

A2010 - Account : New Notes

Overview

Use Notes, our enhanced note-taking tool in Salesforce, to add important information to your records.

- Use only one note per topic if possible

Step-By-Step

STEP 1

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

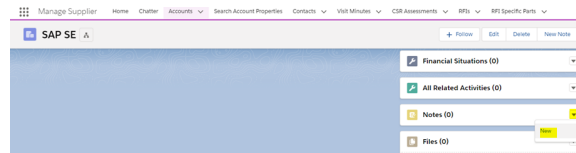
2- In View Menus => Select **"My Accounts"**

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

blocked URL

STEP 2

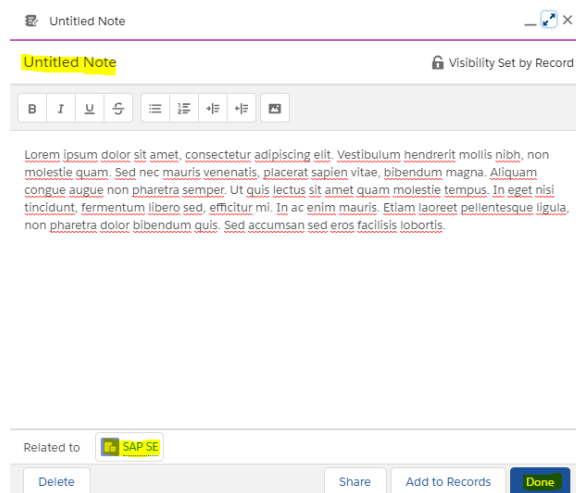
Scroll down to the **"Notes"** related list and click in the button **"New"**



STEP 3

1- Replace the **"Untitled Note"** by a title
Write the note in the free text zone.

2- Click on **"Done"**



Related articles

- [A2011 - Account : Attached files](#)

Table of content

- [Step-By-Step](#)
- [Related articles](#)
- [Need help?](#)
 - [How to ask for assistance?](#)

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.