

Account: Convert a Prospect

Overview

In this section, you will find information about the end-to-end prospect conversion process. This section focuses mainly on the process steps with Salesforce as starting point. The process for account creation in SAP is covered in another section.

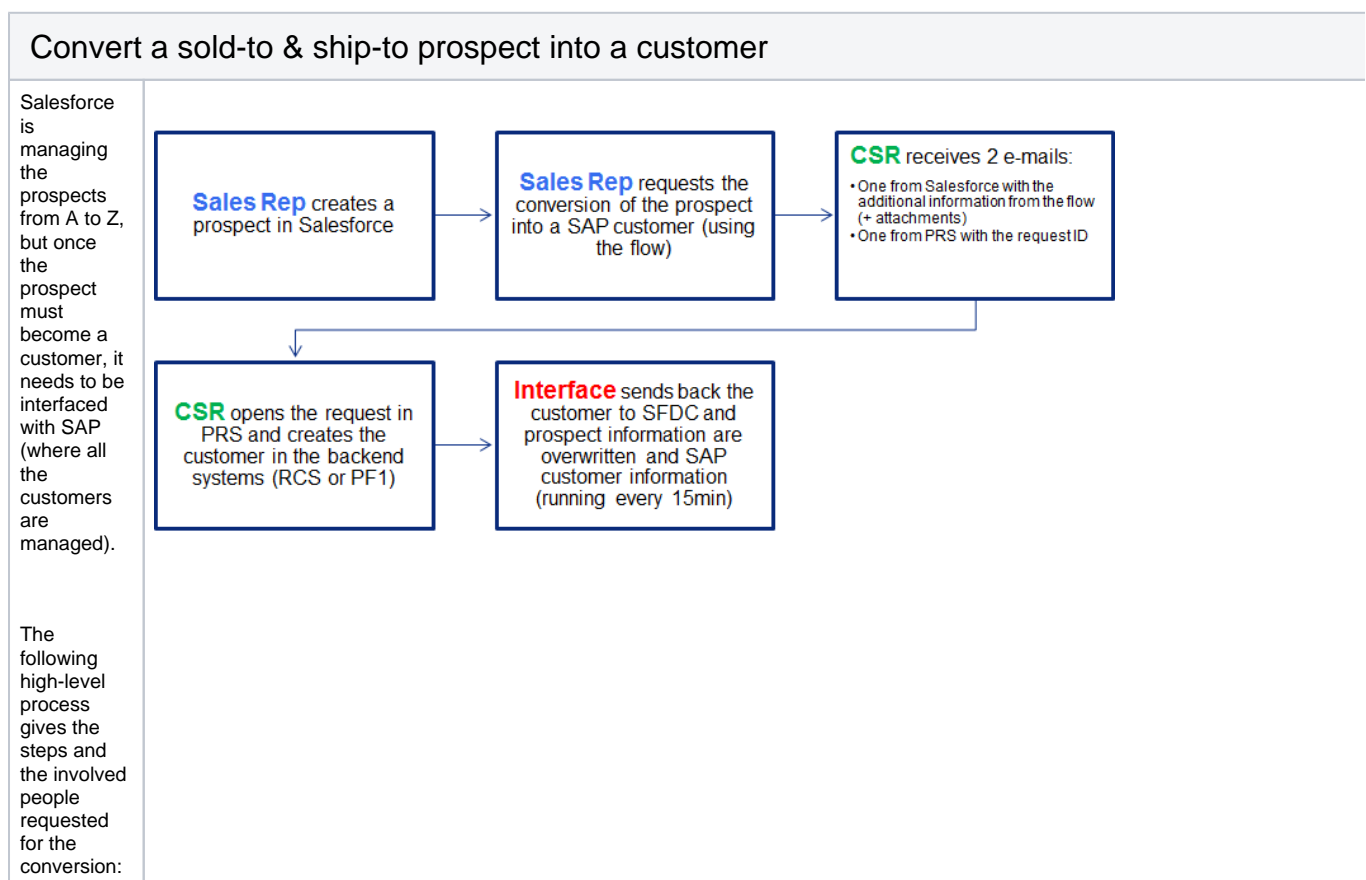
Concerned profiles:

Sales - Customer Service


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Step By Step



Example of the email received by the CSR from Salesforce and the request in PRS



Dear CSR,

Arnaud Denewet has requested the conversion of the prospect "BASF Brussels" into a customer in SAP. Please find below the details of the request:

