

Account: Create a Prospect

Overview

In this section, you will find information about how to create a prospect account in Salesforce

Concerned profiles:

Sales

Step By Step

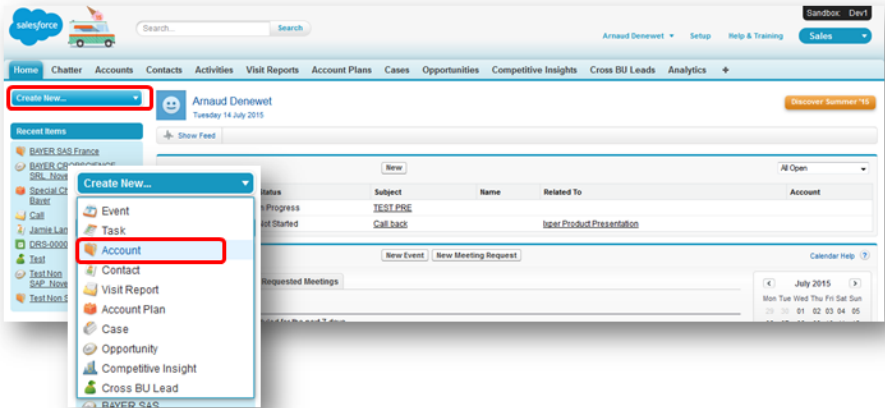
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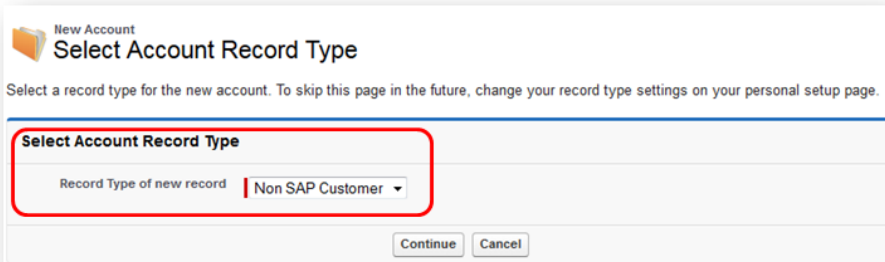
 Before to create a prospect, search on it to avoid creating a duplicate!

The system will warn you if a duplicate is found (based on name or address)

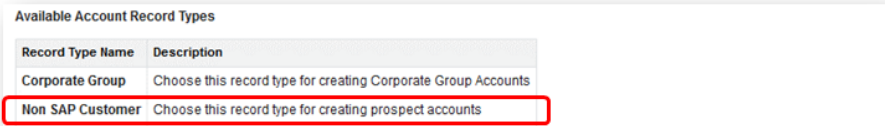
If the prospect /account does not exist, click on **Create New...** and then click on **Account**



You can now decide the type of account you want to create.

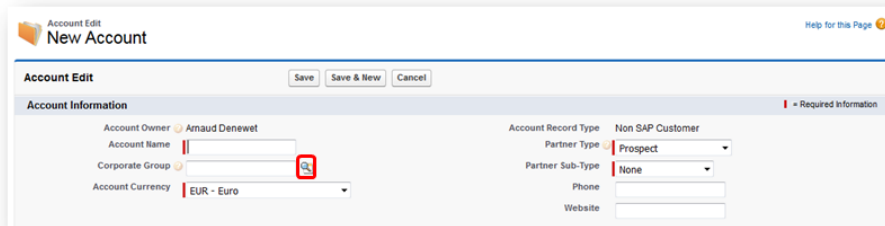


From the list of possible record types, select **Non SAP Customer**



Enter now the **information** on the account

- In Account name, enter the name of the account, for example **'Bayer CROPSCIENCE'**
- Use then the **lookup icon** to search a Corporate Group



Account Edit
New Account

Account Edit [Save] [Save & New] [Cancel]

Account Information [Required Information]

Account Owner: Amaud Denewet

Account Name: [Empty]

Corporate Group: [Empty] [Lookup Icon]

