

Account: Mass update customer segmentation

Overview

In this section, you will find information about the process to mass update the customer segmentation (Account Type, GBU Customer Classification) from the Corporate Group page. Only your GBU data steward has the right to take these actions, and only for the accounts flagged for his GBU (flagged for his GBU means having a GBU Customer Segmentation record for this GBU).

Concerned profiles:

Data steward only

Step By Step

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Assign segmentation to Accounts

From the Corporate Group page, a GBU Data Steward can mass update the segmentation (Key Account, Critical Account) of all the accounts related to the Corporate Group, but only the ones flagged for his GBU (flagged for his GBU means having a GBU Customer Segmentation record for this GBU)

1

John (David's GBU Data Steward) opens the Corporate Group up for which he wants to start the update and scrolls down to the related list GBU Customer Segmentation. Then he clicks on **New GBU Customer Segmentation**

The screenshot displays a web-based system interface. At the top, there is a 'System Information' section with the following details: Created By: Roger Arnaud, 22/01/2016 13:18; Last Modified By: Ashish Tiwari, 17/02/2016 12:56; Corporate Group Status: Validated; PRS ID: 801004; Corporate Group: [icon]; RCS ID: GRCL200072. Below this are 'Edit' and 'Delete' buttons. The main content area is divided into two sections: 'GBU Customer Segmentation' and 'Approval History'. The 'GBU Customer Segmentation' section features a button labeled 'New GBU Customer Segmentation' which is highlighted with a red rectangle, and a 'GBU Customer Segmentation Help' link. Below it, it states 'No records to display'. The 'Approval History' section has a 'Submit for Approval' button and an 'Approval History Help' link, also with 'No records to display' below it.

2

John must then first select the GBU

. He also can use the BU field below to only update the accounts for this BU.

Section where Users are able to detail more Client Information relevant for the GBU/BU

With the "Account Information" section, users are able to detail more Client Information relevant for the GBU/BU => **NEW** in Winter 17' Release

3
John defines then the **GBU Customer Classification** and the **GBU Account Type** and clicks on **Save**

GBU Customer Segmentation Edit

New GBU Customer Segmentation

Help for this Page

GBU Customer Segmentation Edit Save Save & New Cancel

Information (managed by Sales Rep) ! = Required Information

Account AIR PRODUCTS

GBU Special Chem

BU

Information (managed by CommX)

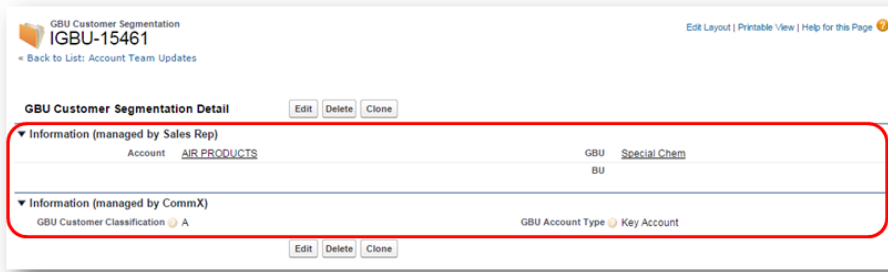
GBU Customer Classification A

GBU Account Type Key Account

Save Save & New Cancel

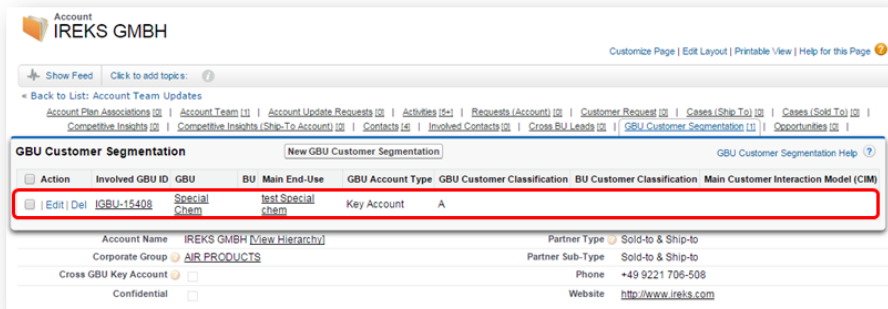
4

Once it's done, the record at Corporate Group level indicates the changes performed...



5

... While at account level, the change has been performed.



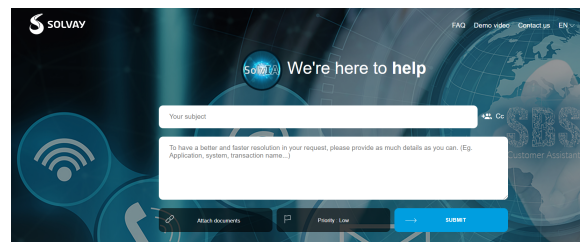
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Related articles

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

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