General information for BASF Brussels
 Account Name: BASF Brussels
 Account Address: Kortenberglaan 60, 1000 Brussel, Belgium
 Account Type: Sold-to & Ship-to
 Account Salesforce ID: a0F240000036WbK

Sold-to contact:
 Name: Michel Lecompte
 Phone: +32 2 262 04 12
 Email: Michel.Lecompte@basfbelgium.com
 Function: Purchase Manager
 Department: Purchase

Shipping conditions for BASF Brussels
 Full/Partial Loads: Full Load
 Delivery Hours: 08-18
 Incoterm 1: DDP
 Incoterm 2: Brussels



Supply Chain contact:
 Name: Louis Bertrant
 Phone: +32 465 78 76 98
 Email: louis.bertrant@basfbelgium.com

Additional Ship-to account for BASF Brussels
 Account Name: BASF Anvers
 Account Address: Scheldelaan 600, 2040 Antwerpen, Belgium
 Account Salesforce ID: a0F240000036W11

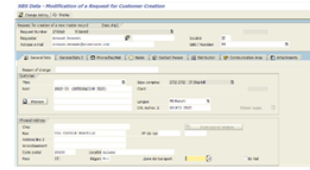
Shipping Conditions:
 Full/Partial Loads: Partial Loads
 Delivery Hours: 09-18
 Incoterm 1: DDP
 Incoterm 2: Anvers

Supply Chain contact:
 Name: Philip Cano
 Phone: +32 432 56 76 87
 Email: philip.cano@basfbelgium.com

3. Billing Information
 The Sold-to account is also a Bill-to account: Yes

 
 Account Letterhead.jpg (1) Account Letterhead.jpg (2)

Draft account created by SFDC in PRS



- Fields pre-filled via integration:
- Customer Name (Capitalized)
 - Address (Capitalize)
 - Local Address
 - CSR Name
 - Account Partner Type
 - Salesforce ID

Section to be repeated for all additional ship-to accounts created on top of a Sold-To & Ship-To



Account **BAYER CROPSCIENCE** Customize Page | Printable View | Help for this Page

Show Feed

Back to List: Opportunities

Account Plan Associations (0) | Account Team (1) | Activities (0) | Cases (Ship To) (0) | Cases (Sold 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) | Vint Reports (0) | Activity History (0) | Approval History (0) | Account History (0) | Google Docs, Notes, & Attachments (0)

Account Detail Edit Convert Prospect To Customer

Account Information

Account Owner	Uma Brahmanavaram Change	Account Record Type	Non SAP Customer Change
Account Name	BAYER CROPSCIENCE New Hierarchy	Partner Type	Prospect
Corporate Group	BAYER	Partner Sub-Type	Sold-to & Ship-to
		Phone	
		Website	

Address Information

Address	RUE DE RANISSECK BRUSSELS, Bruxelles 1120 Belgium
House Number 1	315
House Number 2	
Region	EMEA

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- A c c o n t a c t o r a n i n v o l v e d c o n t a c t r e l a t e d t o t h e p r o s p e c t

*Open the **prospect** that you want to convert as a customer. Note that it will trigger the creation of the account in SAP, and inform your CSR!*

Click on the button **Convert Prospect to Customer**

Account: BAYER CROPSCIENCE

Account Detail

Convert Prospect to Customer

Account Information

Account Owner: Uma Brahmanayagam (Change)

Account Name: BAYER CROPSCIENCE (View Hierarchy)

Corporate Group: BAYER

Account Record Type: Non SAP Customer (Change)

Partner Type: Prospect

Partner Sub-Type: Sold-to & Ship-to

Address Information

Address: RUE DE RANSEBEEK, BRUSSELS, Bruxelles 1120, Belgium

House Number 1: 315

House Number 2:

Region: EMEA

Select the **CSR** of **group of CSR** to receive the request

Choose an option to identify your CSR

Options

- Select my CSR from the account team
- Search for my CSR based on his/her name
- I am part of a GBU working with CSR Teams

Depending of the selection, next section is different and allows you to record the details:

Select your CSR from the Account Team

My CSR: Philippe Renier

Select your CSR by searching on his/her name

My CSR: [Search]

Select your CSR Team

Identify your CSR Team: Peroxides NA

Choose if you prefer just **sending a document** or going through the **full flow**

How do you want to fill in the conversion request?

