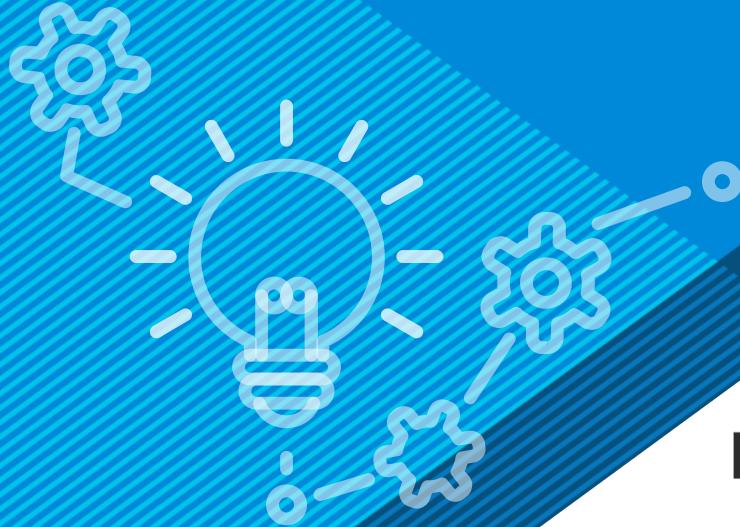




POSCO International CRM Innovation

User Manual_ Account&Contact

2025. 10



Step 1

Account Management

▶ 1. Account View

1. View list of accounts
2. View detailed account information

▶ 2. Account Update

1. Update account information
2. Create Account Card
3. Manage account organization chart

▶ 3. Account Creation

1. Create an account not linked to BP
2. Convert to a BP-linked account

Contents_PC

Step 2

Contact Management

▶ 1. Contact View

1. View contact list
2. View detailed contact information

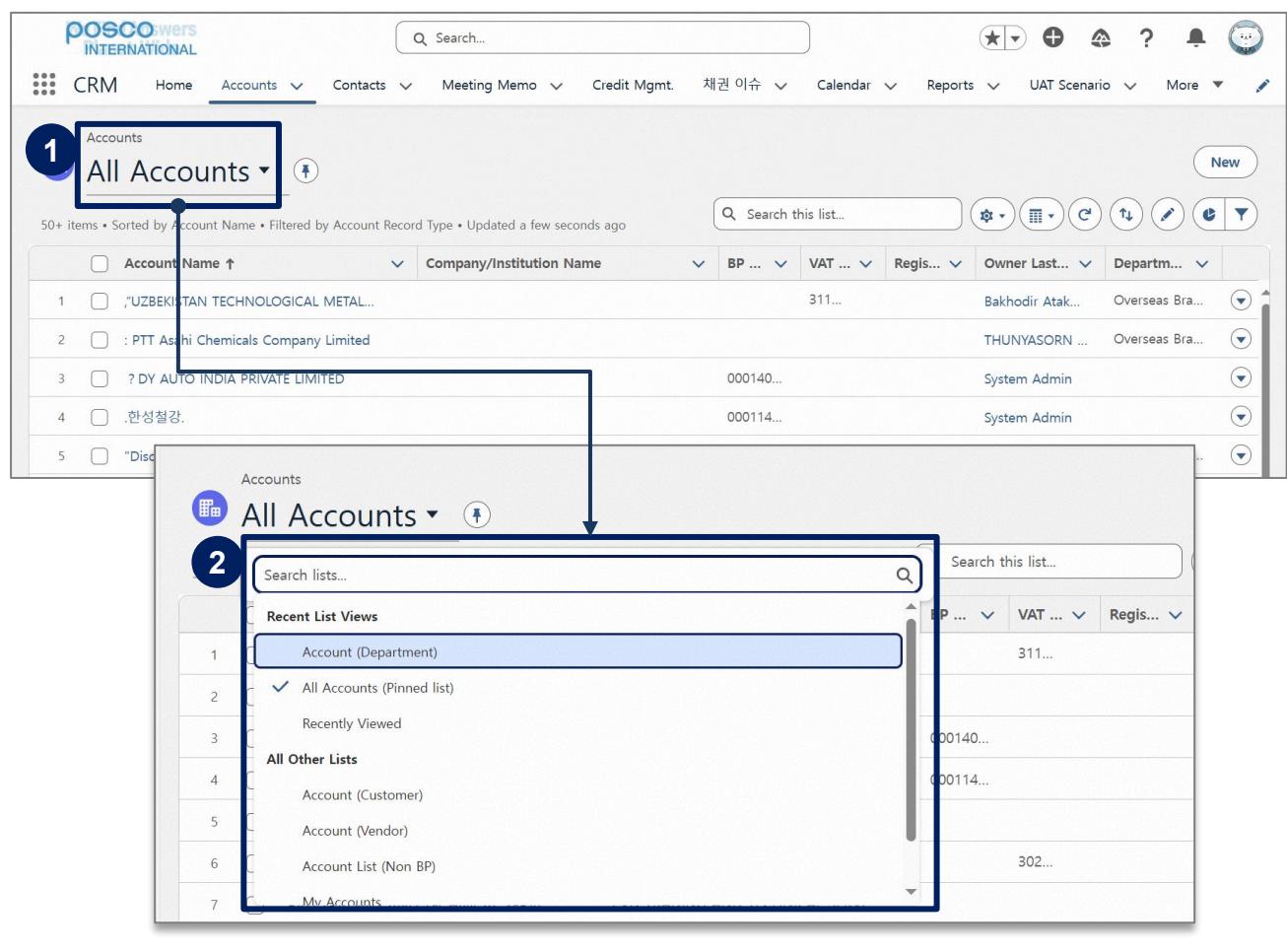
▶ 2. Contact Update

1. Update contact information

▶ 3. Contact Creation

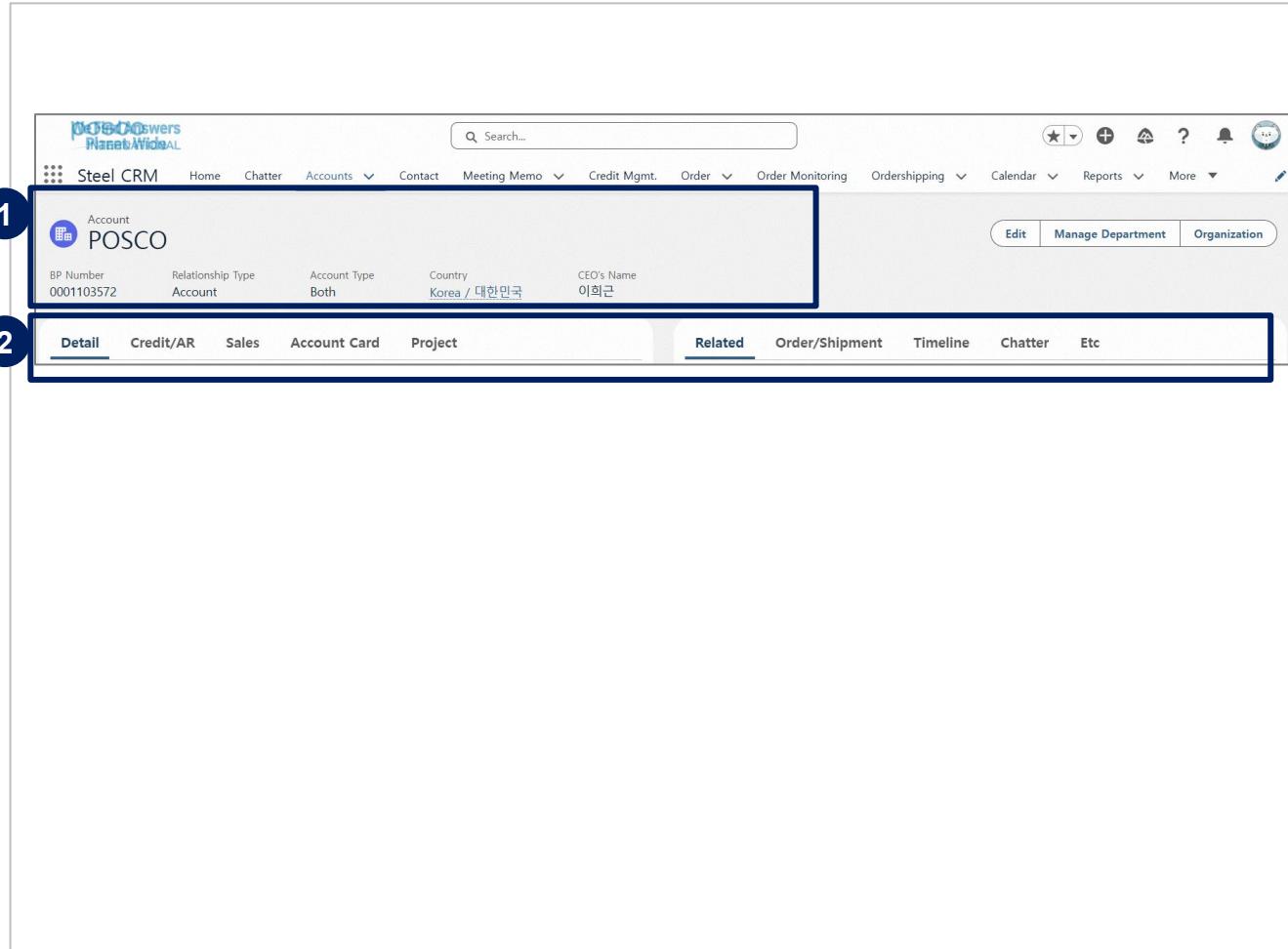
1. Create a single contact
2. Create multiple contacts

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.01 View list of accounts
Menu	Account		
Navigation	CRM App > Account > Account List		
	<p>1. Click “Account List”</p> <ul style="list-style-type: none"> - When clicked, a list of accounts is displayed based on the selected search criteria. <p>2. List View Types</p> <ul style="list-style-type: none"> - My Accounts: Accounts created by the user - All Accounts: All registered accounts - Recently Searched Items: Accounts recently searched (Unsortable) - Recently Viewed Accounts: Accounts recently viewed (Sortable) - Account (Customer): Accounts categorized as Customer type - Account (Vendor): Accounts categorized as Vendor type - Account (Department): Accounts managed based on the user's organization - Account (Non BP): Accounts not yet linked to a Business Partner (BP) 		

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		



The screenshot displays the POSCO Steel CRM interface for viewing account details. At the top, there is a header with the POSCO logo, a search bar, and various navigation links such as Home, Chatter, Accounts, Contact, Meeting Memo, Credit Mgmt., Order, Order Monitoring, Ordershipping, Calendar, Reports, and More. Below the header, the main content area shows account information for 'POSCO'. The information includes:

- BP Number: 0001103572
- Relationship Type: Account
- Account Type: Both
- Country: Korea / 대한민국
- CEO's Name: 이희근

Below this information is a tab navigation bar with the following tabs: Detail (selected), Credit/AR, Sales, Account Card, Project, Related, Order/Shipment, Timeline, Chatter, and Etc.

