

Account: Account Team

Overview

In this section, you will find information about account ownership & account team in Salesforce:

- Principles and business rules for account ownership
- How the account team is managed in Salesforce
- How to create a default account team



Account Ownership

Each Account in Salesforce must have one and only one “Account Owner”. This rule is in place differently depending if the account is a customer or a prospect:

- For **prospects**, Account Owner is the creator, the sales rep who created the prospect in Salesforce
- For **existing SAP customers**, Account Owner is “SAP User”, a generic name meaning the account is controlled by SAP.

Concerned profiles:

ALL

Step By Step

Ownership

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Business & Solution Rules

Account Owner

Each Account in Salesforce must have one and only one "Account Owner". This rule is in place differently depending if the account is a customer or a prospect:

-For prospects, Account Owner is

the creator, the sales rep who created the prospect in Salesforce

-For customers, Account Owner is "Admin User", a generic name meaning the account is controlled by SAP.

Consequences:

-After conversion, the Account Owner becomes an Account Team member with "Read/Write" access.

-As a consequence, he will only be able to add people with "Read" access in the account team



Roles & Responsibilities

The Account Owner is in charge of the maintenance of his accounts. He keeps the related data up to date and maintains the account team upon request from other BUS /GBUS

Prospect

Account Detail

▼ Account Information

Account Owner	Arnaud Denewet [Change]
Account Name	Sold-to Account [View Hierarchy]
Corporate Group	Test Account
Cross GBU Key Account	☐
Confidential	☐

SAP Customers

Account Detail

▼ Account Information

Account Owner	Admin [Change]
Account Name	Sold-to Account [View Hierarchy]
Corporate Group	Test Account
Cross GBU Key Account	☐
Confidential	☐

Account Visibility



*Confidential accounts can only be seen by Owner and account team members

	All sales users	Account Owner / GBU data stew. (& above)	Account Team Member with Read access (& above)	Account Team Member with Read/Write access (& above)
View an Account	✓*	✓	✓	✓
Create an Account	✓	✓	✓	✓
Submit a Convert / Update request	✗	✓	✗	✓
Edit an Account (i.e. update account hierarchy)	✗	✓	✗	✓
Delete an Account	✗	✗	✗	✗

Account team

Business & Solution Rules

-Each Account has an "Account Team" which lists all the Solvay users interacting with the account. These users have a "Role" and can be from multiple GBUs.

Account team roles:

- Account Manager SAP
- Customer Service Representative SAP
- Account Manager
- Key Account Manager
- Customer Service Representative
- Sales Support
- Business Development
- Technical Service
- Product Manager
- Marketing

Business rules & Interface for **customers**:

- An interface is set up from SAP to Salesforce in order to update the Account Teams in Salesforce
- Users synchronized from SAP will be added to the account team, and will receive one of these 2 roles:
 - "Account manager (SAP)"
 - "Customer Service Representatives (SAP)"
- In case the user is already in the Account Team, he will remain in the account team and his/her role will be updated in Salesforce to reflect SAP interface
- Users that would be in the Salesforce account team and not in SAP won't be updated by the interface



The Account team is also updated with the SAP team with the value (SAP) on the user role.

Only the current role in SAP is updated. (the previous one is removed from the account team in Salesforce)

No need to remove manually the SAP role anymore

Account Team			Account Team Help
			Add Add Default Team Display Access Delete All
Action	Team Member	Team Role	
Edit Del	Arnaud Denewet	Account Manager	
Edit Del	Philippe Leroy	Sales Support	
Edit Del	Philippe Renier	Account Manager	
Edit Del	Pieter Hauthege	Customer Service Representative	

Business rules for **prospects**:

- For prospects, it is the Account Owner who is in charge to add or remove in the "account team" the account define their rights (with "Read/Write" or only "Read" Account Access).

