FD - P1. Account & Contact management

Version	Date	Description	Author
v.1	30.03.2017	Creation	Jeremie Seabra
v.2	14.12.2017	Lightning update	Sophie Millet
v.3	25.05.2018	Lightning Spring 18 update	Sophie Millet
v.4	14.10.2018	Lightning Fall 18 update	Hicham Mohamed Tabbak
v.5	21.02.2020	Conversion process review	Josiane Peytraud

0. Definitions

0.1 Account Definition

Accounts are Syensqo's customers, partners and distributors.
Each account stores information such as a name, address, phone numbers and customer attributes.
For each account, you can link information such as opportunities, activities, cases, visit reports, notes and attachments.

Source document Functional design from Accenture project

Global overview of interface for Account managment in CRM

Record type	Partner type	Definition
Corporate Group	n.a.	Account specifically created for grouping accounts under one parent. Corporate Group can not be used for business transactions in SAP
Non SAP customer	**Prospect**	Syensqo's potential customers (sold-to or ship-to or both, as SAP customers), not yet recorded in SAP
	Indirect Customer	Customer Syensqo is not directly doing business with, but is buying Syensqo's products
	Non-Buying Entity	Account not buying products from Syensqo, but in relationship with Syensqo (i.e. Corporate Centers, Research Centers, Universities, Laboratories, etc.)
	Third Party	Account not directly involved in a selling transaction but involved to perform specific services for a SAP Customer
	Vendor	Account providing goods or services to Syensqo
	Chemplex Prospect	Prospects which are not in SAP, belonging to Chemplex business - part of Novecare Chemlogics.
	Chemplex Customer	Customers which are not in SAP, belonging to Chemplex business - part of Novecare Chemlogics.
SAP customer	**Ship-to**	SAP customer to whom Syensqo is shipping the products
	Sold-to & Ship-to	SAP customer to whom Syensqo is selling and shipping the products

0.2 Account Components & Layouts

Each account record type is displayed with a different layout, using different components: **(Classic View)**

Component	Definition	Standard / Custom	Corporate Group	SAP customer	Prospect
iTools	Account specifically created for grouping accounts under one parent. Corporate Group is not interfaced with SAP	~~App~~ Custom	X		
Chatter		Standard	X	X	X
Related lists	Visit reports, Opportunities, Quotes, VOC, ...	Standard		X	X
Related lists	Commitments, Contracts	Standard		X	
Sold and Pending Orders		Custom, integrated with Clickview		X	
Competitive Insights		Custom		X	X
Service related lists	Open Complaints, Sample Requests, Customer Requests, Customer Specific Requirements, Webforms	Custom		X	X
Incoterms & Payment terms		Custom		X	
Highlights		Custom	X	X	X
GBU customer segmentation		Custom	X	X	X
Activity		Standard	X	X	X
Prospect conversion		Custom			X

(Lightning View)

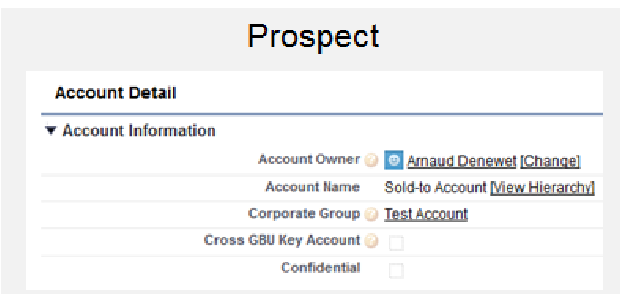
Component	Definition	Standard / Custom	Corporate Group	SAP customer	Prospect
iTools	Account specifically created for grouping accounts under one parent. Corporate Group is not interfaced with SAP	~~App~~ Custom	X		
Chatter		Standard	X	X	X

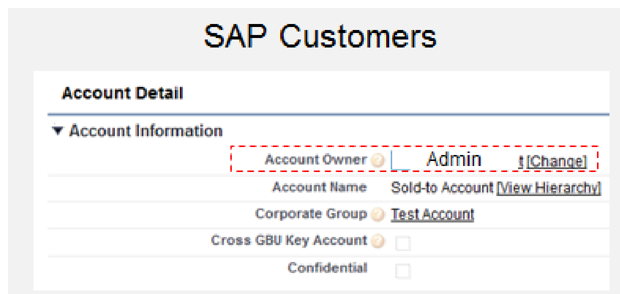
Tabs	Visit reports, Competitive Insights, Related	Custom		X	X
Tabs	Business, Service	Custom		X	X
Tabs	Details	Standard		X	X
Custom Actions	Update Request, Visit Preparation Report	Custom		X	
Custom Actions	Visit Preparation Report, Edit, Change owner	Custom			X
Highlights		Custom	X	X	X
GBU customer segmentation		Custom	X	X	X
Activity		Standard	X	X	X
Prospect conversion		Custom			X

0.3 Account Owner

Each Account in Salesforce must have one and only one “Account Owner”. This rule is in place differently depending if the account is a customer or a prospect:

- For prospects, Account Owner is the creator, the sales rep who created the prospect in Salesforce
- For customers, Account Owner is “Admin User”, a generic name meaning the account is controlled by SAP.





Consequences

The Account Owner is added to the Account Team at the creation as Account Manager. So he won't loose the visibility on his accounts after the conversion.

Roles & Responsibilities

The Account Owner is in charge of the maintenance of his accounts. He keeps the related data up to date and maintains the account team upon request from other BU's/GBU's

1. Functional Process : Account Management

1.1 Prospect Creation

The following fields are mandatory on creation:

- Name
- Street
- City
- Country
- Partner Type
- Partner Sub-Type
- Currency
- Corporate Group

If the Partner Type is Prospect, then the Partner Sub-Type must be "Sold-To & Ship-To" or "Ship-To".

The field Region is automatically populated depending on the Country.

The field "Account Organization" is automatically populated depending on the GBU of the user and is visible only by Users with "System Admin (Lite)" and "System Administrator" profiles.

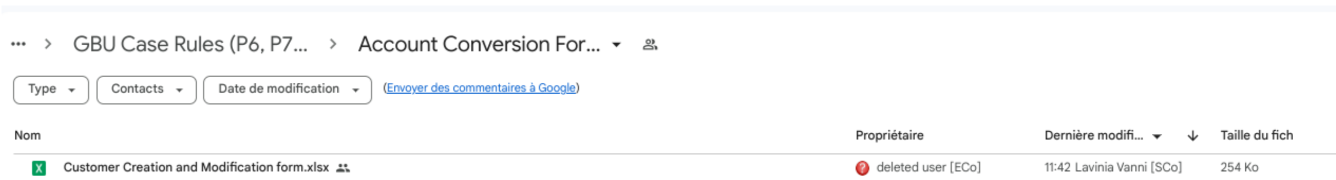
- If the user is part of Kandelium, the field Account Organization is setup with **Kandelium**
- For the other users, the field Account Organization is setup with **SCO**
- The value **ALL** has been set up when doing the split for PAX project. It means that the account was existing before this split and that he is visible by all the users whatever is their GBU.

1.2 Conversion / Update request

1.2.1 Pre-requisits

A GBU Segmentation and a Contact are mandatory before starting the conversion. **Procedure Account Management**.

Users can also download directly from the conversion flow via a link to a shared folder where 2 files **Customer Creation form** will be created for SCO and ECO with different logo (Novecare requested we removed this option for them)

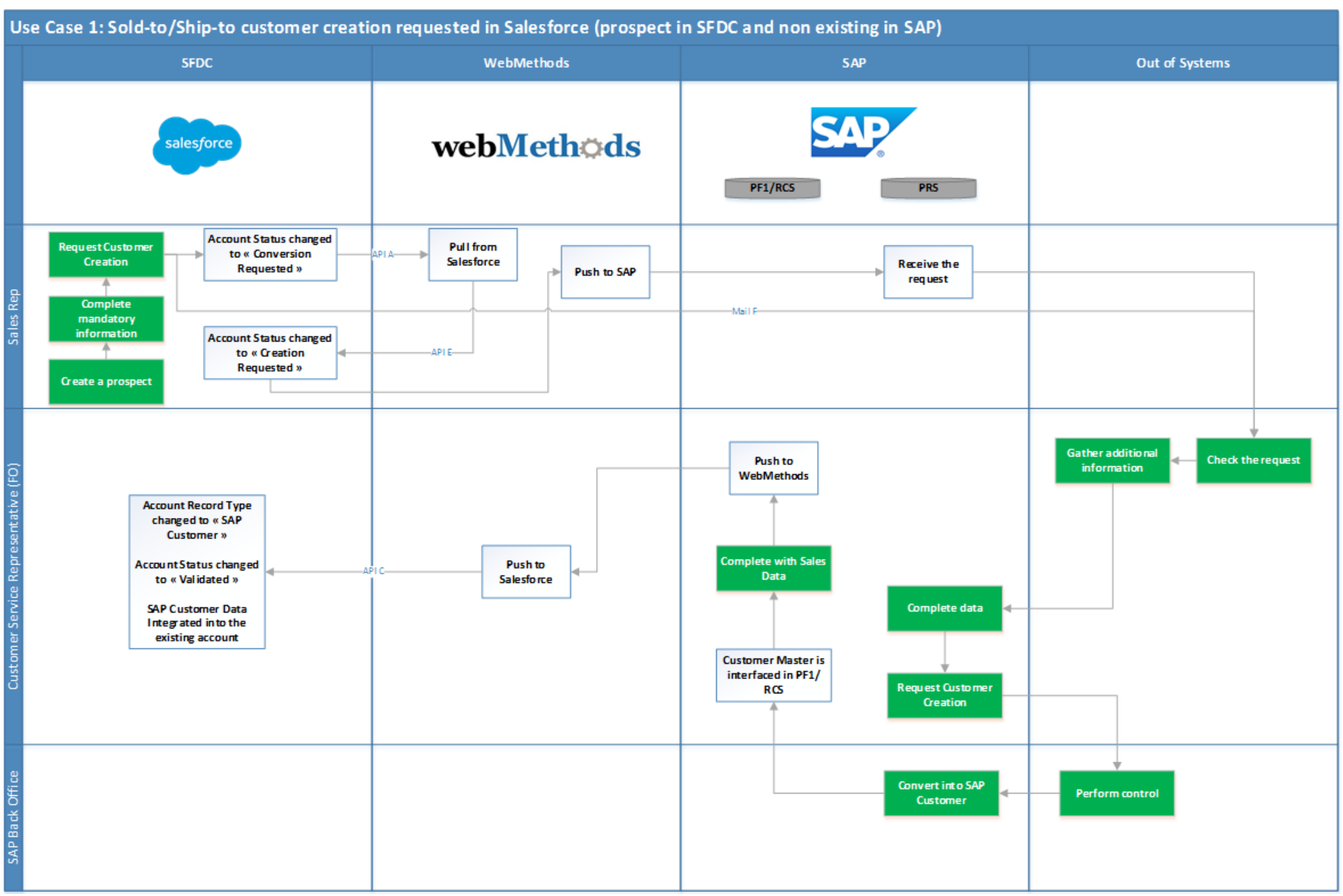


For Canada, United States, Brazil, United Kingdom, Italy and Australia, the field State/Province must be populated before starting the conversion.

For Technology Solutions, Novecare and Soda Ash, the corporate group is mandatory and must be populated before starting the conversion.

