

FD - P1. Account conversion (WIP)

- Version Control
- 1. General overview
- 2. Screen Flow detail
 - 2.1 Before presenting the 1st screen
 - 2.2 Screen 1 = General Information
 - 2.2.1 Selection of the CSR
 - 2.2.2 Definition of the GBU
 - 2.2.3 Definition of the Account Sub-Type
 - 2.2.4 Detail or File upload?
 - 2.2.5 File Upload:
 - 2.2.6 Sold-to or Ship-to
 - 2.2.7 "Do you wish to copy the incoterms and payments terms from an existing quote?"
 - Radio Button Yes/No, Mandatory
 - 2.2.8 Specify for Novecare
 - 2.3 When clicking "Next" on the 1st screen
 - 2.3.0 Is the checkbox "Reject" ticked?
 - 2.3.1 Update the request with the information from the screen
 - 2.3.2 Update / Create the GBU Segmentation
 - 2.3.3 if option "I have prepared ..." has been selected
- 3. Conversion Process
 - 3.1 Contacts Screen
 - 3.2 When clicking "Next" on the "Contact Screen"
 - 3.2.1 Update the request with the following information
 - 3.2.2 Get the information needed for the "Delivery Screen"
 - 3.3 Delivery Screen
 - 3.4 When clicking "Next" on the "Delivery Screen"
 - 3.4.1 Update the request with the following information
 - 3.4.2 If we're converting a Ship-To
 - 3.4.3 Get the information needed for the "Payer Screen"
 - 3.5 Payer and Bill-To Screen
 - 3.6 When clicking "Next" on the "Payer Screen"
 - Update the request with the following information
 - 3.7 Summary Screen
 - 3.8 When clicking "Submit" on the "Summary Screen"
 - 3.8.1 Is the Checkbox "Reject" ticked?
 - 3.8.2 Update Request with the following information
 - 3.8.3 For GBUs which run the Conversion Process in 2 steps
 - 3.8.4 If the user requested an additional Ship-to
 - 3.8.5 Create the contacts if needed
 - 3.8.6 Send an email
 - 3.8.7 Update the following information
- 4. Rejection Process
 - 4.1 Update the request
 - 4.2 Send an email
- 5. The SAP interface
- 6. Useful links

Version Control

Version	Date	Description	Author
v.1	29.02.2024	Creation	Josiane Peytraud

1. General overview

This Conversion process flow is launched by an action button for the Non SAP Accounts. So it's visible only on the layout "Non SAP Customer Lightning".

Do not allow to run the flow if:

- The Partner Type is not "Prospect" => error message: "You can not convert this Account since his Partner Type is not Prospect."
- The Account Status is not "Prospect" => error message: "You cannot convert this from prospect to customer, as a request has already been created. Please contact your CSR"
- The Corporate Group is flagged as "Not SAP Compatible" => error message: "All accounts in CRM must be assigned to a Corporate Group, which indicates the legal entity of the account. Please remove the current Corporate Group and search for the correct Corporate Group name. If the Corporate Group does not exist, assign the account to 'Decision: Various' Corporate Group."
- There is at least one contact linked to the Account => error message: "There is no Contact linked to this Account. Please create one or add an existing one in the related contact list."
- Screening Status is set to "Blocked" => error message: "This Account has been blocked by GTS. You can't start the conversion."

- For Technology Solutions, the user is a Sales Rep and has already done the "1st run" => error message: "As a Sales Rep., this record can't be edited, the request has been sent to the Customer Service Rep."
- For Novecare, the user is not one of the 3 users indicated in the following custom label => error message: "As a Sales Rep., this record can't be edited, the request has been sent to the Customer Service Rep."
 - NovecarePamEmail
 - NovecareAPACAdditionalEmail
 - NovecareAPACAdditionalEmailNumber2

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 Novecare also, the conversion process is done in 2 steps:

- First, the sales Rep or the CSR, initiate the process and on the last screen, instead of submitting the creation in SAP, the request is saved and the system advises Pam Accardi.
- Then Pam Accardi has a look and agrees and sends the request to SAP or rejects it.

How to know if a GBU does the conversion process in 2 steps: This information is in the custom metadata named GBU (SLV7_MDT_GBU__mdt), on the field Account Conversion Steps of the GBU.

2. Screen Flow detail

2.1 Before presenting the 1st screen

Check if there is already an existing request not closed for this Account.

If Yes, retrieve it and populate the 1st screen with those information

If no, create one, so until the end of the process, we won't have 2 ways of working, with:

- Record Type = 01224000000TaNPAAK (Conversion Request)
- Account (SLV2_REQ_Account__c) = ID of the Account we're converting
- Record Status (SLV2_REQ_Record_Status__c) = Draft
- Owner = ID of the user doing the conversion

2.2 Screen 1 = General Information

2.2.1 Selection of the CSR

There are 3 possibilities for the user to select the CSR who will receive the email with the summary of the Conversion Request and the one with the SAP Request number (for all GBUS except Technology Solutions and Novecare) or will be the main point of contact for Data Team who manages the Account creation in SAP for Technology Solutions and Novecare.

