

A1711 - New other document

Overview

In this section, you will record other type of documents like audit, QHSE, Risk matrix, Supplier code of conduct or other types, related to supplier.



You can make the document private (visible only by you) and share it with other Users ([A1712 - Make a document private - confidential](#))

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Step-By-Step

STEP 1

blocked URL

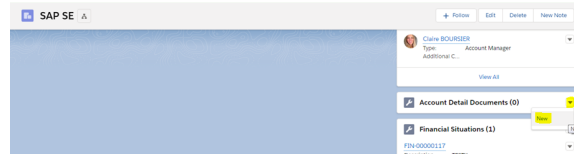
1- In Tabs => Click on **"Accounts"**

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

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

STEP 2

Scroll down to the **"Account Detail Documents"** related list and click in the button **"New"**



STEP 3

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

2- Choose the **Type** eg. "Audit"

3- Fill some content in the **description** field

4- Click on **Save** at the end of the pages

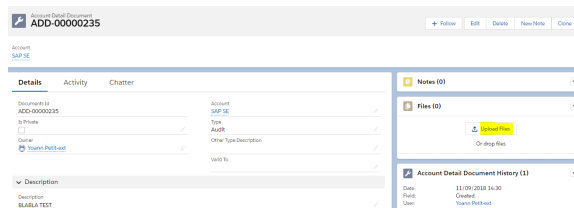
New Account Detail Document

Information	
Documents Id	Account SAP SE
Is Private ☐	Type Audit
Owner Yohann Petit-ext	Other Type Description
	Valid To
Description	
Description BLABLA TEST	
Cancel Save & New Save	

STEP 4

Save Save & New Cancel

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



STEP 5

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- 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

- [A1510 - New RFI](#)

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.