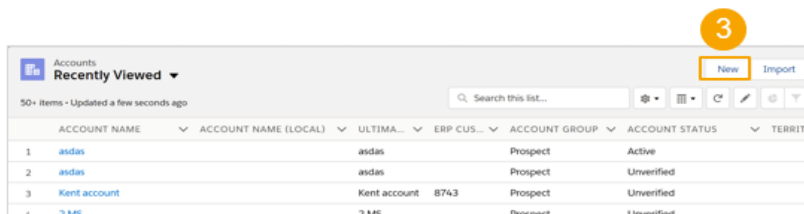


Purpose

The purpose of this document is to highlight the steps for creating a new account in SFDC and moving it along the sales process. This document applies to EMEA Commercial Operations.

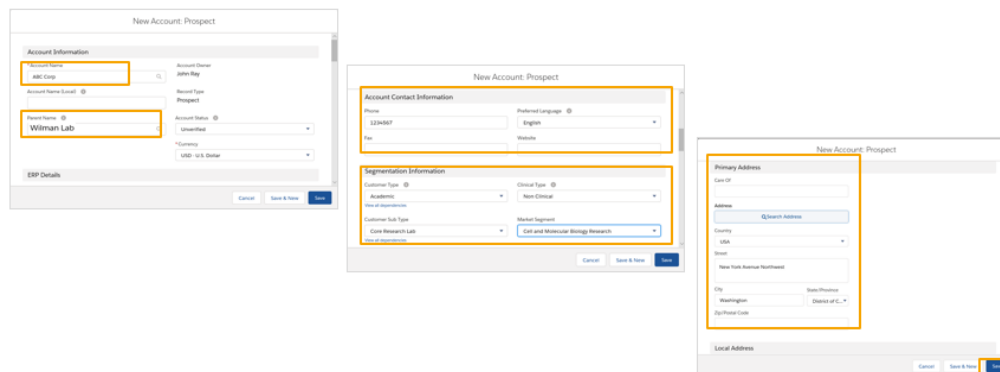
1. Creating a New Account

1. **Search** Salesforce for any existing account that may exist to avoid creating a duplicate account or to confirm if it should be linked to an existing hierarchy
2. Once Verified, **Go to Accounts tab** on Salesforce homepage
3. **Click the New button** to create a New Prospect Account



	ACCOUNT NAME	ACCOUNT NAME (LOCAL)	ULTIMA...	ERP CUS...	ACCOUNT GROUP	ACCOUNT STATUS	TERRITO...
1	asdas		asdas		Prospect	Active	
2	asdas		asdas		Prospect	Unverified	
3	Kent account			8743	Prospect	Unverified	
4	2 MS		2 MS		Prospect	Unverified	

4. Enter the new account's information:
 - **Account Name** – Refer to [SFDC Account Naming Policy](#) guidelines
 - **Parent Account Name** (If applicable) – To get full search results with additional details, type **Enter** once you have started typing
 - **Account Contact Information**: Phone Number (no special characters), Website, Contacts
 - **Segmentation Information** – If you wish to add multiple Market Segments and sub-segments, you can do so prior to submitting for ERP # assignment
 - **Primary Address** – Use the built in Google Search Function to do an address search



5. Click **Save**

The system may display a duplicate account warning in case the Account Name / Local Name, Phone and Address of the account are the same as an existing account.

Note: Consider using the original account found by the system for your sales opportunity rather than the new duplicate you are trying to create

2. Submitting a New Prospect for ERP ID

Once an account is created, it should be submitted to ERP for validation. Execute the following steps to submit the account to ERP

1. Go to the Submit Prospect tab on the account details page
2. Scroll down to the **Market Segment Entry Form** section
3. Click + to add an additional market segment if applicable
 - a. Select the Market Segment from the drop-down menu
 - b. Click the + sign to add more market segments
 - c. Select the **Market Sub Segment**, if applicable
 - d. Enter the **Allocation %**. Click **Even Split** to evenly split the market share
4. Scroll down to the Additional **Segmentation Details** section
5. Select **Clinical Type**
6. Select **Customer Type** and **Customer Sub Type**
7. Click the **Save** button

Scroll up and click the Submit to ERP button once the details have been saved. This will change the prospect status to prospect validation.


Once verified, the account moves to Active Prospect stage with ERP ID

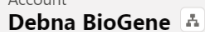
3. Submitting for Account Upgrade from Prospect to Sold-To

1. Locate the account you wish to raise a request for, make sure it is an Active Prospect

The screenshot displays the account details for "Insight Biotechnology Limited". At the top, there are tabs for "Account", "Follow", "Edit", and "View Account H". Below this, a table lists account details: Territory Name (UK London North), District (EU UK South), Customer Type (Commercial), Market Segment (Cell and Molecular Biology Research), Clinical Type (Non Clinical), and Address Status (Verified). A progress bar shows the account status as "Active Prosp..." and "Pending Upg...". Below the progress bar, the "Account Status: Active Prospect" is confirmed. The "Key Fields" section includes "ERP Customer Id" (4000051722), "Territory Region" (EMEA), and "Account Owner". The "Guidance for Success" section states: "All initial checks completed, account authorized to be used as a Prospect account. User can now create opportunities and quotes and use as active Prospect account." On the right, a "We found no pot Account." message is displayed, along with "Related List Quick Link" options: "Agreements (Account) (1)", "Agreement Account Relationships (0)", and "Related Contacts (0)".

2. If the NCIF has been requested (New legal entity unknown to Illumina) and received the Data Stewards will email you asking for the first order value and estimated annual spend with the NCIF to be able to convert the Prospect to a Sold To.
3. If the account is for an existing Legal entity known to Illumina (i.e University of Cambridge, then if you would like the account converted to a Sold To. You can request the prospect to be converted to a Sold To using the PO. Customer Care will raise a MDG request to convert the account once they receive the purchase order.
4. Once approved the Data Steward or customer care will email you to advise that the account is a Sold To. You will also be able to see on the account page in SFDC that the account status is now 'Active' and the Account group has changed from Prospect to Sold To.


Account


+ Follow

Territory Name	District	ERP Customer Id	Tier	Market Segment
Sweden Uppsala - Stockholm	EU Nordics East & Baltics	4000051657	Tier 3	Multiple

▼


✓


✓

✓

Active

Account Status: Active


Account



VAT Number: SE 750823468401

▼

ERP Details

Account Group

?

Sold To

ERP Customer Id

?

4000051657

Release History

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