- "Select my CSR from the account team" => selection in the list of users from the Account Team with the role = "Customer Service Representative"
- "Search for my CSR based on his/her name" => search on User object
- "I am part of a GBU working with CSR Teams or Service Center" => selection in the list of the queues from QueueSubject with SubjectType = 'SLV2_Request__c' AND Queue.Email != " (This option is used by ECO GBU's)

2.2.2 Definition of the GBU

Display a picklist for GBU selection with:

- available list based on the organization of the user
- default value = the one of the user, if several, the 1st one.

2.2.3 Definition of the Account Sub-Type

Based on the Account and the selected GBU, retrieve the GBU Account Sub-type from the GBU Segmentation object (SLV_Involved_GBU__c) and give the possibility to the user to change it.

If none, put default value as "End-User".

2.2.4 Detail or File upload?

For Novecare, we don't propose the possibility to load a file. So, set the value to "Ask me the Detail...." and don't show this section

For the other GBU's, give the following possibilities with a Radio-button:

- I have prepared a creation form and can attach it [Download Customer Creation Form](#)
- Ask me the details required and I will provide what I know (inclu. attachments)

2.2.5 File Upload:

Even when the user hasn't selected the option "I have prepared ...", they must have the possibility to load a file.
So, in any situation, give the possibility to load one.
Display what has been previously loaded.
Display what has just been loaded.

2.2.6 Sold-to or Ship-to

Ask the user to confirm if he would like to create a Sold-to or a Ship-to in SAP.
Pre-populate the information based on the Partner Sub-Type of the Account.

2.2.7 "Do you wish to copy the incoterms and payments terms from an existing quote?"

Radio Button Yes/No, Mandatory

- Not for Technology Solutions and Novecare as they don't do Quote on Prospect
- If Yes, "Quote" +
 - Lookup on Quote (SLV2_Quote__c)
 - Retrieve
 - Payment Term (SLV2_quote_Payment_terms__c)
 - Incoterm 1 (SLV2_quote_Incoterm__c)
 - Incoterm 2 (SLV2_quote_Location__c)
- If No, nothing else

2.2.8 Specify for Novecare

If it's the 2nd step, we add 1 checkbox: Reject
If the checkbox is ticked, add a field "Reason of rejection".

2.3 When clicking "Next" on the 1st screen

2.3.0 Is the checkbox "Reject" ticked?

If yes, then go to the Rejection Process.
If no, then go on.

Before displaying the following screen, we need to perform few activities in order to save what has been done so far and be able to re-start the process if stopped in the middle and not re-ask everything to the user.

2.3.1 Update the request with the information from the screen

On the Request, depending on the option selected, update the following information:

- Options (SLV2_REQ_Options__c) = Option selected in the section "Selection of the CSR"
- If "Select my CSR from the account team" or "Search for my CSR based on his/her name" is selected =>
 - My CSR (SLV_REQ_My_CSR__c) = Id of the selected user
 - Conversion Notification Email (SLV10_REQ_Conversion_Notification_Email__c) = Email of the selected user
- If not,
 - CSR Team (SLV2_REQ_CSR_Team__c) = ID of the selected queue
 - CSR Queue name (SLV2_REQ_CSR_Queue_Name__c) = Name of the selected queue
 - Conversion Notification Email (SLV10_REQ_Conversion_Notification_Email__c) = Email of the selected queue
- If the Conversion process is done in 2 steps, then the Conversion Notification Email should be the one of data team. The email of data team is in the custom metadata "Org Settings", on the value of the label "Data Team Email". **it seems only TS is using this email address ??? and it's not the correct email address**
- Type of Account (SLV2_REQ_Type_of_account__c) = "Sold-ToShip-to" if "Sold-To & Ship-To" is selected, "Ship-To" if not
- CSR GBU (SLV10_REQ_CSRGBU_Picklist__c) = the selected GBU
- Conversion Request? (SLV2_REQ_Conversion_Request__c) = Picklist value depending on what has been selected in the "Detail or File" section
- Attach the loaded file is there is one.
- Copy Incoterms and Payment terms (SLV2_REQ_Cpy_Incoterms_and_Payment_terms__c)
- Quote (SLV2_REQ_Quote__c)

2.3.2 Update / Create the GBU Segmentation

Update: If there is already a GBU segmentation existing for this Account and this GBU, update the GBU Account Sub-type with the selected value.

Creation: if there is no GBU Segmentation already existing, create one with:

- Record Type (RecordTypeId) = 01224000000TaO2AAK (GBU Customer Segmentation)
- Account (SLV_Account__c) = Id of the Sold-To we're converting
- GBU (SLV7_GCS_GBU__c) = the one determined above
- GBU Account Sub-type (SLV_Account_Sub_Type__c) = the selected one

2.3.3 if option 'I have prepared ...' has been selected

Ensure there is a file uploaded => error message: "You can't go further unless you attach a file."

If yes, go to the Summary Screen.

