

A1311 - Account Contacts and related contacts

Overview

In this section, you will find information about how to create a new supplier contact in Salesforce.

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Step-By-Step



Before creating a contact, search it to avoid creating a duplicate. In case of duplicate, the system will warn you if:

- the email address is the same than an existing contact

And the system will guide you to the existing contact. And then you will be able to **add a relationship**.

If the Contact does not exist, it is recommended to create it from the account page

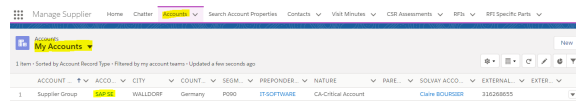
STEP 1

Add Account Contacts

1- In Tabs => Click on **"Accounts"**

2- In View Menus => Select **"My Accounts"**

3- In ListViews => Click on the supplier name. e.g.SAP SE

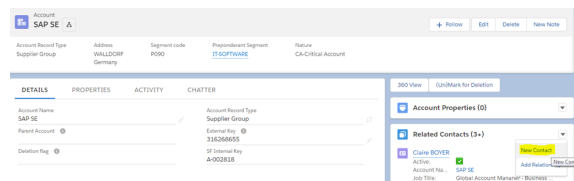


You can create a contact and relate it to any account in Salesforce, even if you're not part of the Account Team

STEP 2

If the Contact does not exist, it is recommended to create it from the account page

Go to the related list **"Related Contacts"** and click on the button **"New Contact"**



STEP 3

Contact Information

Account Name is automatically filled in this field. E.g."SAP SE"

1- Fill **First Name**, **Last Name**

2- In **"Type"**, select a function

3- Fill **Phone**, **Mobile**, **Email address**



Use the international format, contacts are shared.

New Contact: General contact

Contact Information

Job Title

* Account Name
SAP SE

* Name
Salutation
--None--

First Name

* Last Name

Deletion Flag

Type
Group Environment Manager
Commercial Manager
Sustainable Development Manager

4- Fill all information you have "Mailing Street, Mailing City, Mailing State /Province, Mailing Zip/Postal Code, Mailing Country"

5- Click on **Save**

The screenshot shows a contact form with the following sections:

- Source:** A dropdown menu with "--None--" selected.
- Contact Information:** Fields for Phone, Mobile, Fax, and Email. A "Reports To" field with a search icon is also present.
- Address Information:** Fields for Mailing Address (with a search icon), Mailing Country (set to Germany), Mailing Street, Mailing City (set to WALLDORF), Mailing State/Province (set to --None--), and Mailing Zip/Postal Code.
- System Information:** A section at the bottom with "Cancel", "Save & New", and "Save" buttons.

Verify, if I added the Contact

STEP 4

After saving, I return automatically on the tab "Contact" with the name of the contact that you added

I verify, if I added well the Contact to my Account. e.g. "SAP SE"

The screenshot shows the contact details for Claire BOYER. The page includes a header with navigation tabs (Manage Supplier, Home, Chatter, Accounts, Search Account Properties, **Contacts**, Visit Minutes, CSR Assessments) and a sub-header for the contact. Below this, there are tabs for DETAILS, PROPERTIES, ACTIVITY, and CHATTER. The DETAILS tab is active, showing fields for Job Title (Global Account Mananer - Business Object (Sap)), Account Name (SAP SE), Name (Claire BOYER), and Account Name (SAP SE). There are also checkboxes for Active, Deletion Flag, and Type (Other).

- Click on **Account**, In View Menu => Select "My Accounts". In ListView => Click on the "Account name" e.g. "SAP SE"

Go to the related list "Related Contacts" and check if contact is added well eg. "Mrs Claire BOYER"

The screenshot shows a list of related contacts for the account "SAP SE". The list is titled "Related Contacts (3+)" and contains three entries:

- Claire BOYER:** Active (checked), Account Name: SAP SE, Job Title: Global Account Mananer - Business Object...
- Claire BOYER:** Active (checked), Account Name: SAP SE, Job Title: Global Account Mananer - Business Object...
- Virgile CANCRE:** Active (checked), Account Name: SAP SE, Job Title: Directeur Commercial Field Operation Ma...

A "View All" link is located at the bottom of the list.

Related articles

- [A1312 - Solvay account team](#)

Need help?

How to ask for assistance?

Dear SalesForce Convergence user,

For any question or issue regarding Convergence, please :

- create a request in **Service One** with the following information:
 - I want to update data in Convergence [Maintain data ownership in CONVERGENCE](#)
 - I want to mass upload procurement data [Maintain procurement data in CONVERGENCE](#)
 - Process : Data & Analysis
 - PTP-Subprocess: Purchasing Tools Support
 - PTP-Category: Convergence

For account creation, please refer to [here](#).

Thank you very much,

Convergence Team.