



## EMEA Commercial Operations

### When to Create a New Account in SFDC

Last Modified: December 2021

Updated by: Melissa Dolton

## Purpose

To outline the difference between a lead and a prospect and provide cases on when a new account should be created in SFDC.

## Definitions, Systems and Acronyms

Term	Description
Lead	A person that has not yet been associated to an account or an opportunity
Contact	Someone who is associated with one of the salesforce accounts
Account	Business accounts storing company/organization information
Prospect Account	A business entity that has shown interest in purchasing products or services from Illumina

## Responsibilities

Role/Function	Responsibilities
Territory Account Manager ( <b>TAM</b> )	<ul style="list-style-type: none"><li>• Account creation</li><li>• NCIF submission</li><li>• Quote creation</li></ul>
Inside Sales Account Manager ( <b>ISAM</b> )	<ul style="list-style-type: none"><li>• Account creation</li><li>• NCIF submission</li><li>• Quote creation</li></ul>
Quote Specialist	<ul style="list-style-type: none"><li>• Quote creation</li></ul>
Data Steward	<ul style="list-style-type: none"><li>• Monitor new account creations</li></ul>

## When to create a new account:

- 1) New customer **interacted with** does not already exist in SFDC
  - Check to see if the account already exists by **searching the name, care of, website, and contact**

- If **no duplicate** account exists, proceed with account creation

Q university of east anglia

nts ▾ Contacts ▾ Leads ▾ Opportunities ▾ Reports ▾ Agreements ▾ Customer Agreements - DEPRE... ▾ More ▾

### Accounts

6 Results • Sorted by Account Name ▾

Account Name ↑ ▾	Care Of ▾	A... ▾	Ultimate Parent ▾	ERP Custom... ▾	Acco... ▾	Accoun... ▾
<a href="#">University of East Anglia</a>	Faculty of Science Finance		University of East Anglia	6000002377	Sold To	Active
<a href="#">University of East Anglia</a>	Biomedical Chemistry		University of East Anglia	6000024964	Sold To	Active
<a href="#">University of East Anglia</a>	Norwich Medical School		University of East Anglia	6000019392	Ultimate Consignee	Active

- 2) An existing institution account in SFDC is opening a new lab and is purchasing an instrument/ doing significant business with Illumina (different location, department, lab, new project, etc)

- Search for the customer institution in SFDC and view the **hierarchy**

ACCOUNT > UNIVERSITY OF EAST ANGLIA

### Account Hierarchy

ACCOUNT NAME	ERP CU...	CARE OF	ACCOUNT GROUP
▾ <a href="#">University of East Anglia</a> <b>current</b>	6000002...	Faculty of Science Fina...	Sold To
<a href="#">University of East Anglia</a>	6000019...	Norwich Medical School	Ultimate Consignee
<a href="#">University of East Anglia</a>	6000024...	Biomedical Chemistry	Sold To

- Create the new account and **follow the hierarchy's naming convention** (e.g. University of East Anglia) Department or Facility in the Care of
- Put the **Parent Account's name** when creating the new lab account so the new account is linked to the hierarchy (e.g. Parent for University of East Anglia is University of East Anglia (ERP ID 6000002377))

Account Name

University of East Anglia

Account Name (Local) ⓘ

Parent Name ⓘ

[University of East Anglia](#)

Ultimate Parent ⓘ

University of East Anglia

- 3) If an existing account in SFDC is marked as “Pending Obsolete” or “Obsolete.”  
**\*\*\*Before account creation, reach out to your EMEA Data Steward email: ILMN-COM-EMEA-DATA-STEWARD@illumina.com to possibly bring the existing account back to Active or they can advise what existing account you need to use or if a new account indeed can be created.**

IndieBio	IndieBio	4000011260	Ultimate Consignee	Pending Obsolete
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## Release History

Version	Date	Originator	Description of Change
1	09/12/2021	Melissa Dolton	Initial Release