

A1312 - Solvay account team

Overview

In this section, you will find information about account ownership & account team in Convergence :

- Principles and business rules for account ownership
- How the account team is managed in Salesforce

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Step-By-Step



Each Account has a Solvay Account Manager. The **Solvay Account Manager** takes care of his or her supplier's page. He or she is the buyer in charge of the Account page & content consistency.

Each Account has an "**Solvay Account Team**" which lists all the Solvay users interacting with the account. Every buyer can subscribe himself to the Solvay Account Team, or subscribe someone else.

STEP 1

Account Owner you can add someone in the account team

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

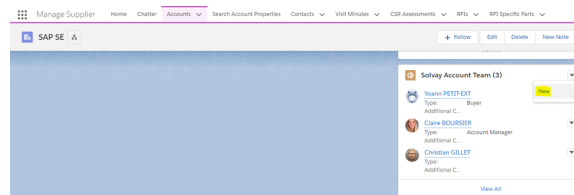
2- In View Menus => Select "**My Accounts**"

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

blocked URL

STEP 2

Go to the related list "**Solvay Account Team**" and click on the button "**New**"



STEP 3

Team Member Edit : information

Account => the name is automatically filed in the field Account ". E.g. **SAP SE**"

1- In **Type** to transfer from "available" to "chosen", click on the arrow. eg. **Manager**

2- User => fill part of the name and press the "Enter" key in the "User" Field.

3- Click on **buyer name**. eg.Mario COCCO

4- Click **Save**

New Team Member

The form is titled "New Team Member" and is divided into two main sections: "Information" and "System Information".

Information Section:

- * Account:** A dropdown menu showing "SAP SE".
- * User:** A dropdown menu showing "Mario COCCO".
- Type:** A dropdown menu showing "Buyer".
- Additional Comment:** A text area for additional comments.

System Information Section:

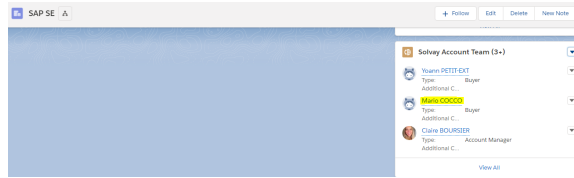
- MemberID:** A field for the member ID.
- Owner:** A field showing "Yoann PETIT-EXT".

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

STEP 4

I verify if I added well the buyer

- After saving, I return automatically on " Account". E. g. "SAP SE"
- Go to the related list "**Solvay Account Team**" I verify, I added well the Buyer/Manager



Related articles

- [A1311 - Account Contacts and related contacts](#)
- [A1313 - New prospect](#)

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.