A1411 - New Account properties

Overview

Pre Qualified: Based on the knowledge of the market and on collected documents (RFI, CSR,...), does the supplier meet the requirements to go further in the qualification?

Table of content

- Step-By-Step
- Related articles
- Need help?
    - How to ask for assistance?

Step-By-Step

- Create an account properties
- A1412 - MZS qualification

STEP 1

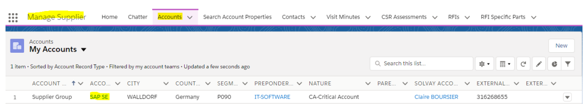
Each buyer can add new **"Account Properties**"

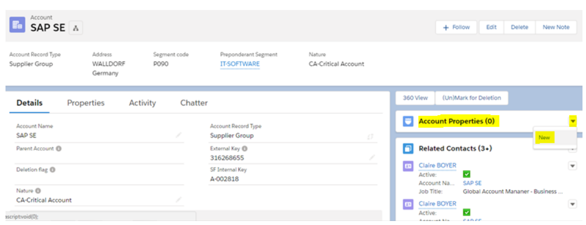
1- In Tabs => Click on “**Accounts**”

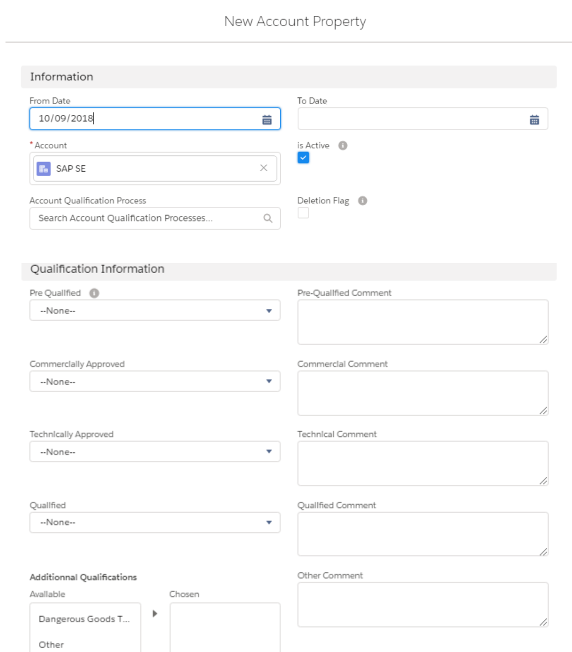
2- In View Menus => Select “**My Accounts**”

3- In ListViews => Click on “**Account name**” e.g. SAP SE

4- Go to the right of your screen to find the "**Account Properties**" and click on the button "**New**“







STEP 2

Information

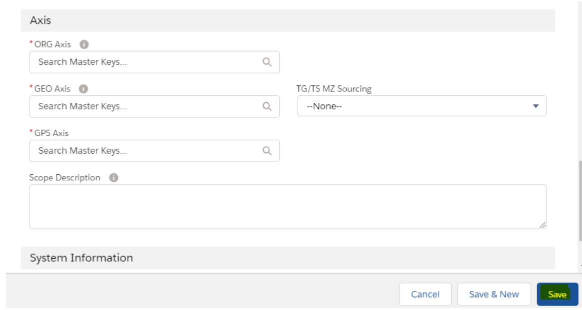
1- Fill the date “to date" if necessary. **Account** is automatically fill in this square eg. SAP SE

Qualification Information

2- Select in the menu (**Yes** or **No** or **N/A**) “**Pre Qualified, Commercially Approved, Technically Approved, Qualified** “

If you select "No", a comment / reason is mandatory

Axis
3- Fill**, Organisational Axis, Geographical Axis, GPS Axis** (you can use the the magnifier)



Scope Description: Define here more precisely the scope of this Account Property

Related articles

- A1413 - Qualification process (advanced)

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.