

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

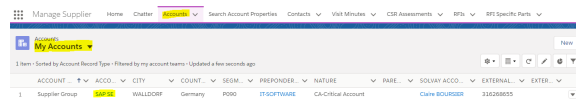
STEP 1

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

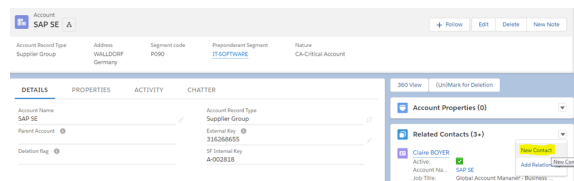


You can create a contact and relate it to any account in Salesforce, even if you're not part of the Account Team

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**

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"

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.