Account: Account Team

Overview

In this section, you will find information about account ownership & account team in Salesforce:

- Principles and business rules for account ownership
- How the account team is managed in Salesforce
- How to create a default account team

Account Ownership

Each Account in Salesforce must have one and only one “Account Owner”. This rule is in place differently depending if the account is a customer or a prospect:

- For **prospects**, Account Owner is the creator, the sales rep who created the prospect in Salesforce
- For **existing SAP customers**, Account Owner is “SAP User”, a generic name meaning the account is controlled by SAP.

Concerned profiles:

ALL

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Step By Step

Ownership

Business & Solution Rules

Account Owner

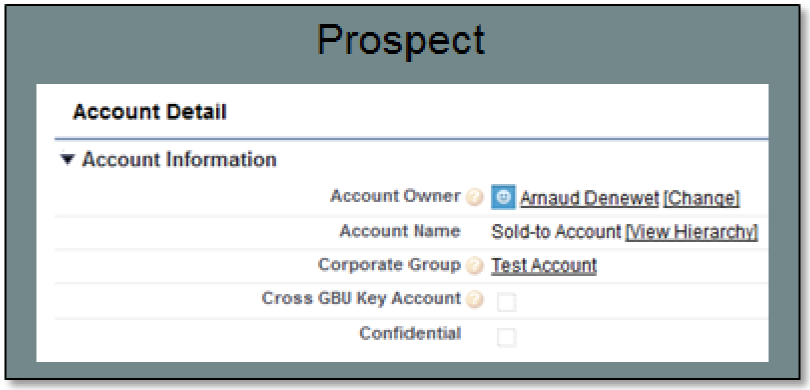
Each Account in Salesforce must have one and only one "Account Owner". This rule is in place differently depending if the account is a customer or a prospect:

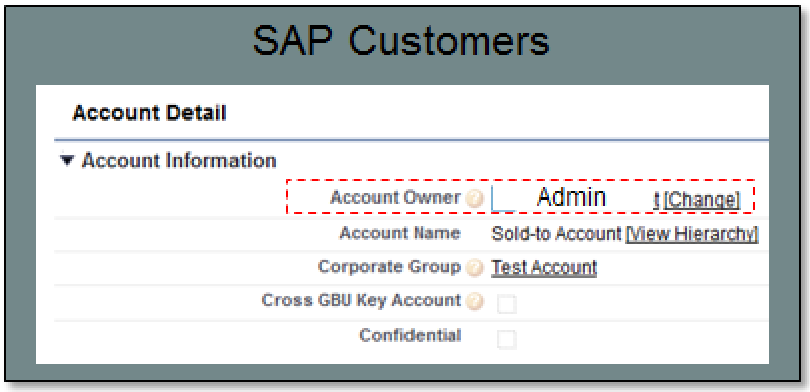
-For prospects, Account Owner is the creator, the sales rep who created the prospect in Salesforce
-For customers, Account Owner is "Admin User", a generic name meaning the account is controlled by SAP.
Consequences:

-After conversion, the Account Owner becomes an Account Team member with "Read/Write" access.
-As a consequence, he will only be able to add people with "Read" access in the account team

Roles & Responsibilities

The Account Owner is in charge of the maintenance of his accounts. He keeps the related data up to date and maintains the account team upon request from other BUs /GBUs





Account Visibility

*Confidential accounts can only be seen by Owner and account team members

	All sales users	Account Owner / GBU data stew. (& above)	Account Team Member with Read access (& above)	Account Team Member with Read/Write access (& above)
View an Account	√*	√	√	√
Create an Account	√	√	√	√
Submit a Convert / Update request	×	√	×	√
Edit an Account (i.e. update account hierarchy)	×	√	×	√
Delete an Account	×	×	×	×

Account team

Business & Solution Rules

-Each Account has an “Account Team” which lists all the Solvay users interacting with the account. These users have a “Role” and can be from multiple GBUs.
Account team roles:
-Account Manager SAP
-Customer Service Representative SAP
-Account Manager
-Key Account Manager
-Customer Service Representative
-Sales Support
-Business Development
-Technical Service
-Product Manager
-Marketing

Account Team Add | Add Default Team | Display Access | Delete All — Account Team Hel

