

FD - P1. Account Team Member (ATM) - Custom Object (WIP)

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Version Control

Version	Date	Description	Author
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1. General overview

The Account Team Member (ATM) custom object has been created to manage Sales Representatives (Sales Rep) and Customer Service Representatives (CSR) coming from SAP.

But as we're receiving those information from SAP per Account and Sales view, it has been decided to also use it for the GBU Segmentation Pull and Push interfaces.

Each time, someone does an update on an Account in SAP, the system sends to Core CRM, the list of the sales views of this Account and for each of them, indicates the corresponding Sales Rep and CSR.

All those information are stored in the ATM object, waiting for the batch running once a night which will update the Account Team Member object, the standard one.

2. The interface from SAP

3. The batch

We have a sequence of 3 batches running daily at 1AM CET doing the following main actions:

- Create new account team members
- Delete existing account team members
- The account team member replacement is managed manually - check section 5.1 below

Step-by-step process:

1) "SLV28_ATM_0_process" starts the Account Team Members Sync Process

Picks all the Account Team Member records created with SAP record type and Status = To Insert

2) "SLV31_CEM_ATMUpdateGBU_Batch" populates the Sales Area and GBU on the Account Team Member records

3) "SLV5_1_ATM_1_process" manages the records with SAP record type marked with the status to Delete

3.1. updates the status of the ATM records to "To Process".

3.2. deletes the records with the status = To Delete

The fields populated in CRM by the batches are:

User (lookup)

GBU

Status (To be Processed, Processed or other status stating any kind of error)

Record Type: Salesforce

Account Team Member History

We are saving the Status History, in order to track the original request from SAP. The status created by SAP is To Insert or To Delete, and in Salesforce becomes to Process and Processed. In order to understand what was the type of request (create ATM or delete ATM, please check the history table).

5. What to do when.....

5.1 A Sales Rep is replacing another one by taking his code

On WP1, the Sales Rep is identified with a code = the sales group. One of the parameter of this code is the email address of the Sales Rep.

When a new Sales Rep replaces an old one and take the ownership of all his portfolio, on SAP side, they "just" replace the email address of the previous Sales Rep by the new one.

The problem is that when doing that, the process which follows the changes done on an Account doesn't detect that something has changed as on the Account we still have the same code.

In such a situation, we need to "force" the send of the impacted accounts in order for CRM to get the new relation Account - new email address. This is generally done with the transaction BD12 in SAP.

5.2 A User if moving from 1 GBU to another one

6. Useful links

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

[Accounts' Interfaces with SAP](#)

[WebMethods FSD](#)