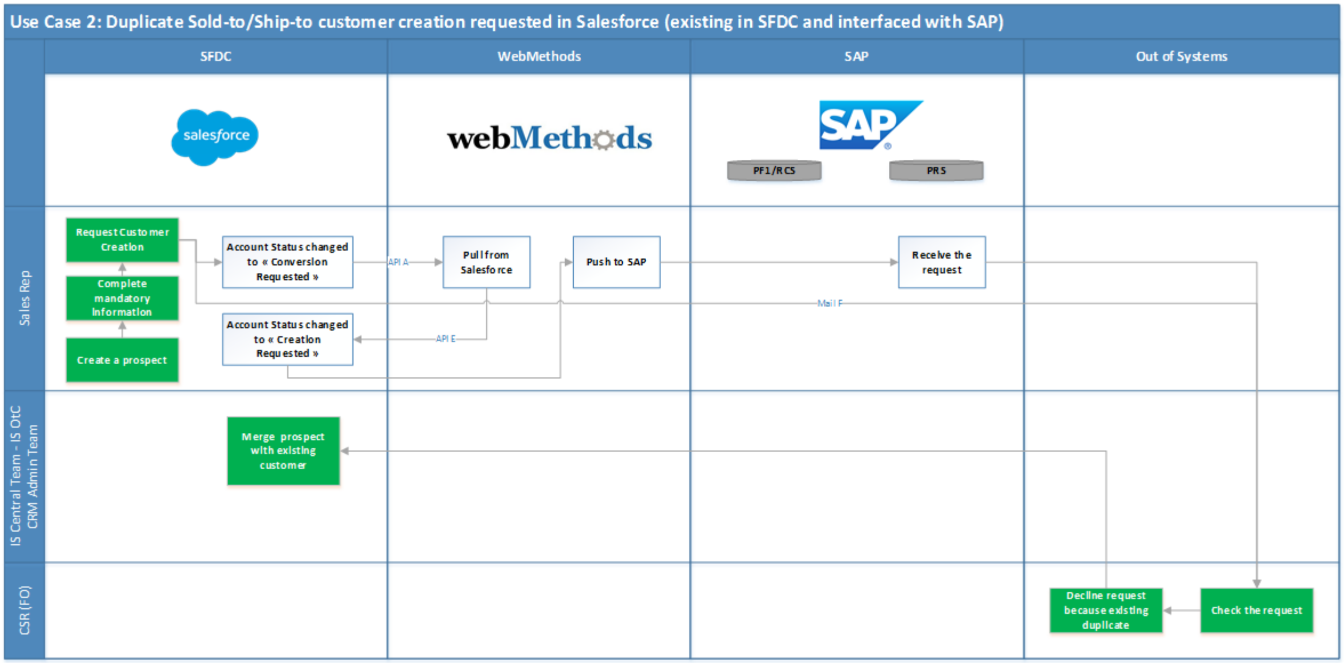
1.2.2 Use Cases of Conversion / Update request

Sold-to/Ship-to customer creation requested in Salesforce (prospect in SFDC and non-existing in SAP)



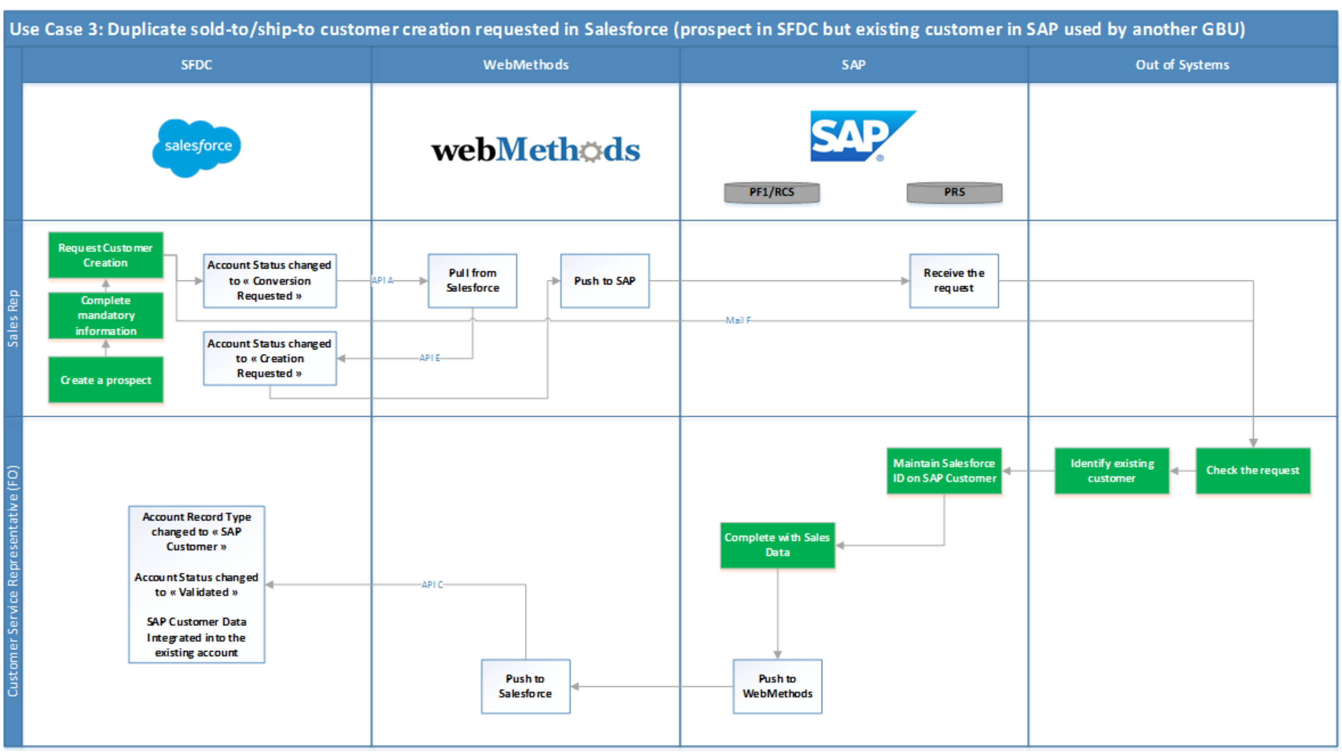
In this scenario, when checking the request, assumption is that the request is valid and no duplicate account is found. Next scenario covers the situation when a duplicate account is identified.

Duplicate sold-to/ship-to customer creation requested in Salesforce (existing in SFDC and interfaced with SAP)

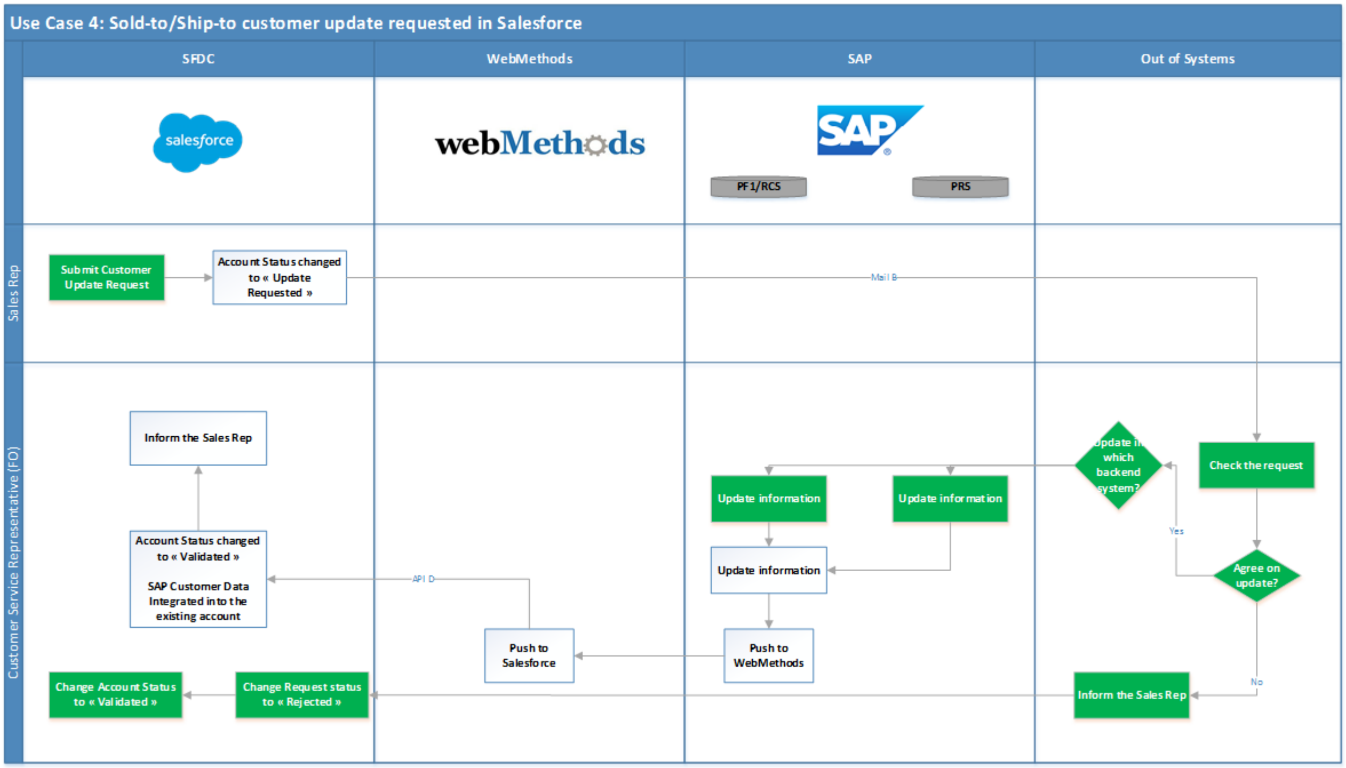


Note: If the prospect created already exists as an account in SFDC, the “merge” operation will be done by IS Support Team.

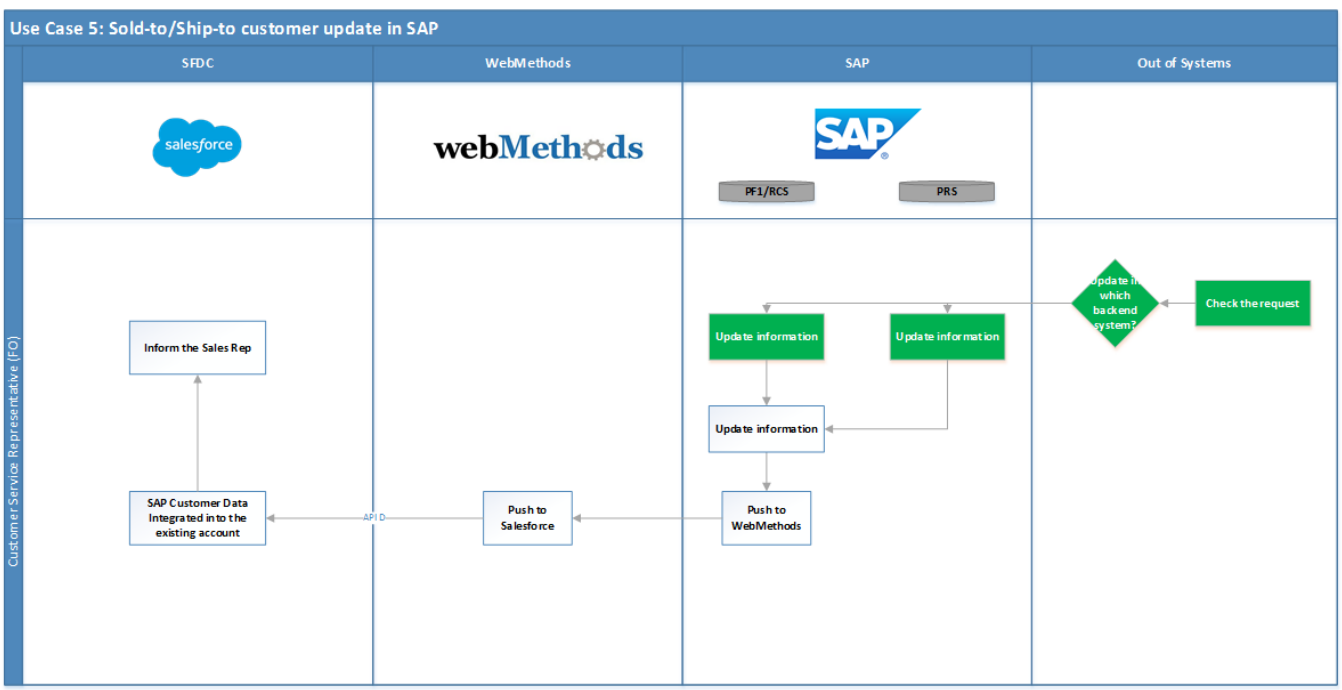
Duplicate sold-to/ship-to customer creation requested in Salesforce (prospect in SFDC but existing customer in SAP used by another GBU)



