

# A1313 - New prospect

## Overview

In this section, you will find information about how to create a prospect account in Convergence

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## Step-By-Step



Before to create a prospect, search on it to avoid creating a duplicate!

The system will warn you if a duplicate is found (based on name or address)

### STEP 1

**Prospect/account does not exist,**

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

2- Click on => **"New"**

3- In the "New Account" pop-up window appearing, choose the record type **"Prospect"** and then click on **"Next"**

ACCOUNT...	ACCOUNT NAME	CITY	COUNT...	S...	PREPONDERAN...	NATURE	PARENT ACCO...	SOLWAY ACCO...	EXTERN
1	Supplier Group SAP SE	WALLDORF	Germany	RO00	ITSOFTWARE	CA-Critical Account	CAre BOUTRIDER		336261

### New Account

Select a record type



Additional Supplier

It is equivalent to a form to request a creation within Convergence of a supplier which exists within PF1-050=PRS, or in PE1-300/BAAN/INFI or a contracted supplier such as maritime line



Prospect

It does not exist neither in PF1-050=PRS, nor in PE1-300/BAAN/INFI. It is not contracted! It is created by Buyer. It is not maintained, and deleted after some time

Cancel

Next

### STEP 2

#### Account Information

1- Fill **"Account Name"** CHINT ELECTRIC CO.,LTD and **"Language"** Chinese

#### Address Information

2- Fill **"Street, City, State/Province, Zip/Postal Code, Country"**

#### Solvay Stakeholders

3- Fill **Solvay Account Manager**. You can use the magnifier at the right of the "User" Field.

4- Click on **Save**

The screenshot shows a web form with the following sections:

- Purchasing Segmentation**: A search field labeled "\*Preponderant Segment" with the placeholder "Search Master Keys..." and a magnifying glass icon.
- Address Information**:
  - Address**: A text input field with a magnifying glass icon and the label "Search Address".
  - Country**: A dropdown menu with "--None--" selected.
  - Street**: A text input field.
  - City**: A text input field.
  - State/Province**: A dropdown menu with "--None--" selected.
  - Zip/Postal Code**: A text input field.
  - PO Box**: A text input field with a help icon.
  - PO Box Postal Code**: A text input field with a help icon.
  - Company Postal Code**: A text input field with a help icon.
- Solvay Stakeholders**: A search field labeled "\*Solvay Account Manager" with the placeholder "Search People..." and a magnifying glass icon.

At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save".

## 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.*