

SOP: Entering the System Account ID for New System Sales Accounts in Salesforce

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Purpose

To ensure Professional Services (PS) can complete customer installations and migrations without delays, all new **System Sales** accounts must have the appropriate **System Account ID** entered in Salesforce during account creation.

Scope

This procedure applies to **Genpact** team members responsible for creating new System Sales customer accounts in Salesforce.

Procedure

1. When creating a new **System Sales** account in Salesforce, obtain the appropriate **System Account ID** from the accounting system.
2. Enter the System Account ID into the appropriate account number field under the **Other Information** section of the Salesforce Account record.
3. Verify the account number has been saved before completing the account setup or handing the account off to another team.

Why This Is Required

The **System Account ID** originates from the accounting system and is required by **Professional Services (PS)** to complete customer installations and system migrations.

If the System Account ID is not populated:

- Professional Services cannot complete the installation or migration.
- PS must contact the Operations team to obtain the missing account number.
- Customer implementations are delayed while the information is located and entered.

Entering the System Account ID during account creation eliminates unnecessary follow-up and helps ensure projects remain on schedule.

Example

Customer: Western Oregon University

During a migration to Manitou, the System Account ID was not entered in Salesforce. As a result, Professional Services had to contact the Operations team to obtain the account number before the installation could proceed. This delay could have been avoided if the System Account ID had been entered during account creation.

When creating a new System Sales account, enter the appropriate account number in the corresponding field under the Other Information section of the Salesforce Account record.

For example, if the customer is using Manitou, enter the account number in the Manitou Account # field located in the right column of the Other Information section.

Example: The Manitou Account # field contains 1051.



Important

- Enter the account number in the field that corresponds to the customer's platform:
 - Manitou Account #
 - SIMS Account #
 - AlarmBiller Account #
 - AlarmBiller Pro Account #
 - SedonaOffice Account #
 - Managely Account #
 - Stages Account #
 - NetSuite ID
- These account numbers originate from the accounting system and **must** be entered during account creation.
- If the account number is missing, Professional Services cannot complete the installation or migration until the Operations team provides the information, resulting in unnecessary delays.

Expected Outcome

All new System Sales accounts contain the appropriate System Account ID in Salesforce before they are handed off, allowing Professional Services to complete installations and migrations without interruption.