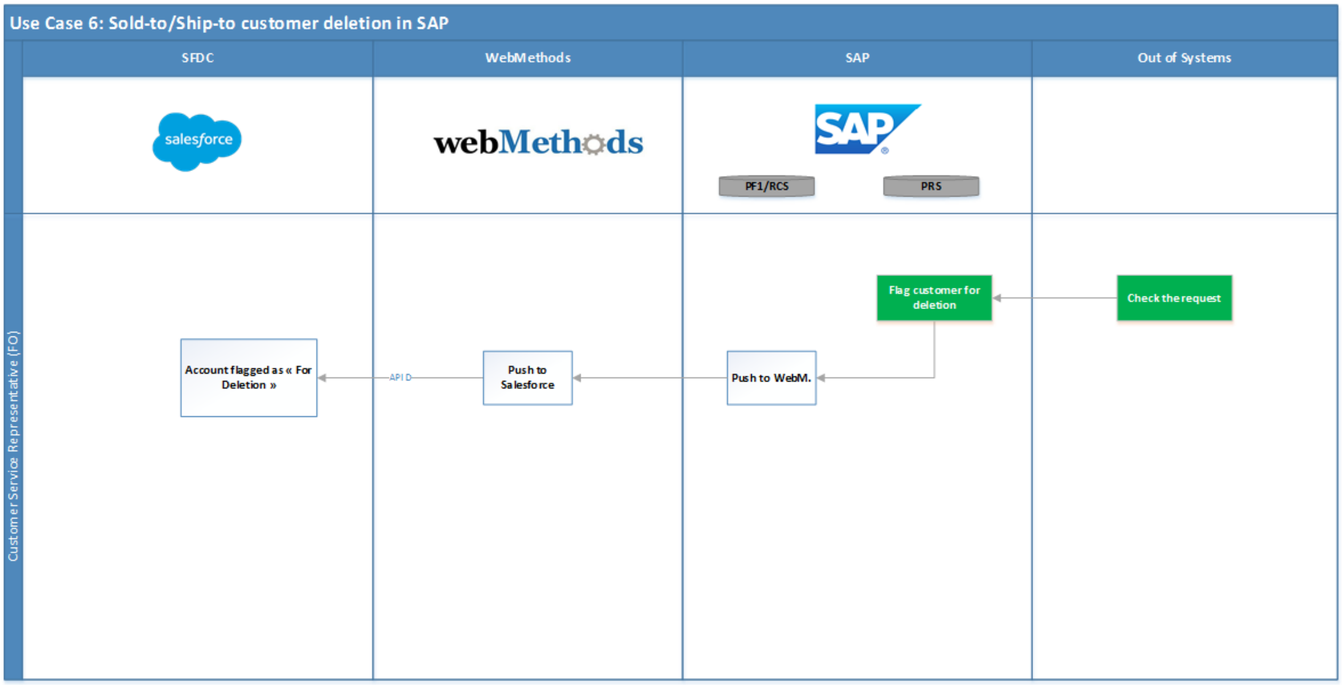
Sold-to/Ship-to customer update requested in Salesforce



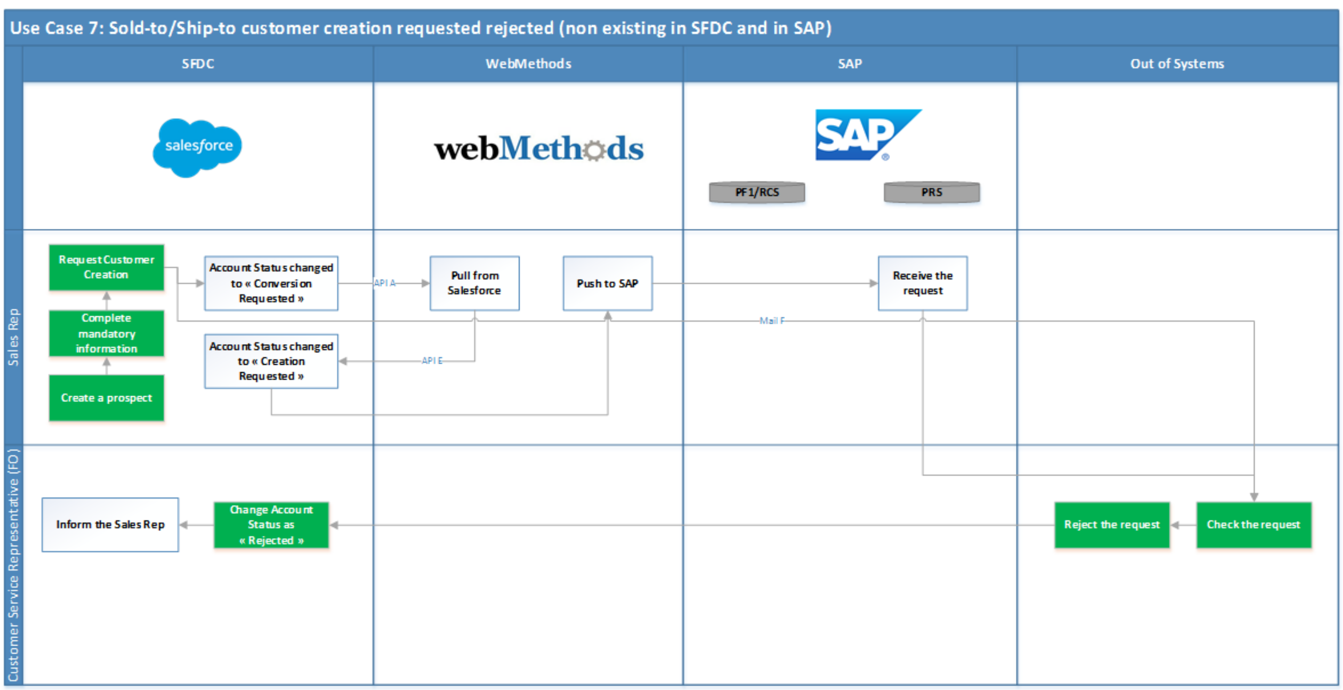
Sold-to/Ship-to customer update in SAP



Sold-to/Ship-to customer deletion in SAP



Sold-to/Ship-to customer creation requested rejected by CSR



Note: typical use case: A dummy account is created by mistake by a user confusing Test and prod environments

1.2.3 API and Mail

Following information are transferred through the interfaces between Salesforce and SAP

1.2.3.1. APIs

- **API** : customer creation request from Salesforce
    - Salesforce account ID

    - Account Owner
    - Account Name
    - Address (street, zip/postal code, city, country)
    - Address (local language) (street, zip/postal code, city, country, language key)
    - Customer Service Representative Name
    - Customer Service Representative Email address
    - Account Partner Type (sold-to & ship-to or ship-to)
    - If ship-to : take the Salesforce account ID of the sold-to account defined in the relationship (in order to create the relationship ship-to /sold-to in SAP)

- **API C**: customer creation order from SAP
    - Salesforce ID
    - PRS ID
    - RCS ID
    - Account Name
    - Address (street, zip/postal code, city, country)
    - Address (local language) (street, zip/postal code, city, country, language key)
    - Account Partner Type (sold-to & ship-to or ship-to)
    - Account Status (= Validated)

- **API D**: customer update order from SAP
    - Salesforce ID
    - PRS ID
    - RCS ID
    - Account Name
    - Address (street, zip/postal code, city, country)
    - Address (local language) (street, zip/postal code, city, country, language key)
    - Account Partner Type (sold-to & ship-to or ship-to)
    - Flag for deletion

- **API E**: Account Status
    - Account Status (= Validated)

1.2.3.2. Mails

- **Mail B** : customer update request from SFDC (will trigger a mail that contains the following values)
    - Salesforce account ID
    - PRS ID
    - RCS ID (could be blank in RCS)
    - Requested by
    - Salesforce must request the user to select the appropriate CSR based on the Account team.
    - Update requested:
        - Account Name
        - Address (street, zip/postal code, city, country)
        - Address (local language) (street, zip/postal code, city, country, language key)
        - Relationship (between a sold-to and a ship-to)
        - Flag for deletion

- **Mail F** : additional information requested at customer creation in Salesforce (Sold-to & Ship-to)
    - Account Information
        - Name
        - Address
        - Account Owner Email
        - Account type
        - GBU Account Sub-Type
        - CSR Name
        - Contact (lookup to select an existing contact or all the information to create one)
    - Shipping Conditions
        - Shipping Conditions
        - Full/Partial Loads
        - Delivery Hours
        - Incoterm 1
        - Incoterm 2
        - Checkbox: Is customer Tax Exempt
        - Supply Chain Contact (manual input)
        - Financial Contact (lookup to select an existing contact)
        - Safety Data Contact (lookup to select an existing contact)
        - COA Contact (lookup to select an existing contact)
    - If the Sold-to account doesn't need additional Ship-to account
        - Checkbox
    - If the Sold-to account needs additional Ship-to account, existing ship-to account:

        - Ship-to Account (lookup to select an existing ship-to in Salesforce)
    - If the Sold-to account needs additional Ship-to account, non existing ship-to account:
        - Ship-to Account NameShip-to Address
        - Ship-to Account Name in local language
        - Ship-to Account Address in local language
    - If the Sold-to account is also a Bill-to account, following checkbox:
        - Checkbox
    - If the Sold-to account is not a Bill-to account as well, additional information:
        - Bill-to Name
        - Bill-to Address
    - If the Sold-to account is also a Payer account, additional information:
        - VAT Number and TAX ID 1, 2, 3, 4 and 5
        - Payment terms
        - Currency
        - Payment mode
        - Yearly Estimated Turnover
        - Estimated Volume
        - Unit of Measure
        - Estimated Value of First Order
        - If the customer is not interested in e-invoicing
            - Checkbox
        - If the customer is interested in e-invoicing
            - Invoice E-mail
        - Payer Contact (lookup to select an existing contact or all the information to create one)
    - If the Sold-to account is not a Payer account as well, additional information:
        - Payer Name
        - Payer Address
        - VAT Number and TAX ID 1, 2, 3, 4 and 5
        - Payment terms
        - Currency
        - Payment mode
        - Yearly Estimated Turnover
        - Estimated Volume
        - Unit of Measure
        - Estimated Value of First Order
        - If the customer is not interested in e-invoicing
            - Checkbox
        - If the customer is interested in e-invoicing
            - Invoice E-mail
        - Payer Contact (lookup to select an existing contact or all the information to create one)
    - Target System
        - Checkbox Target System PF1
        - Sales area PF1
        - Checkbox Target System WP1
        - Sales area WP1

1.2.4 Technology Solutions conversion specificity

For Technology Solutions, the conversion process is done in 2 steps:

- First, the Sales Rep. initiate the process and on the last screen, instead of submitting the creation in SAP, he saves his request and the system advises the CSR selected at the beginning of the conversion.
- Then, the CSR reviews and completes what has been initialized by the Sales Rep and submits the creation to SAP.

