Account & Contact management

In order to be able to see an account in the view "My Accounts", you have to be listed in the Account team of this account.

If it's not the case, you have to contact:

- the account owner for a prospect
- your GBU data steward for a SAP account

and ask them to add you in the account team.
First, confirm if the account you want to create doesn't exist in SFDC through the search functionality.

Then, click on create new account and choose 'Non SAP Customer' as he will be created with one of the following partner types: prospect, non buying entity or indirect customer.
As soon as you need to start suppplying your customer, request the conversion of your prospect.
Click on the button « Convert Prospect to Customer » and fill in the required information.
You should include all those that have a direct or indirect interaction with the customer. Always include your CSR.
This can be caused by the confidentiality. In this case you need to ask one of the account managers to add you in the account team.
For a Non SAP account, the account owner is the account manager who created it. His responsibility is to ensure that the account information is properly maintained.

For a SAP account, the account owner is "Admin". That means that the ownership is shared between the Account Managers of the Account team.
You can not edit an account if the record is locked.
It must be locked because an account conversion is on-going or because a new Corporate Group link must be approved.

- If Status = Creation Requested, Updated Requested or Conversion Requested => the record is locked
- If Corporate Group Relationship Status = Requested => the record is locked

The corporate group represents the highest hierarchy level of the account's structure.
Identify what part is the contact playing in the business process despite of his function in the company.
Check the Account History.
When someone ask to delete an account because there is a double entry, we have to use the tool "Merge accounts". Go on the home page of the account, and click on the tool "Merge Accounts". Input part of the account name in order to find the accounts you would like to merge and click on "Next" Select the accounts you would like to merge and click on "Next". Select which fields you would like to keep from wich account. You can keep the name from one account and the address from the other. Click on Merge. One of the account will be kept with the selected information and all the activities, contacts, team members, ... See the document "How to merge 2 accounts" : https://docs.google.com/document/d/1eVMxPqM3rf5IG6h18zegy2lvAooDTg4ZiAfi7SxwTKo/edit

This kind of request has to be transferred to CRM champion and Data Steward (= data admin) of the GBU. The list of those people is in the tab "Welcome page". (to be reviewed)
Corporate group creation has to be initialized in the CRM but is not managed by CRM support -> UR to be assigned to Coporate Sales&Marteking team (Clotilde Dellafaille <clotilde.dellafaille@solvay.com>)
When a data steward doesn't approve the new link bewtween an account and a corporate group, it's his job to remove the link or update it with the correct corporate group.

SFDC Accounts - SAP Customer
To have more information about conversion process, please go to this page: Account: Convert a Prospect
Way: Accounts > search Bayer Corporate (for example) > open the account > select GBU specific as Account view > select Contains as Involved GBU(s) > fill in NOVE and click GO

? Unknown Attachment

No error generated. The filter does not return the expected information.

Filter 'GBU specific' uses 'Involved GBU(s)' field as dynamic field, this is created in iTools:

? Unknown Attachment

The field 'Involved GBU's)' is a multi picklist field and therefore only the complete name of the picklist value will be visible by the search functionality.

Since iTools is a managed package, there is nothing we can do to change the behaviour. But we can propose the following solution: use the arrow in order to choose the good GBU name.

? Unknown Attachment

Several reasons:

- you are in the ALL-SHR-Restricted public group.
- the Visit Report restriction = GBU Restricted (and you dont belong to the GBU) or Visit Report Team (and you dont belong to the Visit Report team).