

Account: Convert a Prospect

Overview

In this section, you will find information about the end-to-end prospect conversion process. This section focuses mainly on the process steps with Salesforce as starting point. The process for account creation in SAP is covered in another section.

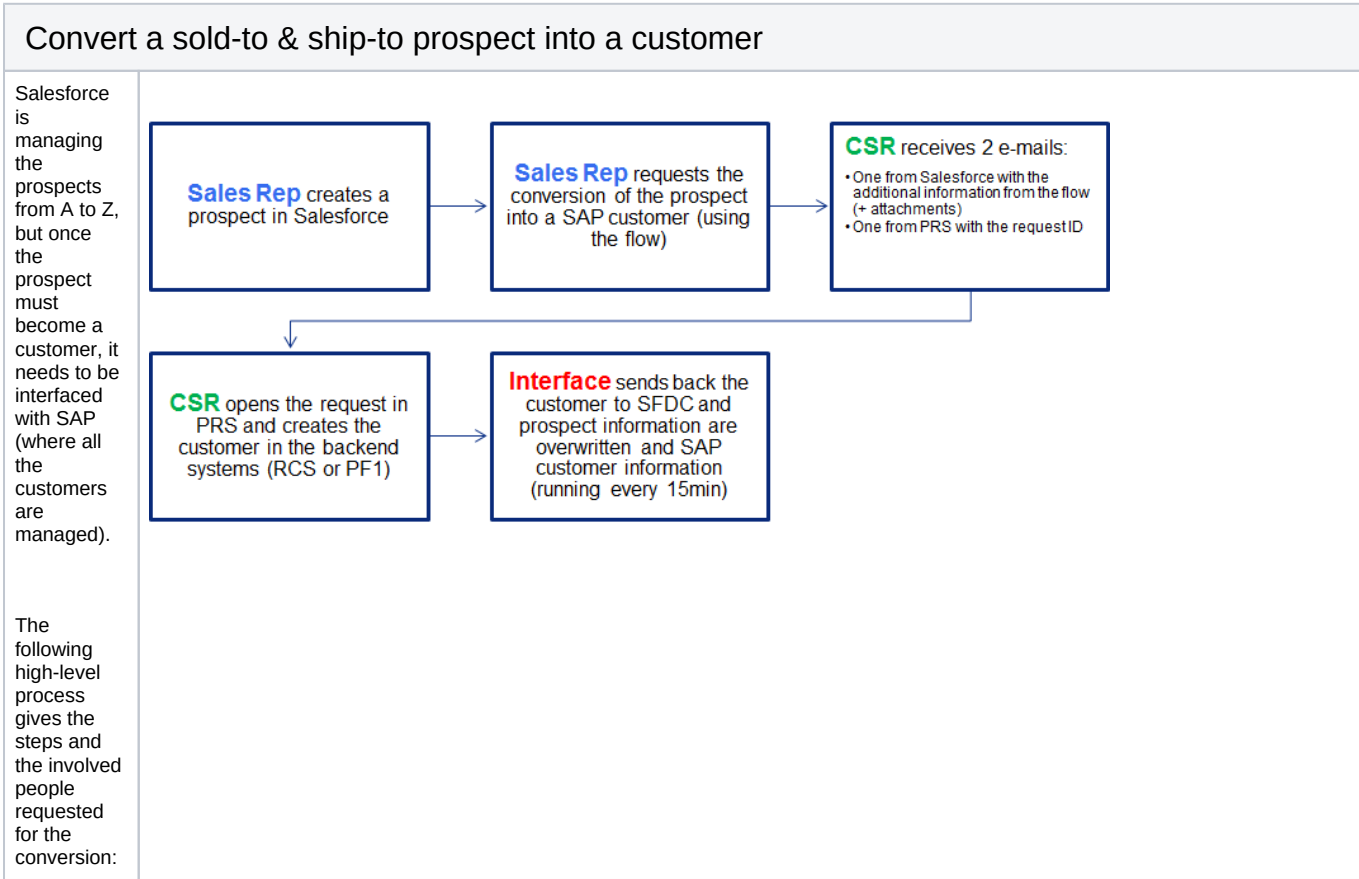
Concerned profiles:

