

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"**

Accounts										
Recently Viewed										
3 items - Updated a few seconds ago										
ACCOUNT...	ACCOUNT NAME	CITY	COUNT...	S...	PREFONDERAN...	NATURE	PARENT ACCO...	SOLVAY ACCO...	EXTEN	
1	Supplier Group SAP SE	WALLDORF	Germany	POSD	ITSCPTNAME	CA-Critical Account	Carte BC/PRSD			338208

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 for 'Solvay Account Manager'. It is divided into several sections: 'Purchasing Segmentation' with a search field for 'Preponderant Segment'; 'Address Information' which includes fields for 'Address' (with a 'Search Address' button), 'Country' (a dropdown menu currently showing '--None--'), 'Street', 'City', 'State/Province' (a dropdown menu currently showing '--None--'), 'Zip/Postal Code', 'PO Box' (with an information icon), 'PO Box Postal Code' (with an information icon), and 'Company Postal Code' (with an information icon); and 'Solvay Stakeholders' with a search field for 'Solvay Account Manager'. 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.