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

Version Control

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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 used 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 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 mambers
- 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

3.3. for each ATM record with record type = SAP, the system checks if we have a similar record, containing the same information but the record type is Salesforce

if we already have the team member in the system for the same account, sales area and same role and the record type Salesforce, the system creates an ATM record with the status = to delete, to remove the previous team member

3.4. if the person is already part of the team, the system marks the record with the status = To Delete

3.5. The system evaluates if the new team member exists in SF as a user and if the user is active and if the user license is Salesforce. The status is updated according to these cheks.

The ATM records marked with the Status equals to "User Inactive" or "Non existing user" or "License Type not Salesforce" are also marked to be deleted, and are deleted.

3.5. The team member record doesn't exist in the ATM table, so it's marked with the Status = To Insert, Record Type = Salesforce,

3.6. The team member record exists in the ATM table, so it's marked with the Status = To delete

3.7 For the team members created, the Status is updated to Processed

4) "SLV5_1_ATM_2_process" checks if there are ATM records with record type = Salesforce in the status = To Process

repeats the similar steps from the previous batch 3.1 - 3.7

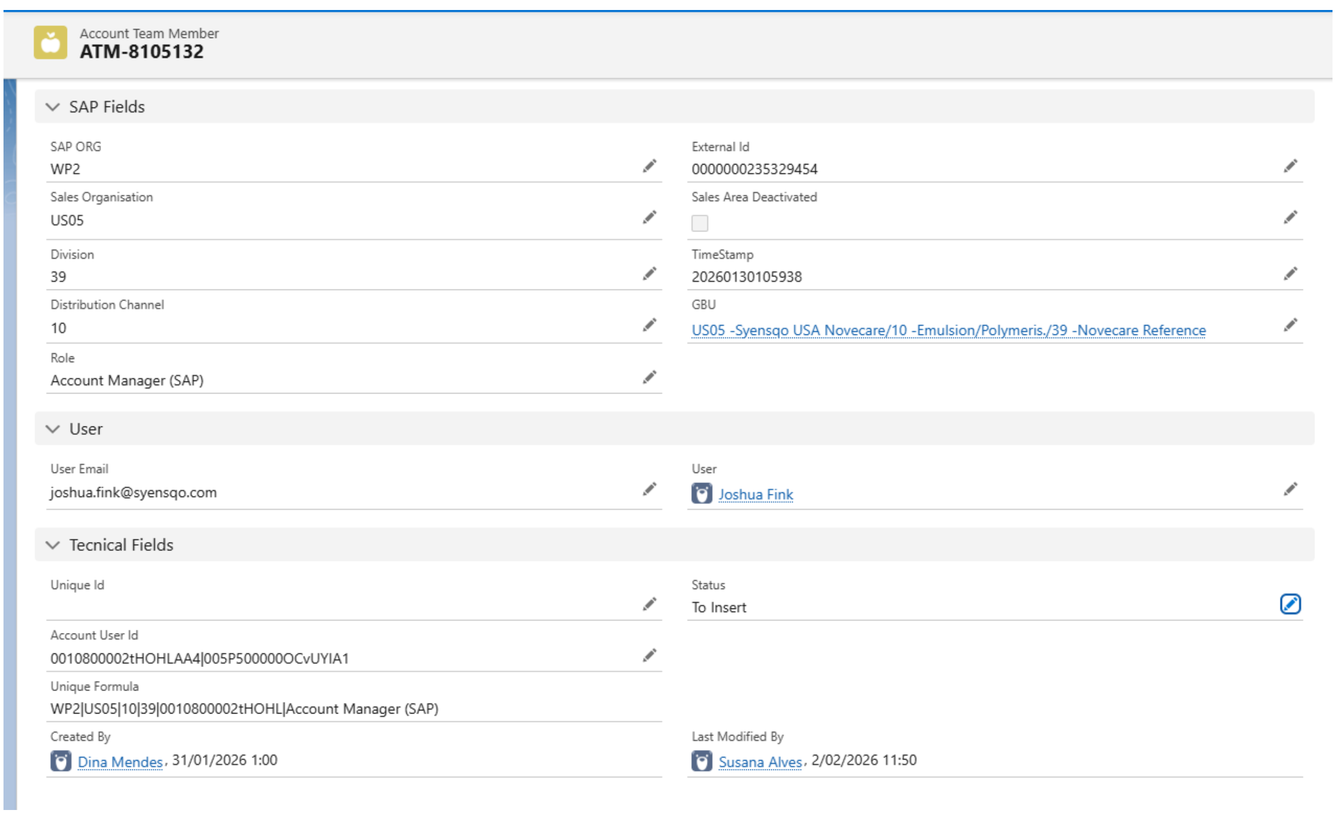
4. Fields List

The fields received from SAP are:

User Email

Status (with the options To insert or To delete)

Record Type: SAP



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