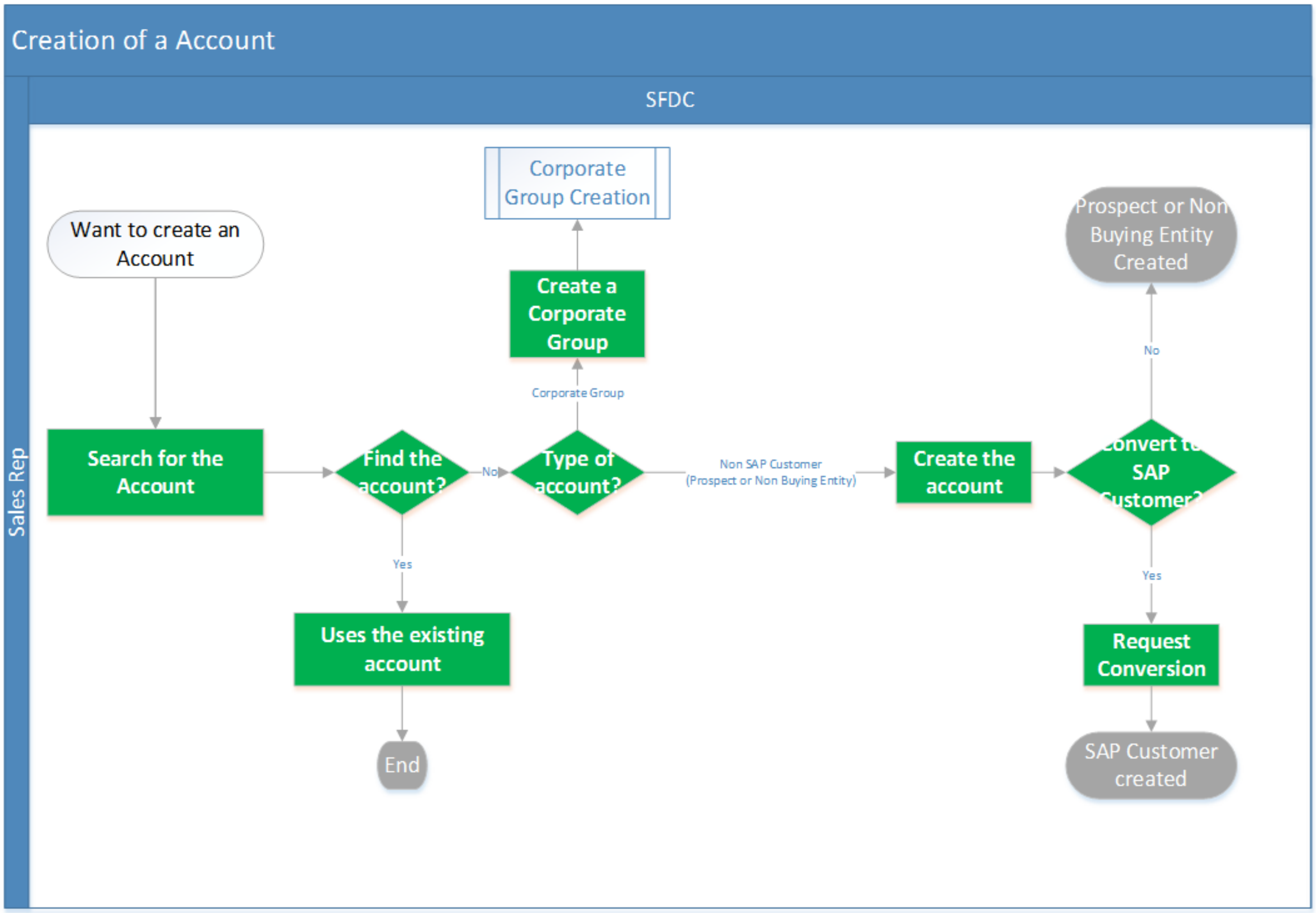
If the CSR initiates the conversion, then the process is not done in 2 steps and allow the submitting of the creation at once.

For Technology Solutions, the following fields are mandatory when the CSR runs the conversion:

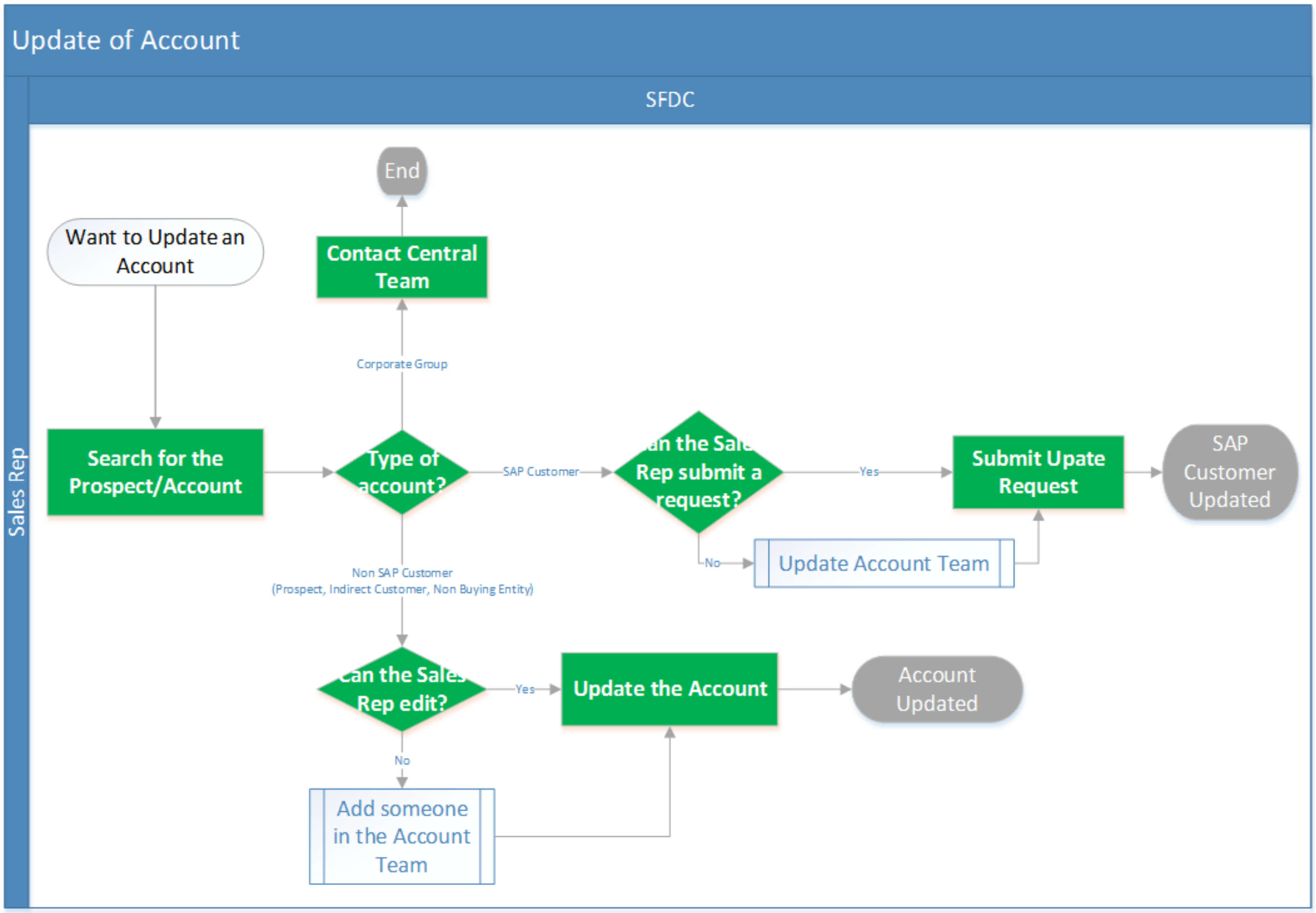
- Shipping conditions
- Full / Partial Load
- Incoterm 1
- Incoterm 2
- Safety Data Contact
- COA Contact
- Payment Terms
- Payment Mode

1.3 Processes not including an interface with SAP

1.3.1. Creation of an Account

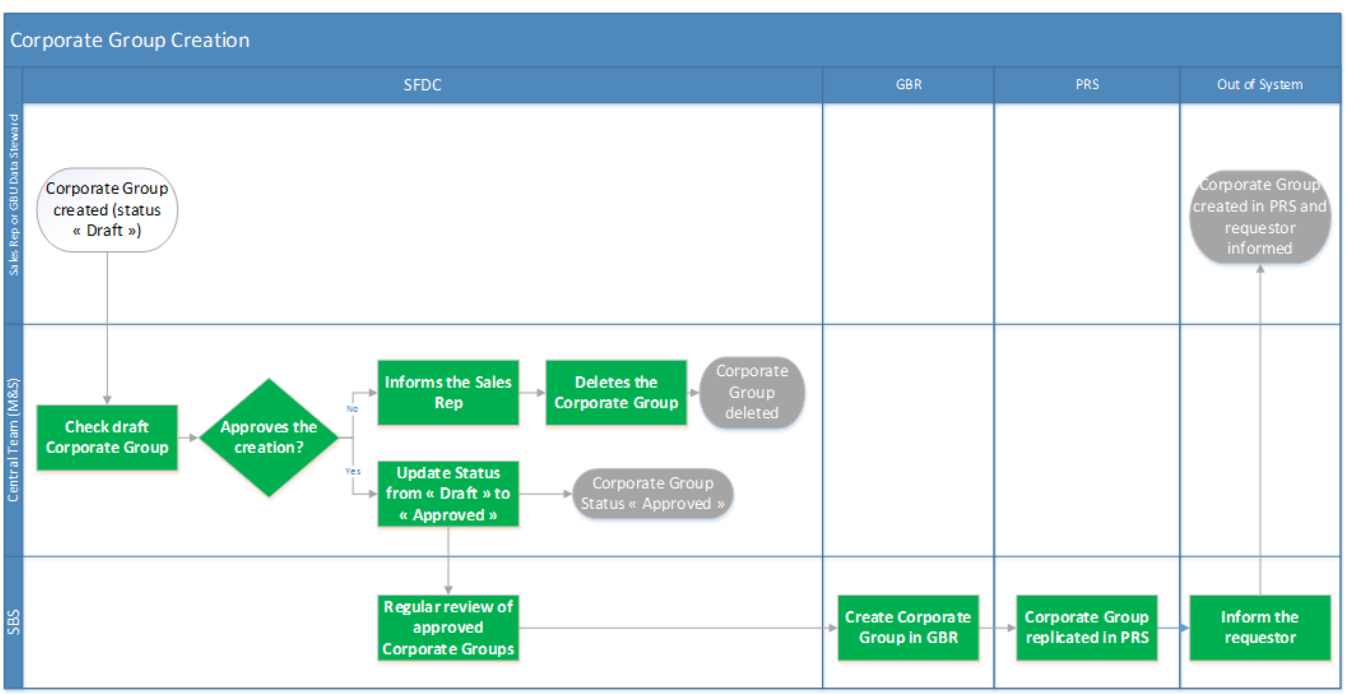


1.3.2. Update of an account



If the sales rep is actively involved at an account, and cannot edit it, then the user should add itself to the account team using the "Manage my Account Team Role" Button.

1.3.3. Corporate Group Creation



- Corporate Group Creation
  - Sales Reps enter in SFDC the new Corporate Groups after Go-Live in draft status.
  - S&M will review / approve on regular basis these corporate groups in SFDC
  - SBS will create the Corporate Group in GBR, then the code is replicated in SAP (PRS)
  - Hierarchy Updates
    - Sales Reps update the link Corporate Group – Customer in Salesforce
    - On regular basis, S&M review these links based on a report executed by GBUs data steward. This report will include the info on how many GBUs are working on the Corporate Group.
    - SBS will assign on regular basis the customers to the Customer group either in PRS and GBR.
- Twice a week, 3 reports are running for APDM Team; Those reports are in the folder Weekly reports for Accounts. They are:
  - Corporate Group Creations - Approved
  - Customer links to Corp Groups
  - New Customer links to Corp Groups

Those reports are sent to Admin user (sbs-is-crm.support@solvay.com). From this mailbox, a forwarding rule send them to Customers.datamanagement@solvay.com in order to create a BMC Helix request managed by DATA Team.

