**Runbook – Account Address creation / Fusion Sync / CnC (Intern) Sync**

SalesForce --> Intern CRM --> Fusion. First, required to check whether the new ship to address exists in intern CRM.

Ship to address from SalesForce to intern CRM to Fusion

1. SalesForce to intern CRM @Michael Hill, @May Chen, @Eduardo Contreras

Can you confirm the ship to address in intern CRM tables

2. intern CRM to Fusion @Wenchi Yao

Accounts Creation: Ojas team normally creates account by navigating to Accounts screen and filling up the address.

Oncer account is created the address flags are tagged too.

After Account is created it should sync with Fusion and then further it should sync to CnC (Intern**)**A screenshot of a computer

AI-generated content may be incorrect.

**If Account Sync is proper, then Omega Account Number should be generated after some time as shown below.**

A screenshot of a computer

AI-generated content may be incorrect.

**Similarly for the address (Site) Omega Site Number should also be generated as shown below**

A screenshot of a computer

AI-generated content may be incorrect.

1. **What if Omega Account Number is not generated.**

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AI-generated content may be incorrect.

Edit “Toggle me to Force Unity Sync” flag and mark it as True. Wait for some time (may be one hour) and the Omega Account Number will be generated.

Similarly, for Site Address try to perform manual sync with Unity if Omega Site Number is not generated.



1. **If Bill to Address Falg is not populated and the issue is reported by the user (Ojas)**
   * Fix the "Bill to Flag Address" for the Account in SFDC
   * Provide SFDC Address Id to Rhonda & Jonathan (Fusion Team) to update in Fusion
   * Get Omega Site id from Rhonda & update that in SFDC
   * Provide SFDC Id & Omega Site Id to Intern Team (CNC (Phoebe Britanico / May Chang)
2. **Another Issue reported & Solution**

[T206212156](https://www.internalfb.com/intern/tasks/?t=206212156)

**Problem**: Invoice Data Sync from Fusion to EP Billing fails. Revenue Operations cannot find the Invoice in EP Billing and CnC. Can't continue with month-end close activities.

**Cause**: Site id is not in CnC, data sync can't create an invoice without a Customer Address.

In a perfect world, customer sites should NOT be created in Fusion. SFDC is the source of truth. There is no integration for customer site creation from FUSION to CnC to SFDC.

However, due to a new business process, where an address can be used in other regions, e.g. KR address can be used in FB US (not only FB IE), **but business also had to create the site in FUSION** to create the invoice.

Workaround:

1. EP\_EECI\_oncall or SFDC team needs to create the site in SFDC. Then provide the salesforce id to Business.
2. BUSINESS team updates the Salesforce ID in FUSION Site level. This process will create new site in CnC.
3. Enterprise Engineer updates the Ent CRM with correct site id from FUSION. CnC team will need the new FBID & SFDC ID of the new site.
4. Data sync will automatically sync the invoice (no action needed).

**Suggested Short Term solution**:

1. When BUSINESS creates a new site in FUSION (which is an edge case), BUSINESS team needs to create a task for ep\_eeci\_oncall to do Step #1 above and request for the new Salesforce Site ID.
2. BUSINESS performs Step #2 above.
3. BUSINESS will raise a task for CnC team (ep\_cnc oncall). Supply the Orace Site ID and Salesforce Site ID. Request CnC to update the oracle site id for the said Salesforce Site id.
4. CnC team (ep\_cnc oncall) will update Ent CRM Address.

**4. Issues Reported:**

* Bill To Address flag is removed when Manual Sync to unity is done.

I was not able to reproduce**.**

* **Why we have to do manual Sync, if Omega Account number is not generated by itself ?**

This needs to be investigate by Engineering / Fusion / CNC team, but it seems that the answer is to get an Omega number, a customer must have passed a credit check. The credit team is responsible for performing credit check on all customers. Once a credit check is approved in Salesforce a unique omega number will be assigned to that account

Without credit approval there is no Omega account, without an Omega account we cannot bill the customer.

**Important Contacts**

Fusion Team: Nitin / Rhonda / Jonathan Faulkner

CnC Team: Phoebe Britanico / May Chan ep\_cnc\_oncall

**Account Credit Check.**

<https://www.internalfb.com/wiki/Revenue_Assurance_Workplace/FAQ/>

To be able to invoice a customer, an omega number is required to be assigned to the customers Salesforce account instance. To get an Omega number, a customer must have passed a credit check.