3. Conversion Process

3.1 Contacts Screen

Fields to display for Sold-to are:

- Ask if **Sold-to contact** is existing.
 - If yes, lookup on contact
 - If no, input fields, check that input data are not corresponding to an existing contact (First Name, Last Name and Email address)
- Ask if Sold-To Contact is also the:
 - Safety Data Sheet Contact
 - Certificate of Analysis Contact
 - Supply Chain Contact
 - Payer Contact
- **Safety Data Sheet Contact** is the same as the Sold-to?
 - If yes, copy/paste the information from the Sold-to Contact
 - If no, ask if the Safety Data Sheet Contact exist
 - If yes, lookup on contact
 - If no, input fields, check that input data are not corresponding to an existing contact (First Name, Last Name and Email address)
 - Ask if Safety Data Sheet Contact is also the
 - Certificate of Analysis Contact
 - Supply Chain Contact
- **Certificate Of Analysis Contact** is the same as the Sold-to or as the Safety Data Sheet?
 - If yes, copy/paste the information from the Sold-to or SDS Contact
 - If no, ask if the CoA Contact exist
 - If yes, lookup on Contact
 - If no, input fields, check that input data are not corresponding to an existing contact (First Name, Last Name and Email address)
- **Supply Chain Contact** is the same as the Sold-to or as the Safety Data Sheet?
 - If yes, copy/paste the information from the Sold-to or SDS Contact
 - If no, input fields
- **Payer Contact** is the same as the Sold-to? "The Payer contact is the person we call when we have questions about the payment."
 - If yes, copy/paste the information from the Sold-to Contact
 - If no, ask if the Safety Data Sheet Contact exist
 - If yes, lookup on contact
 - If no, input fields, check that input data are not corresponding to an existing contact (First Name, Last Name and Email address)

Fields to display for Ship-to are:

- Ask if the **Safety Data Sheet Contact** exist
 - If yes, lookup on contact
 - If no, input fields, check that input data are not corresponding to an existing contact (First Name, Last Name and Email address)
 - Ask if Safety Data Sheet Contact is also the
 - Certificate of Analysis Contact
 - Supply Chain Contact
- **Certificate Of Analysis Contact** is the same as the Safety Data Sheet?
 - If yes, copy/paste the information from the Safety Data Sheet Contact
 - If no, ask if the CoA Contact exist
 - If yes, lookup on Contact
 - If no, input fields, check that input data are not corresponding to an existing contact (First Name, Last Name and Email address)
- **Supply Chain Contact** is the same as the Safety Data Sheet?
 - If yes, copy/paste the information from the SDS Contact
 - If no, input fields

The list of fields to display to the user when the contact is not existing are:

- First Name
- Last name => Mandatory
- Language => Picklist based on the field Language of the object Contact or the Global Picklist Language (it's the same picklist, use the simplest option), Mandatory
- Function => Picklist based on the field Function of the object Contact, Mandatory
- Job Department => Picklist based on the field Job Department of the object Contact, Mandatory
- Phone
- Mobile
- Email=> Mandatory

A phone or a mobile is mandatory for Payer Contact, so also for the Sold-To Contact if the Sold-to Contact is also the Payer one.

When a contact is selected with the lookup, populates the same fields as above + Account Name from the contact and display them so the user can ensure he selected the contact he was looking for.

