

# Corporate Group management - GBU Data Steward

## Overview

**Who:** GBU Data Steward

**What:** Create, Change, Delete a Corporate Group in CRM and assign Accounts to this Corporate group.

**Link** to the New Corporate Group & Customer assignments process : <https://drive.google.com/file/d/0B8qpNOj1F9diSW5ncEFXbWRXQVU/view>

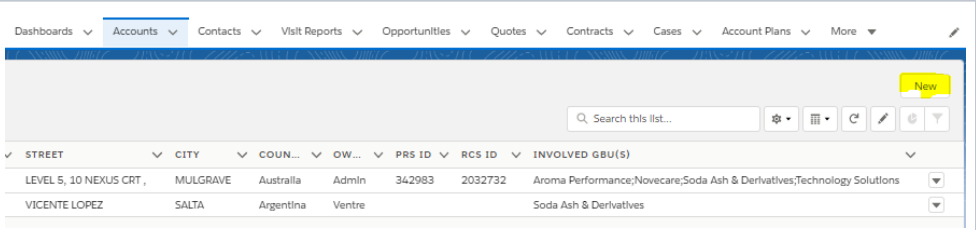
## Table of contents

- [Overview](#)
- [Table of contents](#)
- [Step-by-step](#)
  - [I. Corporate Group Creation - via Core CRM](#)
  - [II. Corporate Group Update / Delete - via Service One ticket \(BMC helix\)](#)
  - [III. Corporate Group mass update request - via Service One ticket \(BMC helix\)](#)
  - [IV. Customer assignment to Corporate Group \(Creation/ Update\) - via Core CRM](#)
  - [V. Customer assignment to Corporate Group \(mass update\) - via Service One ticket \(BMC helix\)](#)
- [Related articles](#)
- [Can't find information?](#)

## Step-by-step

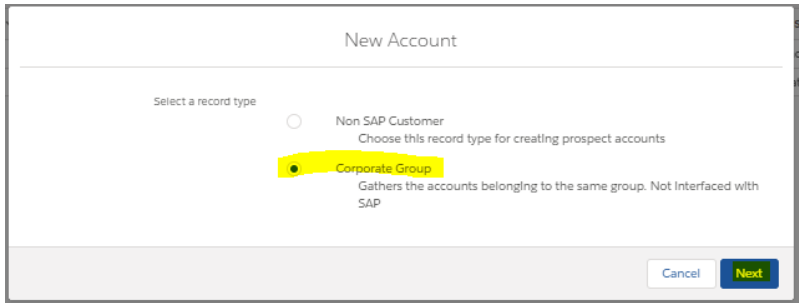
### I. Corporate Group Creation - via Core CRM

- In account tab, click on button **New** to Create a new Account.



The screenshot shows the CRM interface with the 'Accounts' tab selected. A 'New' button is highlighted in the top right corner. Below the navigation bar is a search bar and a table of accounts with columns: STREET, CITY, COUN..., OW..., PRS ID, RCS ID, and INVOLVED GBU(S). Two rows of account data are visible.

- Select Record Type : **Corporate Group** and click on button **Next**.



The screenshot shows the 'New Account' dialog box. It has a title 'New Account' and a section 'Select a record type'. There are two radio button options: 'Non SAP Customer' (unselected) and 'Corporate Group' (selected and highlighted with a yellow box). Below the options is a description for 'Corporate Group': 'Gathers the accounts belonging to the same group. Not interfaced with SAP'. At the bottom right, there are 'Cancel' and 'Next' buttons.

- Enter **Account name** ( 20 characters maximum)
- Corporate Group must meet the 5 criteria
- Input the creation reason
- click on **SAVE**

New Account: Corporate Group

**Additional Information**

\* Account Name

X GBU KA

Criteria for Corporate Group Creation

- 1 - Must be unique In SFDC
- 2 - Must represent the legal structure of a company
- 3 - Must not be based on specific GBU criteria (eg. BASF Novicare)
- 4 - Must have multiple ship-to or sold-to linked to it
- 5 - Must have an expected annual revenue superior to 1M Eur

Confirm that the 5 conditions are met

Creation Reason

**System Information**

Status	PRS ID
Draft	
Corporate Group Status	RCS ID
New	

- Corporate Group is created but **locked** until **Approval** from Mariana Chavez .

Account **NEW CORPORATE GROUP**

Account Updates & Conversions (0)

Account History (2)

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
04/06/2019 15:47	Record locked.	Nicoletta Ventre		
04/06/2019 15:47	Created.	Nicoletta Ventre		

[View All](#)

Approval History (2)

STEP NAME	DATE	STATUS	ASSIGNED TO
<a href="#">Corporate Group Creation Approval</a>	04/06/2019 15:47	Pending	Alexia CARTRY
<a href="#">Approval Request Submitted</a>	04/06/2019 15:47	Submitted	Nicoletta Ventre

- **Corporate Marketing & Sales approver** will always exchange with the requester via Chatter before decision .

Click to add topics:

Post File Link More

Write something...

Search | Show All Updates

**Clotilde della Faille** to Solvay Only

Dear @Paul Bradley - INACTIVE , before validating your Corporate Group request, can you please let me know if the following conditions are met for Cabot Microelectronics?

- When the new Corporate Group is **Approved**, it **can be used for Account assignment** in CRM , a ticket is automatically generated **twice a week** assigned to "IS-DATA-MSD" group in order to update GBR and PRS systems within 1 week maximum to be available for reporting.

## II. Corporate Group Update / Delete - via Service One ticket (BMC helix)

*\*Prior to requesting the **deletion** of a Corporate Group, make sure that there is no remaining accounts linked to it in CRM and BW or Analytics , and if so, change the assignment of the accounts to the right Corporate group.*

Create request in Service One Customer care to mak any change on Corporate Group, will be submitted to approval of Mariana Chavez.

- **IS-DATA-MSD team** will handle changes with CRM team and inform you when completed.

## III. Corporate Group mass update request - via Service One ticket (BMC helix)

*\*Attention : only **GBU Data Steward** and **Corporate Marketing & Sales** can initiate the mass request for Creation, update or deletion of corporate groups. Other users must contact their GBU Data steward .*

- Fill the template "RCS - PRS Customer Group / Sub-group" in <https://sites.google.com/a/solvay.com/sbs-is-as-sdd/forms>

- **APDM team** will handle changes with CRM team and inform requester when completed.

## IV. Customer assignment to Corporate Group (Creation/ Update) - via Core CRM

- Any **User** can assign or change assignment of an account to a Corporate Group in core CRM (only approved ones).

- **GBU Data stewards** will Approve/Reject the assignmt request in Core CRM.

- Twice a week, a report with list of **approved assignments** will generate automatically a ticket to **APDM Team** for update of GBR and PRS tand so make the links available also for Sales Reporting and dashboards.

## V. Customer assignment to Corporate Group (mass update) - via Service One ticket (BMC helix)

*\*Attention : only **GBU Data Steward** and **Corporate Marketing & Sales** can initiate the mass requests for account assignments to Corporate Group . Other users must contact their GBU Data steward .*

- Fill the template "RCS - PRS Mapping Group x Customer " in <https://sites.google.com/a/solvay.com/sbs-is-as-sdd/forms>

- **IS-DATA-MSD team** will handle changes with CRM team and inform requester when completed.

### Related articles

### Can't find information?

#### Related docs

- [Web support contact](#)