1.3.4. Transfer of Account Ownership

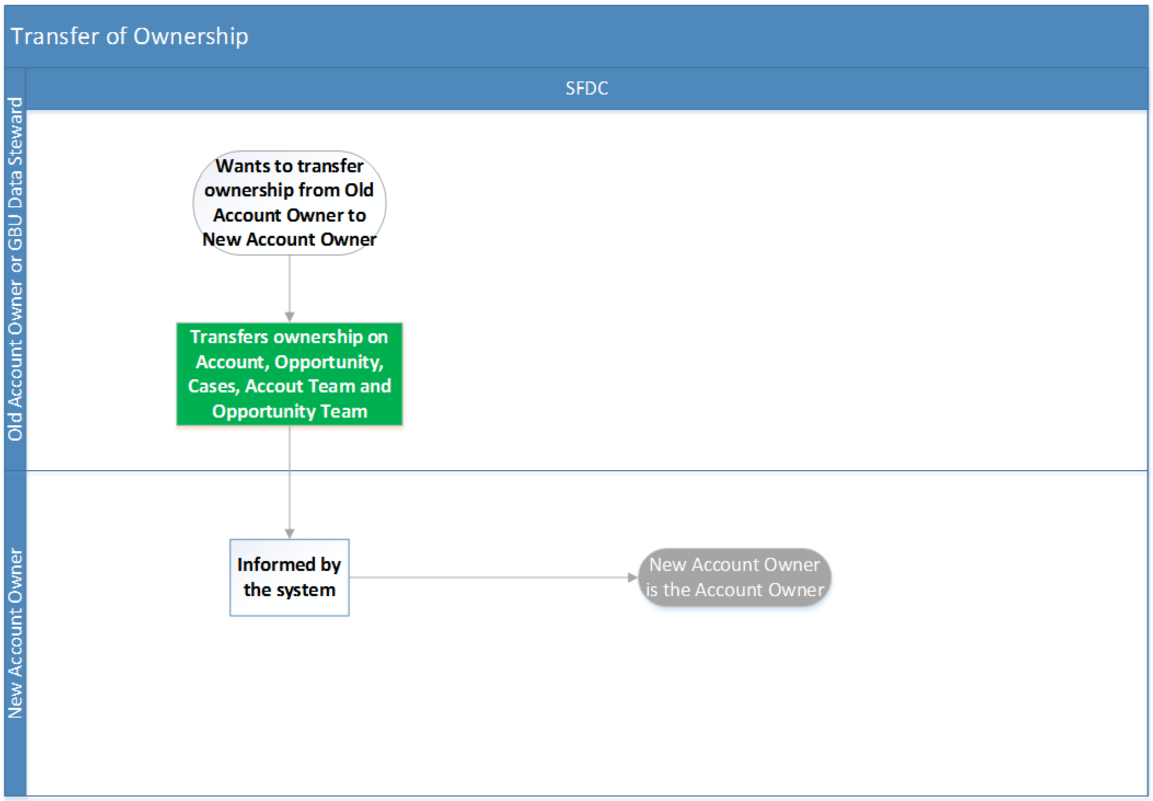


Figure 12: Transfer of Ownership Process

1.4 Trigger the creation of a GBU / BU customer segmentation

If not existing, a new GBU customer segmentation record is created automatically on accounts each time a transactional record is created :

- An opportunity is created
- A quote is created
- A visit report is created
- A case (any record type) is created

The newly created GBU customer segmentation records is created with the following values :

- Record type = GBU customer segmentation
- GBU = GBU of the transactional record (opportunity / case etc)
- GBU Account Sub-Type = End user

A BU customer segmentation child record is created as well with the following values :

- Record type = BU customer segmentation
- BU = BU of the transactional record (opportunity / case etc)

If the account is linked to a Corporate group account, and if the GBU customer segmentation doesn't exist on the related Corporate Group, Corporate GBU /BU customer segmentation records are created as well on the related CG group.

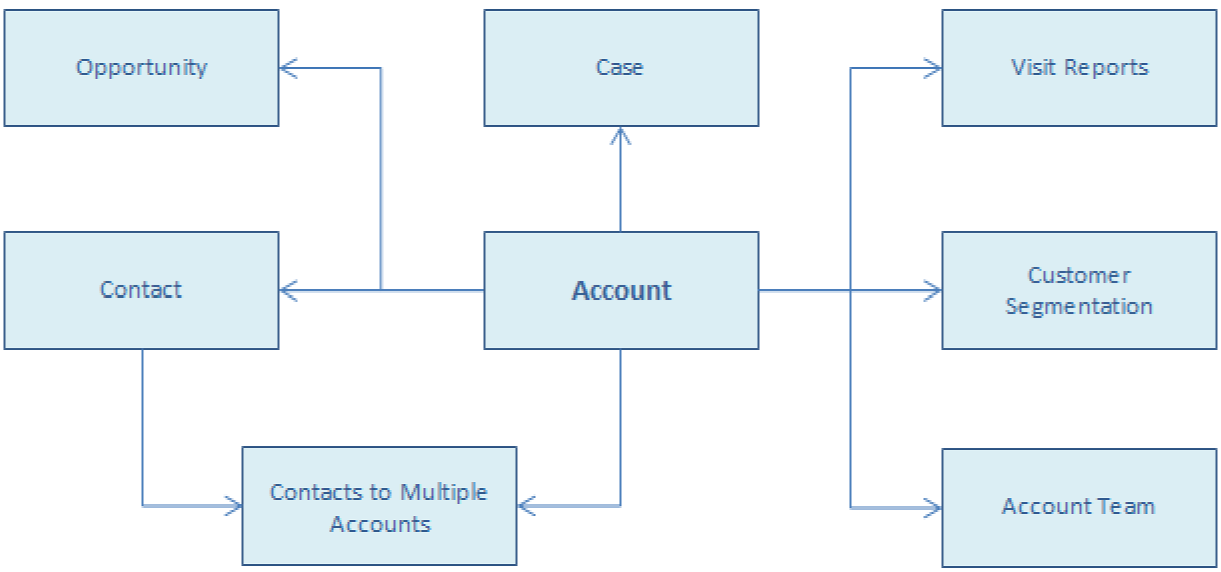
If a contact is linked to the transactional record (opportunity / case etc), the "related GBU" field of the contact is updated as well with a new GBU value stored in a picklist with multiple values.

When a user with a single GBU value in his/her profile (not applying to MBU users) creates a new prospect, a new GBU customer segmentation record is created using the GBU of the user, as well as a Corporate GBU customer segmentation, but the BU customer segmentations records are not created.

When a user with a single GBU value in his/her profile (not applying to MBU users) creates a new contact, the "related GBU" field is populated automatically with the GBU of the active user.

2. Data Model & Security

2.1 Main objects



1. **Accounts**: Standard Salesforce Object to manage the information about the Ship-to and Sold-to related with the Complaint
2. **Account Team**: Salesforce object that allows to list all the Syensqo users working on the account and to define for them a specific role (account manager, customer service representative, strategic marketing, etc.).
3. **Customer Segmentation**: Object used to record which GBU and BU is working on the account and specify some information per GBU or BU (i.e. Moved to Distribution , GBU segment , Account sub- type (=Customer Group in SAP) , etc.).
4. **Contacts**: Standard Salesforce Object to manage the contact person from the Ship-to or Sold-to
5. **Contacts to Multiple Accounts**: Standard object used to link multiple contacts to multiple accounts.
6. **Case**: Standard Salesforce Object to store and manage all general information regarding a Complaint
7. **Opportunity**: Standard Salesforce Object to manage potential deals.
8. **Visit Reports**: Custom object to store and manage visit reports.

2.2 Account Security Model

Action	All Sales Users	Account Owner / GBU Data Steward and hierarchical above	Account Team Member with Read/Write access and hierarchical above
View	yes *	yes	yes
Create	yes	yes	yes
Request Conversion / Update	no	yes	yes
Edit	no	yes	yes

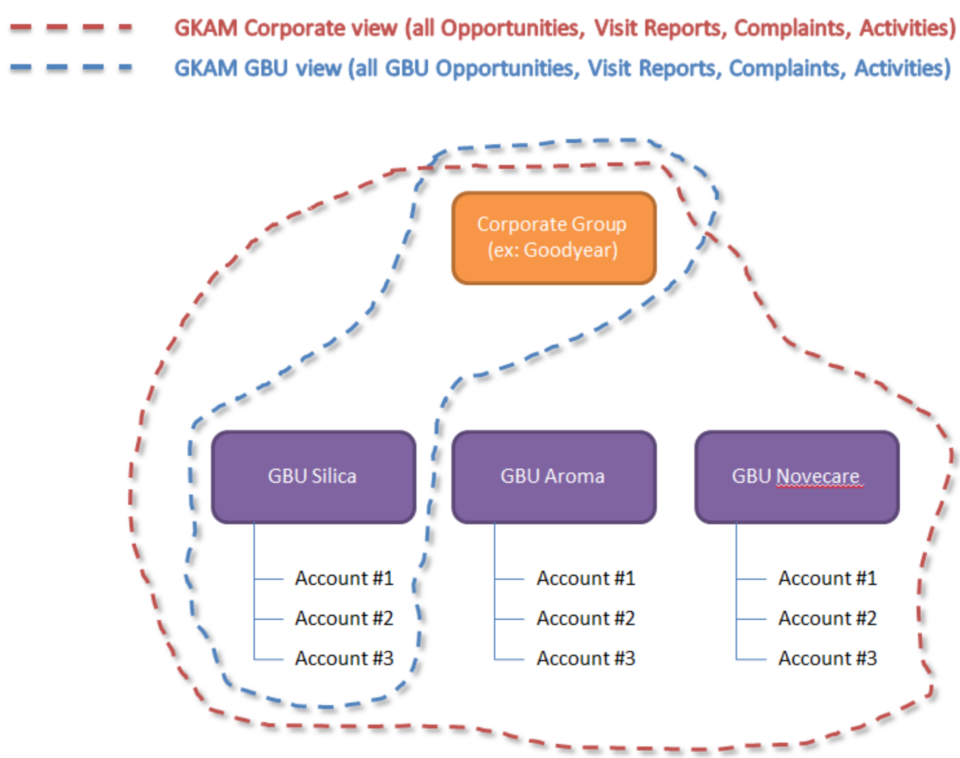
Delete	no	no	no

* Confidential accounts can only be seen by Owner and Account Team members

Corporate Account security model :

2 team member roles are specifically defined at CG group account team level :

- Global Key Account Manager: can see all accounts related to a Corporate Group within his own GBU
- Group Key Account Manager: can see all accounts related to a Corporate Group for ALL GBUs.



