

# Master data: CUSTOMER

 Unable to locate Jira server for this macro. It may be due to Application Link configuration.

Note: For all sheets to explore who owns the sheet and how it is maintained

Clean the fields which are

## Customer related attribute requirements

| Requirements                     | Description                                                   | Comment                                                  | Existing source in transparency                                                            | Technical name in transparency source (mainly BW) table name and attribute name | Transformation /Rules for transparency dashboard                                                                                                                                                                                                                                                                                                                                                                                                         | Naveen Comment/ question                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | SF source                                                               | Comment about SF                                           | Searching in BW (meeting with Anon & Saint) |
|----------------------------------|---------------------------------------------------------------|----------------------------------------------------------|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|------------------------------------------------------------|---------------------------------------------|
| Customer ID                      | Identified with PRS Code, RCS Code, SAP Code or SF Code       |                                                          | SAP BW/SF                                                                                  |                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | table ACCOUNT in CORE                                                   |                                                            |                                             |
| Parent ID<br>= Customer group ID |                                                               | A customer might not have any parent                     | SAP BW / File<br><br>QVSBS_BW_QRY_CPCOPA03_0001                                            |                                                                                 | <p>To be confirmed by Ayoub and Franck</p> <p>Identified with file 1zic15VUcl1NyDLGZXQRDm QypY0-uw4yUtuPRu1scxU . Group Mapping</p> <p>By mapping with the GBU and C_SOLDID</p> <p>If no match, then take</p> <p>QVSBS_BW_QRY_CP COPA03_0001 . C_SO LDID . C_CORPGR</p> <p>For Ship-To, take</p> <p>QVSBS_BW_QRY_CP COPA03_0001 . C_SHI PID . TXTLG</p> <p>If composed, take the name after "/"</p> <p>Note: To investigate further to have one rule</p> | <p>NG(15/06): Can you confirm who manages this sheet and how frequently the changes applied to this sheet.</p> <p>Also I could see only 250 records in the file but I am sure we will have more than 250 customers so not sure is this the right file to use.</p> <p>As well We need SOLDID and GBU to look into the sheet but GBU info will not be available in source customer tables. For now we will populate the value coming from Salesforce core-crm.</p> <p>Can you conform if users need parent id and parent group name please?</p> <p>GURRAM-ext, Naveen I will get back to you on this.</p> <ul style="list-style-type: none"> <li>the sheet is only to be used for CM (composit material GBU) the rest is available in BW</li> <li>The gsheets needs to be updated by the transparency team</li> </ul> <p>GURRAM-ext, Naveen To ask from Naveen where is the source</p> | table ACCOUNT:<br><br>Available in CORE and iCare                       | ParentID                                                   |                                             |
| Ship to ID                       | SAP code for customer to whom Solvay is shipping the products | Transactional data in the fact table of the target model | QVSBS_BW_QRY_CPCOPA03_0001<br><br>QV_BW_QRY_MV SDSO61_0001<br><br>QV_BW_QRY_CP COPC07_0001 | [C_SHIPID]<br>Ship_to_party<br><br>Key [C_SHIPID]. [2C_SHIPID]                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | The attributes in the CORE in the table ACCOUNT<br><br>Partner_Sub_type | There is no relation between the ship to and sold to in SF |                                             |
| Sold to ID                       | SAP code for customer to whom Solvay is selling the products  | Transactional data in the fact table of the target model |                                                                                            |                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                         |                                                            |                                             |

