

# 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>

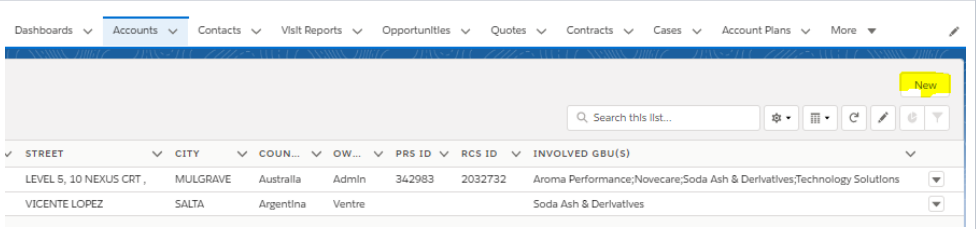
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## Step-by-step

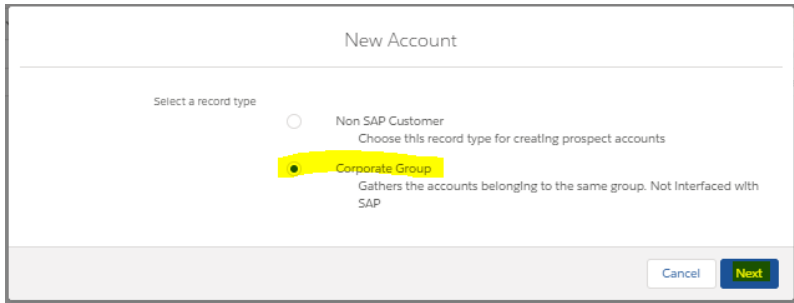
### I. Corporate Group Creation - via Core CRM

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



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

- 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      |
|---------------------------------------------------|------------------|-----------|------------------|
| <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 |

Recall

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

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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](#)