Account Currency: EUR - Euro

Account Record Type: Non SAP Customer

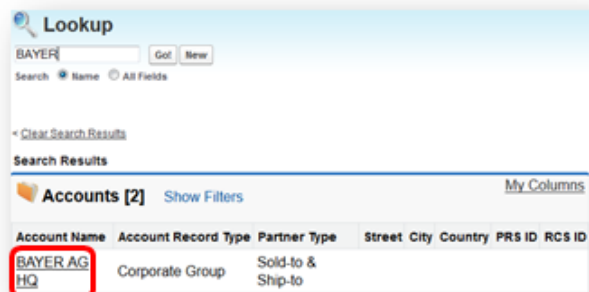
Partner Type: Prospect

Partner Sub-Type: None

Phone: [Empty]

Website: [Empty]

Search for **Bayer** Corporate Group and once found, click on the **Name**



Lookup

Search: BAYER [Got] [New]

Search: [Name] [All Fields]

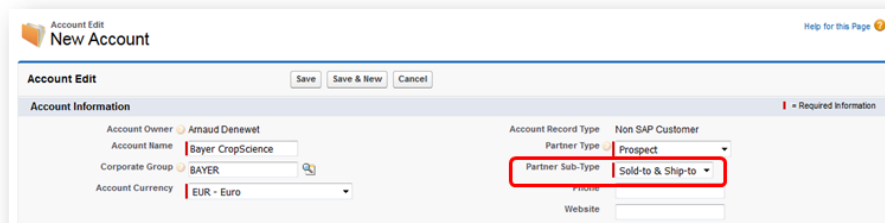
Clear Search Results

Search Results

Account Name	Account Record Type	Partner Type	Street	City	Country	PR\$ ID	RC\$ ID
BAYER AG HQ	Corporate Group	Sold-to & Ship-to					

You must also define the **Partner Sub-Type**. You have 2 options:

- Sold-to & Ship-to
- Ship-to



Account Edit
New Account

Account Edit [Save] [Save & New] [Cancel]

Account Information [Required Information]

Account Owner: Amaud Denewet

Account Name: Bayer CropScience

Corporate Group: BAYER [Lookup Icon]

Account Currency: EUR - Euro

Account Record Type: Non SAP Customer

Partner Type: Prospect

Partner Sub-Type: Sold-to & Ship-to

Phone: [Empty]

Website: [Empty]



Value "Sold-to" has been

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Enter the address information (English only). You can also enter the address in a local language, like in Japanese or Chinese characters. That's convenient!

Enter the address information (English only). You can also enter the address in a local language, like in Japanese or Chinese characters. That's convenient!

The screenshot shows a web form titled 'Address Information'. It is divided into three main sections: 'Address Information', 'Local Language', and 'System Information'. The 'Address Information' section contains fields for Country (a dropdown menu), Street, City, State/Province (a dropdown menu), Zip/Postal Code, House Number 1, House Number 2, and Region (a dropdown menu). A red box highlights the Country, Street, City, State/Province, Zip/Postal Code, and House Number 1 fields. A callout bubble points to the Country field, stating: 'The Alphabet field allows user defining in which alphabet (Chinese, Arabic, Thai, etc.) the address in local language is formatted'. The 'Local Language' section contains a 'Language' dropdown menu (set to '--None--') and a list of fields for local language input: Street (Local Language), Country Code (Local Language), City (Local Language), State/Province (Local Language), Zip/Postal Code (Local Language), House Number 1 (Local Language), and House Number 2 (Local Language). A red box highlights these fields. A callout bubble points to the Country Code (Local Language) field, stating: 'System Information fields are not editable by the sales rep. Only System admin have right to update them'. The 'System Information' section at the bottom contains fields for Status (set to 'Prospect'), CSR, CSR Queue, PIS ID, RCS ID, and Other ERP ID. A red box highlights the 'Save' button at the bottom of the form.

A map view of the Accounts address is now displayed directly on the account page. By clicking on the image, a new tab is opened on google maps.



Incoterms & Payment terms are displayed as before on the account layout,with additional list of fields complaint with the future design in Lightening for Incoterms & Payment Terms.

