

MPR Id- 489325 (Account Creation)

Problem Statement- Request to create a new Account with following details:

Account Name: Mirae Asset Securities

- **Account Owner:** Lakshya Mundra
- **Sales Dev:** Shubham Gupta
- **Territory:** SAARC
- **Address:** 1st Floor, Tower 4, Equinox Business Park, LBS Marg, Off BKC, Kurla (W), Mumbai 400070, Maharashtra, India
- **Website:** <https://english.securities.miraeasset.com/>

Solution:

1. Go to Account object.
2. click on New.
3. Enter the above details in the relevant as shown in the screenshot:
4. Keep the Legal Account Name the same as Account Name.

The screenshot shows the 'Prospect Customer' page in Salesforce. The top navigation bar includes buttons for '+ Create New', 'Screen Flow Journey', 'Print', 'Pulse', 'Action Center', 'Classic' (highlighted in green), 'Related Links', and a close button. The main section has fields for 'ACCOUNT NO.' (00066283) and 'SALES/KAM OWNER' (Lakshya Mundra). A 'RELATED OPPORTUNITY WON' section shows a red 'X'. Below this, a tab bar has 'Summary' selected, followed by 'Account Segmentation', 'Demo Request', 'Account Scoring', 'Account Team', 'US', 'CSM', 'User Dashboard', and 'Servicing Dashboard'. The summary section displays various account details: Account Name (Mirae Asset Securities), Legal Name (Mirae Asset Securities), Territory Location (Not Specified), Customer Currency (INR), Account Type (Not Specified), Parent/Child relation (Parent Account), Category (Not Specified), Rating (Hot), ProfileImage (a placeholder icon), Short Name (Mirae Asset Securities), Status (Active), Account No. (00066283), Importance (Normal), Territory (SAARC), Parent Account (with a 'Show Hierarchy' link), Industry, Type, and CRM Budget (with a red 'X').

5. After filling in the details click on Save and check the account's details.
6. Account Id- **66283**