Action	Team Member	Team Role
Edit | Del	Arnaud Denewet	Account Manager
Edit | Del	Philippe Leroy	Sales Support
Edit | Del	Philippe Renier	Account Manager
Edit | Del	Pieter Hauttekeete	Customer Service Representative

Business rules & Interface for **customers**:
•An interface is set up from SAP to Salesforce in order to update the Account Teams in Salesforce
•Users synchronized from SAP will be added to the account team, and will receive one of these 2 roles:
•“Account manager (SAP)”
•“Customer Service Representatives (SAP)”
•In case the user is already in the Account Team, he will remain in the account team and his/her role will be updated in Salesforce to reflect SAP interface
•Users that would be in the Salesforce account team and not in SAP won’t be updated by the interface

> The Account team is also updated with the SAP team with the value (SAP) on the user role.
>
> Only the current role in SAP is updated. (the previous one is removed from the account team in Salesforce)
>
> *No need to remove manually the SAP role anymore*

Business rules for **prospects**:
•For prospects, it is the Account Owner who is in charge to add or remove in the “account team” the accc
define their rights (with “Read/Write” or only “Read” Account Access).

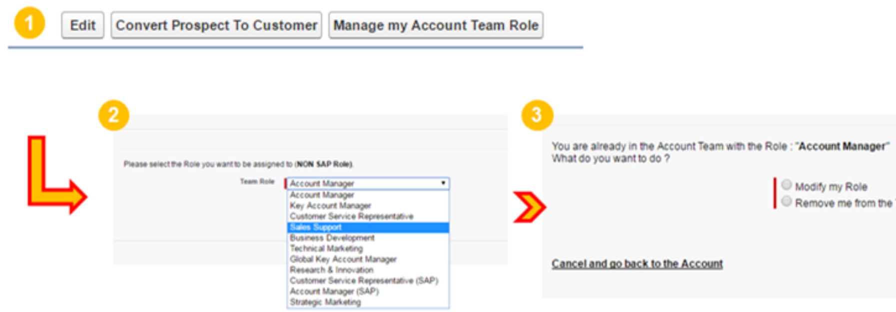
Each member of the account team with “Read/Write” access on the Account can add other members in t
member, now, has "Read/write" access => **New in Winter 17' Release**

Account Team Add | Add Default Team | Display Access | Delete All

Action	Team Member	Team Role
Edit | Del	Chie Fukuoka	Account Manager
Edit | Del	Keiko Homma	Customer Service Representative (SAP)
Edit | Del	Kiyomi Ando - INACTIVE	Account Manager
Edit | Del	Shuzo ANDO	Account Manager (SAP)

Now, if you would like to be added to a specific Account Team or to manage your already set upped role on an Account, you can click on the "Manage My Account Role" button on an Account page and choose an action ("Modify my role" or 'Remove me from the team").

=> New in Winter 17' Release



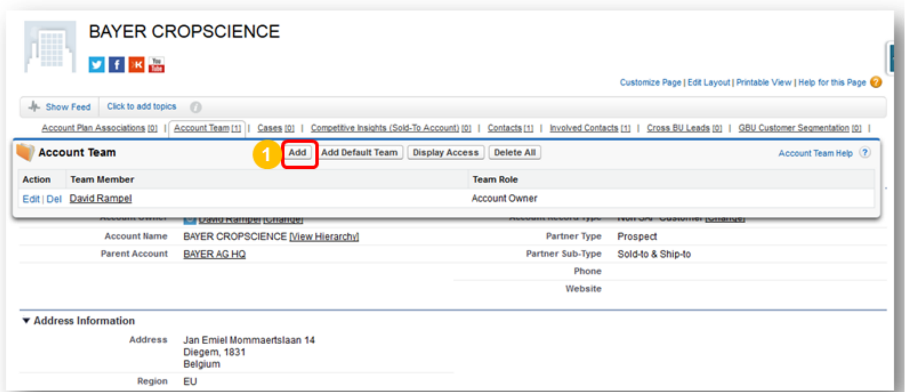
On customer accounts, GBU Data Steward keeps the possibility to add users in the account team with read/write access

	All sales users	Account Owner / GBU data stew. & above	Account Team Member with Read access (& above)	Account Team Member with Read/Write acces (& above)
Add a user in the account team with "Read" right	×	√	×	√
Add a user in the account team with "Read/Write" right	×	√	×	×
Remove a user from the account team	×	√	×	×

