

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>

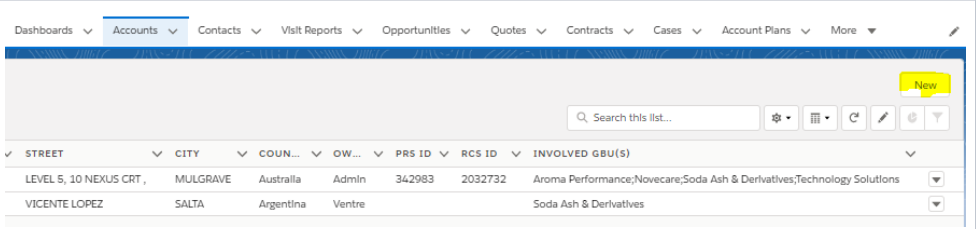
Table of contents

- [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

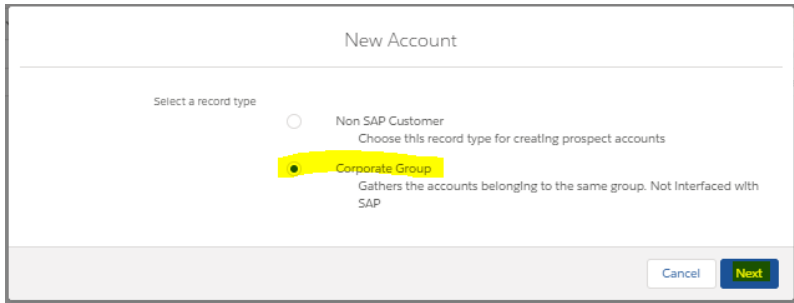
I. Corporate Group Creation - via Core CRM

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



The screenshot shows the 'Accounts' tab in the Core CRM system. At the top, there is a navigation bar with various tabs: Dashboards, Accounts (selected), Contacts, Visit Reports, Opportunities, Quotes, Contracts, Cases, Account Plans, and More. Below the navigation bar is a search bar with the text 'Search this list...'. To the right of the search bar is a 'New' button. Below the search bar is a table with columns: STREET, CITY, COUN..., OW..., PRS ID, RCS ID, and INVOLVED GBU(S). The table contains two rows of data: one for 'LEVEL 5, 10 NEXUS CRT, MULGRAVE, Australia, Admin, 342983, 2032732, Aroma Performance;Novecare;Soda Ash & Derivatives;Technology Solutions' and another for 'VICENTE LOPEZ, SALTA, Argentina, Ventre, Soda Ash & Derivatives'.

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



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

- 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 Novocare)
- 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	

Cancel Save & New Save

- 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
Corporate Group Creation Approval	04/06/2019 15:47	Pending	Alexia CARTRY
Approval Request Submitted	04/06/2019 15:47	Submitted	Nicoletta Ventre

Recall

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

Hide Feed Click to add topics:

Post File Link More

Write something...

Share

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](#)