1. Account & Contact Onboarding

Overview

Concerned profiles:

SALES REPS CSR DATA STEWARD / ADMIN OR "**ALL**"

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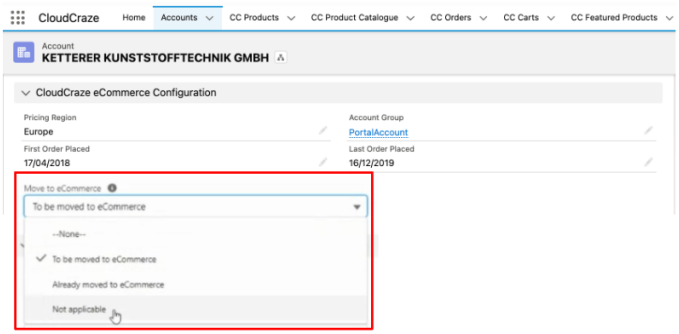
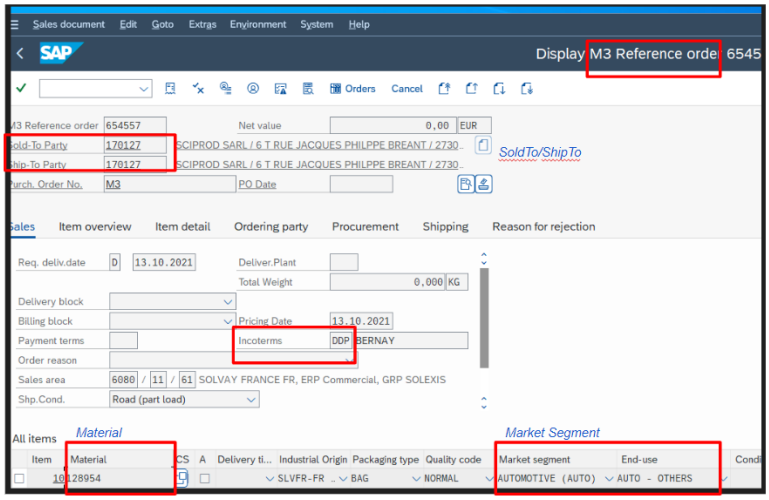
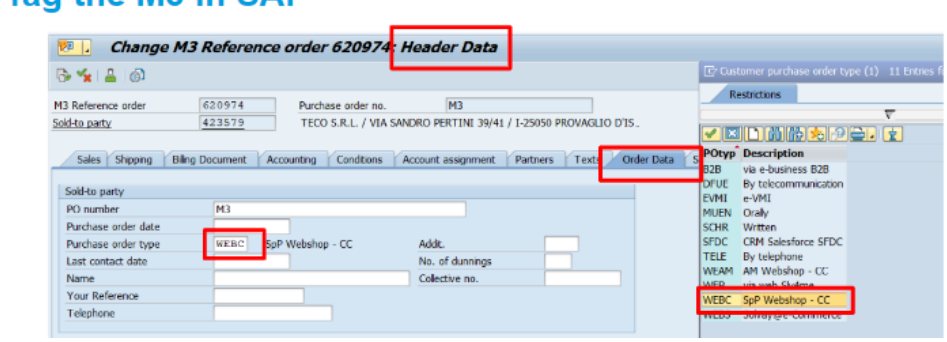
Step-By-Step

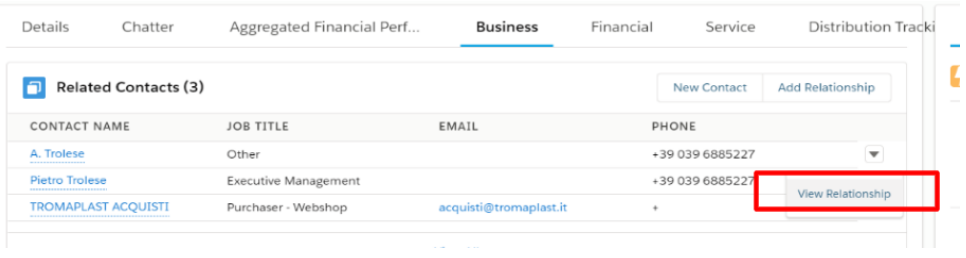
Step 1 - ICARE (Sales Reps) SALES REPS		
1.1	Identify customer candidate account	
1.2	Send to CSR EMEA (nicoletta.bagnara-ext@syensqo.com) APAC flora.huang@syensqo.com (Fei)) yun.shao@syensqo.com NAM	Email Template from SalesRep to CSR Dear CSR, Please prepare the following account(s) for the Webshop. 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

