Account: Create a Prospect

Overview

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

Concerned profiles:

Sales

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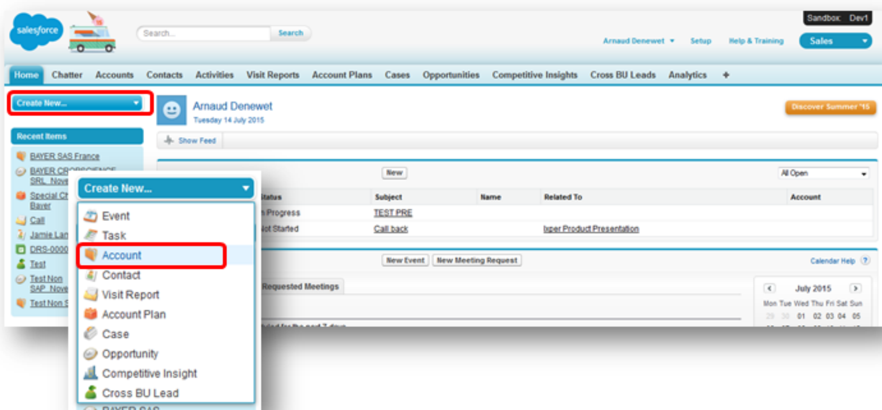
Step By Step

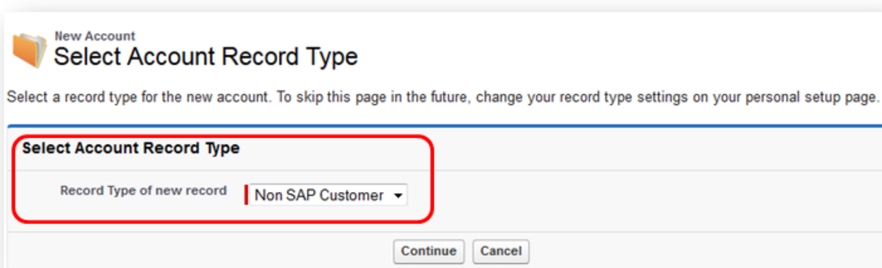
Before to create a prospect, search on it to avoid creating a duplicate!

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

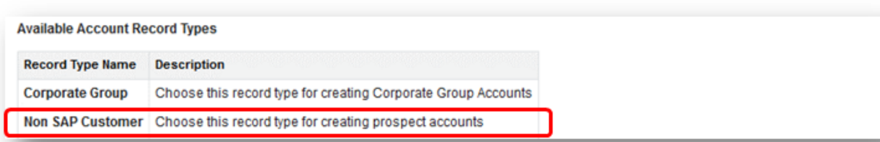
If the prospect /account does not exist, click on **Create New**… and then click on **Account**

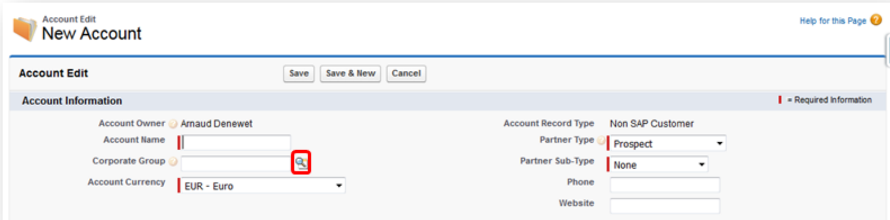
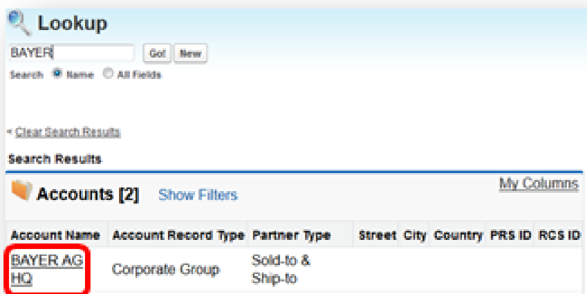
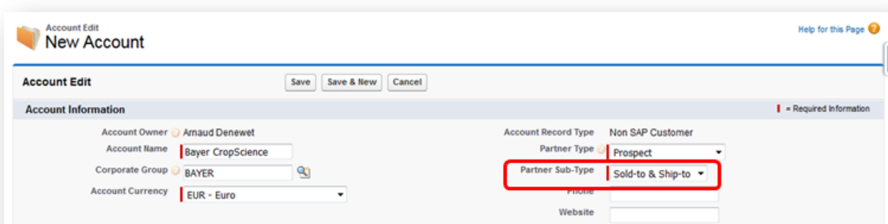


You can now decide the type of account you want to create.

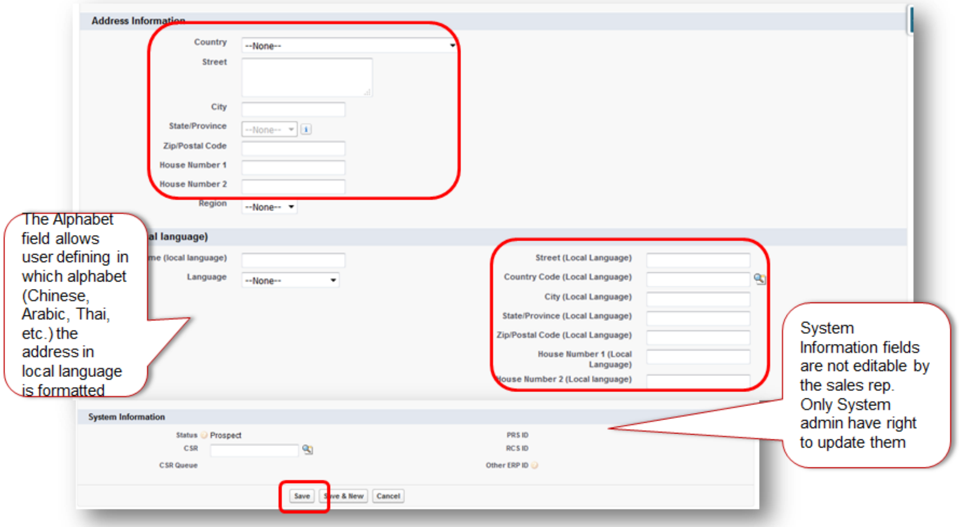


From the list of possible record types, select "**Non SAP Customer**"



