

A1710 - New financial situation

Overview

You can record financial rating given by Credit management team or Duns & Bradstreet data base, and can also record financial reports.

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Step-By-Step

STEP 1

Account Owner you can Create "New the financial situation"

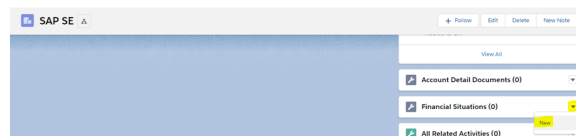
[blocked URL](#)

1- In Tabs => Click on "Accounts"

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

3- In ListViews => Click on "Account Name" e.g. SAP SE

STEP 2



STEP 3

1- Verify that the **name** of your supplier is the right one on the field "Account"

2- Fill some content in the **description** field.

3- Click on "Save" at the end of the page

New Financial Situation

Information

Financial Situation Id: _____ Owner: Yoann Petit-ext

Account:

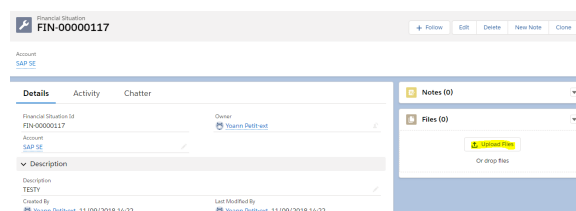
Description

Description:

B I U

STEP 4

Scroll down to the "Files" related list of the Financial Situation you just created and click on the "Upload Files"

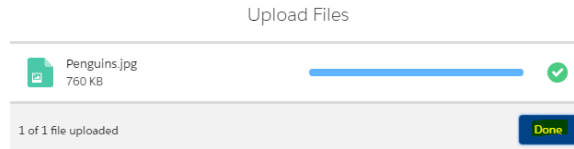


STEP 5

1- Choose a file from your computer and click on the "**Open**" button

2- The chosen file is uploading

3- Click on the button "**Done**"



Related articles

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.