3.2 When clicking "Next" on the "Contact Screen"

3.2.1 Update the request with the following information

- **For Sold-to Contact:**
 - Contact exist (SLV2_REQ_Contact_exist__c) = Does the Sold-to Contact exist?
 - Sold-to Contact (SLV2_REQ_Sold_To_Contact__c) = the ID of the contact if one has been selected
 - Sold To Cont. First Name (SLV2_REQ_SoldToContFirstName__c) = First Name
 - Sold To Cont. Last Name (SLV2_REQ_SoldToContLastName__c) = Last Name
 - Language (SLV2_REQ_LanguagePick__c) = Language
 - Sold To Cont. Function (SLV2_REQ_SoldToContFunction__c) = Function
 - Job Department (SLV2_REQ_SoldToContJobDepartment__c) = job Department
 - Sold To Cont. Phone (SLV2_REQ_SoldToContPhone__c) = Phone
 - Sold To Cont. Mobile (REQ_SoldToContMobile__c) = Mobile
 - Sold To Cont. Email (SLV2_REQ_SoldToContEmail__c) = Email
 - The Sold-To Contact is also the (ACC_Sold_To_Contact_also__c) = All the selected values
- **For Safety Data Sheet Contact:**
 - Safety Data Contact exist (SLV29_REQ_SafetyData_Contact_Exist__c) = Does the Safety Contact exist?
 - Safety Data Contact (SLV4_1_REQ_Safety_Data_Contact__c) = the ID of the contact if one has been selected
 - First Name (SLV29_REQ_SafetyData_First_Name__c) = First Name
 - Last Name (SLV29_REQ_SafetyData_Last_Name__c) = Last Name
 - Language (SLV29_REQ_SafetyData_Language__c) = Language
 - Function (SLV29_REQ_SafetyData_Function__c) = Function
 - Job Department (SLV29_REQ_SafetyData_Job_Department__c) = job Department
 - Phone (SLV29_REQ_SafetyData_Phone__c) = Phone
 - Mobile (REQ_SafetyData_Mobile__c) = Mobile
 - Email (SLV29_REQ_SafetyData_Email__c) = Email
 - SDS Contact Also COA Contact (ACC_SDS_Contact_Also_COA_Contact__c) = Certificate of Analysis Contact
 - SDS Contact Also Supply Chain Contact (ACC_SDS_Contact_Also_Sup_Chain_Contact__c) = Supply Chain Contact
- **For Certificate Of Analysis Contact:**
 - COA Contact exist (SLV29_REQ_COA_Contact_Exist__c) = Does the CoA Contact exist?
 - COA Contact (SLV4_1_REQ_COA_Contact__c) = the ID of the contact if one has been selected
 - First Name (SLV29_REQ_COA_First_Name__c) = First Name
 - Last Name (SLV29_REQ_COA_Last_Name__c) = Last Name
 - Language (SLV29_REQ_COA_Language__c) = Language
 - Function (SLV29_REQ_COA_Function__c) = Function
 - Job Department (SLV29_REQ_COA_Job_Department__c) = job Department
 - Phone (SLV29_REQ_COA_Phone__c) = Phone
 - Mobile (REQ_COA_Mobile__c) = Mobile
 - Email (SLV29_REQ_COA_Email__c) = Email
- **For Supply Chain Contact:**
 - Supply Chain Contact First Name (SLV2_REQ_Supply_Chain_Contact_First_Name__c)
 - Supply Chain Contact Name (SLV2_REQ_Supply_Chain_Contact_Name__c)
 - Supply Chain Contact Phone (SLV2_REQ_Supply_Chain_Contact_Phone__c)
 - Supply Chain Contact Mobile (REQ_Supply_Chain_Contact_Mobile__c)
 - Supply Chain Contact Email (SLV2_REQ_Supply_Chain_Contact_Email__c)
- **For Payer Contact:**
 - Payer Contact exist (SLV4_REQ_Payer_Contact_Exist__c) = Does the Payer Contact exist?
 - Payer Contact (SLV2_REQ_Payer_Contact__c) = the ID of the contact if one has been selected
 - First Name (SLV2_PayerFirst_Name__c) = First Name
 - Last Name (SLV2_Payer_ContactLastName__c) = Last Name
 - Language (SLV17_REQ_Payer_Contact_Language__c) = Language
 - Function (SLV17_REQ_Payer_Contact_Function__c) = Function
 - Job Department (SLV27_Payer_Job_Department__c) = job Department
 - Phone (SLV2_PayerContPhone__c) = Phone
 - Mobile (REQ_PayerCont_Mobile__c) = Mobile
 - Email (SLV2_PayerCont_Email__c) = Email

3.2.2 Get the information needed for the "Delivery Screen"

- **Extract the list of Country** based on the field Country of the Account or on the global picklist
- **Extract the list of State** based on the field State of the Account or on the global picklist
- **Extract the list of Language** based on the field Language of the object Request
- **Extract the list of Alphabet** based on the field Alphabet of the object Request
- **Extract the list of sales area for WP1** from the object Utility with the following filters:
 - Record Type = Sales Area
 - GBU (SLV7_UTI_GBU__c) = GBU defined at the beginning of the process
 - Source System = WP1
 - Is Active = True

Display Sales Organisation, Distribution Channel and code.

- **Extract the list of sales area for PF1** from the object Utility with the following filters:
 - Record Type = Sales Area
 - GBU (SLV7_UTI_GBU__c) = GBU defined at the beginning of the process
 - Source System = WP1
 - Is Active = True

Display Sales Organisation, Distribution Channel and code.

- **Extract the list of Shipping Conditions for WP1** based on the field "Shipping condition for WP1" from the object Request
- **Extract the list of Shipping Conditions for PF1** based on the field "Shipping condition for PF1" from the object Request
- **Extract the list of plants** from the object Utility with the following filters:
 - Record Type = Other
 - Type = Plant
 - Involved GBU = contains the GBU defined at the beginning of the process
 - Is Active = True
- **Extract the list of Incoterm 1** based on the field Incoterm 1 from the object Request

3.3 Delivery Screen

Fields to display are:

- **For Sold-To: "Does this account require a different delivery address?"** + Radio button Yes/No, Mandatory

If Yes, "Does the ship-to (delivery address) already exist in Core CRM?" + Radio button Yes/No, Mandatory

If Yes, "Type the name of the account to identify the delivery address" + lookup on Account to find the Ship-To

If No, "Provide the details of the Ship-To account (delivery address) + following input fields

- Customer Name, Mandatory
- C/O Name
- Country, Mandatory, Picklist based on the previous extraction
- Street, Mandatory, text area
- State/Province, Dependent picklist on the country one
- City, Mandatory
- Postal Code, Mandatory (**really?**)
- Customer Name (Local Language)
- C/O Name (Local Language)
- Street (Local Language), Text area
- City (Local Language)
- State/Province (Local Language)
- Postal Code (Local Language)
- Country (Local Language), Lookup on Utility with Type = Country
- Language, Picklist based on the previous extraction
- Alphabet, Picklist based on the previous extraction