2.3 GBU customer segmentation data model

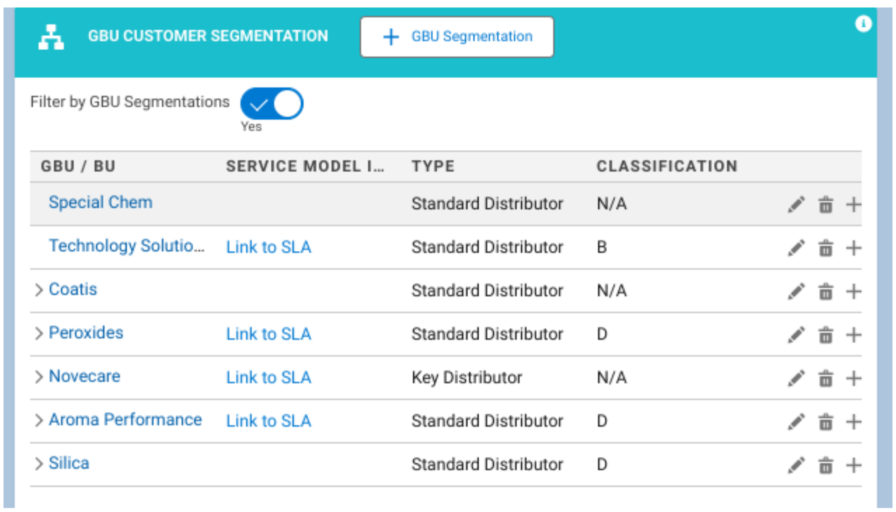
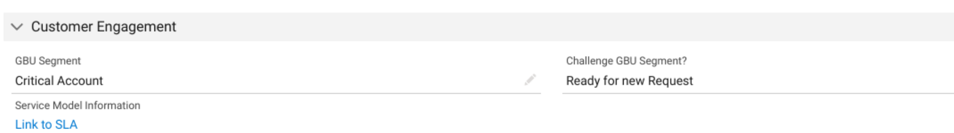
GBU customer segmentation parent object

Field	Mandatory ?	Picklist values	Definition
Information (managed by Sales Rep)			
Account	X		Account involved in this GBU customer segmentation

GBU Account Sub-Type	X	Compounder Distributor End-User Original Equipment Manufacturer Non-profit Organization (University , R&D, HQ) Service Provider (Consultant, Testing Laboratory) Trader Transformer/Converter Wholesales / Retailer	Type of relationship between this account and the GBU
GBU	X		
Account information			
General Account Information			
Information (managed by CommX)			
GBU Customer Classification		A Potential B C D Aroma - Front Runner Aroma - Lean Master Aroma - Emerging Champion Aroma - Smart Shark Soda Ash - Showcase - Solvair	Segmentation of the account for the GBU
GBU Account type		Strategic Account Key Account Critical Account Standard Account Key Distributor Standard Distributor Not valid Not yet assigned Prospect Account	A key account is a current or potential account who represents a major & strategic part of Syensqo's growth potential and contribution, with an important marketing stake for Syensqo. A reference in the market, willing to partner with Syensqo (e.g. on innovation), and a global, regional or local customer with a complex relationship to manage.

BU customer segmentation child object

Field	Mandatory ?	Picklist values
Information (managed by Sales Rep)		
Account	X	
BU	X	

Main End-Use		
Information (managed by CommX)		
Main Customer Interaction Model (CIM)		Broad offering provider Customized solution provider Lean/Reliable Product/process innovator Trader/transactional provider
~~Service Model~~		~~Picklist values are defined by GBU, and dependent on the GBU~~
Service Model information	Optional : only few GBUs	In Core CRM in component GBU customer segmentation  in ICAre Account page layout "Details" 

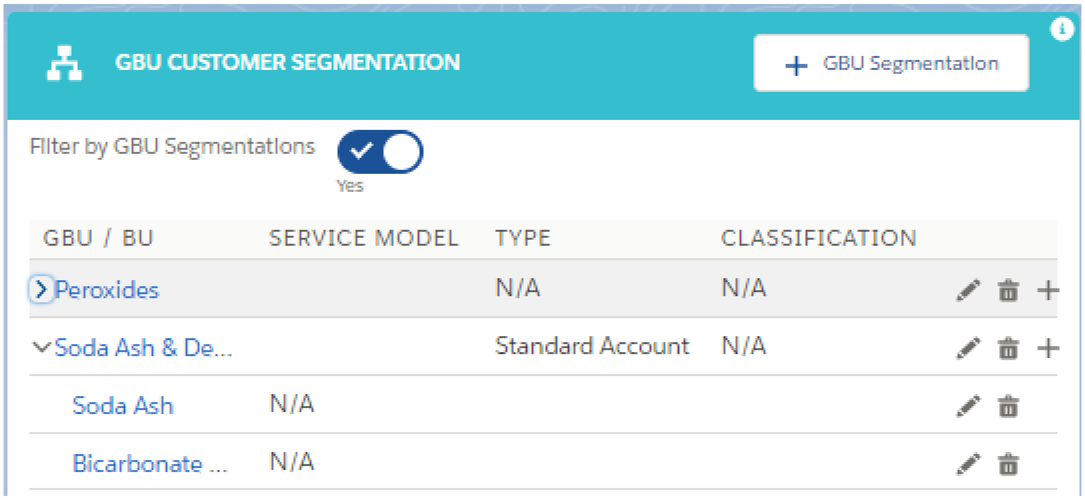
2.4 Contacts

Contacts listed on the account as related contacts are Account Contact relationships.

3. Account Custom Buttons & Features

3.1 GBU customer segmentation

The GBU customer segmentation object and the BU segmentation child objects records for each account the related list of GBUs and BUs working with this account, the type of relationship between the GBU / BU and the account and the classification of this account for the GBU/BU.



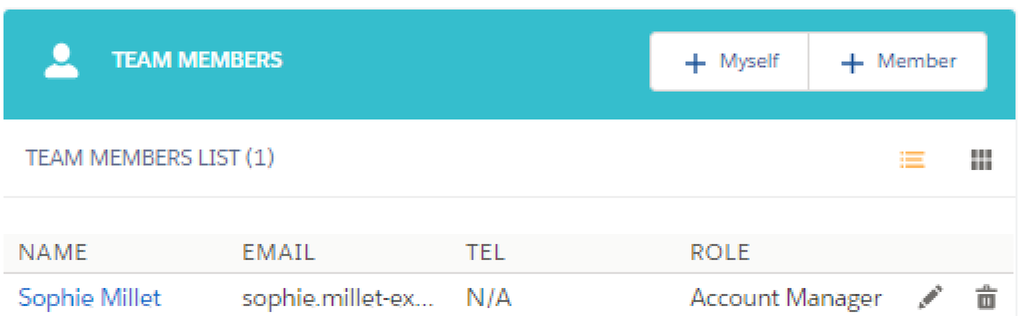
The "GBU customer segmentation" component shows the list of GBU customer segmentation (including BU child records) related to the account.

There is a filter on the component to show by default all the GBU customer segmentation records (collapsed, no BU records).

- If the filter is set on "No", then all team members and all contacts relationships related to the account are listed within the component
- If the filter is set to "Yes", then :
  - A GBU segmentation record is highlighted (the 1st by default)
  - Team members displayed are listed filtered by GBU (if the multi GBU access field of the team member user record contains the GBU value of the GBU segmentation record highlighted)
  - Contacts displayed are listed filtered by GBU (if the related GBU field of the contact record contains the GBU value of the GBU segmentation record highlighted)

Manage Team Memberships

The management of account team members is handled through the GBU customer segmentation custom component using that sub-component :

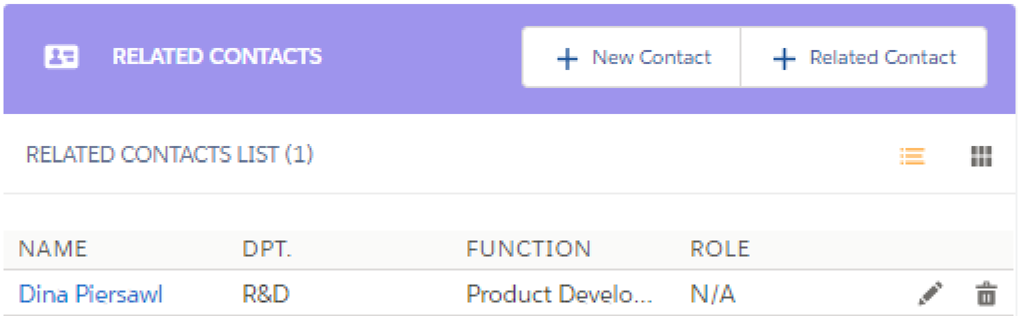


- "+ Myself" custom button : Any Salesforce user can add him self to an account team by clicking this button. The user will be prompted to select the role that best describes its relation with this account : Account Manager, Key Account Manager, Customer Service Representative, Sales Support, Business Development, Technical Marketing, Global Key Account Manager, Research & Innovation, Strategic Marketing. This button is available on Prospects and SAP Customers.
- "+ Member" standard button : as an account team member, a user can add another user into the account team by clicking on this button.

Maintenance of team members from SAP interface Batch - jobs

Manage Contacts

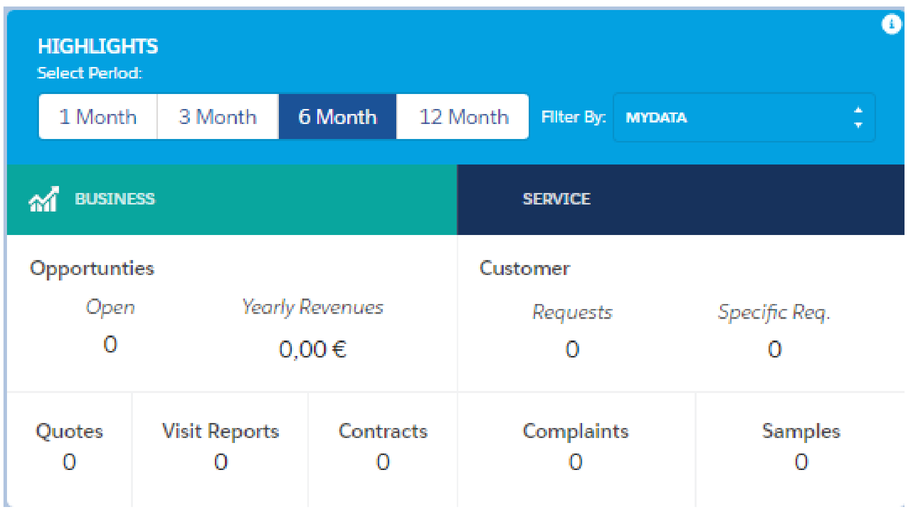
The management of contacts is handled through the GBU customer segmentation custom component using that sub-component :



- "+ New Contact" standard button : this action will trigger the creation of a new contact record, related (primarly) to the account
- "+ Related Contact" standard button : this action will trigger the creation of a link "Account Contact relationship" between an existing contact and the account

3.2 Highlights

The Accounts highlights is a master-view of all the related information which might interest the user when dealing with a specific account. This component also appears in his home page and provides cross-accounts view for the accounts which the user is related to.



If an object is not used by a GBU, the count on objects never apply and the value "N/A" is displayed against the object instead of a number. The definition of those custom settings are listed here.

	Aroma Performance	Coatis	Fibras	Novecare	Performance Polyamides	Peroxides	Silica	Soda Ash & Derivatives	Special Chem	Corporate	Solvay Energy Services
Opportunities											
Quotes											N/A
Contracts											
Visit Reports											
Customer Requests						N/A		N/A	N/A		
CSR		N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A
Complaints											
Samples											N/A

If the count of an object is 0, the 0 is not clickable.

If the count of an object is > 0, the figure is clickable is will open a modal view listing the details of the objects :

Open Opportunities (1)

NAME	ACCOUNT	RECORD TYPE	EXPECTED YEARLY REVENU	CLOSE DATE	STAGE	OWNER	GBU	BU
fgjhfj	COSMOCIENCIA ESPECI...	Growth-Product Requirin...	60 300,00 €	06-mai-2018	1 - Qualify	Novecare Lightning	Novecare	Coatings

Counts of objects are based on the accounts processed :

- For a SAP or non SAP account, the Highlight component counts the number of records of different objects related to the current account;

- For a Corporate Group, the Highlight component counts the number of records of different objects related to all accounts where the Corporate group is the parent.

Then, the following rules apply:

- Open Opportunities (not closed) where Creation Date > "time range" days ago, for instance creation date > April 28 if today is May 28 and time range is 1 month
- Quotes where where Creation Date > "time range" days ago
- Visit Reports where where Creation Date > "time range" days ago
- Contracts where where Creation Date > "time range" days ago
- Open Cases (not closed/inactive Complaints, Sample Requests, Customer Requests, Customer Specific Requirements) where Creation Date > "time range" days ago

Where "time range" is based on the number of months the user selected on the component.

Data are then filtered by :

- "My Data": The record will be counted if the active user is owner of the record
- "GBU": the record will be counted if the GBU of that record is the same as the one the user Selected (GBUs listed in the filter are the GBU listed in the multi GBU access field of the team member user record)
- "My Team Data": the record will be counted if Ithe active user is on the **record** team (Cases, Opportunities, etc) **or** if the active user is the owner

3.3 Prospect Conversion component

After creating a new Prospect, the user can request its conversion by clicking on the "Convert Prospect to Customer" button. This will launch a wizard asking the user to complete information needed for the Customer's creation. This component is only available on Prospects.