- 1. Top Key Information Area**
Displays key Account information at the top of the screen.
- 2. View Detailed Information by Tab**
 - Detail Tab:** Shows company basic information, SAP integration details, and Nice D&B data.
 - Credit/AR Tab:** Displays credit and receivables information based on the Account.
 - Sales Tab:** Shows sales data based on the Account.
 - Account Card Tab:** Allows document creation and information entry based on Account details.
 - Project Tab:** Displays information on projects and long-term contracts linked to the account.
 - Related Tab:** Displays linked contacts, meeting notes, and gift information.
 - Order/Shipment Tab:** Shows shipment and order data per Account.
 - ETC Tab:** Displays additional information such as handled items and responsible organizations.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(General Information)
Navigation	CRM App > Account > Account List > Account Details View		

The screenshot shows the 'Account Details View' page in Salesforce. At the top, there are tabs: 'Detail', 'Credit/AR', 'Sales', and 'More'. A blue circle with the number '4' is overlaid on the 'More' tab. Below the tabs, there are three main sections:

- Section 1 (General Tab):** Contains fields for Company/Institution Name (포스코), Establishment Date (1965. 10. 29.), Relationship Type (Account), Employees (2,231), Website (www.posco.com), and Branch.
- Section 2 (Description Tab):** Contains a single field: Description (포스코).
- Section 3 (SAP Information Tab):** Contains fields for Country (Korea / 대한민국), Country Type (Korea), VAT Reg. No., Registration No. (3018702315), and Corporation No.

Section 4 (Nice & DnB Tab) is highlighted with a blue border. It displays a list of contacts from Nice & DnB, including Kim Minsoo (대리), Kang Dongwoo (사원), Yoo Hanyoung (과장), Kim Byunggeon (차장), and Kim Younghe (차장). It also shows a list of meeting memos from SAP, including 'Test Meeting Memo...' and 'Mobile Meeting Memo...'.

1. Account Information Section

- This section contains the most basic and essential information about the account.
- Most fields in this section are mandatory.

2. Description Section

- This area displays a text-based description of the company.

3. SAP I/F Information

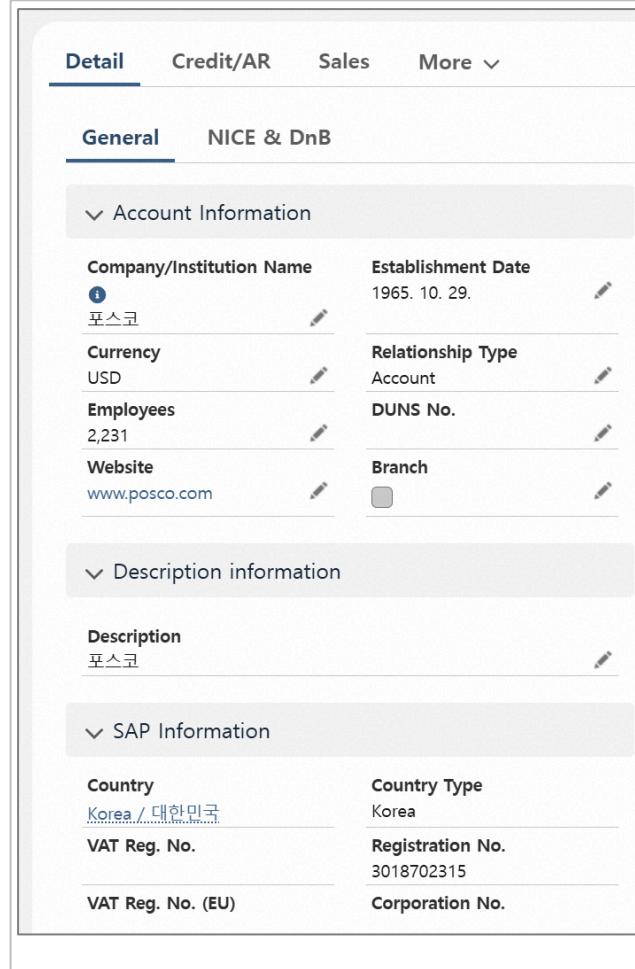
- Shows data retrieved from the SAP system during integration.
- This information is read-only and cannot be edited in Salesforce.

4. NiceD&B Information Tab

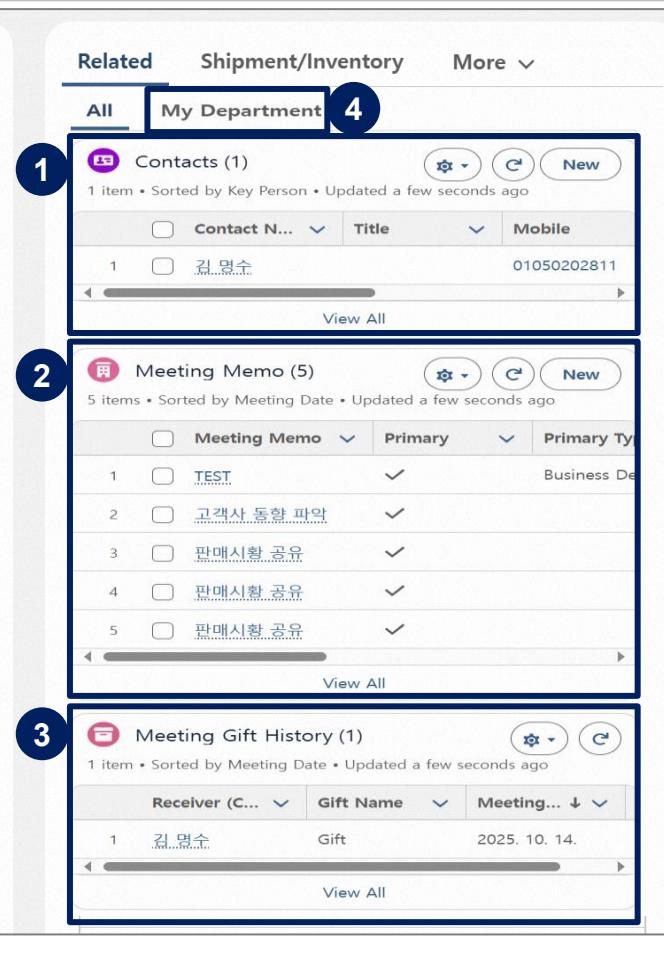
- When clicked, this tab displays company data integrated from NiceD&B.
- Users can view a company overview and financial information for the past three years.
- This information is also read-only and cannot be modified.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Related)
Navigation	CRM App > Account > Account List > Account Details View		



The screenshot shows the 'Account Details View' page. At the top, there are tabs for 'Detail', 'Credit/AR', 'Sales', and 'More'. Below these are sections for 'General' (Company Name: NICE & DnB), 'Account Information' (Establishment Date: 1965. 10. 29), 'Description Information' (Description: 포스코), and 'SAP Information' (Country: Korea / 대한민국, VAT Reg. No.: 3018702315, VAT Reg. No. (EU):).