If No, nothing else

- **For Ship-To: "What is the related Sold-To?"**, Lookup on Account, only SAP Customer, Sold-To/Ship-To Mandatory.
- **Target System and Sales Area:**

2 columns, 1 for WP1 and 1 for PF1 with:

- Target System WP1, Checkbox, Pre-ticked for Novecare and Technology Solutions
- Sales Area WP1, Data table populated with previous extraction, with a search, mandatory for Novecare and Technology solutions
- Shipping conditions for WP1, Picklist based on the previous extraction, Help text = "General shipping strategy for the delivery of goods from the seller to the buyer (rail, truck, ...)"
- Target System PF1, Checkbox, Not visible to Novecare and Technology Solutions
- Sales Area PF1, Data table populated with previous extraction, with a search, Not visible to Novecare and Technology Solutions
- Shipping conditions for PF1, Picklist based on the previous extraction, Help text = "General shipping strategy for the delivery of goods from the seller to the buyer (rail, truck, ...)", Not visible to Novecare and Technology Solutions

For Novecare and Technology Solutions, display only the WP1 information.

- **Fill in the Delivery details for this shipping address** with:
 - Full/Partial Loads, only 20 characters
 - Delivery Hours
 - Delivering Plant, Picklist based on the previous extraction
 - Incoterm 1, Picklist based on the previous extraction, Help text = "Internationally accepted rules set by the International Chamber of Commerce (ICC) that define delivery conditions and connected buyer and seller obligations."
 - Incoterm 2, Help text = "Exact place where the seller will handle the goods to the buyer (not necessarily the same as Ship-To location)."

3.4 When clicking "Next" on the "Delivery Screen"

3.4.1 Update the request with the following information

- Different Delivery Address (SLV2_REQ_Different_Delivery_Address__c), for Sold-To only
- Delivery Address Exist (SLV2_REQ_Delivery_Address_Exists__c), for Sold-To only
- Sold To (SLV2_REQ_Sold_To__c), for Ship-To only
- Target System WP1 (SLV20_REQ_Target_System_WP1__c)
- Sales Area WP1 (SLV20_REQ_Sales_View_WP1__c) = the ID of the selected Sales Area
- Shipping conditions for WP1 (SLV2_REQ_Shipping_Conditions__c) = the value of the selected value
- Target System PF1 (SLV20_REQ_Target_System_PF1__c)
- Sales Area PF1 (SLV20_REQ_Sales_View_PF1__c) = the ID of the selected Sales Area

- Shipping conditions for PF1 (SLV23_REQ_Shipping_Conditions_PF1__c) = the value of the selected value
- Full/Partial Loads (SLV2_REQ_Full_Partial_Loads__c)
- Delivery Hours (SLV2_REQ_Delivery_Hours__c)
- Delivering Plant (SLV20_REQ_Delivering_Plant__c)
- Incoterm 1 (SLV2_REQ_Incoterm_1__c)
- Incoterm 2 (SLV2_REQ_Incoterm_2__c)

If an additional delivery Address is required and if it doesn't already exist, we also need to update the following information

- Customer Name (ACC_Ship_To_Customer_Name__c)
- C/O Name (ACC_Ship_To_C_O_Name__c)
- Country (SLV2_REQ_BillingCountry__c)
- Street (SLV2_REQ_BillingStreet__c)
- State/Province (SLV2_REQ_BillingState_Province__c)
- City (SLV2_REQ_BillingCity__c)
- Postal Code (SLV2_REQ_BillingZip_Postal_Code__c)
- Customer Name (Local Language) (ACC_Ship_To_Customer_Name_Local_Language__c)
- C/O Name (Local Language) (ACC_Ship_To_C_O_Name_Local_Language__c)
- Street (Local Language) (SLV2_REQ_Street_New__c)
- City (Local Language) (SLV2_REQ_City_New__c)
- State/Province (Local Language) (SLV2_REQ_State_New__c)
- Postal Code (Local Language) (SLV2_REQ_Zip_Postal_Code_New__c)
- Country (Local Language) (SLV2_REQ_Country_local_language__c)
- Language (SLV8_ShipTo_Language__c)
- Alphabet (SLV2_REQ_Alphabet__c)

If an additional delivery Address is required and if it exist, update the following information

- Ship To (SLV2_REQ_Ship_To__c)

3.4.2 If we're converting a Ship-To

Go to the Summary Screen.

