FD - P1. Corporate Group Interface

Version Control

Version	Date	Description	Author
v.1	21.01.2022	Creation	Josiane Peytraud
V.2	09.09.2025	Adapt SAP System's name	Josiane Peytraud

1. General overview

The management of Corporate Groups is moving from GBR to SAP PRS.
It means that Corporate Group will no longer have 2 codes. Only the PRS one will remain.

It has also been agreed that CRM is the master for links between Accounts and Corporate Group. That's why we'll

- ensure that on Account conversion, the Corporate Group assigned to the Account is not "Not yet Assigned".
- send the corporate group within the account conversion interface.
- set a new interface with PRS in order to update SAP each time the Corporate Group attached to an Account is changed.
- ensure that SAP PF2 and WP2 send back to CRM Core and ICare this change.

2. Account Conversion

When a user would like to start an account conversion, we first check that the Corporate Group assigned to this Account can be send to SAP.
It means that we check that the field "Not SAP Compatible" of the Corporate Group linked to the Account is not ticked. If this field is ticked, then we display an error message to explain to the user that he needs to select another Corporate Group.

When sending information to PRS to create the creation workflow, we also send the Corporate Group Code. So the SAP customer is created with the correct Corporate Group.

3. Corporate Group Links interface (CRM => SAP PRS)

There is a field named "Corporate Group Changed". It's a checkbox.
It's visible on the SAP Account Layout in the "System Information" section, in display mode for all the users except for System Administrator, System Admin (Lite) and GBU Data Steward Lightning.

Each time the corporate group linked to a SAP Account is changed, the system will set to TRUE this field "Corporate Group Changed".

Every 10mn, WebMethods runs a job which selects accounts with "Corporate Group Changed" set to true AND PRS Code of the Corporate Group well populated. We need to do those 2 selections as it's possible to link accounts to a new Corporate Group before it's getting its PRS Code.

If the update is well pushed to PRS, WebMethods will set back the field "Corporate Group Changed" to FALSE.

4. Corporate Group Links interface (SAP => CRM)

Each time a Corporate Group is updated on an Account in PRS, this change is "pushed" to PF2 and/or WP2.

Each time a Corporate group is updated on an Account in PF2 or WP2, this update is sent to ICare and/or Core depending on which CRM ID is indicated.

5. Corporate Group Name update in iCARe

On Salesforce side for Parent Account (with the record type Corporate Group Record Types, we are allowed to update the following fields:

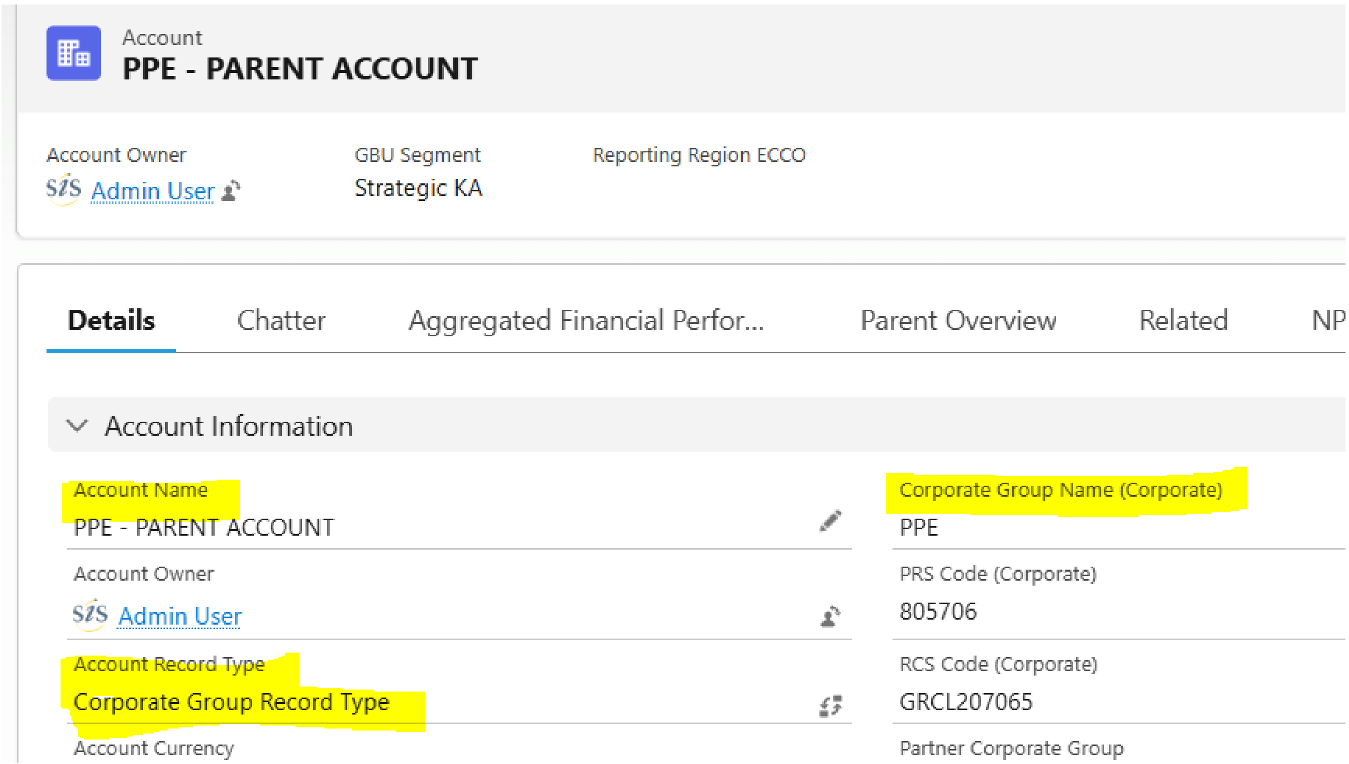
- Account name (Name)

It's only managed in iCARe.

We are not allowed to update the following fields:

- Corporate Group Name (Corporate)

This field is the one used in integrations with all other the different applications and we mustn't update it in iCARe.



6. How to fix customers without Corporate Group in SAP

1) Open the account in CRM

1.1) if Partner Type is empty or Prospect, update it with Sold-to or Sold-to & Ship-to

1.2) if Partner Type is already Sold-to or Sold-to & Ship-to, move to the next step

2) tick the checkbox "Corporate Group Changed" in the System information section

3) Click on Save button

4) Confirm with SAP Data team if they receive the update on account (10 minutes later)

7. Useful links

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

System data Flow CRM - Dataiku - Mappy - SAP (slides) + Mappy queries in Dataiku existing flows (text doc)

Accounts' Interfaces with SAP

WebMethods FSD

Corporate Group links Management

Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

From Jan 31, 2022 to Feb 09, 2026	Actor	Type	Activity	Version
	PEYTRAUD, Josiane , GILLES, Anne and Alves, Susana	Edit	multiple updates from PEYTRAUD, Josiane , GILLES, Anne and Alves, Susana	
Jan 21, 2022				
	PEYTRAUD, Josiane	Edit	created the page at 4:07 pm	