▼ **Incoterms and Payment Terms** (Transactions for last 12 months)

ACCOUNTS > ADISSEO FRANCE SAS ETABLISSEMENT DE COMMENTRY SERVICE COMPTABILITE

Incoterms And Payment Terms

47 items • sorted by name

RELATED TO	PARTNER TYPE	COUNTRY / CITY	PRS ID / RCS ID	GBU
ADISSEO FRANCE S.A.S.	Ship-to	France / COMMENTRY	164194 / 53681	Novecare
ADISSEO FRANCE S.A.S.	Ship-to	France / COMMENTRY	164194 / 53681	Novecare
ADISSEO FRANCE S.A.S.	Ship-to	France / COMMENTRY	164194 / 53681	Novecare
ADISSEO FRANCE S.A.S.	Ship-to	France / COMMENTRY	164194 / 53681	Novecare
ADISSEO FRANCE S.A.S.	Ship-to	France / COMMENTRY	164194 / 53681	Silica
ADISSEO FRANCE S.A.S.	Ship-to	France / COMMENTRY	164194 / 53681	Silica

On GBU Account Sub-Type picklist, value Distributor was removed and new value Trader was added.

On GBU Customer Classification Pick list, Value P was renamed to Potential.

New Service Model Pick list (Customizable by GBU) data template will be provided on demand for massive load.

You have successfully created the prospect.

GBU Customer Segmentation Edit [Save] [Save & New] [Cancel]

Information (managed by Sales Rep)

Account: ADISSEO FRANCE SAS ETABLISSEMENT DE COMMENTRY SERVICE COMPTABILITE

GBU Account Sub-Type: **--None--**

Prospect for my GBU: ☐

GBU: Novocare

BU: Agro

Main End-Use:

GBU Region: EMEA

Account Information

General Account Information

Information (managed by GBU Commercial Excellence)

GBU Customer Classification: **--None--**

GBU Account Type: **Standard Account**

Service Model: **--None--**

BU/Regional Classification: **--None--**

Main Customer Interaction Model:

Account BAYER CROPSCIENCE [Customize Page] [Printable View] [Help for this Page]

[Show Feed]

[Back to List: Opportunities]

Account Plan Associations (0) | Account Team (1) | Activities (0) | Cases (Ship-To) (0) | Cases (Sold-To) (0) | Competitive Insights (0) | Competitive Insights (Ship-To Account) (0) | Contacts (0) | Involved Contacts (0) | Cross-BU Leads (0) | Customer Request (0) | GBU Customer Segmentation (0) | Opportunities (0) | Opportunities Involved Accounts (0) | VML Reports (0) | Activity History (0) | Approval History (0) | Account History (0) | Google Docs, Notes, & Attachments (0)

Account Detail [Edit] [Convert Prospect To Customer]

Account Information

Account Owner: **Vima Brahmanavagam** [Change]

Account Record Type: **Non SAP Customer** [Change]

Account Name: **BAYER CROPSCIENCE** [View Hierarchy]

Partner Type: **Prospect**

Corporate Group: **BAYER**

Partner Sub-Type: **Sold-to & Ship-to**

Phone:

Website:

Address Information

Address: **RUE DE RANSBEEK**

BRUSSELS, Bruxelles 1120

Belgium

House Number 1: **315**

Number:

EMEA

Address and Name recorded are automatically capitalized for SAP conversion purpose

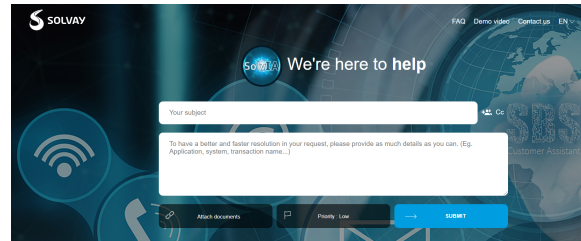
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[Need help?](#)

- Account: Convert a Prospect
- Account: Corporate Group Creation
- Account: Presentation

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/>

The image shows a web interface for creating a support ticket. At the top left is the 'S SOLVAY' logo. In the top right corner, there are links for 'FAQ', 'Demo video', 'Contact us', and 'EN'. The main heading is 'We're here to help' with a Solvia logo icon. Below this is a text input field labeled 'Your subject:'. Underneath the subject field is a larger text area with a placeholder text: 'To have a better and faster resolution in your request, please provide as much details as you can (Eg. Application, system, transaction name...)'. At the bottom of the form, there is an 'Attach documents' button with a paperclip icon, a 'Priority: Low' dropdown menu, and a blue 'SUBMIT' button. The background of the interface features a dark blue theme with icons for a Wi-Fi signal, a speech bubble, and a globe.

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