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| Ship to KA ID       | Final customer that receives the product. (it can be blank it is different than ship to mentioned above)<br><br>= Final consignee ID  | Transactional data in the fact table of the target model<br><br>Currently in transparency it has been received from P&L query |                            |                                                                                                                                                                                                                                                   |  | NG(15/06): So will exclude it from the customer scope then. Pls confirm if not<br><br><a href="#">GURRAM-ext, Naveen</a> I will take note to consider in the scope of transactional data. Confirm to exclude from this quarter                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                               | C_GBR15 = ship-to-KA                                                                                                                                                                                                  |
| Final consignee ID  | =Ship to KA ID                                                                                                                        | Transactional data in the fact table of the target model<br><br>Only SpP related.                                             |                            |                                                                                                                                                                                                                                                   |  | NG(15/06): So will exclude it from the current scope as the scope is only for Novacare or do you want us to include and populate blank? Pls confirm ?<br><br><a href="#">GURRAM-ext, Naveen</a> confirm                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                               | C_CUSTID__0C<br>US_F_CONS<br><br>not sure                                                                                                                                                                             |
| Sales rep ID        |                                                                                                                                       | It is linked to account (recording)                                                                                           | QVSBS_BW_QRY_CPCOPA03_0001 | Identified with<br><br>QVSBS_BW_QRY_CPCOPA03_0001<br>.Sales_Employee_Sold_to__E_Mail_Address__Key_<br><br>Or<br><br>QVSBS_BW_QRY_CPCOPA03_0001<br>.Sales_Employee_Ship_to__E_Mail_Address__Key_                                                   |  | NG(15/06): based on transformation rule, looks to me the field holds email address and storing it into rep id doesn't look right. Can you please confirm is this transformation rule correct.<br><br>Also as we discussed and confirmed this may not go into customer flow and this field is more fits into customer GBU flow<br><br><a href="#">GURRAM-ext, Naveen</a> account manager and sales rep ingestion are not in the scope of this Q2. although I will confirm the transformation rule is correct. | In CORE, Sales Rep (CSR Customer Service Representative) and account manager master data available in ACCOUNTT EAMMEMBER attributes: Account ID, USER, Team member role (coming from SAP).<br><br>One account can be managed by several GBUs so there is a one to many relation between account and CSR<br><br>In icare it is different. | Master data of Sales rep and account manger are in SAP. The data flows daily basis to SF per GBU. This info are coming from sales area of the SAP side.<br><br>??When data integrated from SAP to SF, there are rules to make it at GBU level | Sales Employee (Sold-to) [C_CUSTSAL__C_SALEMP]<br><br>Table: /BIC /MC_CUSTSAL<br><br>containing the sales rep belonging to a sales area (sales area is a combination of division, distribution channel, organization) |
| Sales rep name      |                                                                                                                                       |                                                                                                                               |                            |                                                                                                                                                                                                                                                   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                               | Table name:                                                                                                                                                                                                           |
| Sales rep email     |                                                                                                                                       |                                                                                                                               |                            |                                                                                                                                                                                                                                                   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                               |                                                                                                                                                                                                                       |
| Customer Short name |                                                                                                                                       |                                                                                                                               | QVSBS_BW_QRY_CPCOPA03      | QVSBS_BW_QRY_CPCOPA03_0001<br>.C_SOLDID .TXTSH<br><br>Or<br><br>QVSBS_BW_QRY_CPCOPA03_0001<br>.C_SHIPID .TXTSH                                                                                                                                    |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                               |                                                                                                                                                                                                                       |
| Customer Long name  |                                                                                                                                       |                                                                                                                               | QVSBS_BW_QRY_CPCOPA03      | QVSBS_BW_QRY_CPCOPA03_0001<br>.C_SOLDID .TXTLG<br><br>Or<br><br>QVSBS_BW_QRY_CPCOPA03_0001<br>.C_SHIPID .TXTLG                                                                                                                                    |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                               |                                                                                                                                                                                                                       |
| Country             | Country ship to: Country of the customer delivered<br><br>-----<br><br>Country sold to: Country of the sold-to company- Invoice party | Country is available in SF and BW. In case of discrepancy, SF is more reliable                                                | QVSBS_BW_QRY_CPCOPA03      | <a href="#">Country (Key) [C_SHIPID]. [20COUNTRY]</a><br><br><a href="#">Country (Name) [C_SOLDID]. [10COUNTRY]</a><br><br>QVSBS_BW_QRY_CPCOPA03_0001<br>.C_SOLDID .0CO UNTRY<br><br>Or<br><br>QVSBS_BW_QRY_CPCOPA03_0001<br>.C_SHIPID .0CO UNTRY |  | NG(15/06): Is it correct to say transparency is using COUNTRY from BW but we need to check if any discrepancy and if so we should use value from SF?<br><br><a href="#">GURRAM-ext, Naveen</a> yes                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                               |                                                                                                                                                                                                                       |

