

Account: Related Account

Overview

In this section, you will find information about related accounts. The Related Accounts allows to link accounts from different legal structures and have real business connections in Salesforce

Concerned profiles:

- Sales - Customer Service Representatives (all except Strategic Marketing and Technical Teams & Sales Development)

Step By Step

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Definition & Objectives

Definition:

- The Related Accounts object is used to manage the relationship between accounts (Sold-to & Ship-to) in Salesforce and display incoterms and payment terms (coming from SAP) used during the last transactions with the customer.
- SFDC users will be able to link Accounts not belonging to the same legal structure and understand the real business connections between them that through SAP wouldn't be possible.
- In the Account page all connections will be displayed and immediate information of payment terms and Incoterms will be available for negotiations purposes.

Objective:

- The Related Accounts allows to link accounts from different legal structure and have real business connections in Salesforce

Relationship between 2 accounts

1
David opens the prospect for which you want to create a relationship

The screenshot shows the Salesforce 'Account Detail' page for 'BAYER CROPSCIENCE'. The page includes a navigation bar with links like 'Show Feed', 'Back to List: Opportunities', and various tabs for account management. The main content area is divided into sections: 'Account Information' and 'Address Information'. The 'Account Information' section displays fields for 'Account Owner' (Uma Brahmanaswaram), 'Account Name' (BAYER CROPSCIENCE), 'Corporate Group' (BAYER), 'Account Record Type' (Non SAP Customer), 'Partner Type' (Prospect), and 'Partner Sub-Type' (Sold-to & Ship-to). The 'Address Information' section shows the address: 'RUE DE RANSBEEK, BRUSSELS, Bruxelles 1120, Belgium', with house numbers 1 (315) and 2, and region 'EMEA'.

2

David scrolls down until the section Related Accounts and click on Create New Relationship

Account Detail [Edit](#) [Delete](#) [View Hierarchy](#) [Convert Prospect to Customer](#)

▼ Account Information

Account Owner	Amoud Dennewit (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
Confidential	☐	Phone	
		Website	

▼ Address Information

Address	Jan Emiel Mommaertslaan 14 Diegem, 1831 Belgium
Region	EU

▼ Address (local language)

Account Name (local language)	Street (Local Language)
Language	English
	Zip/Postal Code (Local Language)
	City (Local Language)
	State/Province (Local Language)
	Country Code (Local Language)

▼ RELATED ACCOUNTS

[Create New Relationship](#)

No Records To display

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David selects the related account and the GBU involved and click on Save

Related Account Edit [Save](#) [Save & New](#) [Cancel](#) [Help for this Page](#)

New Related Account

Related Account Edit [Save](#) [Save & New](#) [Cancel](#)

Information ! Required Information

Account	BAYER CROPSCIENCE 🔍	Related Account	BAYER S.A. ARGENTINA 🔍
GBU	Novocare 🔍		

[Save](#) [Save & New](#) [Cancel](#)

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David creates the record and click on the account name to come back to the account page

Related Account Detail

Account: BAYER CROPSCIENCE

Related Account: BAYER S.A. ARGENTINA

System Information

Created By: Arnaud Danewst 19/08/2015 15:44

Last Modified By: Arnaud Danewst 19/08/2015 15:44

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On the Account page, you can see you have successfully created a relationship

Action	Account	Related Account	Partner Type	Type	Address	GBU
Edit Delete	BAYER CROPSCIENCE	BAYER S.A. ARGENTINA	Sold-to	Non SAP Customer	RICARDO GUTIERREZ 3652 302156 MUNRO Argentina	Novacare

[Back to the top](#)

Related articles

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

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...)

Attach documents 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