- I have prepared a creation form and can attach it
- Ask me the details required and I will provide what I know (incl. attachments)

Back Save/Draft Next

✓ Have you seen the button "Save"

e / D r a f t " ? T h i s b u t t o n a l l o w s y o u t o s t o p t h e c o n v e r s i o n f l o w a n d r e s t a r t l a t e r , w i t h a l l t h e d a t a r e c o r d e d !

Confirm if the account must be a **sold-to & ship-to** or only a **ship-to**

Confirm the type of the account to convert:

Sold-To & Ship-To

Ship-To

[Back](#) [Save/Draft](#) [Next](#)

Select if a quote exists and can be used to take some shipping details (incoterms and location)



If the value is "Yes", following in this section appears allow in getting the user to select an existing quote

Do you wish to copy the incoterms and payment terms from an exiting quote?

Do you wish to copy the incoterms and payment terms from an exiting quote?

Yes

No

Display quotes created after:

Quote

Define if the account requires a different delivery address or not.

Does this account require a different delivery address

Yes

No

Does the ship-to (delivery address) already exist in SFDC?

Yes

No



If the value is "Yes", following section appears asking the user if the help - to account exist or must be created

Record the shipping details and the supply chain contact details

The screenshot shows a form titled "Provide the delivery details for this shipping address". It contains several input fields: "Shipping Conditions", "Delivery Hours", "Incoterms 2", "Full/Partial Loads", "Incoterms 1", "Sup. Ch. Contact Name", "Sup. Ch. Contact Phone", "Sup. Ch. Contact First Name", and "Sup. Ch. Contact Email". At the bottom, there are three buttons: "Back", "Save/Draft", and "Next". A red rounded rectangle highlights the entire form area.

You can precise if the customer is tax exempt or not

=> New in Winter 17' Release

The screenshot shows a form titled "Tax Exempt:". It contains a single checkbox labeled "Is customer Tax Exempt" which is currently unchecked.

You can add a Financial contact with new tel/fax /email for any new payer

=> New in Winter 17' Release

The screenshot shows a form titled "Provide a Financial Contact:". It has a table-like structure with input fields for "Financial Contact" (with a search icon), "Phone", "Email", "First Name", and "Last Name".

You can add a new contact with tel/fax/email for the person that will receive the safety data sheet

=> New in Winter 17' Release

The screenshot shows a form titled "Provide a Safety Data Contact:". It has a table-like structure with input fields for "Safety Data Contact" (with a search icon), "Phone", "Email", "First Name", and "Last Name".

You can add a contact for the person that should receive the certificate of analysis, or COA, is a certification of the quality of the product shipped. We have to set up the person who should receive this certification when the customer is created in SAP

=> New in Winter 17' Release

Provide a COA Contact:

COA Contact	<input type="text"/>	First Name
Phone		Last Name
Email		

Define the bill-to details



If the evaluation is "Yes", no section appears. If the evaluation is "No", follow

Is your Sold-To also a Bill-To account?

Yes
 No

Identify the Bill To:

Bill-To Name	<input type="text"/>	Bill-To Street	<input type="text"/>
Bill-To Postal Code	<input type="text"/>	Bill-To Country	<input type="text"/>
Bill-To Region	<input type="text"/>		

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Define the payer details



If the value is "Yes", no section appears. If the v

Is your Sold-To also the Payer?

Yes
 No

Back SaveDraft Next

Is your Sold-To also the Payer?

Yes
 No

Identify the Payer:

Payer Name

Payer Country

Payer Street

Payer City

Payer State

Payer Zip/Postal Code

Provide the payment Details:

Payment terms

Payment Mode

Estimated Volume

Unit of Measure

WAT Number/Tax Jurisdictional Code

Currency

Estimated Turnover

Credit Limit Requested

Does the Payer contact already exist in SF DC?

