

# 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

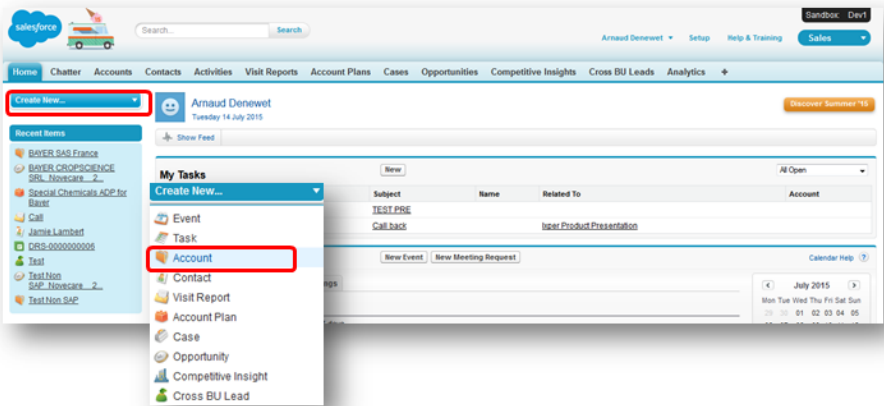
## Step By Step

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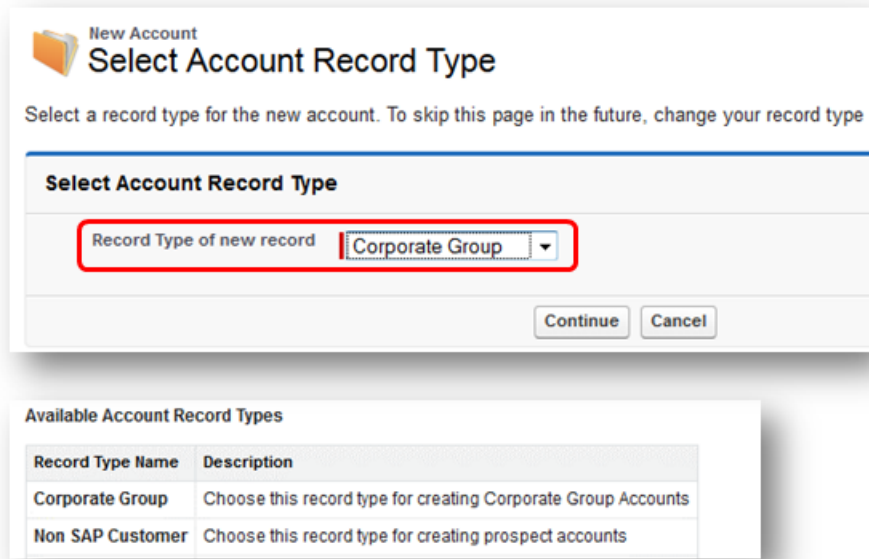
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Create a Corporate Group allows you to link a set of accounts to their “Mother company” (legal structure), and get a top down view on an account hierarc

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**

Done! The Corporate Group is now created in Salesforce

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   | Arnaud Denewet | Arnaud Denewet  |          | Pending        |
| Reassign   Approve / Reject                                          | 24/09/2015 15:55 | Pending   | Sabina Stojova | Sabina Stojova  |          |                |
| Approval Request Submitted                                           |                  |           |                |                 |          |                |
|                                                                      | 24/09/2015 15:55 | Submitted | Arnaud Denewet | Arnaud 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 |        |

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

**Approval History** Recall Approval Request Approval History Help ?

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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

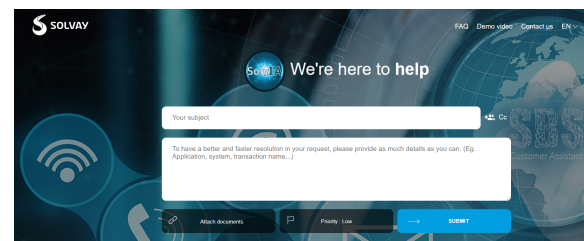
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## Related articles

- [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*