**New Account Review**

Use Account view **Nonvalidated Accounts**

1. Open first account in new tab
2. On a third tab, search for client name to see if there are duplicates

* If potential duplicates are found, determine if the new account is really a duplicate or is a distinct entity
* Merge accounts if necessary (see guidance)
* Ask user if clarification is needed
* Notify user and explain process of searching for accounts before creating new ones

1. Verify that Client Group and Market Sector are correct
2. If the client is an AECOM Global Key Account, make sure that field is checked
3. Add hierarchy if appropriate
4. Verify that Type is correct (e.g., an AE firm should not have Type Client/Prospect)
   * If the Account is an AE firm, check the opportunity:
   * If the Opportunity seems to have been entered incorrectly, with the Prime as the Account instead of the ultimate client, query the user and explain the purpose of the Partners/Competitors object
5. If website field is blank, enter url (if you can be sure you have the right one)
6. Review and edit Description field, or if it is blank, enter brief description from web site or Wikipedia
7. If phone, address, state/province, or country are missing, try to add (check opportunity for clues)
8. Request D&B Report if needed (Guidance TBD)
9. MK Denial:
   * Conduct check at [www.MKDenial.com](http://www.MKDenial.com) (user ID 7969, password aecom) unless client is on the trusted partner list: <https://na1.salesforce.com/01530000001Ahi5>
   * Make note in Comment field that check was done and note results
   * If problem noted in MK Denial, contact Kim Canales-Yarborough
   * (more info at <https://na1.salesforce.com/01530000001Ahi0>)
10. Let user know what changes you made and why (can use Chatter at the top of the record for this)

**Resources:**

Guidance Documents tab in Salesforce:

* Account Naming Conventions
* Guidance on Creating Accounts
* Client Groups and Subgroups Guidance
* Global Key Account list