The screenshot shows the 'My Department' tab selected in the top navigation bar. It displays three connected lists:

- 1. Contacts (1)**: Shows a contact named 김명수 with mobile number 01050202811.
- 2. Meeting Memo (5)**: Shows five meeting memo entries, all marked as 'Business' type. Examples include 'TEST' and '판매시황 공유'.
- 3. Meeting Gift History (1)**: Shows one gift history entry for 김명수 on 2025. 10. 14, labeled 'Gift'.

1. Connected Contacts List

- Displays name, job title, mobile phone number, email, and marks key contacts.
- Clicking the "New" button allows you to add a new contact.

2. Connected Meeting Notes List

- Shows meeting note title, key account status, type, meeting date, department that created it, and summary information.
- Clicking the "New" button allows you to create a new meeting note.

3. Meeting Gift History List

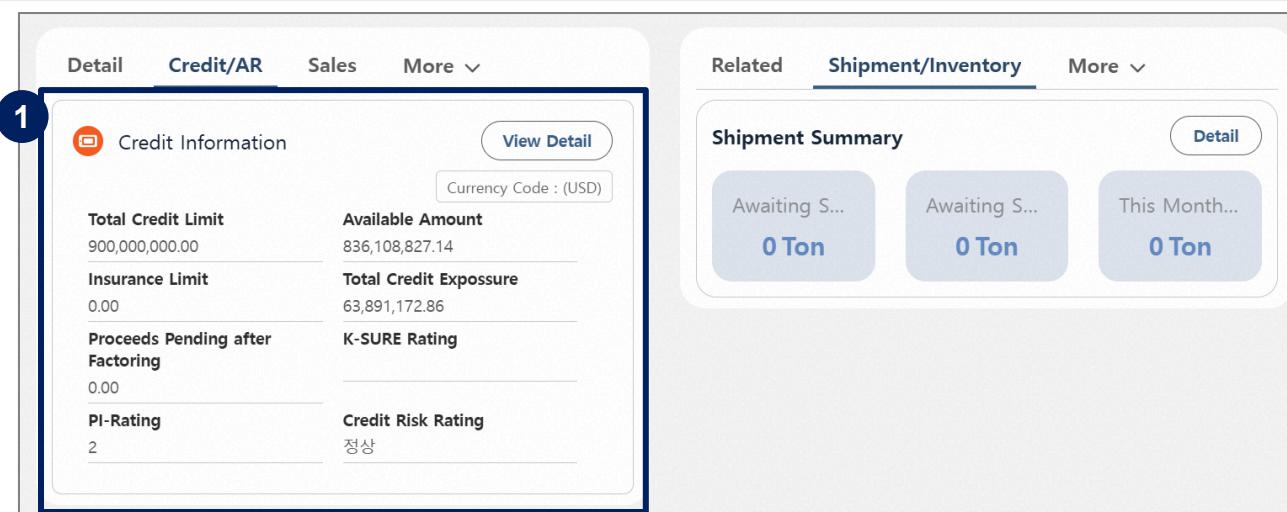
- Displays the list of "Meeting Gift History" recorded in the connected meeting notes.
- Shows recipient, gift name, and meeting date.

4. Clicking the 'My Organization' Tab

- Filters content based on the organization of the logged-in user.
- For upper-level organizations, includes content from subordinate organizations.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Credit/ A/R)
Navigation	CRM App > Account > Account List > Account Details View		



The screenshot shows the 'Account Details View' screen. At the top, there are navigation tabs: 'Detail', 'Credit/AR', 'Sales', and 'More'. The 'Credit/AR' tab is selected. Below this, the 'Credit Information' section is displayed, containing the following data:

Total Credit Limit	Available Amount
900,000,000.00	836,108,827.14

Other fields in this section include:

- Insurance Limit: 0.00
- Proceeds Pending after Factoring: 0.00
- PI-Rating: 2
- K-SURE Rating: 정상

Below the credit information, there is a 'Currency Code : (USD)' button and a 'View Detail' button.

On the right side of the screen, under the 'Shipment/Inventory' tab, there is a 'Shipment Summary' section with three boxes:

- Awaiting S... 0 Ton
- Awaiting S... 0 Ton
- This Month... 0 Ton

1. Credit Information Section

- Displays credit information of business partners based on the corporation the user belongs to.
- Clicking “View Details” switches to the Credit Monitoring Dashboard screen.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Order/Shipment)
Navigation	CRM App > Account > Account List > Account Details View		

1 Shipment Summary

Awaiting Shipment... 0 Ton	Awaiting Shipment 0 Ton	This Month Shipment... 0 Ton
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2 Order (5+)

Order Name	Order Qty(...)	Prod. Name	Spec.
1 01S7616747	99.840	FPJ	JS-SM490A
2 01S7611867	80.496	FPJ	JS-SM490A
3 01S7614271	78.065	FPJ	JS-SS400
4 01S7602411	52.506	FPJ	JS-SM490A
5 01S7617416	80.640	FPJ	JS-SM490A

1. Shipment Status Information Section

- Displays shipment information of business partners based on the organization the user belongs to (Only Steel Division).
- Clicking “Details” switches to the Order/Shipment Monitoring Dashboard screen.

