

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?

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Step-By-Step

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STEP 1

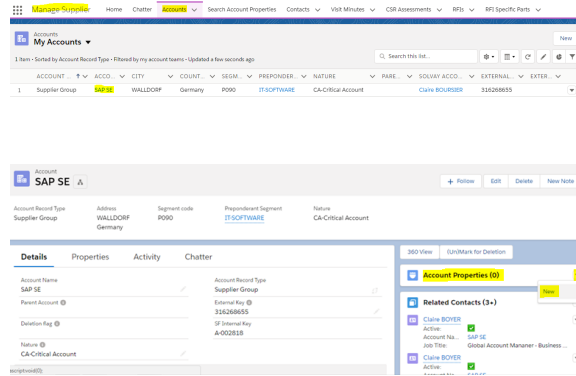
Each buyer can add new **"Account Properties"**

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 "**

New Account Property

Information

From Date: 10/09/2018 To Date:

*Account: SAP SE is Active

Account Qualification Process: Deletion Flag:

Qualification Information

Pre Qualified: --None-- Pre-Qualified Comment:

Commercially Approved: --None-- Commercial Comment:

Technically Approved: --None-- Technical Comment:

Qualified: --None-- Qualified Comment:

Additional Qualifications

Available: Dangerous Goods T... Chosen:

Other:

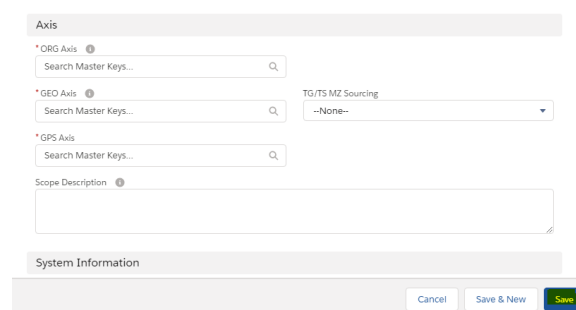
Other Comment:



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

Axis

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



The screenshot shows a Salesforce form titled "Axis". It contains three search fields for "ORG Axis", "GEO Axis", and "GPS Axis", each with a magnifying glass icon. To the right of the "GEO Axis" field is a dropdown menu labeled "TG/TS MZ Sourcing" with "--None--" selected. Below these fields is a large text area for "Scope Description". At the bottom of the form, there is a "System Information" section and three buttons: "Cancel", "Save & New", and "Save".

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.