

1. Account & Contact Onboarding

Overview

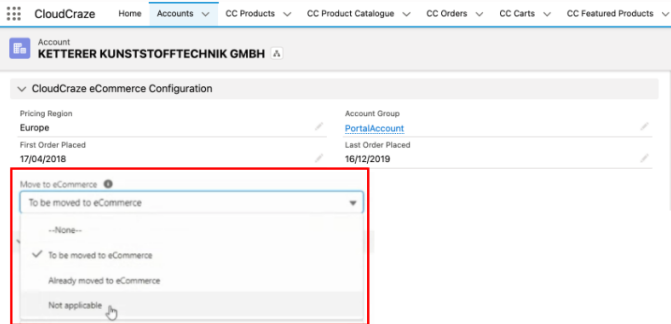
Concerned profiles:

[SALES REPS](#) [CSR](#) [DATA STEWARD / ADMIN](#) OR "**ALL**"

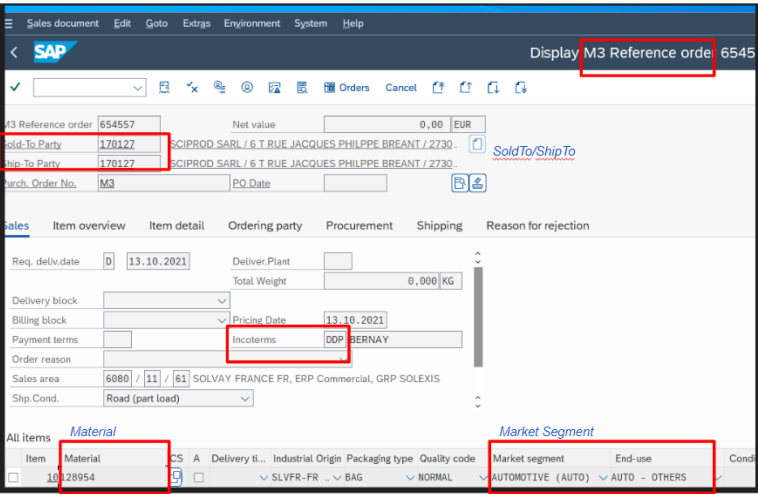
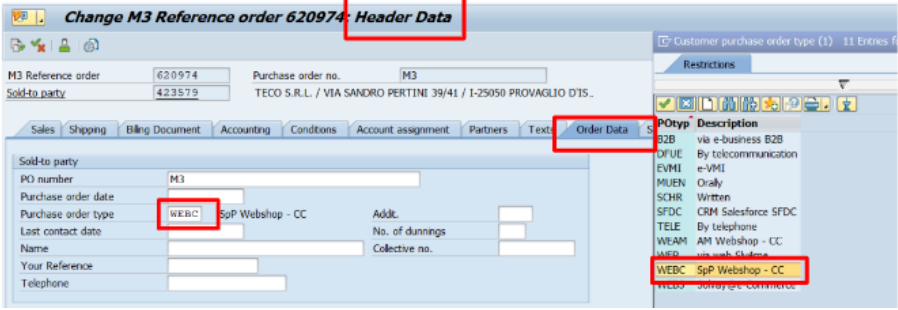
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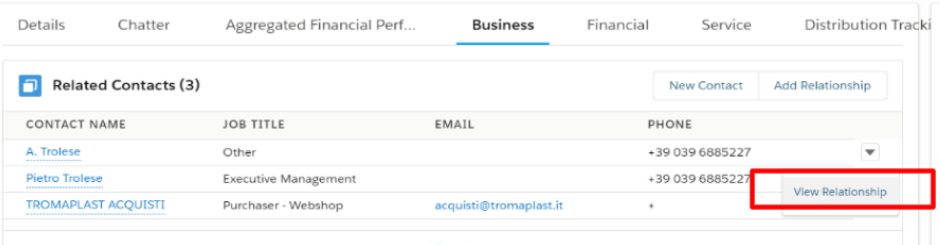
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Step-By-Step

Step 1 - ICARE (Sales Reps)	
SALES REPS	
1.1 Identify customer candidate account	
1.2 Send to CSR EMEA (nicoletta.bagnara-ext@syensqo.com) APAC flora.huang@syensqo.com (Fei) yun.shao@syensqo.com NAM	Email Template from SalesRep to CSR Dear CSR, Please prepare the following account(s) for the Webshop. Account ID in Icare: (link to the account) Contact ID in Icare: (who needs to be able to order products via webshop)
1.3 Update the move the field "Moved to ecommerce" to the value "To be moved to ecommerce"	Up Flag the selected target accounts as « Targeted Account » in SFDC account page  NOTE that there are 4 choices: To be moved to eCommerce Already moved to eCommerce To be moved to Distribution Already moved to Distribution

