

THINGS TO TAKE NOTE WHEN CREATING NEW ACCOUNTS/ LEADS/ CONTACTS

Few things to note when entering info into Accounts/Leads in SFDC – Please print this out for reference.

1. Creation of Leads

- a. Always DOUBLE CHECK that the company is not already an ACCOUNT in SFDC
- b. If it is already an account in SFDC, please create as a new contact under the existing account

2. Conversion from Lead to Account

- a. Always DOUBLE CHECK that the account does not already exist before selecting “**Create New Account**”.
- b. If the account is already in SFDC, you will be able to select “**Attach to Existing: XXX Account**”
- c. REMEMBER to select “**Do not create new opportunity upon conversion**” if you do not intend to create an opportunity for the sales person
- d. Set Task Information Status to “**Completed**”
- e. please ensure that you update the **Customer Type** for the new account, after converting a lead. Customer Type i.e. Prospect/Customer/Partner/etc etc

3. Entering of Contacts to existing Account

- a. please ensure that you update the info in the relevant fields as given i.e. First Name, Last Name. DO NOT enter the entire name into the Last Name field.
- b. please ensure that you DOUBLE CHECK first before adding a new contact to the same account. Do a search for the email address to ensure there is no double entry.

This applies to all accounts, leads and contacts that you intend to create:

1. If you intend to create a new **Account**, please check that the same account does not exist in SFDC first.
2. If you intend to create a new **Lead**, please check that the same lead does not already exist in SFDC, or is already an account
3. If you intend to create a new **Contact**, please check that the same contact does not already exist in the SFDC account.

These are the basic checks we need to perform to ensure as we have as clean a database as possible. This makes it easy for us to maintain and look for information when we need, and not be overwhelmed by unnecessary clutter of duplicate information.