EMEA Commercial Operations
When to Create a New Account in SFDC
Last Modified: December 2021
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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

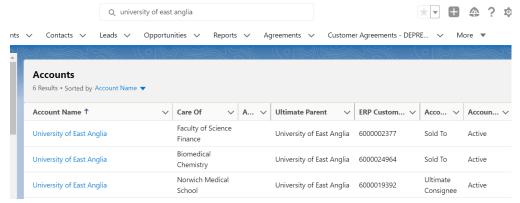| Term	Description
Lead	A person that has not yet been associated to an account or an opportunity
Contact	Someone who is associated with one of the salesforce accounts
Account	Business accounts storing company/organization information
Prospect Account	A business entity that has shown interest in purchasing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

Responsibilities

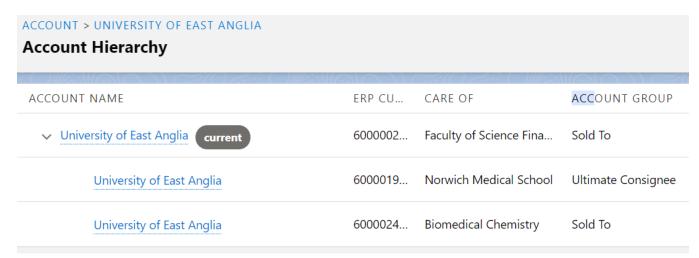| Role/Function	Responsibilities
Territory Account Manager **(TAM)**	• Account creation • NCIF submission • Quote creation
Inside Sales Account Manager **(ISAM)**	• Account creation • NCIF submission • Quote creation
Quote Specialist	• Quote creation
Data Steward	• Monitor new account creations

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

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**

- 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))

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.

Release History

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