3.4.3 Get the information needed for the "Payer Screen"

- **Extract the list of Payment Terms** based on the field "Payment Terms" from the object Request
- **Extract the list of Payment Mode** based on the field "Payment Mode" from the object Request
- **Extract the list of Unit of Measure** based on the field "Unit of Measure" (SLV7_REQ_Unit_of_Measure__c) from the object Request
- **Extract the list of Industry (Giro)** based on the field "Industry(Giro)" from the object Request
- **Extract the information about the Tax codes** from the object Utility with
 - Record Type = "Other"
 - Type = "Country"
 - Language Key = "EN"
 - Country = the country of the Account we're converting

3.5 Payer and Bill-To Screen

Fields to display are:

- **"Is your Sold-To also the Payer?"** + Radio button Yes/No, Mandatory
 - If Yes, nothing else
 - If No, "Identify the Payer:" + following input fields:
 - Payer Name, Mandatory
 - Payer Country, Mandatory, Picklist based on the previous extraction
 - Payer Street, Mandatory, text area
 - Payer City, Mandatory
 - Payer State/Province, Dependent picklist on the country one, Mandatory (**really?**)
 - Payer Zip/Postal Code, Mandatory (**really?**)
- **"Is your Sold-To also the Bill-to?"** "The bill-To is the Account where to send the invoice" + Radio button Yes/No, Mandatory
 - If Yes, nothing else
 - If No, "Identify the Payer:" + following input fields:
 - Bill-To Name, Mandatory
 - Bill-To Country, Mandatory, Picklist based on the previous extraction
 - Bill-To Street, Mandatory, text area
 - Bill-To City, Mandatory
 - Bill-To State/Province, Dependent picklist on the country one, Mandatory (**really?**)
 - Bill-To Zip/Postal Code, Mandatory (**really?**)
- **Provide the Payment Details:**
 - Payment Terms, Picklist based on the previous extraction, Mandatory for Novecare
 - Payment Mode, Picklist based on the previous extraction, Mandatory for Novecare
 - Yearly Estimated Turnover, Mandatory
 - Estimated Volume, Mandatory
 - Unit of Measure, Mandatory
 - Estimated Value of First Order, Mandatory
 - Currency
 - Industry (Giro), only if country of the account = Chile, Picklist based on the previous extraction
 - "Is Customer Tax Exempt?", Checkbox, Help text = "When applicable, document from administration to provide"

- VAT Number, displayed only if the field "Check VAT" is ticked, Mandatory if displayed
- Tax ID 1, displayed only if the field "Tax ID1" is not "Not Used", Mandatory if field "Check Tax ID1" is ticked. Display the field "Tax ID1" from Utility in display mode above the input field.
- Tax ID 2, displayed only if the field "Tax ID2" is not "Not Used", Mandatory if field "Check Tax ID2" is ticked. Display the field "Tax ID2" from Utility in display mode above the input field.
- Tax ID 3, displayed only if the field "Tax ID3" is not "Not Used", Mandatory if field "Check Tax ID3" is ticked. Display the field "Tax ID3" from Utility in display mode above the input field.
- Tax ID 4, displayed only if the field "Tax ID4" is not "Not Used", Mandatory if field "Check Tax ID4" is ticked. Display the field "Tax ID4" from Utility in display mode above the input field.
- Tax ID 5, displayed only if the field "Tax ID5" is not "Not Used", Mandatory if field "Check Tax ID5" is ticked. Display the field "Tax ID5" from Utility in display mode above the input field.
- **"Customer interested in e-invoicing?"** + Radio button Yes/No, Mandatory
 - If Yes, display the field "Invoice Email", Mandatory
 - If No, nothing else

3.6 When clicking "Next" on the "Payer Screen"

Update the request with the following information

- Is Sold-To also Payer (SLV2_REQ_Is_Sold_To_Also_Payer__c)
- Payer Name (SLV2_REQ_Payer_Name__c)
- Payer Country (SLV4_Payer_Country__c)
- Payer Street (SLV4_Payer_Street__c)
- Payer City (SLV4_Payer_City__c)
- Payer State/Province (SLV4_Payer_StateProvince__c)
- Payer Zip/Postal Code (SLV4_Payer_ZipPostalCode__c)
- Payment terms (SLV2_REQ_Payment_terms__c)
- Payment Mode (SLV2_REQ_Payment_Mode__c)
- Yearly Estimated Turnover (SLV2_REQ_Estimated_Turnover__c)
- Estimated Volume (SLV2_REQ_Estimated_Volume__c)
- Unit of Measure (SLV7_REQ_Unit_of_Measure__c)
- Estimated value of first order (SLV7_Estimated_value_of_first_order__c)
- Currency (CurrencyIsoCode)
- Industry (Giro) (SLV7_Industry_Giro__c)
- Is Customer Tax Exempt (SLV4_1_REQ_Tax_Exempt__c)
- VAT Number (LV2_REQ_VAT_Number__c)
- Tax ID1 (SLV20_REQ_Tax_ID1__c)
- Tax ID2 (SLV20_REQ_Tax_ID2__c)
- Tax ID3 (SLV20_REQ_Tax_ID3__c)
- Tax ID4 (SLV20_REQ_Tax_ID4__c)
- Tax ID5 (SLV20_REQ_Tax_ID5__c)
- Payer Contact Exist (SLV4_REQ_Payer_Contact_Exist__c)
- Payer Contact (SLV2_REQ_Payer_Contact__c) = the ID of the contact if one has been selected
- First Name (SLV2_PayerFirst_Name__c)
- Last Name (SLV2_Payer_ContactLastName__c)
- Language (SLV17_REQ_Payer_Contact_Language__c)
- Function (SLV17_REQ_Payer_Contact_Function__c)
- Job Department (SLV27_Payer_Job_Department__c)
- Phone (SLV2_PayerContPhone__c)
- Mobile (REQ_PayerCont_Mobile__c)
- Email (SLV2_PayerContEmail__c)
- Is Sold To Also Bill To (SLV2_REQ_Is_Sold_To_Also_Bill_To__c)
- Bill-To Name (SLV2_REQ_Bill_To_Name__c)
- Bill-To Country (SLV4_Bill_To_Country__c)
- Bill-To Street (SLV4_Bill_To_Street__c)
- Bill-To City (SLV4_Bill_To_City__c)
- Bill-To State/Province (SLV4_Bill_To_StateProvince__c)
- Bill-To Zip/Postal Code (SLV4_Bill_To_ZipPostalCode__c)
- E-invoicing (SLV2_REQ_Customerintsdlnelectinvoice__c)
- Invoice Email (SLV4_Invoice_Email__c)

