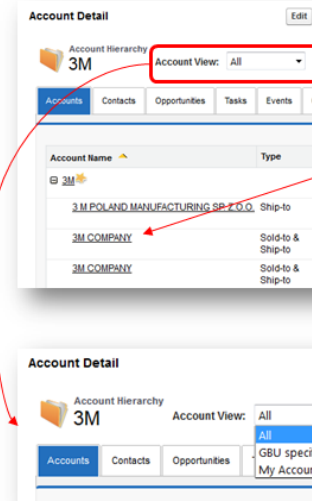
The following views are configured in the system:

- **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

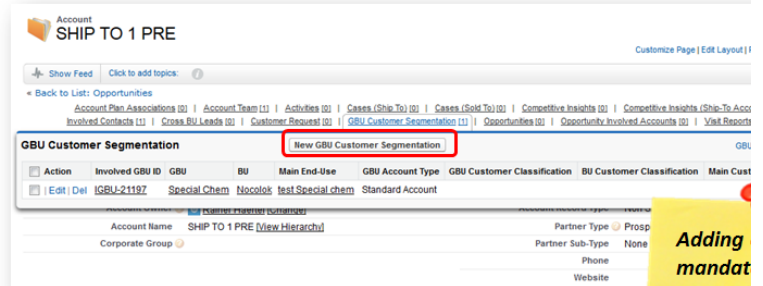
After go-live, the customer segmentation has to be managed by the Account Team Members

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

The form is titled 'New GBU Customer Segmentation'. It has two main sections: 'Information (managed by Sales Rep)' and 'Information (managed by CommX)'. The 'Information (managed by Sales Rep)' section includes fields for 'Account' (A ENTERPRISES (MACA)), 'GBU Account Sub-Type' (None), 'Prospect for my GBU' (checkbox), 'GBU' (Click lookup icon...), 'BU' (Click lookup icon...), 'Main End-Use' (Click lookup icon...), and 'GBU Region' (Click lookup icon...). The 'Information (managed by CommX)' section includes fields for 'GBU Customer Classification' (None), 'BU Customer Classification' (None), 'Main Customer Interaction Model (CIM)' (None), and 'GBU Account Type' (Standard Account). There are 'Save', 'Save & New', and 'Cancel' buttons at the bottom of each section.

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



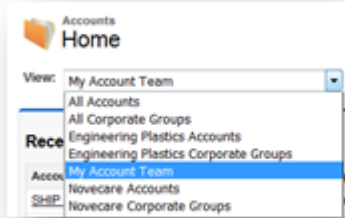
Adding mandat convert into a S. So it's a take!

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

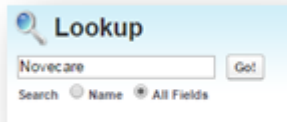
•GBU/BU/Main End-Use: Select your GBU, BU and Main End-Use



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



GBU Customer Segmentation Edit
New GBU Customer Segmentation

GBU Customer Segmentation Edit

Information (managed by Sales Rep)

Account: **AP ENTERPRISES (MAG)**

GBU Account Sub-Type: **None**

Prospect for my GBU: ☐

GBU: **Click lookup icon...**

BU: **Click lookup icon...**

Main End-Use: **Click lookup icon...**

GBU Region: **Click lookup icon...**

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 #	RCIS #
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 ROJO	650 EST DABOA ESPERANCA	Novocare: Special Chem	Mario Araujo	3015124	82932
BAYER S.A.	Sold-to & Ship-to	Brazil	SAO PAULO	1100 R DOMINGOS JORGE	Special Chem	Mario Araujo	3015089	
BAYER S.A. ARGENTINA	Sold-to & Ship-to	Argentina	MUÑO	RICHARDO GUTIERREZ 3650	Novocare	Cida Alvez	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 THAI CO 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

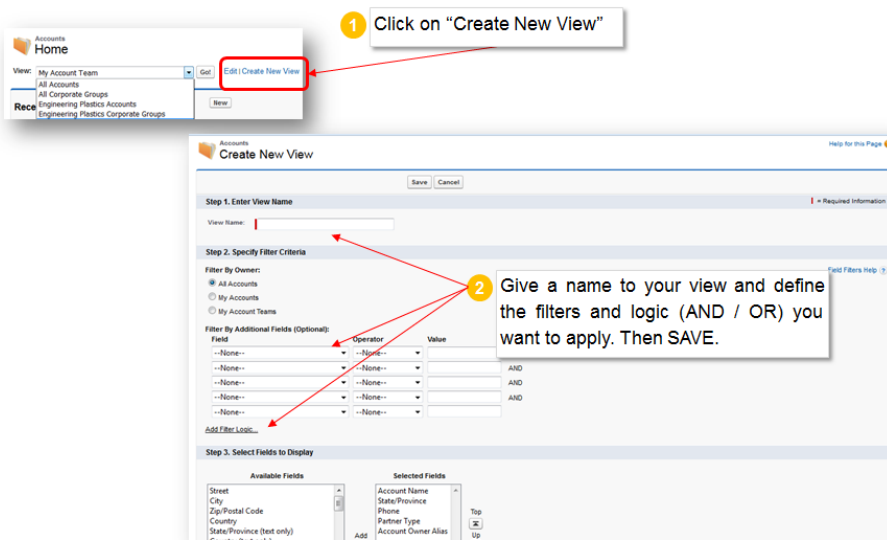
Corporate Group Hierarchy

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

column involved GBU(s), the GBU activity 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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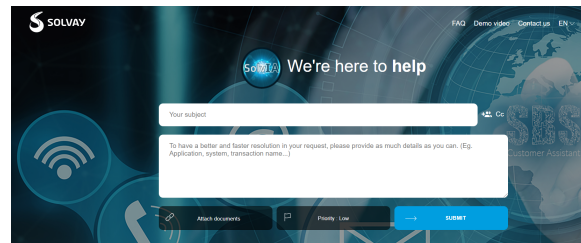
Related articles

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 screenshot shows the Solvia Freshdesk support ticket creation interface. At the top left is the Solvia logo. The header text reads "We're here to help". Below this is a "Your subject:" input field. A smaller text box below the subject field contains the instruction: "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 is an "Attach documents" button, a "Priority: Low" dropdown menu, and a blue "SUBMIT" button. The background features a dark blue theme with icons for a Wi-Fi signal, a speech bubble, and a globe.

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