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| Region=Zone | Aggregation of countries<br><br>example: Asia | Zone names might be different from one GBU to another<br><br>Zone names have been unified in transparency dashboard (see the transformation column)<br><br>In Transparency, it is called region. In BW, it is called Zone.<br><br>important note: it is different from GBU region included in the 2 ) Transactional data - Historical sales                                                                      | QVSBS_BW_QRY_CPCOPA03      | GBU Ship-to zone (BW) 1 [4CPCOPA03-TGB2_ZONEH1]<br><br>Ship_to_party_Geographie_Zone__Key_                                                    | Mapping on QVSBS_BW_QRY_CPCOPA03_0001 . Sold_to_party_Geographie_Zone__Key_<br><br>Or<br><br>Mapping on QVSBS_BW_QRY_CPCOPA03_0001 . Ship_to_party_Geographie_Zone__Key_<br><br>blocked URL | NG(15/06): Not sure why zonenname will be different from GBU to GBU. It should be related to customer. Please let me know if anything I need to take from the comments or can I ignore above line and use transformation rule as base.<br><br>GURRAM-ext, Naveen please take the transformation rule as it is and ignore the comment if it is confusing. Basically the comment says that one GBU might specify Europe as EUROPE and another as EU. in this case both are unified in transparency to be EMEA | available in SF<br><br>What table?                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                        |
| PRS code    |                                               |                                                                                                                                                                                                                                                                                                                                                                                                                  | SF                         | Account . RCS_coded_Account__c                                                                                                                |                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | In CORE, there is PRS=PF1 (PRS ID) , RCS = WP1 (RCS ID) . (other ERP ID). Available in ACCOUNT table. | To check in SAP it happens that there are two accounts for one customer. For example if customer change the VAT, a new account will be created. In SF it doesn't happen so that there is no one to one from SF to SAP. In such a case, the new account is replaced but all the changes in SAP are tracked an another attribute (PRS_ID_history) .<br><br>Note:<br><br>In general to track the changes in an attributes in SF, ACCOUNTHISTORY is the table that include historical and changes of the records.<br><br>Example, if a customer number change, the new one is in the main table and the old number is backed up in ACCOUNTHISTORY table. | /BIC /MC_CUSTID- /BIC /C_CUSTPRS<br><br>it is used to link PF1 and WP1 |
| RCS code    |                                               |                                                                                                                                                                                                                                                                                                                                                                                                                  | SF both (ICARE, CORE)      | Account . PRS_Coded_Account__c                                                                                                                |                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Refer to RCS code comment                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | nothing                                                                |
| SAP code    |                                               |                                                                                                                                                                                                                                                                                                                                                                                                                  | SF both?(to check) /SAP BW | Account . SAP_Sold_To_Number__c<br><br>Or<br><br>QVSBS_BW_QRY_CPCOPA03_0001 . C_SOLDID<br><br>Or<br><br>QVSBS_BW_QRY_CPCOPA03_0001 . C_SHIPID |                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Refer to RCS code comment                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | customer ID                                                            |
| SF code     |                                               | All the above codes are available in SF but the doubt/question is that if for a new customer, the corresponding data is available right away in the SF so that we won't have a gap when using SF as the source. It is also to check if data is available in both SF (icare and Core)<br><br>Currently in the transparency dash all the codes are from SF but it is better o explore if there is a better source. | SF                         | Account . Id                                                                                                                                  |                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | there is no track in BW                                                |