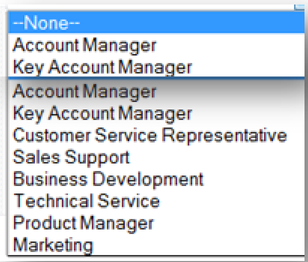
Update the Account Team

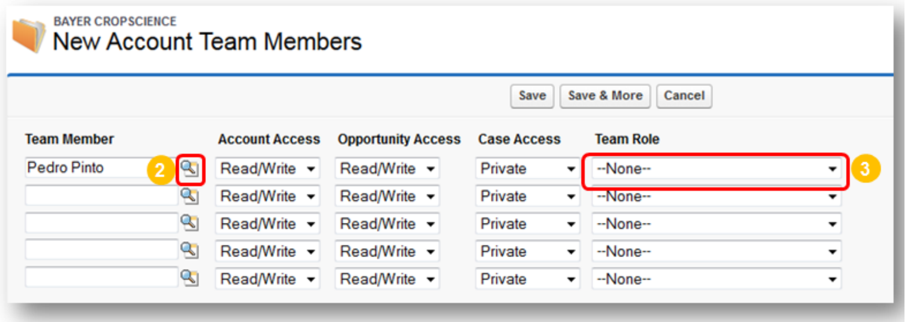
The account team identifies the ones interacting with an account. It allows to quickly find his accounts by using the "My account" list view.

As Account Owner of a prospect account, you can add add someone in the account team. To do so, hoover on Account Team, and click "Add"



Identify the team member to be added, and assign him a “team role”
•In the below example, we add Pedro with Read/Write accesses for account and opportunity, while only Private Access to the Case.
•Roles requires one of the following options:

