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

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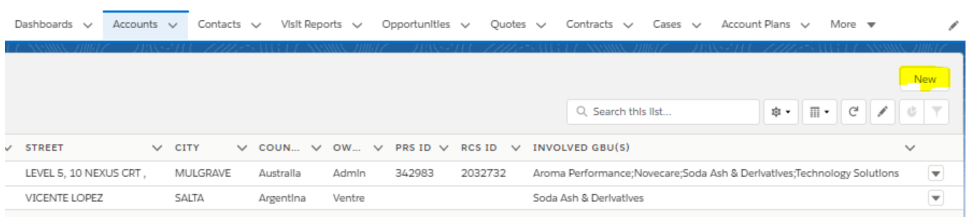
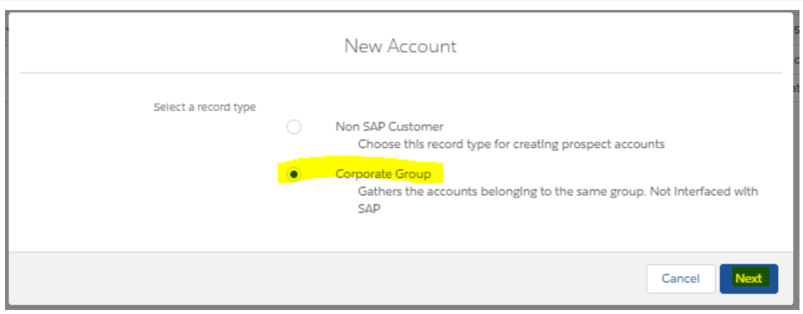
Step-by-step

I. Corporate Group Creation - via Core CRM

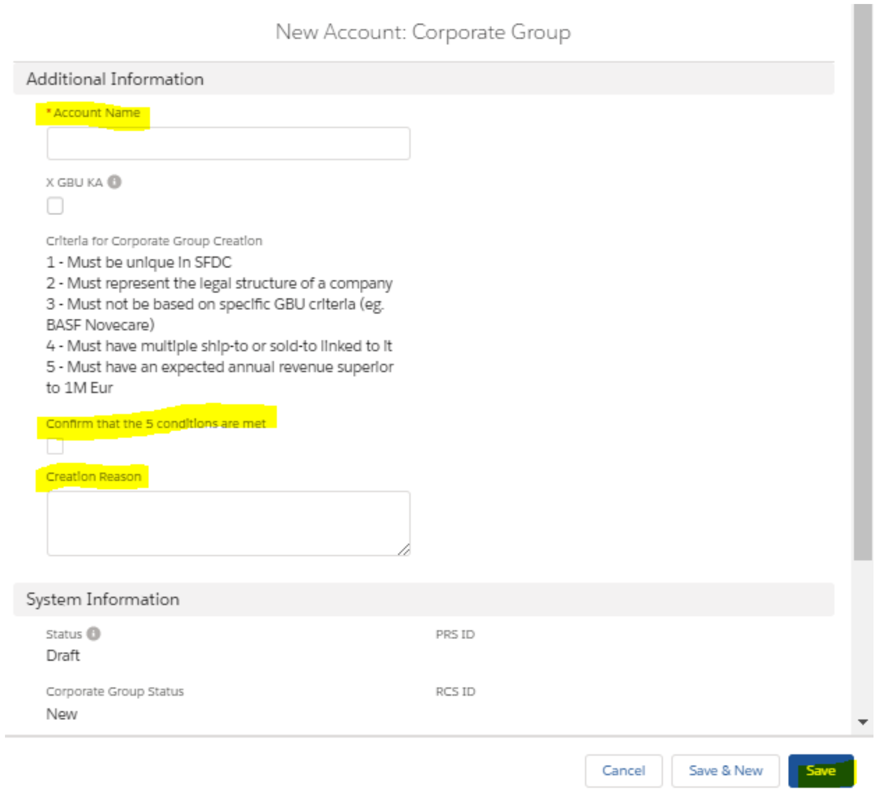
- In account tab, click on button **New** to Create a new Account.



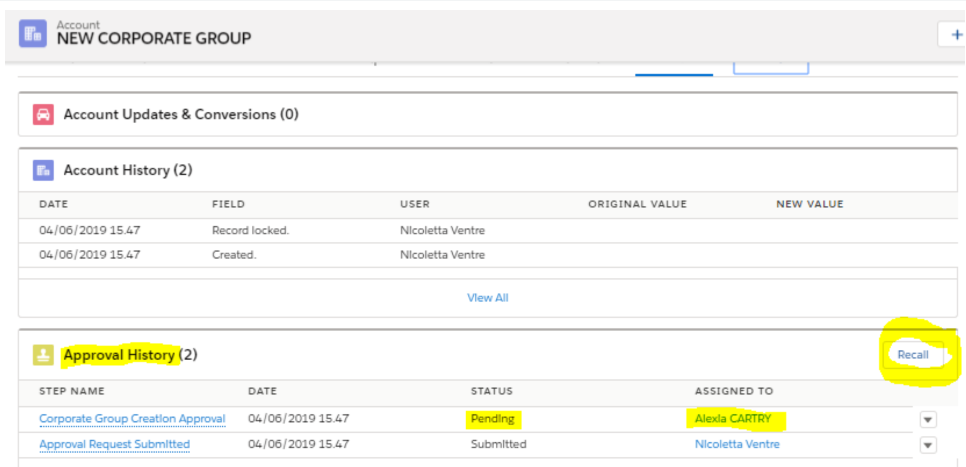
- Select Record Type : **Corporate Group** and click on button **Next.**



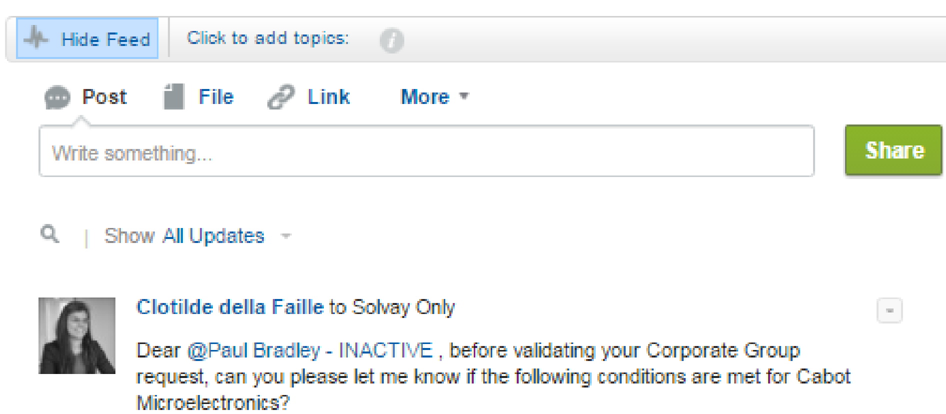
- Enter **Account name** (20 characters maximum)
- Corporate Group must meat the 5 criteria
- Input the creation reason
- click on **SAVE**



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



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



- 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.

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