Each member of the account team with "Read/Write" access on the Account can add other members in the member, now, has "Read/write" access => **New in Winter 17' Release**

Account Team			
			Add Add Default Team Display Access Delete All
Action	Team Member	Team Role	
Edit Del	Chie Fukuoka	Account Manager	
Edit Del	Keiko Homma	Customer Service Representative (SAP)	
Edit Del	Kivomi Ando - INACTIVE	Account Manager	
Edit Del	Shuzo ANDO	Account Manager (SAP)	

Now, if you would like to be added to a specific Account Team or to manage your already set upped role on an Account, you can click on the "Manage My Account Role" button on an Account page and choose an action ("Modify my role" or 'Remove me from the team").

=> New in Winter 17' Release

1 Edit Convert Prospect To Customer Manage my Account Team Role

2 Please select the Role you want to be assigned to (NON SAP Role)

3 You are already in the Account Team with the Role : "Account Manager" What do you want to do ?

Cancel and go back to the Account

On customer accounts, GBU Data Steward keeps the possibility to add users in the account team with read/write access

	All sales users	Account Owner / GBU data stew. & above	Account Team Member with Read access (& above)	Account Team Member with Read/Write access (& above)
Add a user in the account team with "Read" right	×	✓	×	✓
Add a user in the account team with "Read/Write" right	×	✓	×	×
Remove a user from the account team	×	✓	×	×

Update the Account Team

The account team identifies the ones interacting with an account. It allows to quickly find his accounts by using the "My account" list view.

As Account Owner of a prospect account, you can add someone in the account team. To do so, hover on Account Team, and click "Add"

BAYER CROPSCIENCE

Account Team

Account Name: BAYER CROPSCIENCE

Parent Account: BAYER AG HQ

Address Information

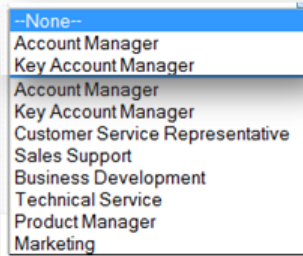
Address: Jan Emiel Mommaertlaan 14, Diegem, 1831, Belgium

Region: EU

Identify the team member to be added, and assign him a "team role"

•In the below example, we add Pedro with Read/Write accesses for account and opportunity, while only Private Access to the Case.

•Roles requires one of the following options:

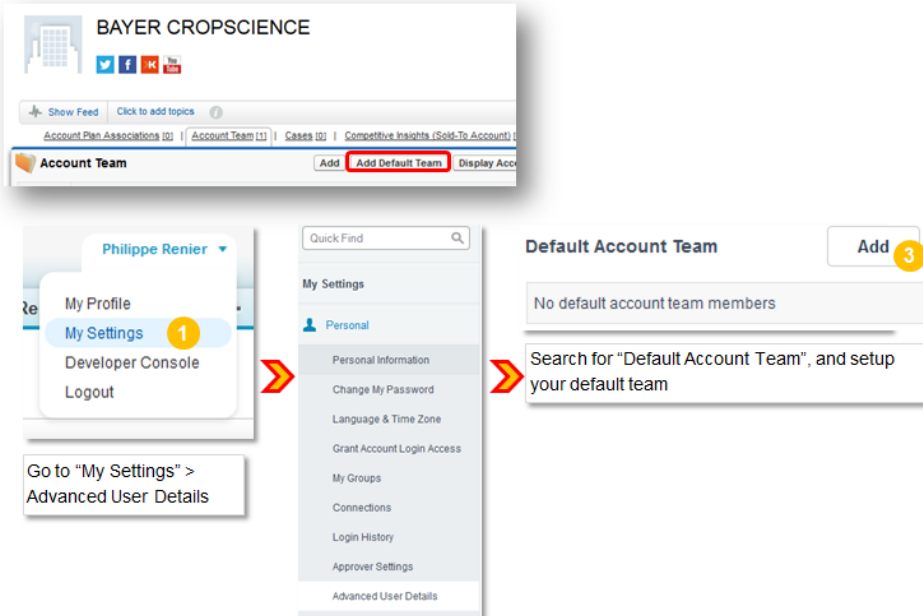


Team Member	Account Access	Opportunity Access	Case Access	Team Role
Pedro Pinto	Read/Write	Read/Write	Private	--None--
	Read/Write	Read/Write	Private	--None--
	Read/Write	Read/Write	Private	--None--
	Read/Write	Read/Write	Private	--None--
	Read/Write	Read/Write	Private	--None--

Create my default account team

Default your account team

If you are working with the same team on some accounts, you may setup your "default account team". This will save you some time!



