

Account: Account Update

Overview

In this section, you will find information about how to request an update of an existing SAP account. This section focuses on process steps with Salesforce as starting point. Specific actions to be performed in SAP by customer service representatives are not described in this section.

Concerned profiles:

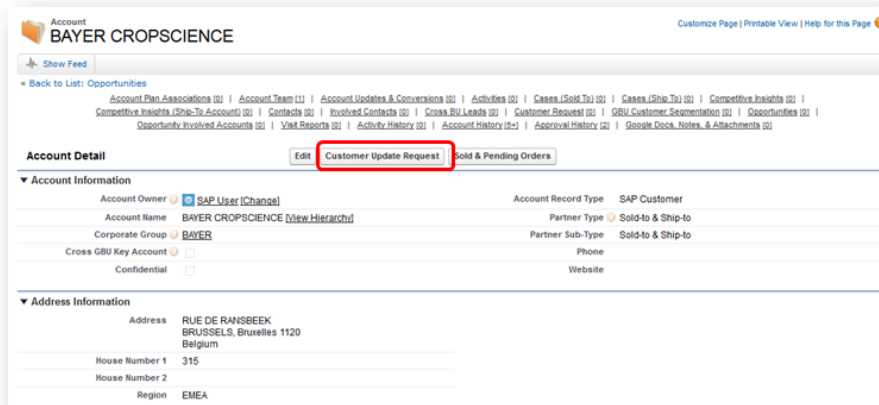
Sales - Customer Service Representatives (CSR)

Table of content

- [Step By Step](#)
- [Related articles](#)
- [Need help?](#)

Step By Step

If you desire to update the name or address of an account, you first have to *open* the account page, then *click* on **Customer Update request**





Y
o
u
m
u
s
t
b
e
p
a
r
t
o
f
t
h
e
A
c
c
o
u
n
t
T
e
a
m
w
i
t
h
r
e
a
d
/
W
r
i
t
e
a
c
c
e
s
s
t
o
r
e
q
u
e
s
t
a
c
t
i
o
n
e
r
u
p
d
a
t
e

Enter the **information** you desire to update and then *click* on **Save**

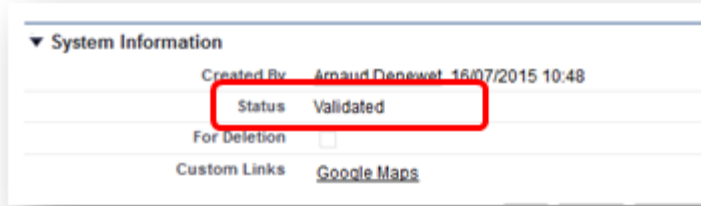
User can assign the update request to a CSR...:

- From the Account Team
- Selected in the CRM
- User can also select a group of CSRs

Once requested, the update request is recorded in Salesforce and you can consult the information

In the meantime, the account status *has been updated to Update Requested*. It is not possible to submit another update request.

Once the account is updated in SAP, the account status is automatically updated to **Validated**.



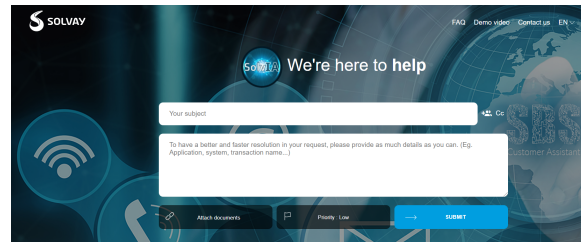
[Back to the top](#)

Related articles

- [Account: Presentation](#)
- [Account: Create a Prospect](#)
- [Account: Convert a Prospect](#)

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example