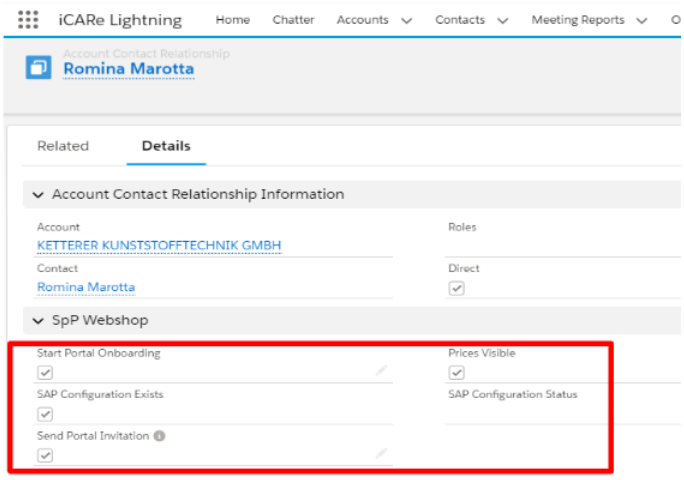
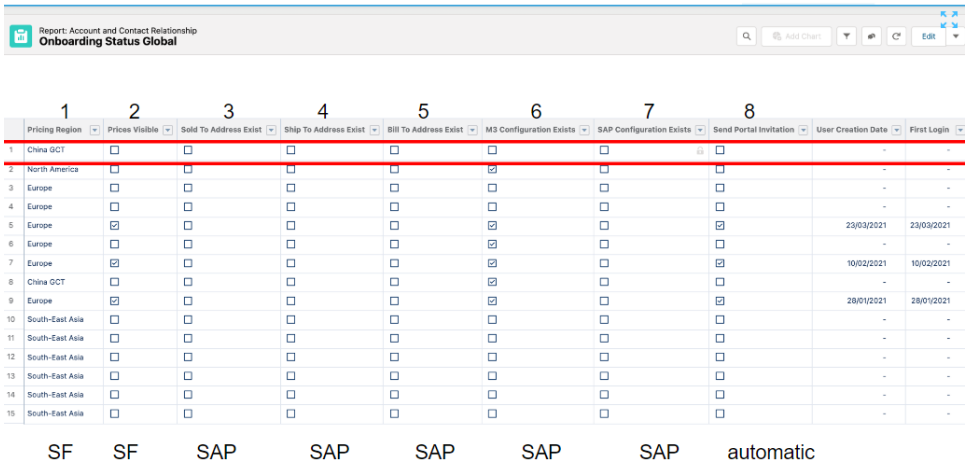
Step 2 - SAP (CSR) CSR		
1.1	Check what is the SAP number matching the Saleforce Account (If not existing Create the SOLDTO)	

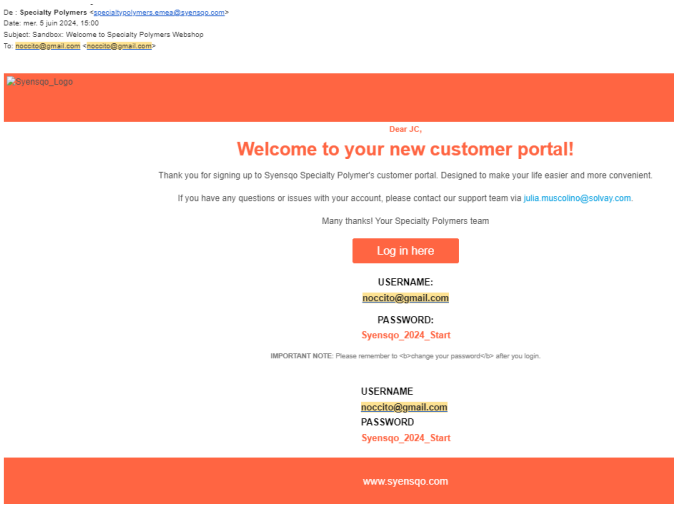
1.2	**Verify/Enter M3 for Webshop** (at least one per Ship To) & check >Material list is correct >Check only in material is found 1 time for all tagged M3s of a Ship To >Markets segment on material lines (optional)	
1.3	**Tag the M3 > Header Data > Purchase Order Type > WEBC (SpP Webshop - CC)**	

Step 3 - ICARE (CSR)

CSR

1.1	Go to ICARE. Go to the Account Page, To Business Tab > & View Relationship of the contact	

1.2	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.	
1.3	**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.	

1.4	**User will receive Welcome email inviting them to change password within 24h**	

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