Yes
 No

Customer interested in electronic invoicing:

Yes
 No

Invoice Email

Back SaveDraft Next

Several fields to detail the Payer Address

New field to save the Invoice Email

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Search for a potential document to attach. If no attachment, *click* directly on **Next**



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If needed, you can attach additional documents to your request

Select File No file chosen

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Review the details of the request and once confirmed, click on **Submit**

Requested Data for Account Conversion

Ship-To & Sold-To
No Additional ship To Required

General information
Account Name: TEST ACCOUNT FF 2
Account Address: WEQWEQW QWECE Afghanistan
Account Type: Sold-ToShip-To
CSR : Filipe Freitas

Sold-to contact:
Name: Filipe FF
Phone: 22222222
Email:
Function: Specialist
Department: Quality

Shipping conditions
Shipping Conditions:
Full/Partial Loads:
Delivery Hours:
Incoterm 1:
Incoterm 2:

Supply Chain contact:
Name:
Phone:
Email:

Additional Ship-to account

Billing Information
The Sold-to account is also a Bill-to account: Yes

Payer Information
The Sold-to account is also a Payer account: Yes
Payment terms:
Currency: EUR
Payment mode:
Estimated Turnover: EUR 2.123,00
Estimated Volume: 1231
Unit of Measure:
Credit Limit Requested: EUR 1.231,00
VAT Number / Tax jurisdictional code:
Customer interested in electronic invoicing?: No

Payer contact:
Name: Filipe FF
Phone: 22222222
Email:

Attachment List

Attachment Name	Link
Agenda 17th.png	View

Additional Information
Specific Information

[Back](#) [Cancel](#) [Submit](#)

List of files attached

Field to store additional information that should be shared with the CSR

Once the request sent, Account stays a **Non SAP Customer** but not editable anymore and Account Status is updated to **Conversion Requested**. You must now wait the creation in SAP.

Account Record Type Non SAP Customer [\[Change\]](#)

Partner Type	Sold-to & Ship-to
Partner Sub-Type	Sold-to & Ship-to
Phone	
Website	

System Information

Created By	Amaud Deneval	16/07/2015 10:48
Status	Conversion Requested	
For Deletion	<input type="checkbox"/>	
Custom Links	Google Maps	

Account
CANDICE INGRAM

[Show Feed](#) [Click to add topics:](#) [?](#)

Account Detail [Edit](#) [Delete](#) [Manage External Account](#) [Cc](#)

Account Information

i The account is pending creation in SAP. Please contact your CSR if the data is not correct.

Account Owner [+](#) [Candice Ingram](#) [\[Change\]](#)

Account Name [CANDICE INGRAM](#) [\[View Hierarchy\]](#)

Corporate Group [?](#)

When the Account is locked under Status = **Conversion requested**, an information message appears on the account layout.

Once the account is created in SAP, the account status will be automatically updated to **Validated**

▼ System Information

Created By: Arnaud Denewet, 16/07/2015 10:48

Status: Validated

For Deletion:

Custom Links: [Google Maps](#)

Convert a ship-to prospect into a customer



BAYER CROPSCIENCE

Account Plan Associations (0) | Account Team (1) | Cases (0) | Competitive Insights (Sole-To-Account) (0) | Contacts (0) | Involved Contacts (0) | Cross BU Leads (0) | GBU Customer Segmentation (0) | Open Activities (0) | Opportunities (0) | Opportunity Involved Account (0) | Visit Reports (0) | Activity History (0) | Google Docs, Notes, & Attachments (0)

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

▼ Account Information

Account Owner	David Rampeel (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 & Ship-to
		Phone	
		Website	

▼ Address Information

Address	Jan Emiel Mommaertsiaan 14 Diegem, 1831 Belgium
Region	EU

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• A c c o n t a c t o r a n i n v o l v e d c o n t a c t r e l a t e d t o t h e p r o s p e c t

Open the **prospect** that you want to convert as a customer. Note that it will trigger the creation of the account in SAP, and inform your CSR!

Click on the button **Convert Prospect to Customer**

BAYER CROPSCIENCE

Account Plan Associations (0) | Account Team (1) | Cases (0) | Competitive Insights (Self-To Account) (0) | Contacts (0) | Involved Contacts (0) | Cross BU Leads (0) | GBU Customer Segmentation (0) | Open Activities (0) | Opportunities (0) | Opportunity Involved Account (0) | Visit Reports (0) | Activity History (0) | Google Docs, Notes, & Attachments (0)

Account Detail Edit Delete Sharing View Hierarchy Hierarchy Builder **Convert Prospect to Customer**

▼ Account Information

Account Owner	David Rampele (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 & Ship-to
		Phone	
		Website	

▼ Address Information

Address	Jan Emiel Mommaertsiaan 14 Diegem, 1831 Belgium
Region	EU

Select the CSR of group of CSR to receive the request

Choose an option to identify your CSR

Options

- Select my CSR from the account team
- Search for my CSR based on his/her name
- I am part of a GBU working with CSR Teams

Depending of the selection, next section is different and allows you to record the details:

Select your CSR from the Account Team

My CSR: Philippe Renier

Select your CSR by searching on his/her name

My CSR: [input field]

Select your CSR Team

Identify your CSR Team: Peroxides NA

Choose if you prefer just sending a document or going through the full flow

How do you want to fill in the conversion request?