Step 2 - SAP (CSR)	
CSR	
1 . 1	Check what is the SAP number matching the Salesforce Account (If not existing Create the SOLDTO)

1 Verify/Enter M3 for Webshop (at least one per Ship To) & 2 check >Material list is correct >Check only in material is found 1 time for all tagged M3s of a Ship To >Markets segment on material lines (optional)	
1 Tag the M3 > Header Data > 2 Purchase Order Type > WEBC 3 (SpP Webshop - CC)	Tag the M3 in SAP 

Step 3 - ICARE (CSR) CSR	
1 Go to ICARE. Go to the Account Page, To Business Tab > & 1 View Relationship of the contact	

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1. Tick "Start Portal Onboarding", "Send Portal Invitation" and "Prices Visible". Then press "Save".

Additional info

- Start portal onboarding: starts backend process of setting up account
- Send portal invitation: portal sends the invitation email
- Prices visible ensures that the customer can see prices in the portal during order entry
- SAP configuration exists: a field that the system automatically ticks (during the night batch) once the account has been set up properly in SAP (M3 tag)

NOTE: To click the above fields, SAP configuration exists must be ticked. This is not a box you can tick.

iCARE Lightning Home Chatter Accounts Contacts Meeting Reports

Account Contact Relationship
Romina Marotta

Related Details

Account Contact Relationship Information

Account: KETTERER KUNSTSTOFFTECHNIK GMBH
Contact: Romina Marotta
Roles: Direct

SpP Webshop

Start Portal Onboarding	Prices Visible
☒	☒
SAP Configuration Exists	SAP Configuration Status
☒	☒
Send Portal Invitation	
☒	

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Troubleshooting Customer Onboarding

Check the Onboarding Status Global Report link [here](#) in case the email is not going out.

NOTE: Step 1-7 all need to have a check mark or a region in order for step 8 (send portal invitation) to be possible. If one step is missing then the email will not send.

Report: Account and Contact Relationship
Onboarding Status Global

	1	2	3	4	5	6	7	8		
	Pricing Region	Prices Visible	Sold To Address Exist	Ship To Address Exist	Bill To Address Exist	M3 Configuration Exists	SAP Configuration Exists	Send Portal Invitation	User Creation Date	First Login
1	China GCT	☐	☐	☐	☐	☐	☐	☐	-	-
2	North America	☐	☐	☐	☐	☐	☐	☐	-	-
3	Europe	☐	☐	☐	☐	☐	☐	☐	-	-
4	Europe	☐	☐	☐	☐	☐	☐	☐	-	-
5	Europe	☒	☐	☐	☐	☒	☐	☒	23/03/2021	23/03/2021
6	Europe	☐	☐	☐	☐	☒	☐	☐	-	-
7	Europe	☒	☐	☐	☐	☒	☐	☒	10/02/2021	10/02/2021
8	China GCT	☐	☐	☐	☐	☒	☐	☐	-	-
9	Europe	☐	☐	☐	☐	☒	☐	☒	28/01/2021	28/01/2021
10	South-East Asia	☐	☐	☐	☐	☐	☐	☐	-	-
11	South-East Asia	☐	☐	☐	☐	☐	☐	☐	-	-
12	South-East Asia	☐	☐	☐	☐	☐	☐	☐	-	-
13	South-East Asia	☐	☐	☐	☐	☐	☐	☐	-	-
14	South-East Asia	☐	☐	☐	☐	☐	☐	☐	-	-
15	South-East Asia	☐	☐	☐	☐	☐	☐	☐	-	-

SF SF SAP SAP SAP SAP SAP automatic

1 . 4	User will receive Welcome email inviting them to change password within 24h	Di : Specialty Polymers <jocciab@polymers.smg@syensqo.com> Date: mon, 5 jun 2024, 15:00 Subject: Sandbox: Welcome to Specialty Polymers Webshop To: nocito@gmail.com <nocito@gmail.com>  Dear JC, Welcome to your new customer portal! Thank you for signing up to Syensqo Specialty Polymer's customer portal. Designed to make your life easier and more convenient. If you have any questions or issues with your account, please contact our support team via julia.muscolino@syensqo.com. Many thanks! Your Specialty Polymers team Log in here USERNAME: nocito@gmail.com PASSWORD: Syensqo_2024_Start IMPORTANT NOTE: Please remember to <change your password> after you login. USERNAME nocito@gmail.com PASSWORD Syensqo_2024_Start www.syensqo.com

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