FD - P1. Focus on GBU Segmentation

Version Control

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1. General overview

On the GBU Segmentation, there is an information named GBU Segment. The list of possible values has been defined at Corporate level.

Core CRM is the master of this information. It's then sent to SAP with a job which runs every 4 hours.
In CRM Analytics, the displayed GBU segment is directly taken in CRM and not from SAP. As any other information, those information are extracted once a night.

Only Data Steward, Admin and Admin(Lite) are able to update the GBU Segment.

Linked to this information, there are 2 others:

- "Do not cascade from Corporate": when this field is ticked, it means that the field "GBU Segment" won't be updated with the GBU segment of the corporate group if this one is updated.
- "Account Type changed": This field is set to True each time the field "GBU Segment" is changed.

2. GBU Segment

2.1 When creating an account

When creating an account, a record is automatically created in the object GBU Segmentation with:

- GBU = the GBU of the user.
- GBU Account sub-type = End-user
- GBU Segment:
  - If the account is created with corporate group “Not Assigned”, the GBU Segment is set to “Not yet assigned” (only when ShipTo are created via SAP interface)
  - If the account is created with corporate group “Decision: Various”, the GBU Segment is set to “Standard Account” .
  - If the account is created with another corporate group, the GBU Segment is set to the value defined at Corporate Group level if there is one, to “Not yet Assigned” if not and a GBU Segmentation is created at Corporate Group level with “Not yet assigned” as GBU Segment.

2.2 When assigning a corporate group to an account

When assigning a corporate group to an account:

- If the corporate group is “Decision: Various”, the GBU Segment is set to “Standard Account” on all the GBU segmentations of the account when GBU Account sub-type <> Distributor , else (if Account sub-type = Distributor) the GBU Segment is set to “Standard Distributor.
- If the corporate group is different from “Decision: Various” or “Not assigned”, the GBU Segment is set to the value defined at Corporate Group level for the GBU if there is one, to “Not yet Assigned” if not and a GBU Segmentation is created at Corporate Group level with “Not yet assigned”.

2.3 When changing the GBU segment at Corporate Group

When changing the GBU Segment at Corporate group level, the GBU Segment of all the accounts assigned to this corporate group is automatically changed except is the check box “Do not cascade from the corporate” is ticked.

2.4 When changing the GBU segment at Account

For those who are able to update the GBU segment,

- if the Corporate Group of the Account is "Not Assigned", the update is blocked and an error message is displayed: "Please update the Corporate Group, then GBU segmentation will be automatically updated."
- if the Corporate Group of the Account is different from "Not Assigned" or "Decision: Various" and if the checkbox "Do not cascade from Corporate" is not ticked, the update is blocked and an error message is displayed: "In order to keep consistency, please review the segmentation at Corporate Group level"
- for other situations => no blocking

Each time a GBU Segment is changed,

- The check box “GBU Segment changed” is ticked, even if it’s done in mass.
- This information is updated on open Cases, Opportunities and Quotes.

Every 4 hours, a job selects all the records with those ticked checkboxes. For each selected account, if it's not a Prospect and not a ship-to, so if it is a **SAP Account Sold-toShipTo**, it searches all the sales views corresponding to the GBU in the Account Team Member (ATM) object and sends the new value to SAP if the sales view doesn't have the checkbox "Do not Send to SAP" ticked in Utility. We send the API name of the GBU Segment and not the value. So if we "just" rename a value, nothing to be done on WebMethods side, only on CRM and SAP.

3. Utility

All the sales views are defined in the object Utility, record type "Sales View" with the following information:

- **Code**: concatenation of Sales Org code / Distribution Chanel code / Division code, separated by “/”, no space
- **Name**: concatenation of Sales Org name / Distribution Channel name / Division name, separated by “/”
- **Sales Org name**: concatenation of the Sales Org Code and the Sales Org Name separated by " - "
- **Distribution Channel nam**e; concatenation of the Distribution Channel Code and the Distribution Channel Name separated by " - "
- **Division name**: concatenation of the Division Code and the Division Name separated by " - "
- **GBU**: GBU for which the sales view is defined.
- **SAP origin**: PF1 or WP1
- **Is Active**: indicates if the Sales View is active or not.
- **Do not send to SAP**: checkbox used to not send any GBU Segment update to SAP when ticked.

Each time an update is done on the sales view of an account in SAP, a job requires Core CRM to get the corresponding GBU Segment. To do so, the program first check what is the corresponding GBU in utility, then "goes" to the GBU segmentation to get the information.
If the sales view doesn't exist in Utility, a notification is sent to crm.support@syensqo.com and the information is stored in a log.
When a sales view is added in the object Utility, a job SLV31_CEM_SendSalesArea_Batch checks if this sales view is listed in the log, and if yes, for each concerned account, sends the GBU Segment to SAP.

4. Account Team Member (ATM) - Custom object

On the ATM object, there is a field GBU. This field is updated with the night job which updates the SAP Account team.
For each account created or updated, SAP sends the list of all the sales views. For each of them, based on what is set up in utility, we determine the GBU.

5. Challenging Process

Generally, the review of the GBU Segment is done in mass once a year. But for exceptional reasons, it can happen that a sales manager needs to change it. But as he can’t do that himself, we’ve put in place a challenging process (Approval process).
On the GBU segmentation, there is an option to request a change named “Challenge GBU Segment”.
This option is available on the GBU Segmentation (so for Accounts) and on the Corporate GBU Segmentation (for Corporate Groups).

For GBU Segmentation, so at Account level:

- if the corporate group of the account is "Not Assigned", then an error message is displayed to tell the user, that he first needs to assign a Corporate Group to the account before requesting any update of the GBU Segment.
- if the corporate group of the account is NOT "Not Assigned and NOT "Decision: Various" and if the checkbox "Do not cascade from Corporate" is not ticked, then an error message is displayed to tell the user that in this situation, he needs to do his request on the Corporate Group. This is to avoid inconsistencies between the GBU segment of the corporate group and the GBU segment of the Accounts assigned to this corporate group.
- for other situation, the approval request is possible

For Corporate GBU Segmentation, so at Corporate Group level: no specific check. The approval request is possible.

6. Analytics

On analytics, the GBU Segment information is taken from Core CRM. But they are not able to get the value. They are extracting the API Name of the picklist. So a mapping table has been set up on QV side.

If we change a value in the GBU Segment picklist, we need to ask QlikView team to update the mapping table they have set between our API Names and the values to display.

7. Useful links

CEM - Global alignment customer segmentation naming

CEM Customer Segmentation Implementation Playbook V2

CEM - Integration Specifications (SAP Interfaces)

Accounts' Interfaces with SAP