Change Account Owner

The account owner is by definition the account manager from the GBU with the largest share of sales.

There are two types of Account Owner

For a Prospect (Non SAP Account) the Owner is the User who have created the Account

If you are the owner, but need to transfer the account ownership of your prospect, click on "Change"

Search for the adequate account owner, tick the checkbox on "Keep Account Team" and click on Save

Attention !! Always check the line "Keep Account Team", o

BAYER CROPSCIENCE

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed | Click to add topics

Account Plan Associations (0) | Account Team (1) | Cases (0) | Competitive Insights (Sold To Account) (0) | Contacts (0) | Involved Contacts (0) | Cross BU Leads (0) | GBU Customer Segmentation (0) | Open Activities (0) | Opportunities (0) | Opportunity Involved Account (0) | Visit Reports (0) | Activity History (0) | Google Docs, Notes, & Attachments (0)

Account Detail [Edit] [Delete] [Sharing] [View Hierarchy] [Hierarchy Builder] [Convert Prospect to Customer]

Account Information

Account Owner	David Rampe [Change]	Account Record Type	Non SAP Customer [Change]
Account Name	BAYER CROPSCIENCE [View Hierarchy]	Partner Type	Prospect
Parent Account	BAYER AG HQ	Partner Sub-Type	Sold-to & Ship-to
		Phone	
		Website	

Address Information

Address	Jan Emiel Mommaertslaan 14 Diegem, 1831 Belgium
Region	EU

Ownership Edit BAYER CROPSCIENCE Help for this Page

This screen allows you to transfer an account from one user to another. When you transfer ownership of an account, the new owner will also gain ownership of the following records related to the transferred account:

- all notes and open activities for this account owned by you
- all contacts within the account owned by you, including all related notes and open activities owned by you
- all opportunities (including closed opportunities if you select the Transfer closed opportunities checkbox below) within the account owned by you, including all related notes and open activities owned by you

Note that completed activities will not be transferred.

The new owner might need to edit sharing.

Select New Owner [Required Information]

Transfer this account: BAYER CROPSCIENCE

Owner: Pedro Pinto

☐ Transfer open opportunities not owned by the existing account owner

☐ Transfer closed opportunities

☐ Transfer open cases owned by the existing account owner

☐ Transfer closed cases

☒ Keep Account Team

☐ Keep opportunity team on opportunities transferred to new owner.

☐ Send Notification Email

[Save] [Cancel]

otherwise CSSR and other Sales Managers will be removed from the team after the transfer.

For SAP Accounts, after the Account has been converted, the Owner is always a generic Admin User

Account
ABB STOTZ-KONTAKT GMBH

Customize Page | Printable View | Help for this Page

Show Feed

Back to List: Permission Sets

Account Team (0) | Account Updates & Conversions (0) | Activities (0) | Cases (Sold To) (0) | Cases (Ship 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) | Opportunity Involved Accounts (0) | Sales Reports (0) | Activity History (0) | Account History (0) | Approval History (0) | Google Docs, Notes & Attachments (0)

Account Detail

Edit | Customer Update Request | Sold & Pending Orders

Account Information

Account Owner (0) **Admin [Change]** | Account Record Type | SAP Customer [Change]

Account Name | ABB STOTZ-KONTAKT GMBH [View Hierarchy] | Partner Type | Sold-to & Ship-to

Corporate Group (0) | ABB | Partner Sub-Type

Cross GBU Key Account (0) | Confidential | Phone

Website

Address Information

Address | EPPELHEIMER STRASSE 82/
HEIDELBERG, Baden-Wuerttemberg 69123
Germany

Corporate Group Approval Ongoing

Region | EMEA

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Related articles

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

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/>

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Your subject

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)

Match Accounts | Priority Low | Submit

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