Users can request the customer to fill the following template, in order to request all needed information to convert the prospect into a customer : Customer Creation and Modification Form.

3.4 Custom Buttons

"Visit Preparation Report" Button

This buttons allows users to check some key information related to the selected account in order to prepare visits to the client.This button is available on Prospects and SAP Customers.

"Update Request" Button

If a user identifies some out of date information, it may request to update the account information by clicking on the "Customer Update Request" button, and by filling the information that is out of date. This button is only available on SAP Customers.

APPENDIX : "Balink" prospect conversion flow in Lightning Experience - disabled and never implemented because no need in the end from business

To activate this process, we need to set the Status of the Account to “Draft” instead of “Prospect”.

A.1 Conversion process component

The "conversion process" component reflects the status of the generated request ("Conversion request" or "Webform" record type).

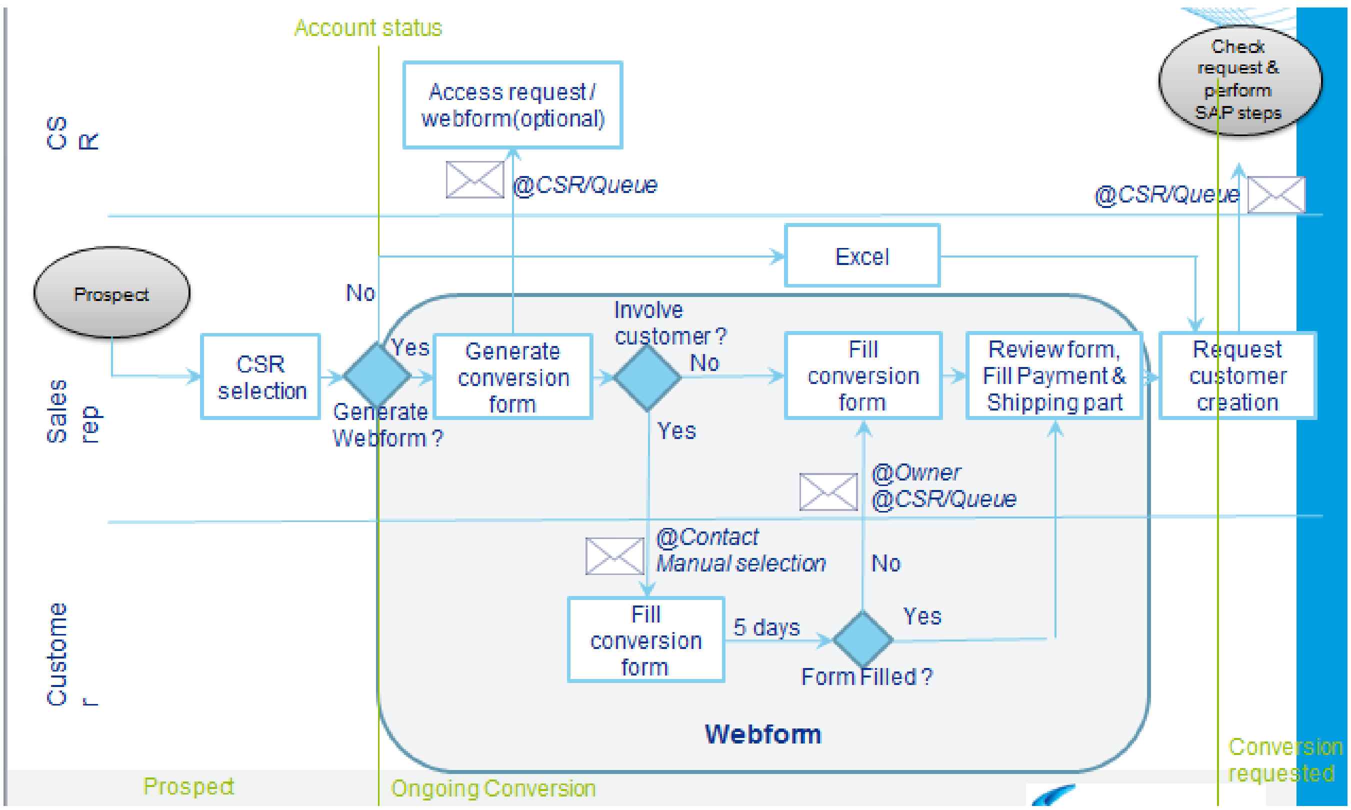
The process described below is creating a request "webform" record type only:

1. The user hits "Start conversion" and completes the wizard to generate the request (described in A.2)
2. Once the conversion webform is created, the component becomes yellow and propose actions - **Request status is "Filling Webform"**:
    a. Go to the form
    b. Lock form
3. Once the conversion webform has been filled, the component becomes blue and propose actions **Request status is "Filling Webform"** :
    a. Go to the form (review)
    b. Lock form
    c. Send to SAP
4. Once send to SAP, the conversion component becomes drak gray, waiting for an SAP account to be created - **Request status is "Conversion requested"**

A.2 Conversion Webform Generation

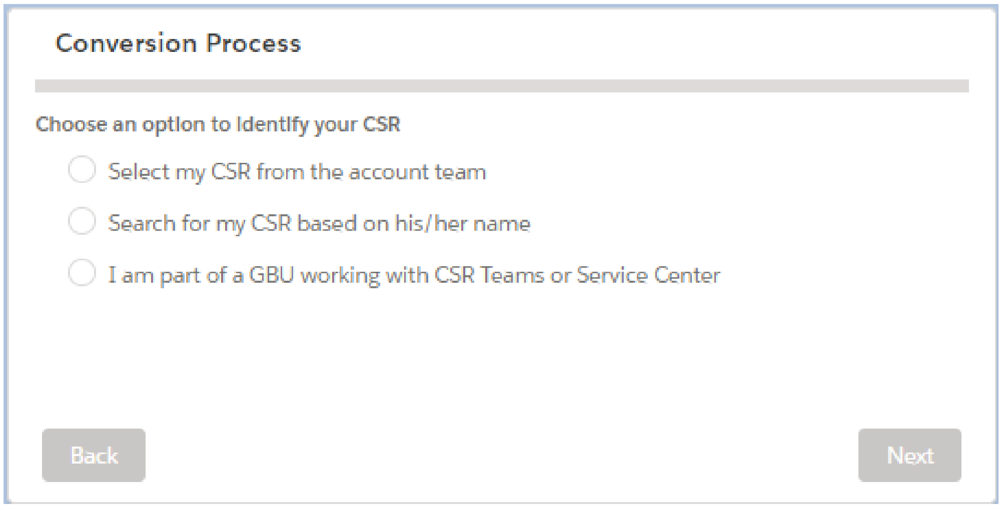
Entry point of this wizard is when the user hits the "Start conversion" button from the conversion component.

In this flow (deactivated in Spring 18 / Summer 18 Lightning release), a wizard asking the user to complete information needed for the Customer's creation, as in the current release flow, but this flow will create a new "conversion webform" record.



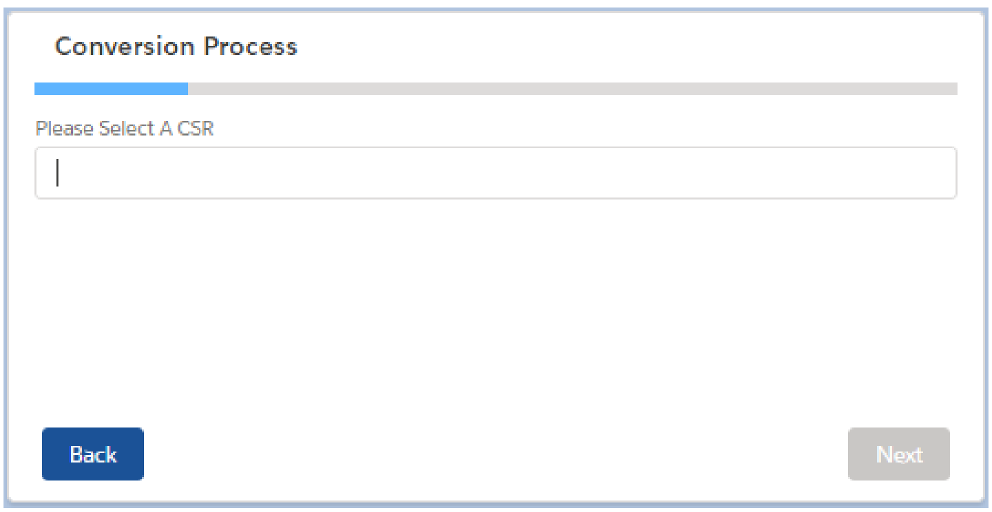
A.2.1 CSR selection

As in the VF flow, the CSR can be chosen from 3 options :



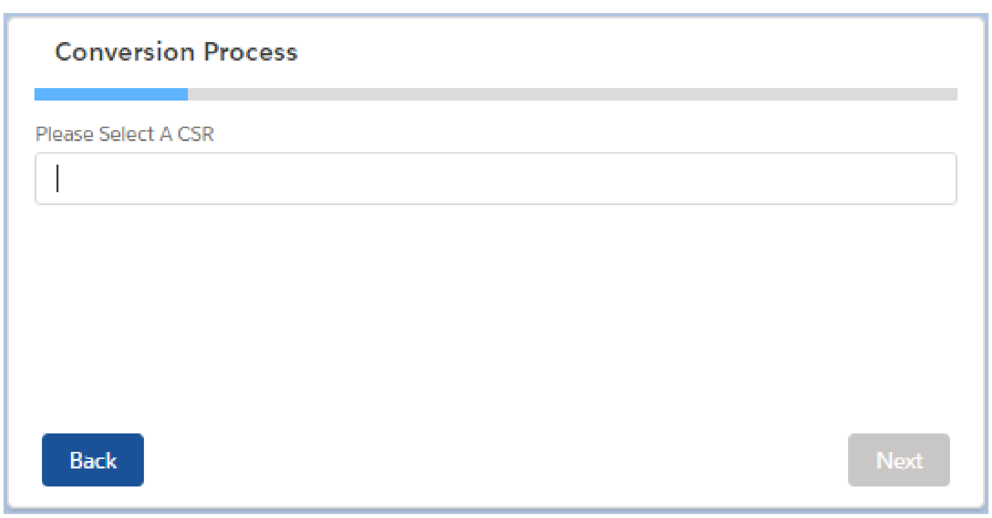
Option 1 :

Select my CSR from the account team



Option 2 :

Search for my CSR based on his/her name



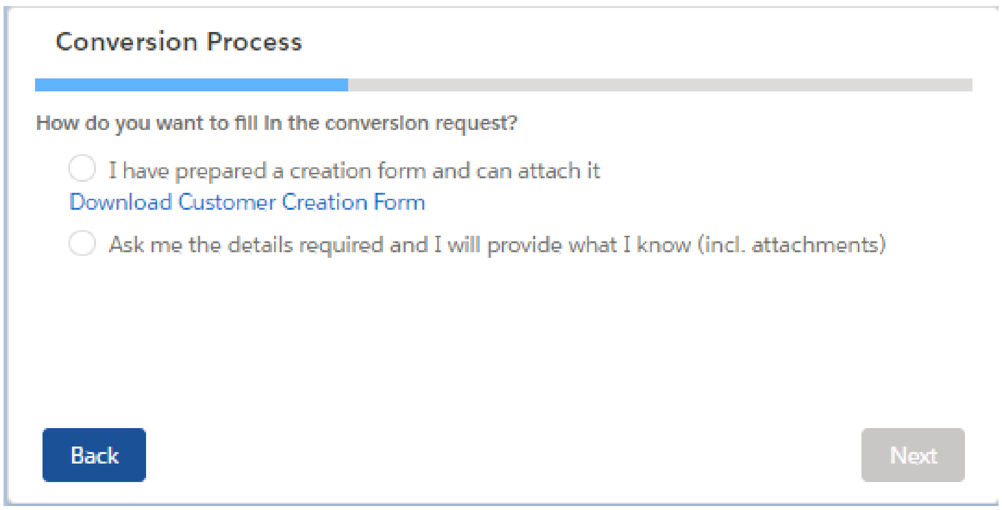
In this option, <u>only users already present in an account team as CSR (team member role)</u> are available in the drop down list