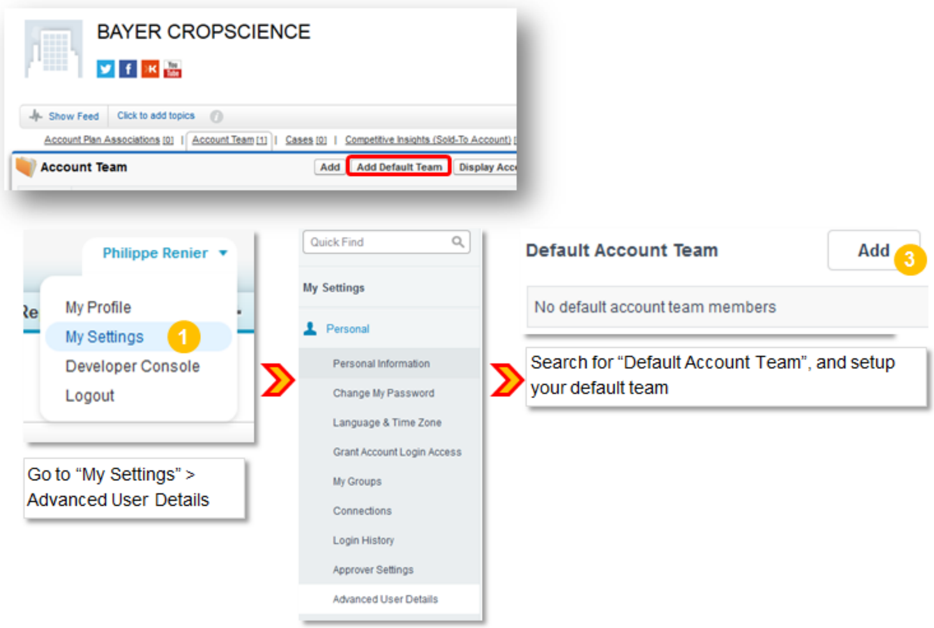




Create my default account team

Default your account team

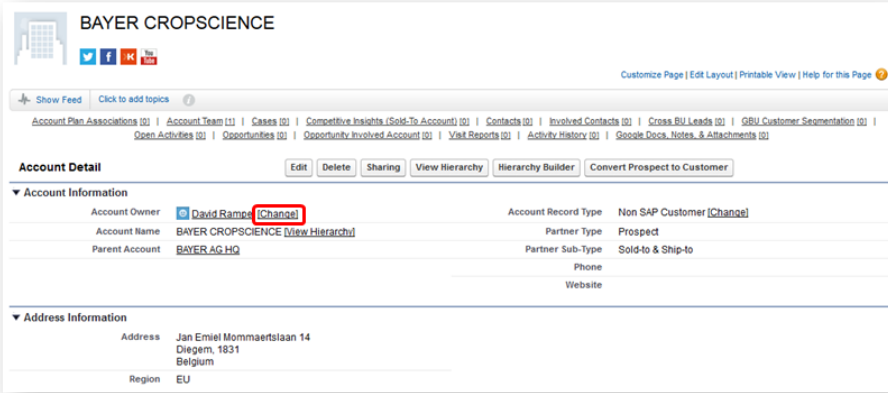
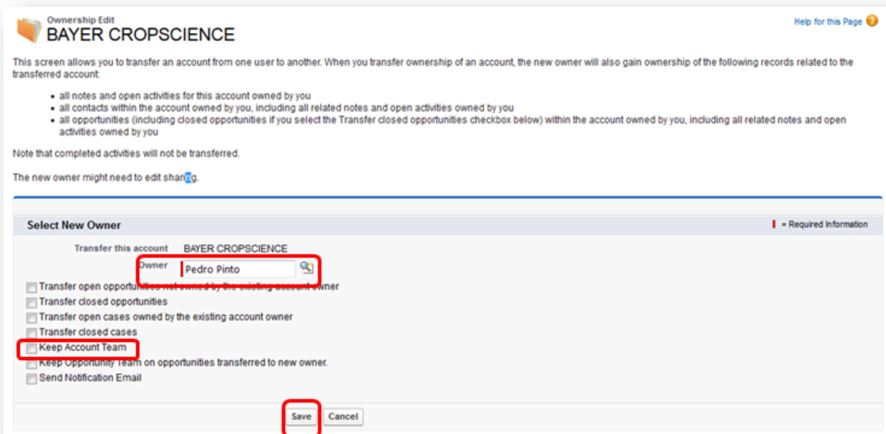
If you are working with the same team on some accounts, you may setup your “default account team”. This will save you some time!



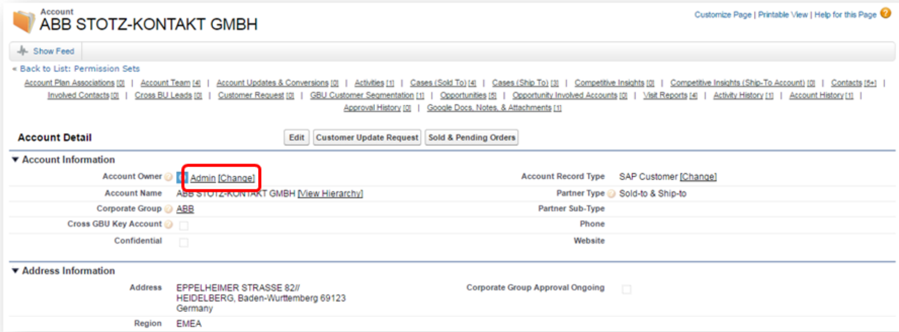
Change Account Owner

The account owner is by definition the account manager from the GBU with the largest share of sales.

There are two types of Account Owner

For a Prospect (Non SAP Account) the Owner is the User who have created the Account If you are the owner, but need to transfer the account ownership of your prospect, click on “Change”	
Search for the adequate account owner, tick the **checkbox** on “Keep Account Team” and click on **Save**. Attention!! Always check the line “Keep Account Team”, o	

therwise CSR and other Sales Managers will be removed from the team after the transfer.

For SAP Accounts, after the Account has been converted, the Owner is always a generic **Admin** User	

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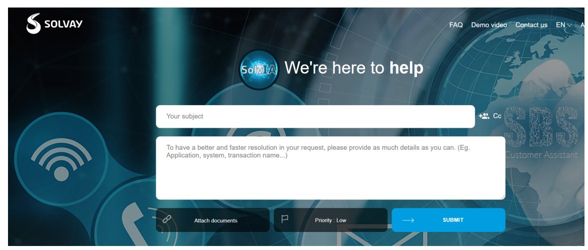
Related articles

- Account: Presentation
- Account: Create a Prospect
- Account: Account Update

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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