Sales - Customer Service

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Step By Step



Example of the email received by the CSR from Salesforce and the request in PRS



asking more from chemistry®

Dear CSR,

Arnaud Denewet has requested the conversion of the prospect "BASF Brussels" into a customer in SAP. Please find below the details of the request:

General information for BASF Brussels

Account Name: BASF Brussels
Account Address: Kortenberglaan 60, 1000 Brussel, Belgium
Account Type: Sold-to & Ship-to
Account Salesforce ID: a0F240000036WbK

Sold-to contact:

Name: Michel Lecompte
Phone: +32 2 262 04 12
Email: Michel.Lecompte@basfbelgium.com
Function: Purchase Manager
Department: Purchase

Shipping conditions for BASF Brussels

Full/Partial Loads: Full Load
Delivery Hours: 08-18
Incoterm 1: DDP
Incoterm 2: Brussels

Supply Chain contact:

Name: Louis Bertrant
Phone: +32 465 78 76 98
Email: louis.bertrant@basfbelgium.com

Additional Ship-to account for BASF Brussels

Account Name: BASF Anvers
Account Address: Scheldelaan 600, 2040 Antwerpen, Belgium
Account Salesforce ID: a0F240000036W11
Shipping Conditions: Full/Partial Loads: Partial Loads
Delivery Hours: 09-18
Incoterm 1: DDP
Incoterm 2: Anvers

Supply Chain contact:

Name: Philip Cano
Phone: +32 432 56 76 87
Email: philip.cano@basfbelgium.com

3. Billing Information
The Sold-to account is also a Bill-to account: Yes



Account Letterhead.jpg (1) Account Letterhead.jpg (2)

Draft account created by SFDC in PRS

- Fields pre-filled via integration:
- Customer Name (Capitalized)
 - Address (Capitalize)
 - Local Address
 - CSR Name
 - Account Partner Type
 - Salesforce ID

Section to be repeated for all additional ship-to accounts created on top of a Sold-To & Ship-To



Account: BAYER CROPSCIENCE

Account Owner: Uma Brahmanayagam (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 RAHISBECK, BRUSSELS, Bruxelles 1120, Belgium

House Number 1: 315

House Number 2:

Region: EMEA

Before requesting the conversion of a prospect into a SAP Customer, follow the following information requirements:

• A G B U C u s t o m e r S e g m e n t a t i o n r e c o r d r e l a t e d t o t h e p r o s p e c t

- Account related to the prospect

Open the **prospect** that you want to convert as a customer. Note that it will trigger the creation of the account in SAP, and inform your CSR!

Click on the button **Convert Prospect to Customer**

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 RU Leads (0) | Customer Request (0) | GBU Customer Segmentation (0) | Opportunities (0) | Opportunity Involved Accounts (0) | Vint Reports (0) | Activity History (0) | Approval History (0) | Account History (0) | Google Docs, Notes, & Attachments (0)

Account Detail

Convert Prospect To Customer

Account Information

Account Owner: Uma Brahmanayagam (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

Phone

Website

Address Information

Address: RUE DE RANSBEEK, BRUSSELS, Bruxelles 1120, Belgium

House Number 1: 315

House Number 2:

Region: EMEA

Select the **CSR** of **group of CSR** to receive the request

Choose an option to identify your CSR

Options

Select my CSR from the account team

Select my CSR based on his/her name

I am part of a GBU working with CSR Teams

Select your CSR from the Account Team

My CSR: Philippe Renier

Select your CSR by searching on his/her name

My CSR: search bar

Select your CSR Team

Identify your CSR Team: Peroxides NA

Depending of the selection, next section is different and allows you to record the details:

Choose if you prefer just **sending a document** or going through the **full flow**

How do you want to fill in the conversion request?

I have prepared a creation form and can attach it

Ask me the details required and I will provide what I know (incl. attachments)

Back Save/Draft Next

Have you seen the button "Save"

e / D r a f t " ? T h i s b u t t o n a l l o w s y o u t o s t o p t h e c o n v e r s i o n f l o w a n d r e s t a r t l a t e r , w i t h a l l t h e d a t a r e c o r d e d !

