

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

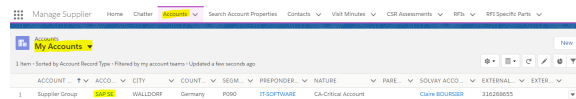
STEP 1

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

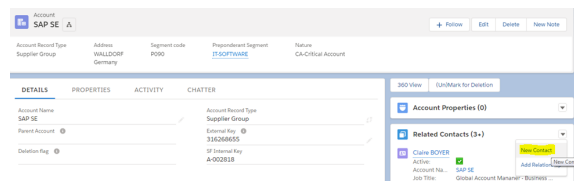


You can create a contact and relate it to any account in Salesforce, even if you're not part of the Account Team

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 the SAP contact creation form. At the top, there is a dropdown menu for 'Innovation Manager' with options: 'Innovation Manager', 'Management System Manager', 'Other' (selected), and 'Supplier Account Manager'. Below this is a dropdown for 'iSource' set to '--None--'. The form is divided into sections: 'Contact Information' with fields for Phone, Mobile, Fax, and Email; 'Address Information' with 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; and 'System Information' at the bottom. At the bottom right, there are buttons for 'Cancel', 'Save & New', and 'Save'.

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"

- 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 the SAP 'Manage Supplier' interface. The top navigation bar includes 'Manage Supplier', 'Home', 'Chatter', 'Accounts', 'Search Account Properties', 'Contact' (highlighted), 'Visit Minutes', and 'CSR Assessments'. The main content area shows the contact details for 'Claire BOYER'. The 'Account Name' is 'SAP SE', 'Email' is 'claire.boyer@sap.com', and 'Phone' is empty. The 'Deletion Flag' is set to '0'. Below this, there are tabs for 'DETAILS', 'PROPERTIES', 'ACTIVITY', and 'CHATTER'. The 'DETAILS' tab is active, showing 'Job Title: Global Account Mananer - Business Object (Sap)' and 'Account Name: SAP SE'. The 'Name' field shows 'Claire BOYER'.

The screenshot shows the 'Related Contacts' list in SAP. The list is titled 'Related Contacts (3+)' and contains three entries. Each entry shows a contact icon, the contact name, a status indicator (green checkmark), and the account name. The first two entries are for 'Claire BOYER' with account name 'SAP SE' and job title 'Global Account Mananer - Business Object...'. The third entry is for 'Virgile CANCRE' with account name 'SAP SE' and job title 'Directeur Commercial Field Operation Ma...'. At the bottom of the list, there is a 'View All' link.

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.