3.7 Summary Screen

This screen shows all what has been done in the previous ones.

We'll also put those 2 additional input fields:

- Specific Information, Help Text: "Please use this field if there is a need to add more information to the Request."
- Sales Area, not for Technology Solutions and Novacare

For Novacare, if it's the 2nd step, we'll display 1 checkbox named Reject.

If the checkbox is ticked, add a field "Reason of rejection".

3.8 When clicking "Submit" on the "Summary Screen"

3.8.1 Is the Checkbox "Reject" ticked?

f yes, then go to the Rejection Process.
If no, then go on

3.8.2 Update Request with the following information

- Specific Information (SLV4_Specific_Information__c)
- Sales Area (SLV10_REQ_Sales_Area__c)

3.8.3 For GBU's which run the Conversion Process in 2 steps

- If it's the 1st run:
 - If it's Technology Solutions and user is a CSR, go to point 3.8.4
 - Else
 - On the Request, update the field IsSaved (SLV10_REQ_Is_Saved__c) = True
 - Send an email to Pam Accardi if Novecare or to the CSR selected at the beginning for other GBU's.
 - Include attachment in email sent - <https://syensqo.atlassian.net/browse/CCCME-9688>
 - Go to the end
- If it's the 2nd run, go on with the following steps.

3.8.4 If the user requested an additional Ship-to

If the user requested an additional delivery address and if it doesn't exist,

- Create the Account with:
 - Account Record Type (RecordTypeId)= 012240000006UNQAA2 (Non SAP Customer)
 - Customer Name (SLV41_Customer_Name__c)
 - C/O Name (SLV41_C_O_Name__c)
 - Account Name (Name) = Concatenation of "Customer Name" and "C/O Name" separated by a space
 - Address (BillingAddress) with Street, Zip/Postal Code, City, Country, State/Province
 - Customer Name (Local Language) (SLV41_Customer_Name_INT__c)
 - C/O Name (Local Language) (SLV41_C_O_Name_INT__c)
 - Account Name (local language) (SLV_Account_Name_local_language__c) = Concatenation of "Customer Name (Local Language)" and "C/O Name (Local Language)" separated by a space
 - Street (Local Language) (SLV_Street_local_language__c)
 - Zip/Postal Code (Local Language) (SLV_Zip_Postal_Code__c)
 - City (Local Language) (SLV_City_local_language__c)
 - Country Name (Local Language) (SLV_Country_local_language__c)
 - State/Province (Local Language) (SLV_State_local_language__c)
 - Language (SLV2_ACC_Language__c)
 - Alphabet (SLV2_Account_Alphabet__c)
 - Partner Type (Type) = "Prospect"
 - Partner Sub-Type (SLV_Partner_Sub_Type__c) = "Ship-to"
 - Status (SLV_SAP_Status__c) = "Prospect"
 - Corporate Group (ParentId) = Corporate Group of the Sold-To we're converting
- Add a GBU Segmentation on this Account with:
 - Record Type (RecordTypeId) = 01224000000TaO2AAK (GBU Customer Segmentation)
 - Account (SLV_Account__c) = Id of the Ship-To we just created
 - GBU (SLV7_GCS_GBU__c) = the one determined at the beginning
 - GBU Account Sub-type (SLV_Account_Sub_Type__c) = the selected one
- Create the corresponding request with:
 - Account (SLV2_REQ_Account__c)= Ship-To ID just created
 - Set all the fields indicated on the points:
 - 2.3.1
 - 3.2.1
 - 3.4.1
 - Record Status (SLV2_REQ_Record_Status__c) = "Submitted"
 - Record Type (RecordTypeId) = 01224000000TaNxAAK (Read Only conversion Request)
- Update the Account with:
 - Partner Type (Type) = "Ship-to"
 - Status (SLV_SAP_Status__c) = "Conversion Requested"
 - If "Select my CSR from the account team" or "Search for my CSR based on his/her name" is selected =>
 - CSR Name (SLV2_Account_CSR_Name__c) = Name of the selected user
 - CSR Email (SLV2_Account_CSR_Email__c) = Email of the selected user
 - If not,
 - CSR Name (SLV2_Account_CSR_Name__c) = Name of the selected team
 - CSR Email (SLV2_Account_CSR_Email__c) = Email of the selected team

