

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)

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Step By Step

Definition & Objectives

Definition:

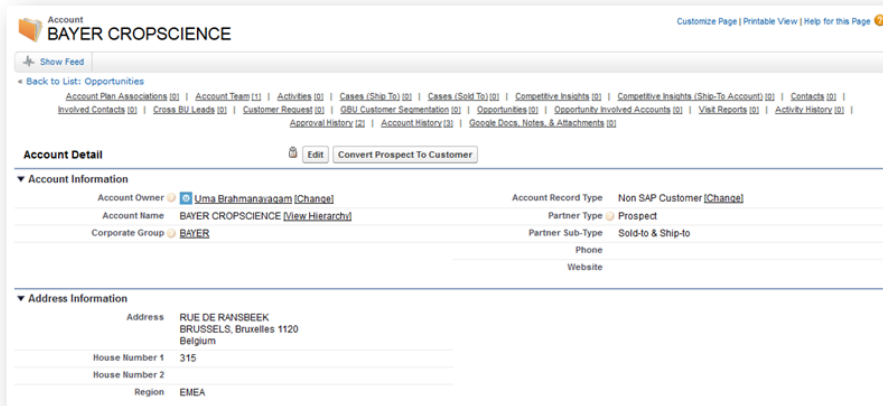
- The Related Accounts object is used to manage the relationship between accounts (Sold-to & Ship-to) in Salesforce and display incoterms and payment terms (coming from SAP) used during the last transactions with the customer.
- SFDC users will be able to link Accounts not belonging to the same legal 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



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	Amgud Denwest [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	<input type="checkbox"/>	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

3

David selects the related account and the GB U involved and click on Save

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

New Related Account

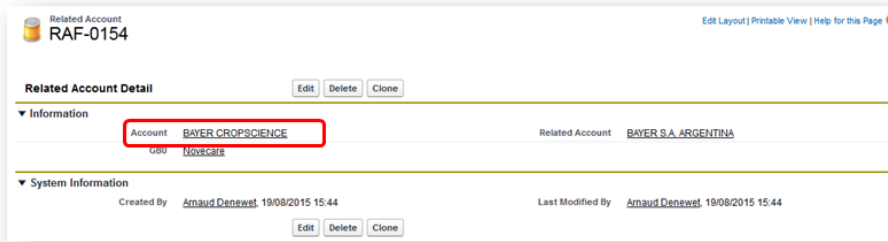
Information ! Required Information

Account	BAYER CROPSCIENCE	Related Account	BAYER S.A. ARGENTINA
GBU	Novecare		

[Save] [Save & New] [Cancel]

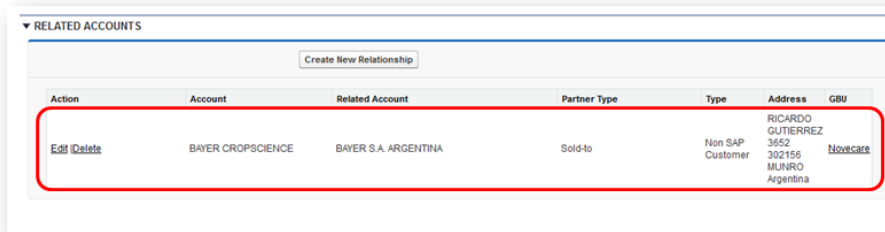
4

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



5

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



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Related articles

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

Need help?

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*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*