

Account: Create a Prospect

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Overview


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

Concerned profiles:

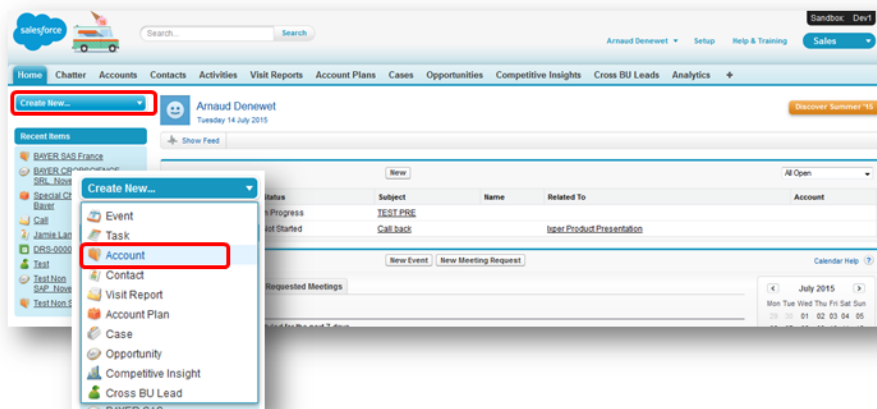
Sales

- [Step By Step](#)
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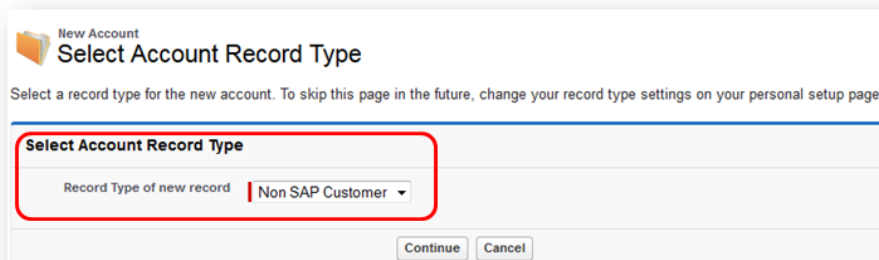
Step By Step

 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)

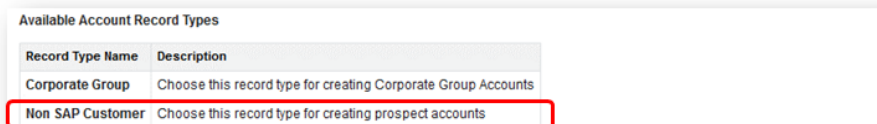
If the prospect /account does not exist, click on **Create New...** and then click on **Account**



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: []
 Corporate Group: [] [Lookup Icon]
 Account Currency: EUR - Euro

Account Record Type: Non SAP Customer
 Partner Type: Prospect
 Partner Sub-Type: None
 Phone: []
 Website: []

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

Lookup

BAYER [Go] [New]

Search [Name] [All Fields]

Clear Search Results

Search Results

Account Name	Account Record Type	Partner Type	Street	City	Country	PRS ID	RCS 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: []
 Website: []



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 software interface with three main sections: 'Address Information', 'Local Language', and 'System Information'. The 'Address Information' section includes fields for Country, Street, City, State/Province, Zip/Postal Code, House Number 1, and House Number 2. The 'Local Language' section includes fields for Name (local language), Language, and corresponding fields for Street, Country Code, City, State/Province, Zip/Postal Code, House Number 1, and House Number 2. The 'System Information' section includes Status (Prospect), CSR, CSR Queue, PIS ID, RCS ID, and Other ERP ID. A 'Save' button is highlighted with a red box. Three callout boxes provide additional information: one points to the 'Address Information' fields, another points to the 'Local Language' fields, and a third points to the 'System Information' fields.

The Alphabet field allows user defining in which alphabet (Chinese, Arabic, Thai, etc.) the address in local language is formatted

System Information fields are not editable by the sales rep. Only System admin have right to update them

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.

Address SALZSTR. 20 //
NIEDERNHALL
Baden-Wurttemberg Germany



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

GBU Customer Segmentation Edit

Save Save & New Cancel

Information (managed by Sales Rep)

Account ADISSEO FRANCE SAS ETABLISSEMENT DE COMMENTRY SERVICE COMPTABILITE GBU Novicare

GBU Account Sub-Type --None-- BU Agro

Prospect for my GBU 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

BU/Regional Classification --None-- Service Model --None--

You have successfully created the prospect.

Account BAYER CROPSCIENCE

Account Detail

Account Information

Account Owner Vima Brahmanavagam [Change]

Account Name BAYER CROPSCIENCE [View Hierarchy]

Corporate Group BAYER

Account Record Type Non SAP Customer [Change]

Partner Type Prospect

Partner Sub-Type Sold-to & Ship-to

Address Information

Address RUE DE RANSBEEK
BRUSSELS, Bruxelles 1120
Belgium

House Number 1 15

Number EMEA

Address and Name recorded are automatically capitalized for SAP conversion purpose

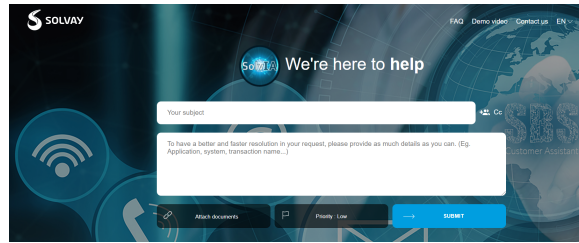
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- Account: Convert a Prospect
- Account: Corporate Group Creation
- Account: Presentation

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 screenshot of the Solvia Freshdesk ticket submission interface. The page has a dark blue background with a globe and various icons. At the top left is the Solvia logo. The main heading is "We're here to help". Below this is a "Your subject" input field. Underneath is a larger text area with a placeholder: "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, there are buttons for "Attach Accounts", "Priority Low", and a blue "SUBMIT" button.

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