Confirm if the account must be a **sold-to & ship-to** or only a **ship-to**

Confirm the type of the account to convert:

- ☐ Sold-To & Ship-To
☒ Ship-To

[Back](#) [Save/Draft](#) [Next](#)

Select if a quote exists and can be used to take some shipping details (incoterms and location)



If the value is "Yes", following section appears allowing the user to select an existing quote

Do you wish to copy the incoterms and payment terms from an exiting quote?

Do you wish to copy the incoterms and payment terms from an exiting quote?

☒ Yes

☐ No

Display quotes created after:

Quote

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Define if the account requires a different delivery address or not.

Does this account require a different delivery address

- ☒ Yes
- ☐ No

Does the ship-to (delivery address) already exist in SFDC?

- ☐ Yes
- ☐ No



If the value is "Yes", following section appears asking the user if the ship - to account exists or must be created

Record the shipping details and the supply chain contact details

Record in the delivery details for this shipping address

Shipping Conditions		Full/Partial Loads	
Delivery Hours		Incoterms 1	
Incoterms 2			

Provide a Supply Chain Contact :

Sup. Ch. Contact Name		Sup. Ch. Contact First Name	
Sup. Ch. Contact Phone		Sup. Ch. Contact Email	

You can precise if the customer is tax exempt or not

=> New in Winter 17' Release

Tax Exempt:

Is customer Tax Exempt	☐
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You can add a Financial contact with new tel/fax /email for any new payer

=> New in Winter 17' Release

Provide a Financial Contact:

Financial Contact		First Name	
Phone		Last Name	
Email			

You can add a new contact with tel/fax/email for the person that will receive the safety data sheet

=> New in Winter 17' Release

Provide a Safety Data Contact:

Safety Data Contact		First Name	
Phone		Last Name	
Email			

You can add a contact for the person that should receive the certificate of analysis, or COA, is a certification of the quality of the product shipped. We have to set up the person who should receive this certification when the customer is created in SAP

=> New in Winter 17' Release

Define the bill-to details



If the value is "Yes", no section appears. If the value is "No", follow

Provide a COA Contact:	
COA Contact	
Phone	
Email	

Is your Sold-To also a Bill-To account?

☐ Yes

☐ No

[Back](#) [Save/Draft](#) [Next](#)

Identify the Bill To:

Bill-To Name		Bill-To Street	
Bill-To Postal Code		Bill-To Country	
Bill-To Region			

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Is your Sold-To also the Payer?

☐ Yes

☐ No

Back Save/Draft Next

Is your Sold-To also the Payer?

☐ Yes

☒ No

Identify the Payer:

Payer Name

Payer Country

Payer Street

Payer City

Payer State

Payer Zip/Postal Code

Provide the payment details:

Payment terms

Payment Mode

Estimated Volume

Unit of Measure

VAT Number/Tax Jurisdictional Code

Currency

Estimated Turnover

Credit Limit Requested

Does the Payer contact already exist in SF DC?

☐ Yes

☒ No

Customer interested in electronic invoicing:

☒ Yes

☐ No

Invoice Email

Back Save/Draft Next

Several fields to detail the Payer Address

New field to save the Invoice Email

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Search for a potential document to attach. If no attachment, *click* directly on **Next**



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If needed, you can attach additional documents to your request

Select File No file chosen

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Review the details of the request and once confirmed, click on **Submit**

Requested Data for Account Conversion

Ship-To & Sold-To
No Additional ship To Required

General information
Account Name: TEST ACCOUNT FF 2
Account Address: WEQWEQW QWEQE Afghanistan
Account Type: Sold-ToShip-To
CSR : Filipe Freitas

Sold-to contact:
Name: Filipe FF
Phone: 22222222
Email:
Function: Specialist
Department: Quality

Shipping conditions
Shipping Conditions:
Full/Partial Loads:
Delivery Hours:
Incoterm 1:
Incoterm 2:

Supply Chain contact:
Name:
Phone:
Email:

Additional Ship-to account

Billing Information
The Sold-to account is also a Bill-to account: Yes

Payer Information
The Sold-to account is also a Payer account: Yes
Payment terms:
Currency: EUR
Payment mode:
Estimated Turnover: EUR 2.123,00
Estimated Volume: 1231
Unit of Measure:
Credit Limit Requested: EUR 1.231,00
VAT Number / Tax jurisdictional code:
Customer interested in electronic invoicing?: No

Payer contact:
Name: Filipe FF
Phone: 22222222
Email:

Attachment List

Attachment Name	Link
Agenda 17th.png	View

Additional Information
Specific Information

Field to store additional information that should be shared with the CSR

Back Cancel Submit

List of files attached

Once the request sent, Account stays a **Non SAP Customer** but not editable anymore and Account Status is updated to **Conversion Requested**. You must now wait the creation in SAP.

