

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

Customize Page | Printable View | Help for this Page

Show Feed

[Back to List: Opportunities](#)

[Account Plan Associations \(0\)](#) | [Account Team \(1\)](#) | [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 \(0\)](#) | [Visit Reports \(0\)](#) | [Activity History \(0\)](#) | [Account History \(1+\)](#) | [Approval History \(2\)](#) | [Google Docs, Notes, & Attachments \(0\)](#)

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



Y
o
u
m
u
st
b
e
p
ar
t
of
th
e
A
c
c
o
u
nt
T
e
a
m
w
it
h
re
a
d
/
W
rit
e
a
c
c
e
s
s
to
re
q
u
e
st
a
c
u
st
o
m
er
u
p
d
ate

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 dropdown menus for 'CSR from the Account Team', 'CSR not part of the Account Team', and 'CSR Queue'. Below this, there are input fields for account details: Account Name, Country, Street, City, State/Province Code, Zip/Postal Code, Old House Number 1, and Old House Number 2. The 'Address Local Language Update' section is also visible, 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).

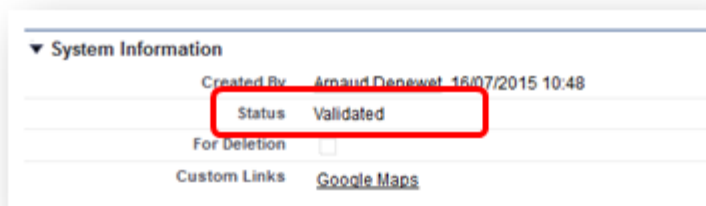
Once requested, the update request is recorded in Salesforce and you can consult the information

The screenshot shows the 'Request Detail' page for 'Req-0306'. It includes a 'Close Request' button and an alert: 'Your Update request has been submitted to the CSR. The Status of account is now "Update Requested" and will move to "Validated" once the change will be performed in SAP'. The page is divided into sections: 'Request Information' (Request Number: Req-0306, Status: Open, Owner: Uma Brahmanayagam, Account: BAYER CROPSCIENCE, Account Status: Update Requested), 'Account Information Update' (To be deleted: checked, CSR from the Account Team: Arnaud Denewet), and 'Address Information Update' (Account Name: BAYER CROPSCIENCE, Old Country: Belgium, Old Street: RUE DE RANSBEEK, Old City: BRUSSELS, Old State: Bruxelles, Old Zip/Postal Code: 1120, Old House Number 1: 315, Old House Number 2:).

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' (Arnaud Denewet, 16/07/2015 10:48) and 'Status' (Update Requested). There is also a 'For Deletion' checkbox and a 'Custom Links' section with a link to 'Google Maps'.

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



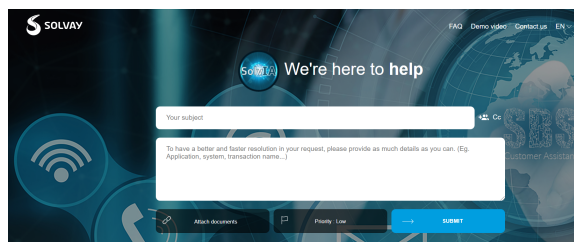
[Back to the top](#)

Related articles

- [Account: Presentation](#)
- [Account: Create a Prospect](#)
- [Account: Convert 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/>



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