SpP Account & Contact

Account

Link to **Account KT documentation**

Link to **Account & contact presentation**

Link to **Account Interface documentation**

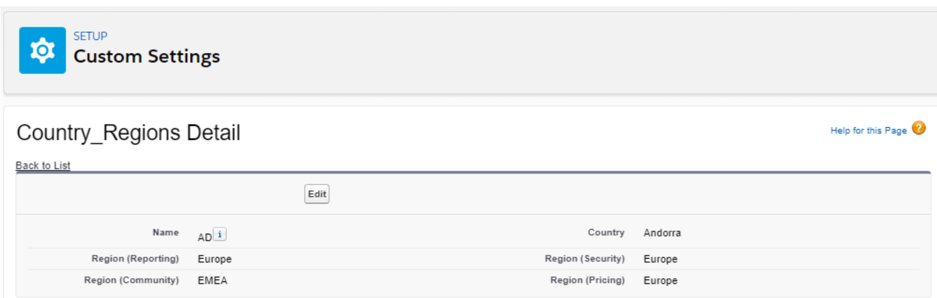
Link to account KT documentation for Composite legacy.

Similar process has been set up in ICARe like in Core CRM : 3 reports are running twice a week to generate automatic ticket to request creation of new Corporate Groups in PRS and make the links between customers and corporate Groups for reporting in BW and dashboard. Reports are running with user Ticket integration **every Wednesday and Saturday at 12:00** and scheduled under Anne Gilles user with Subscribe option. Ticket creation is managed from mailbox CRM team.

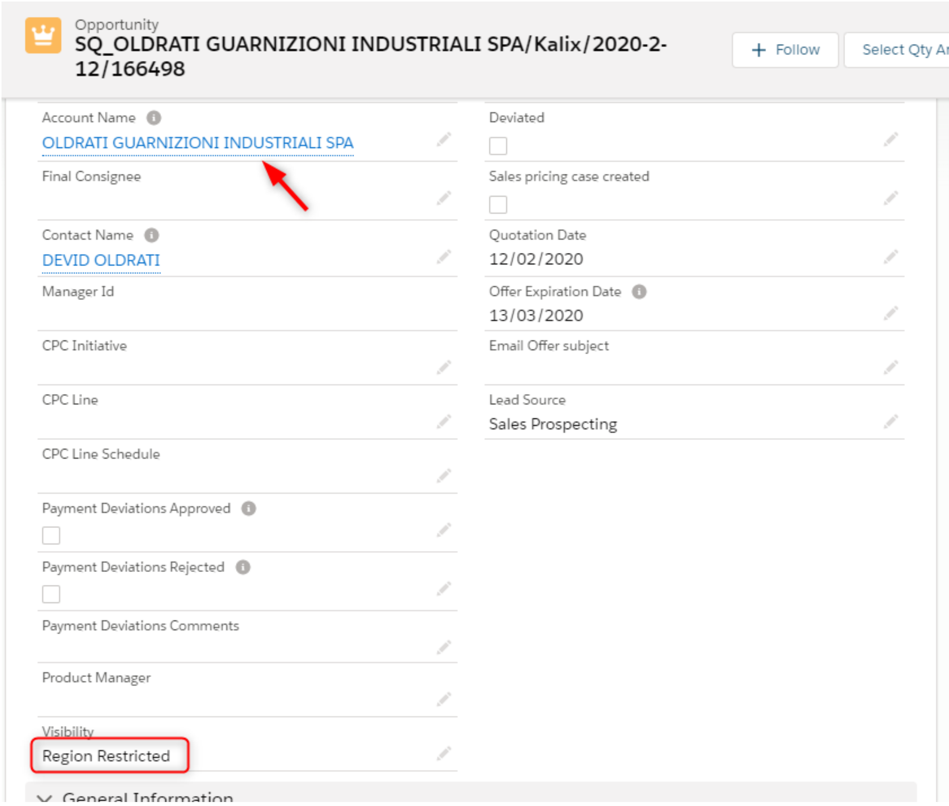
Customer links to Corp Groups	# Accounts : Report	Admin User	14/09/2021, 11:22	✓
New Customer links to Corp Groups	# Accounts : Report	Admin User	14/09/2021, 11:22	✓
Corporate Group Creation - Approved	# Accounts : Report	Admin User	14/09/2021, 11:22	✓

All details are on the page dedicated to SpP ECCO project.
Go on Setup > Custom settings and select "Country_Regions".

Open the country name you are interested in. You will see all information related to the region:



Now, let's take an example. Open a sales quote with "Region restricted" as visibility. You will have to go on the account page to check the country. Then, go on the setup to check the "Region (Security)" field. Compare the region of the user and the region of the account to know if it is normal that the user can or cannot access some information.



The Account Owner completes the "CSR Region" field.
The field is mandatory on:

- Account Record Type (no sync with SAP)
- SAP Account Record Type (Sync with SAP)
- Account Creation Record Type (Pending with SAP)

Please check the 3 following fields (by doing a report):

- Create_SAP_Account__c
- SAP_Sold_To_Number__c
- Create_Sap_Account_case_created__c

To create the case:

- Create_SAP_Account__c needs to be true
- SAP_Sold_To_Number__c needs to be empty
- Create_Sap_Account_case_created__c needs to be false.

If an account is not flagged as Confidential but is related to a NDA contract, then we display a banner on the top indicating to take care and to refer to the NDA contract to know what can be shared or not.
Account Managers must flag accounts that are to be moved or have been moved to distribution, the others that have not been moved need to be flagged as to be moved to eCommerce or have been moved to eCommerce.

To achieve this business needs we used two Picklist fields

- Move to Distribution : To be moved to Distribution , Already moved to Distribution or Not Applicable
- Move to eCommerce : To be moved to eCommerce, Already moved to eCommerce , Not Applicable

At the creation of the account, the fields are not required. the information is required as soon as the SAP creation is asked.

A validation rule control that the values of the both fields are correct :

use case	Move to Distribution	Move to eCommerce
Direct account or Composite Material Account	Not Applicable	Not applicable
Account to move to Distribution	To be moved to Distribution	None
Account already moved to Distribution	Already moved to Distribution	None
Account to move to eCommerce	None	To be moved to eCommerce

Account already moved to eCommerce	None	Already moved to eCommerce

other combinations are not allowed and a message "*You need to indicate if your account must be managed within Distribution or eCommerce"* is displayed.

The validation rules is applied   if the (Account record type = Account creation record type and Create_SAP_Account__c = True) **OR** (Account record type = Sap Account record type)

(see IPB-49, SCME-3129 , SCME-3142)