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	
Search for **Bayer** Corporate Group and once found, click on the **Name**	
You must also define the **Partner Sub-Type**. You have 2 options: •Sold-to & Ship-to •Ship-to ⚠ Value “Sold-to” has bee	

n removed for consistency purpose, as in SAP, any Sold-to is considered as a Ship-to.

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!	

<table>
<tr>
<td>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.</td>
<td>
Address SALZSTR. 20 //
NIEDERNHALL
Baden-Wurttemberg Germany


</td>
</tr>
<tr>
<td>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.</td>
<td>
▼ 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
<table>
<tr><th>RELATED TO</th><th>PARTNER TYPE</th><th>COUNTRY / CITY</th><th>PRS ID / RCS ID</th><th>GBU</th></tr>
<tr><td>ADISSEO FRANCE S.A.S.</td><td>Ship-to</td><td>France / COMMENTRY</td><td>164194 / 53681</td><td>Novecare</td></tr>
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<tr><td>ADISSEO FRANCE S.A.S.</td><td>Ship-to</td><td>France / COMMENTRY</td><td>164194 / 53681</td><td>Silica</td></tr>
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</table>
</td>
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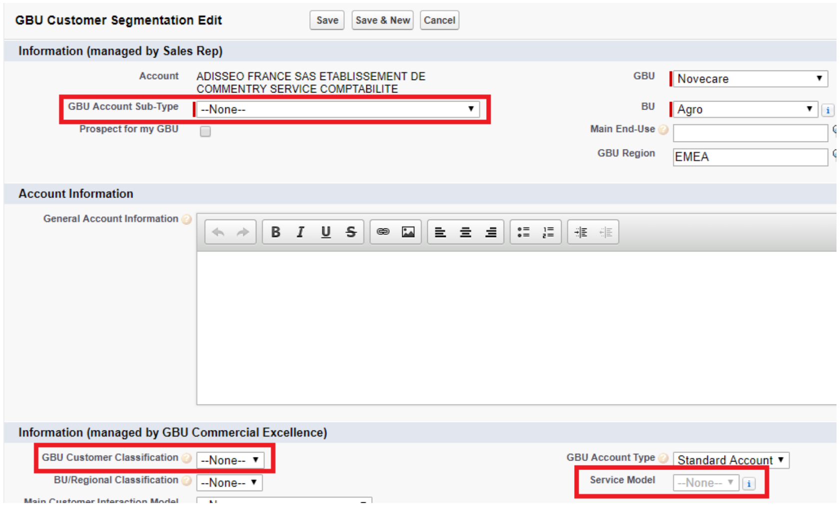
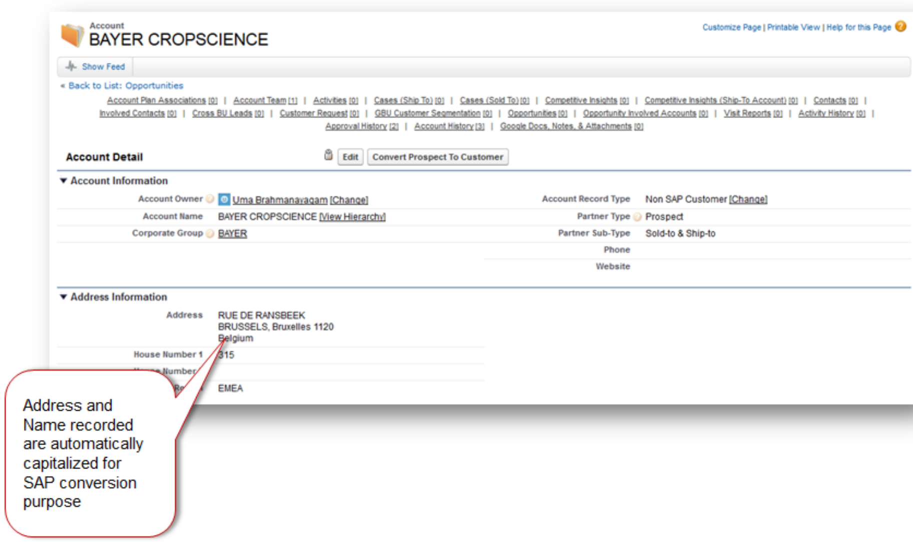
</table>

<table>
<tr>
<td>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 (Customiable by GBU) data template will be provided on demand for massive load.</td>
<td>


</td>
</tr>
<tr>
<td>You have successfully created the prospect.</td>
<td>


</td>
</tr>
</table>

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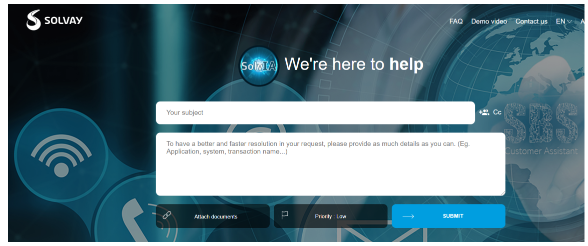
Related articles

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/



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