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.

Table of content

Step-By-Step

STEP 1

Account Owner you can Create"**New the financial situation**"

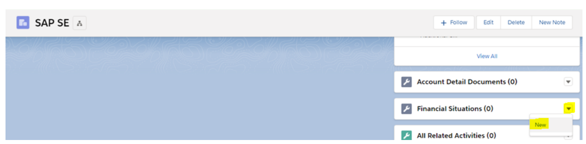
1- In Tabs => Click on "**Accounts**"

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

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

blocked URL

STEP 2

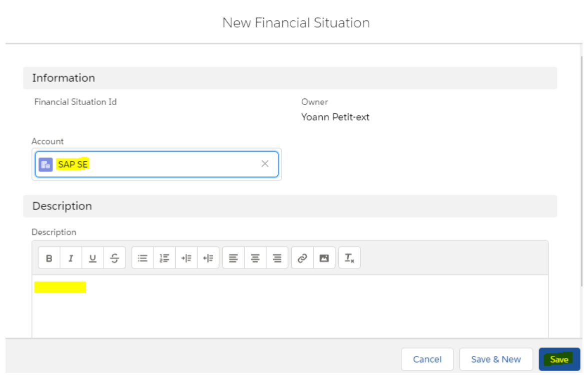


STEP 3

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

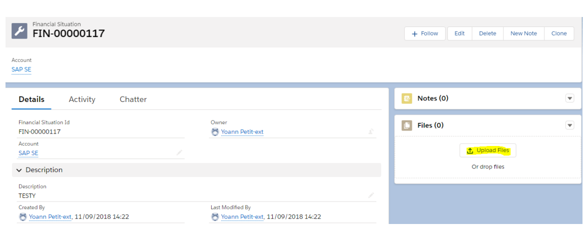
2- Fill some content in the **description** field.

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

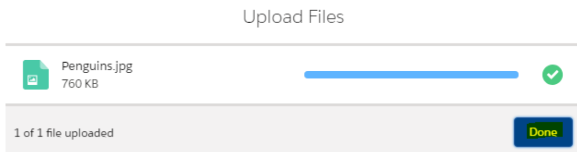


STEP 4

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.