The credit team is responsible for performing credit check on all customers. Once a credit check is approved in Salesforce a unique omega number will be assigned to that account. It should be performed by Revenue Ops team.

The credit application must be filled out by the customer. To get the credit application to the customer, enter a Credit Application Email Address in the 'Credit Application Email' field. Once there is an email there Revenue Ops Team will be able to click 'Enable Credit Application'. The email recipient will then needto complete and submit the application for credit team approval. The turn around period is usually within 24 hours.

[**https://fb.workplace.com/work/file\_viewer/432856064024938/?surface=UNKNOWN**](https://fb.workplace.com/work/file_viewer/432856064024938/?surface=UNKNOWN)

Setting up a Salesforce account for Credit Approval and creating a price plan

**3/14/2024 :Latest Example**

Ojas created a new account, and we are still waiting for the Omega Number. Credit check might be the reason. I will be in touch with Ojas for that.

**https://fb.lightning.force.com/lightning/r/Account/0018V00003D2360QAB/view**

**Recent Issue reported and solved**

|  |  |  |
| --- | --- | --- |
| **Task** | **Title** | **Comments** |
| [T216333311](https://www.internalfb.com/intern/tasks/?t=216333311) | Customer Onboarding - LUXOTTICA HONG KONG SERVICES LTD | - Fixed the "Bill to Flag Address" for the Account in SFDC - Provided SFDC Address Id to update in Fusion - We received Omega Site id back update that in SFDC - This will help in syncing the Billing information to Intern -CnC team updated the Ent CRM --Deleted the EMEA site in fusion and Jonathan Faulkner |
| [T212686069](https://www.internalfb.com/intern/tasks/?t=212686069) | One Door - RL GSPO Core Solutions Request Form |CONSUMER SFDC | FRL ACCOUNT(ROTO VR LTD UK) | - Fixed the "Bill to Flag Address" for the Account in SFDC - Provided SFDC Address Id to update in Fusion |
| [T216150491](https://www.internalfb.com/intern/tasks/?t=216150491) | One Door - RL GSPO Core Solutions Request Form |CONSUMER SFDC | FRL ACCOUNT -SHENZHEN XIAOZHAI TECHNOLOGY CN | SFDC to Fusion happened but it was taken away by Unit Bot - |
| T217680522 | When setting up a new RL account, the HQ Address and Bill To Address are correctly assigned. However, upon syncing the account with Omega using the "Sync Account with Omega" feature, the Bill To Flag unexpectedly disappears. | This issue is being investigated. Tried to replicate for an existing account but was not able to reproduce. |

[**T218146873**](https://www.internalfb.com/intern/tasks/?t=218146873)

**Comments from Eduardo Contreras**

Hello [Michal Gabor](/intern/profile/?id=100010441020435), we can run syncs from Salesforce to external tools knowing the Salesforce record it. But in this situation Emilia reports she cannot find the record in Salesforce. I am not aware of EXTENDED\_CREDIT or C&C system or how to sync AccountId 515086924265433 into Salesforce. In previous tasks (<https://fburl.com/tasks/o3w4v818>) where Sales Intelligence team was tagged the task involved editing a Salesforce record, but in this case there isn't a record in Salesforce and I cannot find a reference where our team synced a record from outside of Salesforce.  
  
Can you please specify how this ad account is supposed to sync into Salesforce? It is probably through unity sync. And could you please involve the oncall of this tool to trigger a sync into Salesforce, if that sync fails because of Salesforce we can look into that, but we don't own external tools or their syncs into Salesforce.

<https://fb.workplace.com/100014927018252/videos/1084416033141952/?idorvanity=1702743373816760>

Salesforce – Fusion Customer Integration Functional Design

https://www.internalfb.com/sevmanager/view/454580

[Matthew Venerus](https://www.internalfb.com/careers/profile/1224690428904288)

XDS comment bubble area

Hi [Muneesh Bhalla](https://www.internalfb.com/intern/profile/?id=1392664771355388), could you please edit the following fields for this account:

FRL Account Name:

Value: DANMARK US

FRL Account

Value: TRUE

FRL Account Status

Value: Active

Workplace Company ID

Value: 9178585408874103