When the Account is locked under Status = **Conversion requested**, an information message appears on the account layout.

Account Record Type Non SAP Customer [Change]

Partner Type Sold-to & Ship-to
Partner Sub-Type Sold-to & Ship-to
Phone
Website

System Information
Created By Arnaud Deneval 16/07/2015 10:48
Status Conversion Requested
For Deletion
Custom Links Google Maps

Account
CANDICE INGRAM

Show Feed Click to add topics: ?

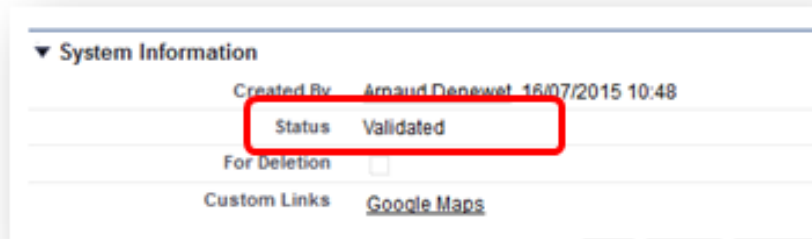
Account Detail Edit Delete Manage External Account

Account Information

The account is pending creation in SAP. Please contact your CSR if the data is not correct.

Account Owner Candice Ingram [Change]
Account Name CANDICE INGRAM [View Hierarchy]
Corporate Group

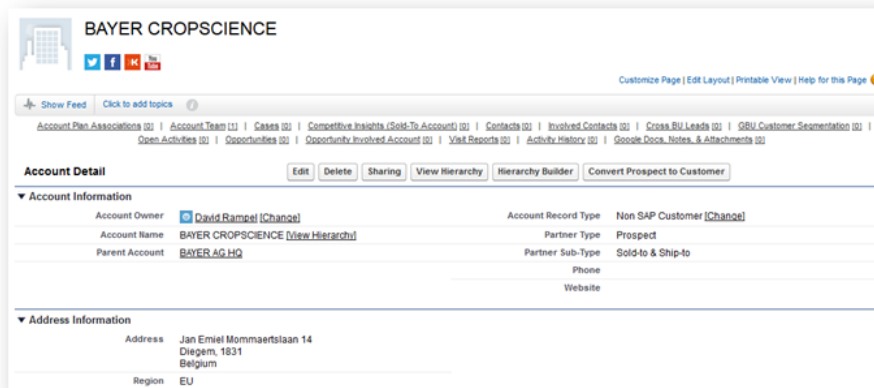
Once the account is created in SAP, the account status will be automatically updated to **Validated**



▼ System Information

Created By	Arnaud Denewet	16/07/2015 10:48
Status	Validated	
For Deletion	☐	
Custom Links	Google Maps	

Convert a ship-to prospect into a customer



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 Rampel (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

Before requesting the conversion of a prospect into a SAP Customer, follow in the following information are requested:

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• Account or an involved contact related to the prospect

Open the **prospect** that you want to convert as a customer. Note that it will trigger the creation of the account in SAP, and inform your CSR!

Click on the button **Convert Prospect to Customer**

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 Rampel [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

Select the **CSR of group of CSR** to receive the request

Choose an option to identify your CSR

Options

- ☐ Select my CSR from the account team
- ☒ Search for my CSR based on his/her name
- ☐ I am part of a GBU working with CSR Teams

Depending of the selection, next section is different and allows you to record the details:

Select your CSR from the Account Team

My CSR:

Select your CSR by searching on his/her name

My CSR: 

Select your CSR Team

Identify your CSR Team:

Choose if you prefer just **sending a document** or going through the **full flow**

How do you want to fill in the conversion request?