<u>Option 3 :</u>

In this option, <u>the </u>list of queues related to request is displayed

A.2.2 Online / Offline conversion request

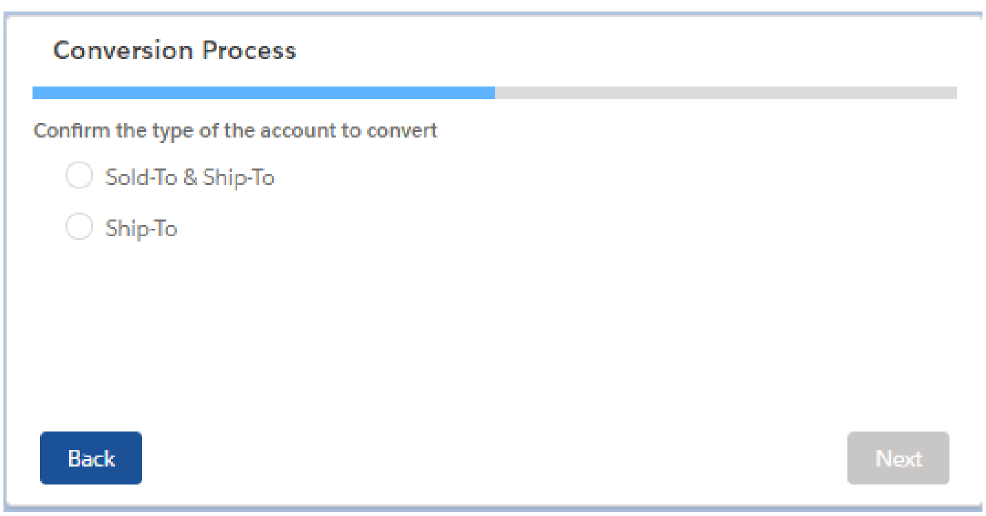
As in the VF flow, customer information can be collected offline :



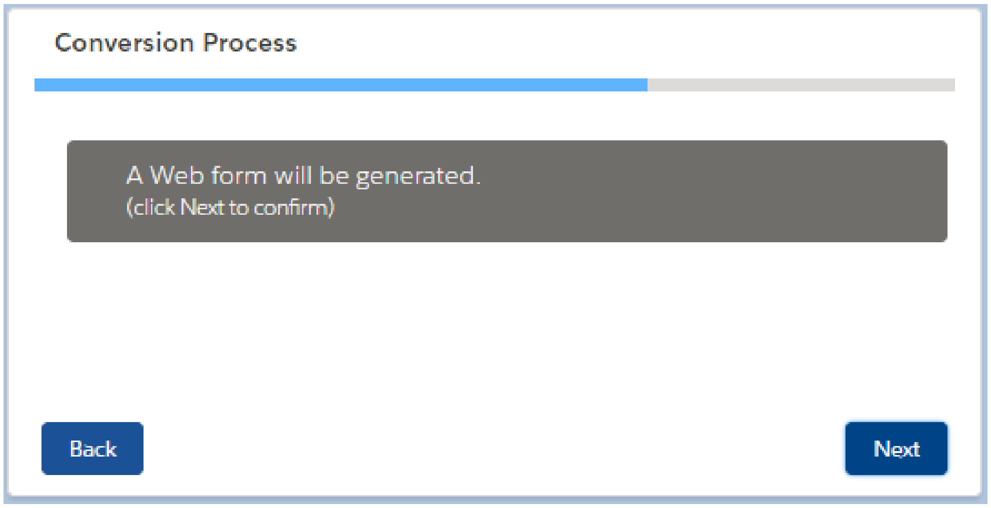
A 3rd option exist (not reflected in the screenshot above), to "fill the conversion webform by a customer".

If a user selects this option, the system will send an email to the customer contact (the 1st contact of the list) with an URL to access, fill and submit the conversion webform.

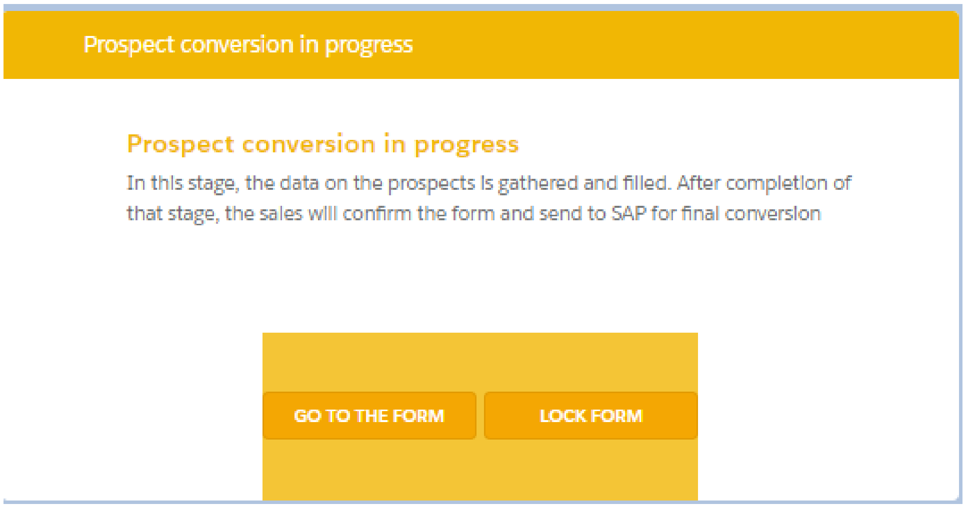
A.2.3 Prospect type selection



A.2.4 Webform generation



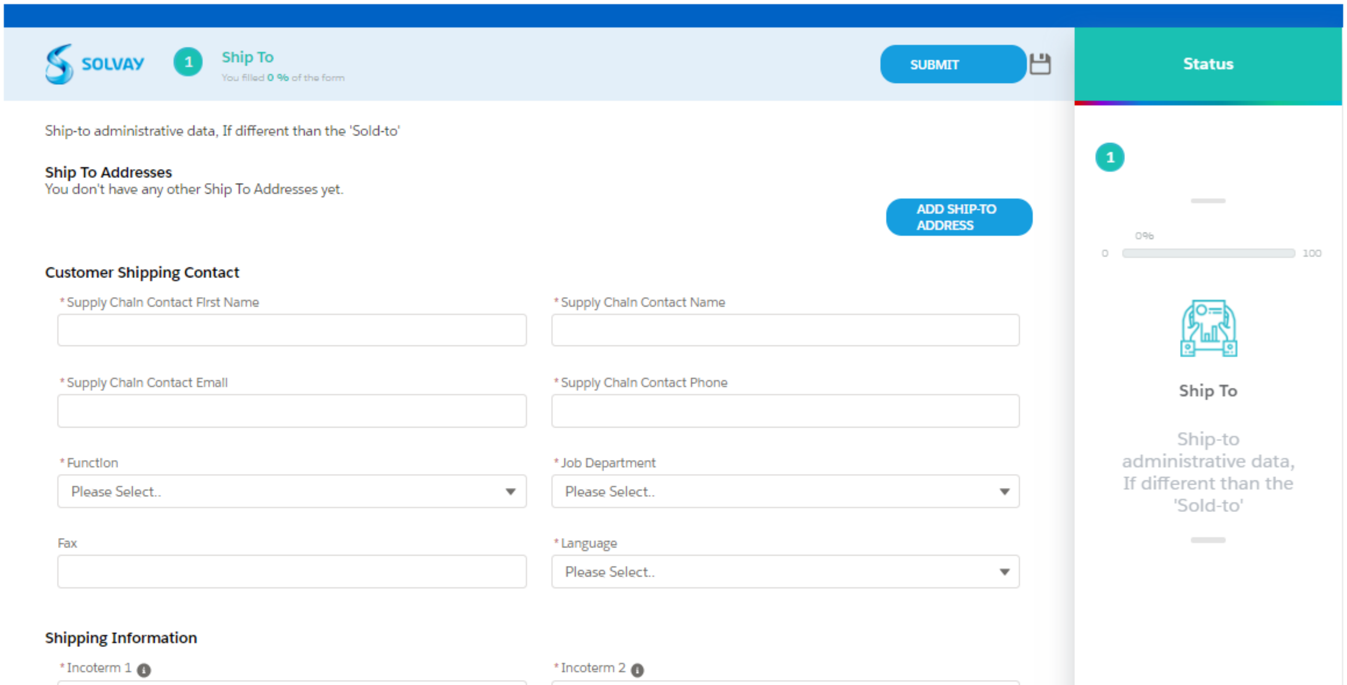
Clicking Next will close the webform generation flow, change the request status and change the component color to the 2nd step of the conversion process :



A.3 Conversion Webform

The conversion webform is a dynamically generated set of pages containing fields, depending on :

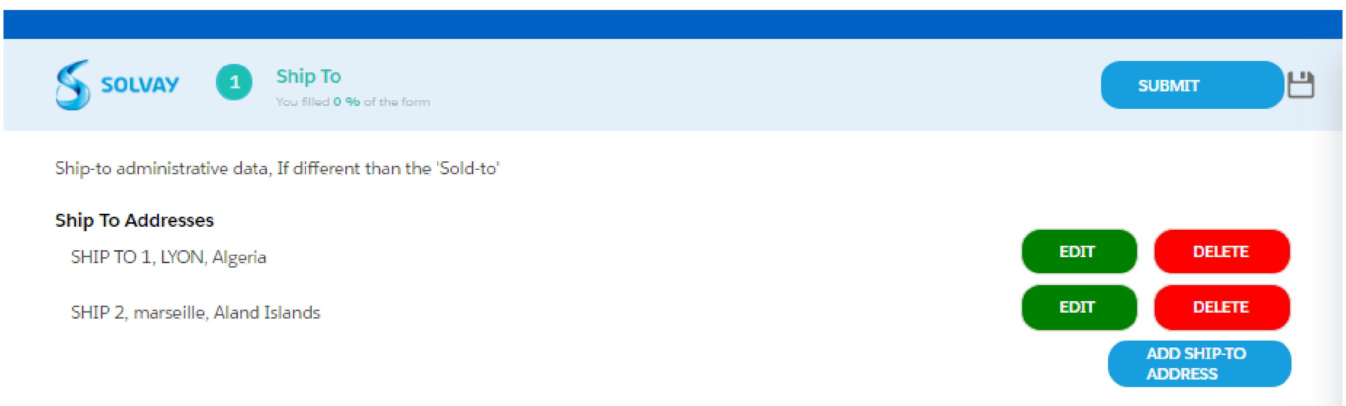
- Sold to & Ship to
- Ship to



Webform page content (fields) and number of pages depend on (managed in Custom settings) :

- "Ship to address is different" checbox (in the webform itself)
- "Bill to address is different" checkbox
- "Payer address is different" checkbox

Additional ship to addresses can be added :



Fall Release Business Rules:

GBU Customer Segmentation	If an account does not have any GBU customer segmentation, when SAP update the account team, create automatically a GBU customer segmentation based on the information of the user whose role in the team is Account Manager SAP	

Last modifications :

User	Last Update
Laurent Champiot-ext	3331 days ago
Jeremie Seabra-ex	3175 days ago
Sophie Millet-EXT	2869 days ago
GILLES, Anne	999 days ago
PEYTRAUD, Josiane	966 days ago
Julien Andreoli-ext	2765 days ago
MARKUS, Evita	532 days ago
BRAHIM, Walid	
KANJA-ext, Zakaria	
NWANGWU, Daniel	
Sebastien Rouxel	