2. Order Information Section

- A list of order information linked to the related Account.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Sales) (1/2)
Navigation	CRM App > Account > Account List > Account Details View		

The screenshot shows the POSCO CRM Account Details View. It includes five numbered callouts:

- 1.** Sales by Account: A section showing Total Performance with Total Sales (1,980) and Total Profit (-633). Below it is a Sales History (3 Years) table for the years 2025, 2024, 2023.
- 2.** Currency/Unit Selection Filter for Amount Display: A dropdown menu set to KRW (M).
- 3.** Organization Selection Filter: A dropdown menu set to All.
- 4.** Sales by Product: A table showing Sales by Product across LV3 and LV4 levels. The table includes columns for LV3, LV4, Item, and 2025. Data rows include HOT ROLLED STEEL and HOT ROLLED COIL (POSCO).
- 5.** Chatter: A feed of activity posts from users like 이현수 and Test Event, including Send Quote and Test Event posts, with options to Like, Comment, and Write a comment.

- 1. Sales by Account**
 - Displays annual sales, gross profit, and pre-tax profit (shown for the past 3 years).
- 2. Currency/Unit Selection Filter for Amount Display**
 - Provides 4 options: KRW (Won / million Won), USD (Dollar / thousand Dollar).
- 3. Organization Selection Filter**
 - For users with department head level or key roles, sales data can be viewed based on their affiliated department/division.
- 4. Sales by Item per Account**
 - Displays annual sales by item.
 - Quantity, sales, and profit are shown per item.
- 5. Sales Data Reference Standard**
 - Based on SAP Billing.
 - Can be viewed by both Sold-To and Ship-To.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Project)
Navigation	CRM App > Account > Account List > Account Details View		

The screenshot displays two main sections of the CRM application:

- Project Section:** This section is titled "Project (2)" and shows a list of two items. The items are "b 프로젝트" and "A 프로젝트". "b 프로젝트" is associated with "Steel" and a quantity of "10,000". "A 프로젝트" is associated with "Steel" and a quantity of "150,000". There are buttons for "New Event" and "New Task".
- Timeline Section:** This section is titled "Timeline" and shows a list of events and tasks. It includes filters for "All time", "All activities", and "All types". The events listed are:
 - Upcoming & Overdue:
 - 차주에 이메일 회신 (10. 24.)
 - 차주에 이메일 회신 (Today)
 - October • 2025:
 - 테스트 (오늘 11:00 | Yesterday)
 - 테스트 (Yesterday)
 - 10월 31일 정기미팅 (오늘 4:00 | Yesterday)
 - 10월 마지막주 정기미팅 (오늘 10:00 | Yesterday)
 - 미팅 메모 '모바일 생성화면 테스... (All-Day Event | Yesterday)

1. Contract/Project Management Section

- To be filled out when there is a long-term contract or project-based transaction with the customer
- Can only be modified or deleted if created by your own organization
- Duplicate registration with the same contract/project name is not allowed
- Can be created regardless of the customer's managing organization and can be mapped to order(Only Steel Division) information

Step 01. Account Management

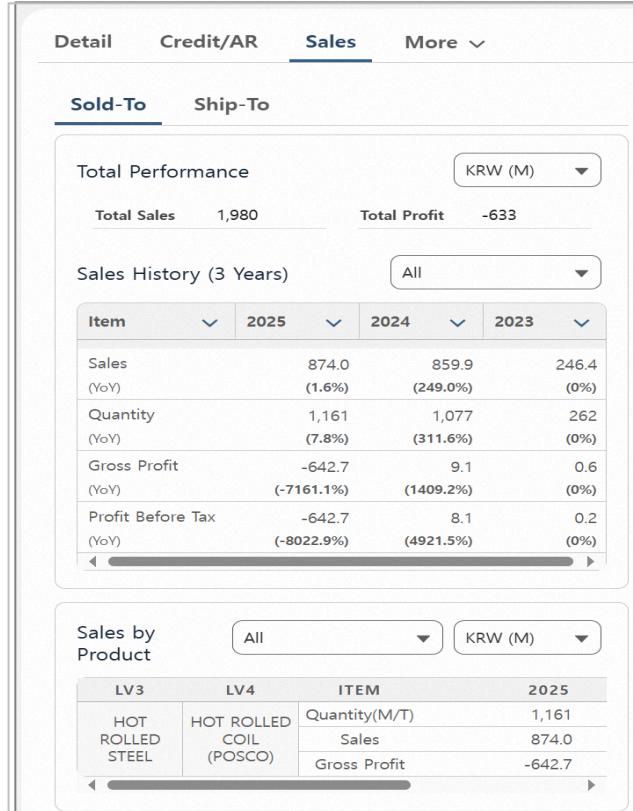
Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Timeline)
Navigation	CRM App > Account > Account List > Account Details View		

The screenshot shows the POSCO CRM Timeline History section. At the top, there are three buttons: 'New Event' (highlighted with a red circle) and 'New Task' (highlighted with a blue circle), both with dropdown menus. Below these are two tabs: 'Timeline' (highlighted with a green circle) and 'More'. A large 'TO-DO List' section displays tasks for '김수혜' (Kim Su-hee) with details like '차주에 이메일 회신' (Email reminder sent to owner) and '차주에 이메일 회신' (Email reminder sent to owner). Below this is a 'Timeline history' section showing events from October 2025, including '테스트' (Test) events and a '미팅' (Meeting) event.

