

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

▼ System Information

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

GRCL200072

RCS ID

Edit

Delete

GBU Customer Segmentation

New GBU Customer Segmentation

GBU Customer Segmentation Help ?

No records to display

Approval History

Submit for Approval

Approval History Help ?

No records to display

2

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

GBU Customer Segmentation Edit
New GBU Customer Segmentation

GBU Customer Segmentation Edit

Information (managed by Sales Rep)

Account: FF TEST

GBU Account Sub-Type: --None--

Prospect for my GBU: ☐

GBU: Click lookup icon:

Main End Use:

GBU Region:

Account Information

General Account Information

Information (managed by CommX)

GBU Customer Classification: --None--

BU Customer Classification: --None--

Main Customer Interaction Model: --None--

GBU Account Type: Standard Account

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) I = 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...

GBU Customer Segmentation
IGBU-15461

Back to List: Account Team Updates

GBU Customer Segmentation Detail

Information (managed by Sales Rep)

Account AIR PRODUCTS

GBU Special Chem BU

Information (managed by CommX)

GBU Customer Classification A

GBU Account Type Key Account

5

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

Account IREKS GMBH

Show Feed Click to add topics:

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Account Plan Associations | Account Team | Account Update Requests | Activities | Requests | Customer Request | Cases (Ship To) | Cases (Sold To) | Competitive Insights | Competitive Insights (Ship To Account) | Contacts | Involved Contacts | Cross BU Leads | GBU Customer Segmentation | Opportunities

GBU Customer Segmentation

Action	Involved GBU ID	GBU	BU Main End-Use	GBU Account Type	GBU Customer Classification	BU Customer Classification	Main Customer Interaction Model (CIM)
[Edit] [Del]	IGBU-15408	Special Chem	test Special chem	Key Account	A		

Account Name IREKS GMBH [View Hierarchy]

Corporate Group AIR PRODUCTS

Cross GBU Key Account

Confidential

Partner Type Sold-to & Ship-to

Partner Sub-Type Sold-to & Ship-to

Phone +49 9221 706-508

Website http://www.ireks.com

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Related articles

- Account: Corporate Group Creation
- Account: Assign an Account to a Corporate Group
- Account: Presentation

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Attach Accounts Priority Low SUBMIT

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