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| Account manager      |                                                                                                                                                              | <p>Account manager and sales rep are both are solvay employee. The data at the target application is used at CPC level.</p> <p>The info are available in all data sources but the challenge is that there are different values from one to another.</p> <p>It has been prioritized for Q4</p> <p>It is only for iCare not for CORE</p>                                                                                                          | SF                                                                   | Account . Owner_Name__c                                                                                                 |  | <p>NG(15/06): I remember seeing this field in core as well. Please confirm if this needs to be excluded as well if not available in core?</p> <p>GURRAM-ext, Naveen not in the scope of this Q</p> | <p>Refer to Sales rep ID comment</p> <p>combination of sales area, division, and distribution channel defined for a GBU.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | ?        |
| Team cluster         |                                                                                                                                                              | <p>Only in iCare and should be empty for CORE</p> <p>Franck comment:</p> <p>Three ways to get the data</p> <ul style="list-style-type: none"> <li>(Preferred solution) API</li> <li>SF function to get the data</li> <li>(not preferred alternative) GoogleSheet for mapping (only used for iCare)</li> </ul> <p>1NVHJMJOTRYA3iR7Pf6HCirAJb2ik7JCRD5b2CrLnSVuc</p> <p>Note: it is used to get the market cluster (link with market cluster)</p> | SF                                                                   | Using API for Account . Team_Cluster__c                                                                                 |  | <p>NG(15/06): Will exclude for now as this is not available for Novacare (core). Also this attribute doesn't seems to me at account level</p>                                                      |                                                                                                                              | <p>This concept is only available in iCare. it is a way in in SpP to associate an account to a team (Sales team?)</p> <p>Corresponding concept in CORE might be BU (to check)</p> <p>Notes:</p> <p>-Team cluster refers to the sales team in Solvay that handles an account. It is a way to associate an account to a sales team in solvay. Each sales team handles a specific (market) like automotive, battery, etc. One account might be purchasing from various teams. in that case, team cluster is the one with the biggest sale. that makes the Market cluster different from team cluster.</p> | ?        |
| GBU customer segment | A customer receiving different service levels could be classified as KA for one GBU and Standard for other. Exceptions: GSKA- they remain GSKA for all GBUs. | Included in the market dimension                                                                                                                                                                                                                                                                                                                                                                                                                | <p>COPA03</p> <p>The Gsheet below is used for this field as well</p> | <p>technical name: GBU Segm. (Sold-to) [C_CUSTSAL__0CUST_GRP2]</p> <p>Customer_Sales_Area_Customer_group__2__Name__</p> |  | <p>NG(15/06): out of scope for customer flow.</p>                                                                                                                                                  | In CORE, the table name is GBU_CUSTOMER_SEGMENTATION .                                                                       | GBU customer segmentation shows what GBUs are related to an account. There is one GBU segmentation per account for a GBU                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | C_CUSTAL |

|                        |                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                     |  |  |  |                           |  |  |
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| Group customer segment | <p>It refers to Solvay group level of segmentation for customer. Depends on the service level a customer receives from Solvay, it can be classified as KA, or standard, etc.</p> <p>The same customer segmentation can be applied at GBU level (below)</p> | <p>only in BW</p> <p>Comment from Lavinia:</p> <p>strategic ley account at group level are enforced to be strategic account for all GBU</p> <p>child account are following the parent account for GBU and group segmentation both (there are exceptions that can be specified by users)</p> | <p>COPA03<br/>Sold_to_party_Gro<br/>up_Segm____Corp_<br/>____Name_</p> <p>and</p> <p>COPA03<br/>Sold_to_party_Gro<br/>up_Segm____Corp_<br/>____Name_</p> <p>check the field:</p> <p>if it contains "not assigned" or is empty, we display "Not Assigned"</p> <p>Then use the mapping file to clean the values of the field retrieved from COPA</p> <p>Colors in the mapping file is should have for transparency dashboard</p> <p>Note: For all sheets to explore who owns the sheet and how it is maintained</p> | <a href="#">Group Segm. (Corp) (Name)_ [C_SOLDID]. [IC_CUSTGRC]</a> |  |  |  | it is not available in SF |  |  |
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