- 1. Click "New Event"**
 - Allows you to create a schedule related to the account.
- 2. Click "New Task"**
 - Allows you to create a to-do item related to the account.
- 3. Timeline History Section**
 - Includes a TO-DO List area showing registered tasks and upcoming events, and a History area showing past events.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Chatter)
Navigation	CRM App > Account > Account List > Account Details View		



Sold-To Ship-To

Total Performance

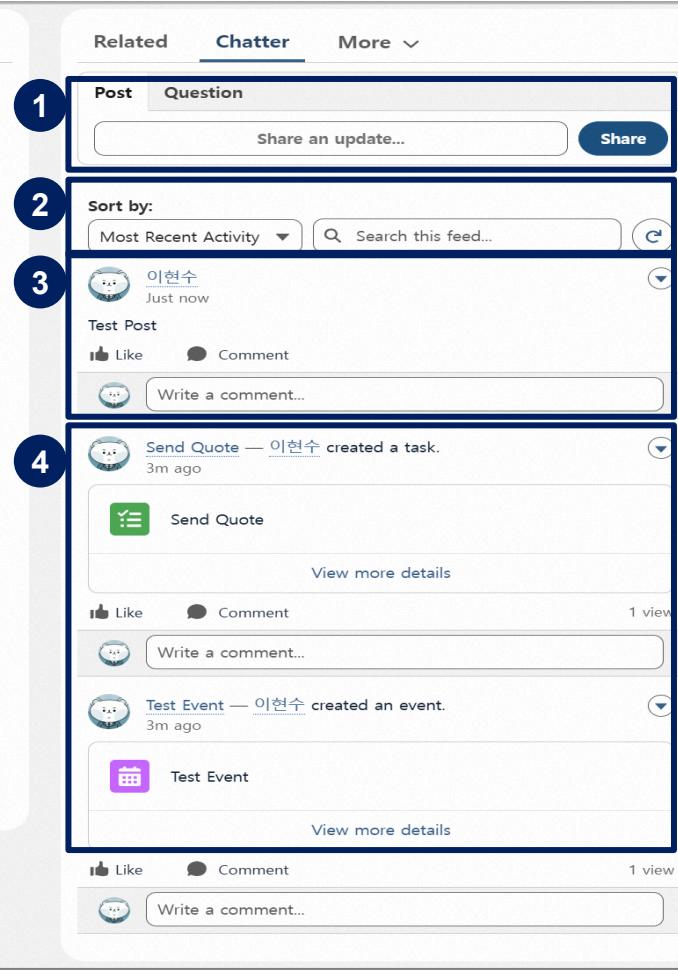
Total Sales	1,980	Total Profit	-633
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Sales History (3 Years)

Item	2025	2024	2023
Sales	874.0	859.9	246.4
(YoY)	(1.6%)	(249.0%)	(0%)
Quantity	1,161	1,077	262
(YoY)	(7.8%)	(311.6%)	(0%)
Gross Profit	-642.7	9.1	0.6
(YoY)	(-7161.1%)	(1409.2%)	(0%)
Profit Before Tax	-642.7	8.1	0.2
(YoY)	(-8022.9%)	(4921.5%)	(0%)

Sales by Product

LV3	LV4	ITEM	2025
HOT ROLLED STEEL	HOT ROLLED COIL (POSCO)	Quantity(M/T)	1,161
		Sales	874.0
		Gross Profit	-642.7



- 1 Post Share an update... Share
- 2 Sort by: Most Recent Activity Search this feed...
- 3 이현수 Just now Test Post Like Comment Write a comment...
- 4 Send Quote — 이현수 created a task. 3m ago Send Quote View more details Like Comment 1 view Write a comment... Test Event — 이현수 created an event. 3m ago Test Event View more details Like Comment 1 view Write a comment...

1. Post Creation Section

- Allows users to write work-related posts or questions based on the account.
- All created posts are visible to everyone.

2. Sorting and Searching Created Posts

- Posts can be sorted and searched.

3. Created Posts

- Posts are displayed in reverse chronological order by default, and all posts allow comments.

4. Created Events/Tasks

- When an event or task is created, it appears in the chatter feed similar to a post, and comments can be added.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Etc. Information)
Navigation	CRM App > Account > Account List > Account Details View		

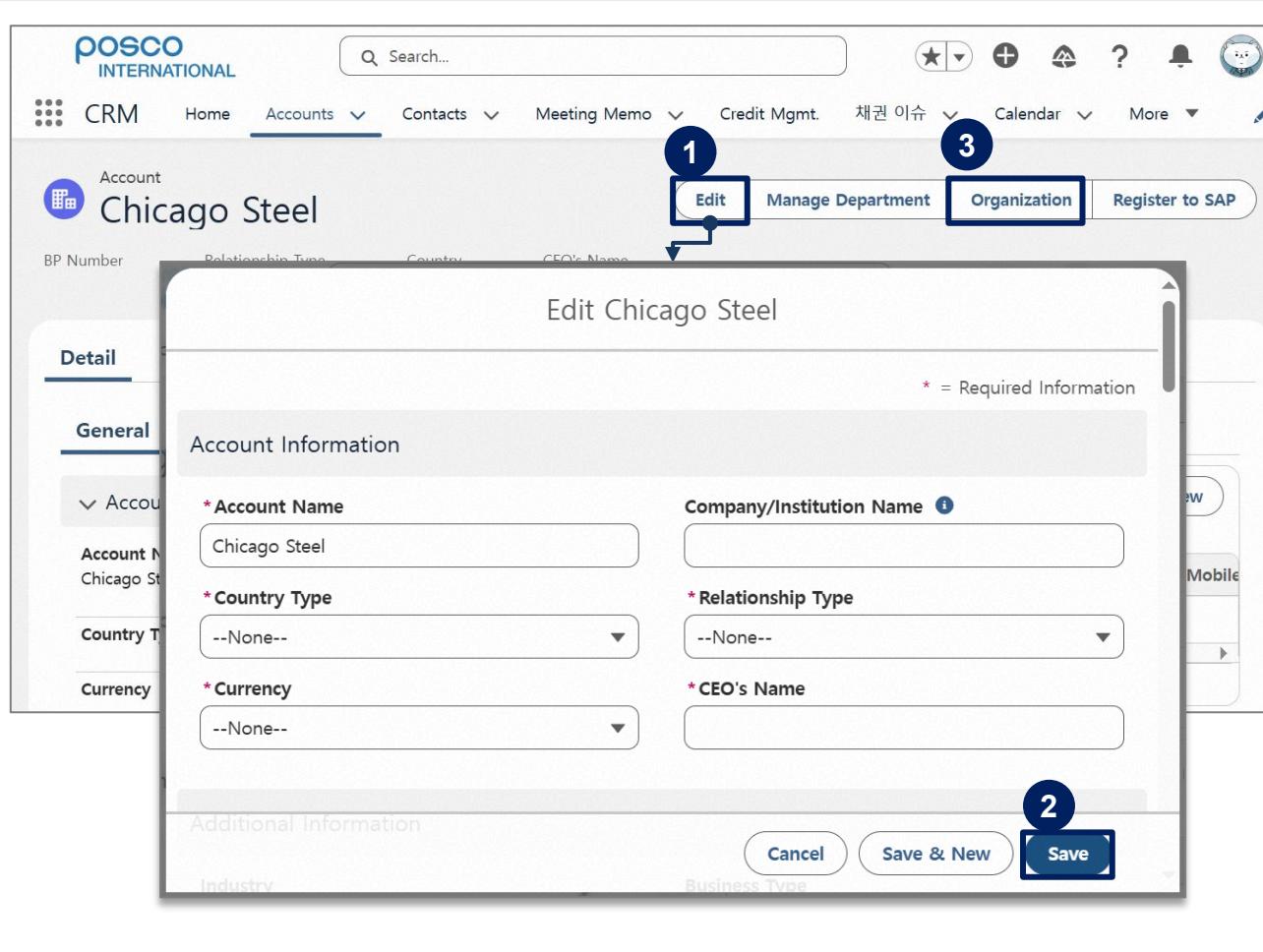
The screenshot displays six sections of the CRM App interface:

