Account: Mass update customer segmentation

Overview

In this section, you will find information about the process to mass update the customer segmentation (Ac count 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

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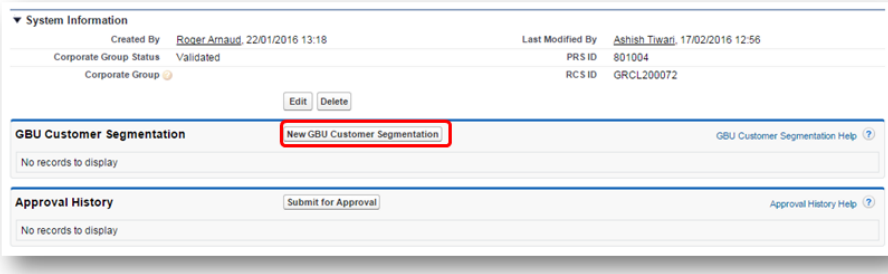
Step By Step

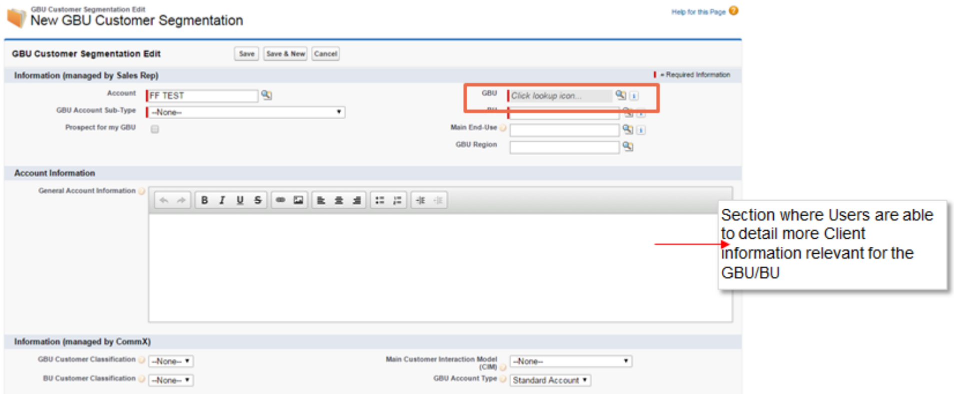
Assign segmentation to Accounts

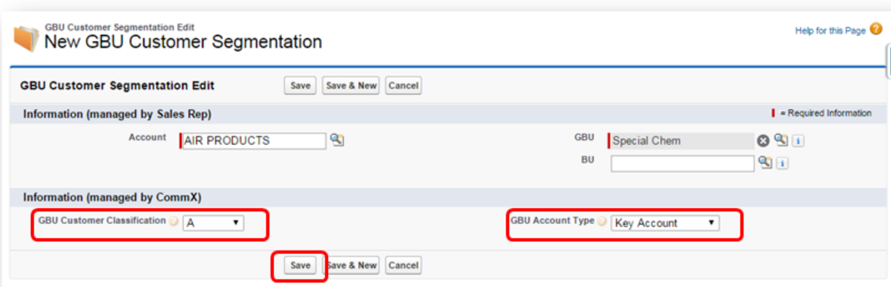
From the Corporate Group page, a GBU Data Steward can mass update the segmentation (Key Account, Critical Account) of all the accounts related to the Corporate Group, but only the ones flagged for his GBU (flagged for his GBU means having a GBU Customer Segmentation record for this GBU

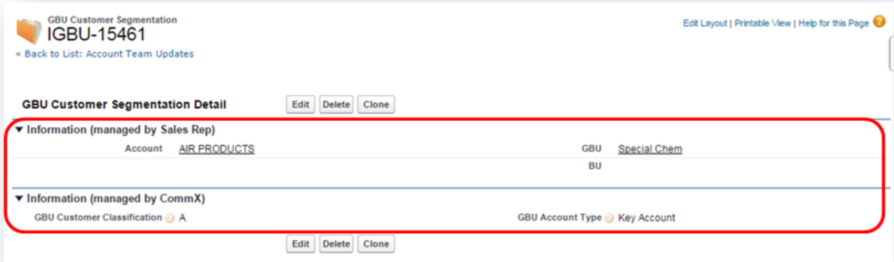
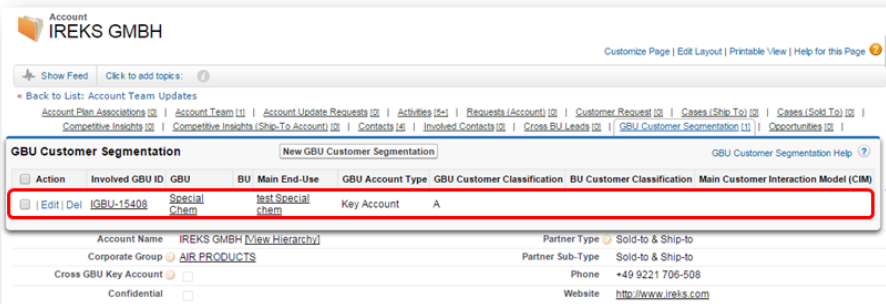
1 John (David's GBU Data Steward) *opens* the **Corporate Group** for which he wants to start the update and *scrolls down* to the related list GBU Customer Segmentation. Then he *clicks* on **New GBU Customer Segmentation**	

2

John must then first *select* the **GBU**. He also can use the BU field below to only update the accounts for this 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**.	

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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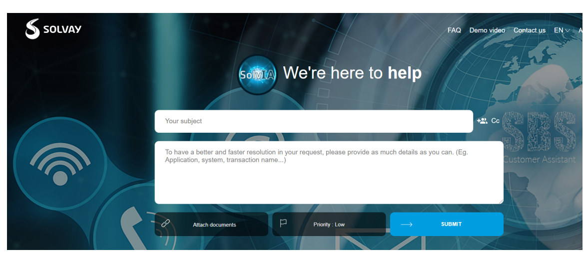
Related articles

- 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