- ☒ I have prepared a creation form and can attach it
- ☐ Ask me the details required and I will provide what I know (incl. attachments)



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Confirm if the account must be a **old-to & ship-to** or only a **ship-to**

Confirm the type of the account to convert:

- ☐ Old-To & Ship-To
☒ Ship-To

[Back](#) [Save/Draft](#) [Next](#)

Define the sold-to related to the sold-to and the shipping details

Define the Sold-To

Sold To

Shipping Information Section

Shipping Conditions Full/Partial Loads

Delivery Hours Incoterm 1

Incoterm 2

Supply Chain Contact Section

Supply Chain Contact Phone Supply Chain Contact First Name

Supply Chain Contact Email Supply Chain Contact Name

[Back](#) [Save/Draft](#) [Next](#)

Search for a potential document to attach. If no attachment, click directly on **Next**

If needed, you can attach additional documents to your request

Select File [Choose File](#) No file chosen [Upload File](#)

[Back](#) [Next](#)

Review the details of the request and once confirmed, click on **Submit**

Requested Data for Account Conversion

Ship-To & Sold-To

No Additional ship To Required

General information

Account Name: TEST ACCOUNT FF 2
Account Address: WEQWEQW QWEQE Afghanistan
Account Type: Sold-ToShip-To
CSR : Filipe Freitas

Sold-to contact:
Name: Filipe FF
Phone: 22222222
Email:
Function: Specialist
Department: Quality

Shipping conditions

Shipping Conditions:
Full/Partial Loads:
Delivery Hours:
Incoterm 1:
Incoterm 2:

Supply Chain contact:
Name:
Phone:
Email:

Additional Ship-to account

Billing Information

The Sold-to account is also a Bill-to account: Yes

Payer Information

The Sold-to account is also a Payer account: Yes

Payment terms:
Currency: EUR
Payment mode:
Estimated Turnover: EUR 2.123,00
Estimated Volume: 1231
Unit of Measure:
Credit Limit Requested: EUR 1.231,00
VAT Number / Tax jurisdictional code:
Customer interested in electronic invoicing?: No

Payer contact:
Name: Filipe FF
Phone: 22222222
Email:

Attachment List

Attachment Name	Link
Agenda 17th.png	View

Additional Information

Specific Information

[Back](#) [Cancel](#) [Submit](#)

List of files attached

Field to store additional information that should be shared with the CSR

Once the request sent, Account becomes a **SAP Customer** and Account Status is updated to **Conversion Requested**. You must now wait the creation in SAP.

When the Account is locked under Status = **Conversion requested**, an information message appears on the account layout.

Once the account is created in SAP, the account status will be automatically updated to **Validated**

Account Record Type	Non SAP Customer [Change]
Partner Type	Sold-to & Ship-to
Partner Sub-Type	Sold-to & Ship-to
Phone	
Website	

System Information	
Created By	Arnaud Denewet 16/07/2015 10:48
Status	Conversion Requested
For Deletion	☐
Custom Links	Google Maps

Account CANDICE INGRAM

[Show Feed](#) [Click to add topics:](#) [i](#)

Account Detail

[Edit](#) [Delete](#) [Manage External Account](#) [C](#)

Account Information

i The account is pending creation in SAP. Please contact your CSR if the data is not correct.

Account Owner	Candice Ingram [Change]
Account Name	CANDICE INGRAM [View Hierarchy]
Corporate Group	

System Information	
Created By	Arnaud Denewet 16/07/2015 10:48
Status	Validated
For Deletion	☐
Custom Links	Google Maps

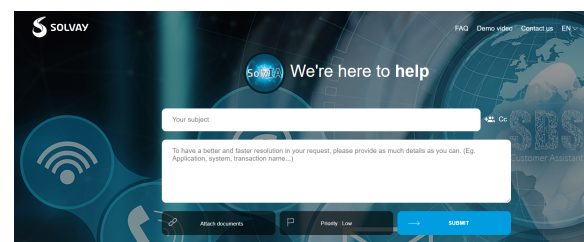
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Related articles

- [Account: Create a Prospect](#)
- [CSR Process - Customer Creation \(SAP\)](#)

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