- 1. Account Department (5+)**: Shows a list of departments. One item is selected: "China Department" (Checked, Default, Created Date: 2025. 10. 1).
- 2. Material Group (5+)**: Shows a list of material groups. Five items are listed: ARMS AND AMMU..., COMMODITY, ENERGY PRODUCT, MACHINERY AND ..., and MACHINERY AND ... (with ellipses).
- 3. Account Company (5+)**: Shows a list of companies. Two items are listed: (1000) (주)포스코인터내셔널 (Vendor) and (1000) (주)포스코인터내셔널 (Customer).
- 4. BusinessTrip Report (5+)**: Shows a list of business trip reports. Five items are listed: 대리 정혜윤, 대리 정혜윤, 사원 배가현, 사원 송우희, and 대리 양상근.
- 5. Files DRM Decryption on Upload**: A section for file uploads. It shows a toggle switch set to "On" and a button "Add Files". Below it, it says "No files attached."
- 6. Account History (5+)**: Shows a history of account modifications. Three items are listed: Shareholding St., Description, and another entry (partially visible).

- 1. Responsible Organization Display Section for the Account**
 - Shows the organization that has permission to edit the account information.
- 2. Exposed Items Handled by the Account**
 - Items that can be added based on the responsible organization.
 - Follows the Material Group standard in SAP.
- 3. Account Code Information Display Section**
 - If the account is linked as a BP or extended to an overseas entity, the relevant corporate information is shown.
- 4. Legacy Business Trip Report Display Section**
 - Shows older business trip reports managed in the Interzone system, linked by account.
- 5. File Upload Section Based on Account**
 - Allows file uploads with optional decryption settings.
- 6. Account Modification History Section**
 - Displays the history of changes made to the account.

Step 01. Account Management

Step (Lv.2)	01.02. Account Update	Step (Lv.3)	01.02.01 Update account information(1/2)
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		



The screenshot shows the POSCO International CRM application. The main navigation bar includes CRM, Home, Accounts, Contacts, Meeting Memo, Credit Mgmt., 채권 이슈, Calendar, More, and a search bar. The 'Accounts' menu is currently selected. Below the navigation is a card for 'Chicago Steel' with tabs for Detail, General, and Account. The General tab is active, showing sections for Account Information (with fields for Account Name, Company/Institution Name, Country Type, Relationship Type, Currency, and CEO's Name) and Additional Information (with fields for Business Type, Industry, and Contact Person). A modal window titled 'Edit Chicago Steel' is open over the general details. Inside the modal, there are fields for Account Name (Chicago Steel), Company/Institution Name, Country Type (None), Relationship Type (None), Currency (None), and CEO's Name. At the bottom of the modal are three buttons: 'Cancel', 'Save & New', and a larger blue 'Save' button. Callouts numbered 1, 2, and 3 point to the 'Edit' button in the top bar, the 'Organization' tab in the top bar, and the 'Save' button in the modal respectively.

1. Click “Edit” Button

- Opens a popup that allows editing of the account.
- Only editable data fields can be modified.
(* Fields like basic information can also be edited by clicking the pencil icon.)

2. After Filling Out the Edit Popup, Click “Save”

- Upon saving, the account information is updated.
- Duplicate checks are performed during editing as well (e.g., when modifying business registration number or VAT ID).

3. Organization Chart Setup for the Account

- Not a mandatory section; can be configured if needed.
- Clicking the organization chart opens the setup screen.
- Detailed organization chart settings are available. 

Step 01. Account Management

Step (Lv.2)	01.02. Account Update	Step (Lv.3)	01.02.01 Update account information(2/2)
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		

The screenshot shows the POSCO International CRM interface. On the left, there's a sidebar with sections like 'Detail', 'General', 'Account Info', 'Account Name (Chicago Steel)', 'Country Type', and 'Currency'. The main area displays account details for 'Chicago Steel'. A central modal window titled 'Manage Department' is open. It contains a message: 'Please add the group responsible for this account. All users in the added group(Lv.3) will be able to edit the account information.' Below this is a list of departments under 'Materials n Bio Resources Business Group'. The 'Materials n Bio Resources Business Operation' department is selected. There are two arrows: one pointing right from the list to the toolbar, and another pointing right in the toolbar itself. A delete icon is also visible in the list. At the bottom of the modal are 'Cancel' and 'Save' buttons.

