

A1413 - Qualification process (advanced)

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Overview

You can manage your supplier qualifications from the simplest case (several suppliers qualified for one product for a specific site) to the most complex cases (several suppliers qualified for several products, on several sites, etc.)

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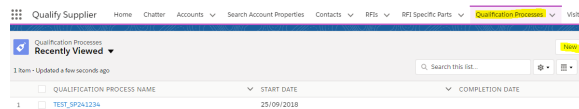
Step-By-Step

STEP 1

Access the "Qualify Supplier" app

1- In Tabs => Click on "Qualification Processes"

2- Click on "New"



STEP 2

Information

1- Fill **Qualification process Name** eg. ENGINEERING EQUIPMENT

2- Fill **Start date**

You can add a Reason / description

3- Click on **Save**

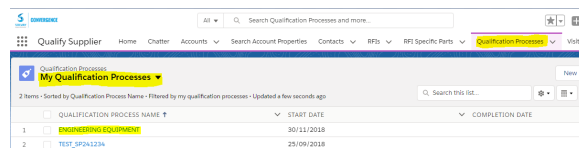
How to add the accounts to Qualification Process

STEP 3

1- In Tabs => Click on "Qualification Processes"

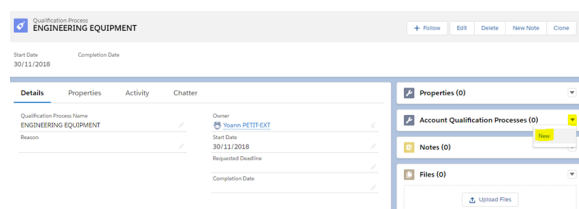
2- In View menus, select "My Qualification Processes"

3- In Listviews, Click on **Qualification Process Name**



STEP 4

Scroll down to find the related list "Account Qualification Processes" and Click on the button "New"



STEP 5

Select an account

Qualification Process is automatically fill in this square eg. "ENGINEERING EQUIPMENT"

1- Fill in the "Account" field. You can use the magnifier to find it.

2- Click "Save" or "Save & New" to add several Accounts

New Account Qualification Process: Creation

Please Select an account

Qualification Process

☒ ENGINEERING EQUIPMENT

*Account

Cancel

Save & New

Save

Related articles

- [A1411 - New Account properties](#)
- [A1412 - MZS qualification](#)

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](#)