

Account: Account Update

Overview

In this section, you will find information about how to request an update of an existing SAP account. This section focuses on process steps with Salesforce as starting point. Specific actions to be performed in SAP by customer service representatives are not described in this section.

Concerned profiles:

Sales - Customer Service Representatives (CSR)

Step By Step

If you desire to update the name or address of an account, you first have to *open* the account page, then *click* on **Customer Update request**

Account

BAYER CROPSCIENCE

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Account Detail

EditCustomer Update RequestSold & Pending Orders

▼ Account Information

Account Owner

SAP User [Change](#)

Account Record Type

SAP Customer

Account Name

BAYER CROPSCIENCE [View Hierarchy](#)

Partner Type

Sold-to & Ship-to

Corporate Group

BAYER

Partner Sub-Type

Sold-to & Ship-to

Cross GBU Key Account

☐

Phone

Confidential

☐

Website

▼ Address Information

Address

RUE DE RANSBEEK
BRUSSELS, Bruxelles 1120
Belgium

House Number 1

315

House Number 2

Region

EMEA



You must be part of the Accredited Team with read / Write access to the database

Enter the **information** you desire to update and then **click** on **Save**

User can assign the update request to a CSR...:

- From the Account Team
- Selected in the CRM
- User can also select a group of CSRs

The screenshot shows a form for updating account information. A red box highlights the CSR selection section, which includes dropdowns for 'CSR from the Account Team', 'CSR not part of the Account Team', and 'CSR Queue'. Below this, there are fields for 'Account Name', 'Country', 'Street', 'City', 'State', 'Zip/Postal Code', 'House Number 1', and 'House Number 2'. There is also a section for 'Address Local Language Update' with fields for 'Account Name (local language)', 'Language', 'Alphabet', 'Country Code (Local Language)', 'Street (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)'.

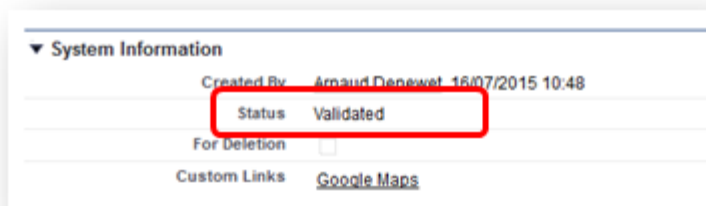
Once requested, the update request is recorded in Salesforce and you can consult the information

The screenshot shows the 'Request Detail' page for 'Req-0306'. It includes a 'Request Information' section with fields for 'Request Number', 'Owner', 'Account', and 'Account Status'. Below this is an 'Account Information Update' section with a 'To be deleted' checkbox and a 'Details for account deletion' message. The 'Address Information Update' section shows a comparison of 'Old' and 'New' address details. The 'Status' is 'Open' and the 'Account Status' is 'Update Requested'.

In the meantime, the account status *has been updated to Update Requested*. It is not possible to submit another update request.

The screenshot shows the 'System Information' section. It includes fields for 'Created By' (Amaud Denewet), 'Created At' (16/07/2015 10:48), 'Status' (Update Requested), 'For Deletion' (checkbox), and 'Custom Links' (Google Maps). The 'Status' field is highlighted with a red box.

Once the account is updated in SAP, the account status is automatically updated to **Validated**.



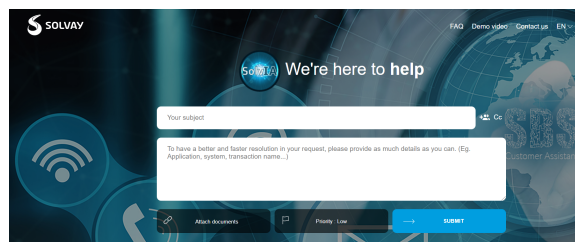
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Need help?

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