- I have prepared a creation form and can attach it
- Ask me the details required and I will provide what I know (incl. attachments)

Back Save/Draft Next

Have you seen the button "Save / Draft"? This button allows

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Confirm if the account must be a **old-to & ship-to** or only a **ship-to**

Confirm the type of the account to convert:

Old-To & Ship-To

Ship-To

Define the sold-to related to the sold-to and the shipping details

Define the Sold-To

Sold To

Shipping Information Section

Shipping Conditions Full/Partial Loads

Delivery Hours Incoterm 1

Incoterm 2

Supply Chain Contact Section

Supply Chain Contact Phone Supply Chain Contact First Name

Supply Chain Contact Email Supply Chain Contact Name

Search for a potential document to attach. If no attachment, click directly on **Next**

If needed, you can attach additional documents to your request

Select File No file chosen

Review the details of the request and once confirmed, click on **Submit**

Requested Data for Account Conversion

Ship-To & Sold-To

No Additional ship To Required

General information

Account Name: TEST ACCOUNT FF 2
Account Address: WEQWEQW QWEQE Afghanistan
Account Type: Sold-ToShip-To
CSR : Filipe Freitas

Sold-to contact:
Name: Filipe FF
Phone: 22222222
Email:
Function: Specialist
Department: Quality

Shipping conditions

Shipping Conditions:
Full/Partial Loads:
Delivery Hours:
Incoterm 1:
Incoterm 2:

Supply Chain contact:
Name:
Phone:
Email:

Additional Ship-to account

Billing Information

The Sold-to account is also a Bill-to account: Yes

Payer Information

The Sold-to account is also a Payer account: Yes

Payment terms:
Currency: EUR
Payment mode:
Estimated Turnover: EUR 2.123,00
Estimated Volume: 1231
Unit of Measure:
Credit Limit Requested: EUR 1.231,00
VAT Number / Tax jurisdictional code:
Customer interested in electronic invoicing?: No

Payer contact:
Name: Filipe FF
Phone: 22222222
Email:

Attachment List

Attachment Name	Link
Agenda 17th.png	View

Additional Information

Specific Information

List of files attached

Field to store additional information that should be shared with the CSR

Once the request sent, Account becomes a **SAP Customer** and Account Status is updated to **Conversion Requested**. You must now wait the creation in SAP.

Account Record Type	Non SAP Customer [Change]
Partner Type	Sold-to & Ship-to
Partner Sub-Type	Sold-to & Ship-to
Phone	
Website	

System Information	
Created By	Arnaud Denewet 16/07/2015 10:48
Status	Conversion Requested
For Deletion	<input type="checkbox"/>
Custom Links	Google Maps

Account CANDICE INGRAM

Show Feed Click to add topics: ?

Account Detail

Edit Delete Manage External Account

Account Information

The account is pending creation in SAP. Please contact your CSR if the data is not correct.

Account Owner Candice Ingram [Change]

Account Name CANDICE INGRAM [View Hierarchy]

Corporate Group

When the Account is locked under Status = **Conversion requested**, an information message appears on the account layout.

Once the account is created in SAP, the account status will be automatically updated to **Validated**

System Information	
Created By	Arnaud Denewet 16/07/2015 10:48
Status	Validated
For Deletion	<input type="checkbox"/>
Custom Links	Google Maps

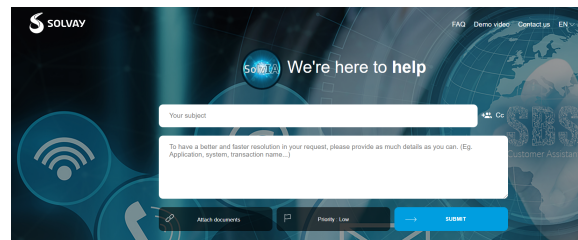
[Back to the top](#)

Related articles

- Account: Create a Prospect
- CSR Process - Customer Creation (SAP)

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