

Account: Assign an Account to a Corporate Group

Overview

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In this section, you can find information about how to assign an account to a corporate group in Salesforce.

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Concerned profiles:

Sales - Customer Service Representatives - Data steward (all except Supply Chain & Quality and Strategic Marketing profiles)

Step By Step

In some cases, you may consider relate a new customer to a Corporate to include it in the Group.

1
To assign the customer to a Corporate Group, open the customer and update the Corporate Group

The screenshot shows the 'Account Detail' page for 'BAYER CROPSCIENCE'. The 'Account Information' section is expanded, showing the following details:

Account Owner	Uma Brahmanasagam [Change]	Account Record Type	Non SAP Customer [Change]
Account Name	BAYER CROPSCIENCE [View Hierarchy]	Partner Type	Prospect
Corporate Group	BAYER	Partner Sub-Type	Sold-to & Ship-to
		Phone	
		Website	

The 'Address Information' section is also visible, showing the address: RUE DE RANSBEEK, BRUSSELS, Bruxelles 1120, Belgium. House Number 1 is 315, House Number 2 is blank, and the Region is EMEA.

2

Once the update is done, a approval is automatically submitted to the GB U Data Steward for validation. He /she will manage the validation and make sure it's reflected in the SAP systems as well.

Account
BAYER CROPSCIENCE

Account Owner: Uma Brahmanasagan [Change]
Account Name: BAYER CROPSCIENCE [New Hierarchy]
Corporate Group: BAYER

Account Record Type: Non SAP Customer [Change]
Partner Type: Prospect
Partner Sub-Type: Sold-to & Ship-to

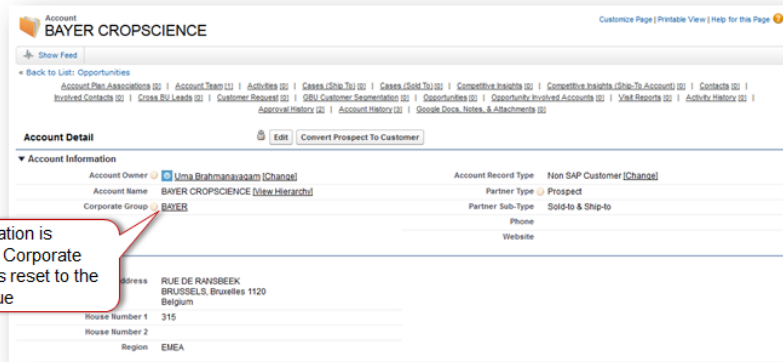
Address Information
Address: RUE DE RANSEDEK, BRUSSELS, Bruxelles 1120, Belgium
House Number 1: 315
House Number 2:
Region: EMEA

Corporate Group Relationship Status: Requested

In the "System Information" section, a field tracks the status of the relationship between the account and the Corporate Group

Step: Step 1	30/01/2016 11:20	Approved	Céline Vanvaenderen	Arnaud Danewal	Approved by Arnaud (as admin) for testing purpose	Approved
Approval Request Submitted	30/01/2016 11:16	Submitted	Test Account	Test Account		

If the association is rejected, the Corporate Group field is reset to the previous value
=> New in Winter 17' Release



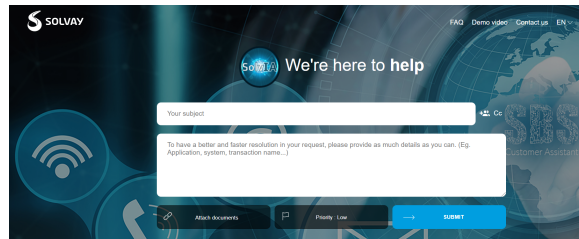
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Related articles

- [Account: Corporate Group Creation](#)
- [Account: Presentation](#)
- [Account: Mass update customer segmentation](#)

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