If the user requested an additional delivery address and if it exists,

- Check if there is a GBU Segmentation for the GBU.
 - If there is one, update the GBU Account Sub-type (SLV_Account_Sub_Type__c) with the selected one.
 - If none, create one with:
 - Record Type (RecordTypeId) = 01224000000TaO2AAK (GBU Customer Segmentation)
 - Account (SLV_Account__c) = Id of the selected Ship-To
 - GBU (SLV7_GCS_GBU__c) = the one determined at the beginning
 - GBU Account Sub-type (SLV_Account_Sub_Type__c) = the selected one
- if this Account is not already a SAP Customer

- Create the corresponding request with same information as what is described just above except the Account which needs to be populated with the ID of the selected Ship-To.
- Update the Account with:
 - Partner Type (Type) = "Ship-to"
 - Status (SLV_SAP_Status__c) = "Conversion Requested"
 - If "Select my CSR from the account team" or "Search for my CSR based on his/her name" is selected =>
 - CSR Name (SLV2_Account_CSR_Name__c) = Name of the selected user
 - CSR Email (SLV2_Account_CSR_Email__c) = Email of the selected user
 - If not,
 - CSR Name (SLV2_Account_CSR_Name__c) = Name of the selected team
 - CSR Email (SLV2_Account_CSR_Email__c) = Email of the selected team

It's important that the Account Status is updated only when the Request is created because WeMethods is "catching" Account with Status "Conversion Requested" and needs information from the corresponding Request in order to create the Workflow in SAP.

3.8.5 Create the contacts if needed

For each contact, check if the user indicated that he was already existing. If not, create the contact with:

- Account Name (AccountId) = The Id of the account we're converting
- First Name (FirstName)
- Last Name (LastName)
- Language (SLV4_Language_Picklist__c)
- Function (SLV_Function__c)
- Job Department (Department__c)
- Phone (Phone)
- Mobile (MobilePhone)
- Email (Email)
- Related GBU (SLV6_Contact_Related_GBU__c) = The selected GBU

3.8.6 Send an email

For Technology Solutions and Novocare EMEA, Email is sent to Data Team,
For Novocare, Email is sent to Pam Accardi
otherwise Email is sent to the CSR or the queue selected at the beginning.

Include the attachment in email sent - <https://syensqo.atlassian.net/browse/CCCME-9688>

3.8.7 Update the following information

- **On the Request**
 - Record Status (SLV2_REQ_Record_Status__c) = "Submitted"
 - Record Type (RecordTypeId) = 01224000000TaNXAAK (Read Only conversion Request)
- **On the Account**
 - Partner Type (Type) = "Sold-to & Ship-to" if on the point 2.2.5 the option "Sold-To & Ship-To" has been selected, "Ship-to" if not.
 - Status (SLV_SAP_Status__c) = "Conversion Requested"
 - On the Account, we need to save the name and the email to who WebMethods will send the email. This depends on the situation.
 - If "Select my CSR from the account team" or "Search for my CSR based on his/her name" is selected =>
 - CSR Name (SLV2_Account_CSR_Name__c) = Name of the selected user
 - CSR Email (SLV2_Account_CSR_Email__c) = Email of the selected user
 - If not,
 - CSR Name (SLV2_Account_CSR_Name__c) = Name of the selected team
 - CSR Email (SLV2_Account_CSR_Email__c) = Email of the selected team

It's important that the Account Status is updated only after all the other updates because WeMethods is "catching" Account with Status "Conversion Requested" and needs information from the corresponding Request in order to create the Workflow in SAP.

4. Rejection Process

4.1 Update the request

- Reason of Rejection (Reason_for_Rejection__c)
- Record Status (SLV2_REQ_Record_Status__c) = "Cancelled"
- Status (SLV2_REQ_Status__c) = "Rejected"
- Record Type (RecordTypeId) = "Read Only Conversion Request"

4.2 Send an email

The email is sent to the Request Owner.

5. The SAP interface

WebMethods has a job running every 10 minutes.

This job scrutes the Accounts with Status set to "Conversion Requested" and:

- Initializes the creation workflow in PRS with the mapping indicated in this **Document**.

If the creation workflow is successfully created in SAP PRS, then WebMethods will

- Send an email to Data Team for Technology Solutions (customers.datamanagement@support.syensqo.com) and to the CSR for the other GBUs (Email of the CSR indicated in the Request) to indicate the PRS workflow number. (**See example here**)
- Update the "Status" (SLV_SAP_Status__c) of the Account to "Creation Requested"

If the creation workflow is not created in SAP PRS, then WebMethods will:

- Set the "Status" (SLV_SAP_Status__c) of the Account to "Rejected".

If it is for any functional reason, then WebMethods will also

- Send an email to crm.support@syensqo.com

WebMethods is doing the updates with user "SAP User".

6. Useful links

Mapping CRM - WM - SAP (Tab: CG Update Core => PRS)

[Accounts' Interfaces with SAP](#)

[WebMethods FSD](#)