1. Click “Manage Department” Button

- Opens a popup where responsible Departments can be added or removed.
- This button is only visible to the owner of the account and its responsible Departments.

2. After Selecting a Department, Click the Right Arrow

- Adds the selected Department (from the left) as a responsible Department for the account.
- The added Department gains editing permissions.
- By default, group-level Departments can be added, and direct groups/sections under the division or department can also be added.

3. Clicking the Delete Icon

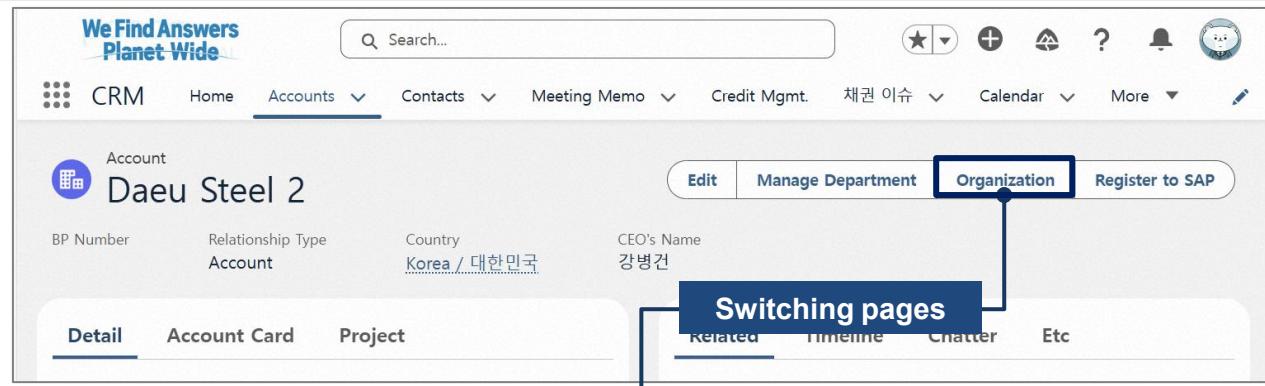
- Removes the selected Department from the editable list.

4. Clicking “Save”

- Applies the changes made to the responsible Department settings.

Step 01. Account Management

Step (Lv.2)	01.02. Account Update	Step (Lv.3)	01.02.02 Manage account Organization Chart
Menu	Account		
Navigation	CRM App > Account > Account List > Organization chart		



We Find Answers Planet Wide

Search... ★ + ? ? ? ?

CRM Home Accounts Contacts Meeting Memo Credit Mgmt. Credit Mgmt. Calendar More

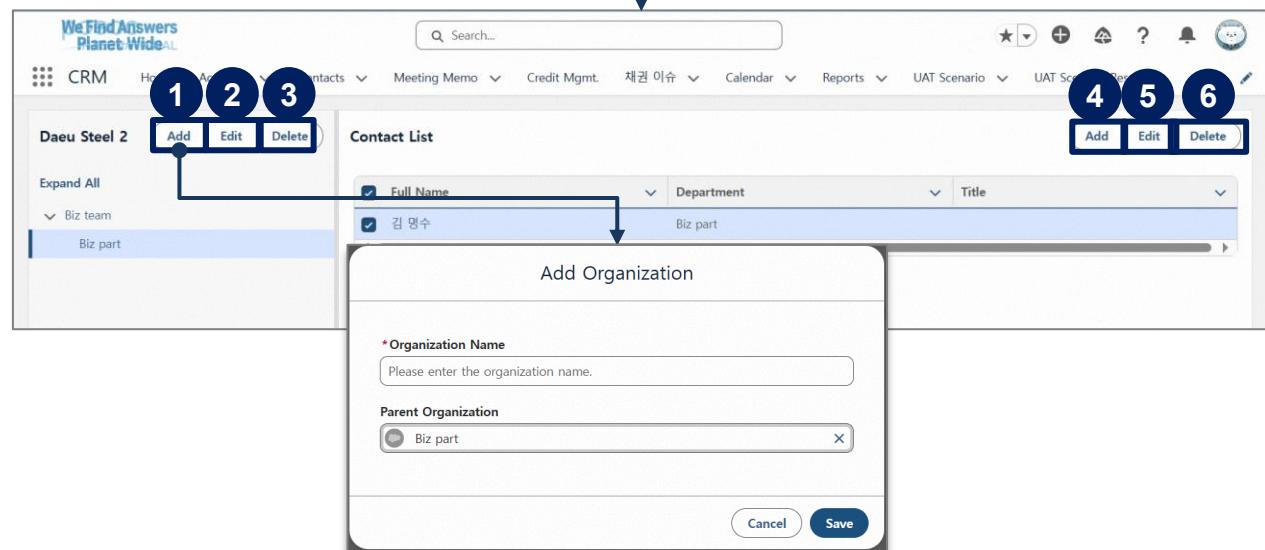
Account Daeu Steel 2

BP Number Relationship Type Country CEO's Name

Korea / 대한민국 강병건

Detail Account Card Project

Related Timeline Chatter Etc



We Find Answers Planet Wide

Search... ★ + ? ? ? ?

CRM Home Accounts Contacts Meeting Memo Credit Mgmt. Credit Mgmt. Calendar Reports UAT Scenario UAT Scenario

Daeu Steel 2 Add Edit Delete

Contact List Add Edit Delete

Full Name Department Title

김 명수 Biz part

Add Organization

* Organization Name
Please enter the organization name.

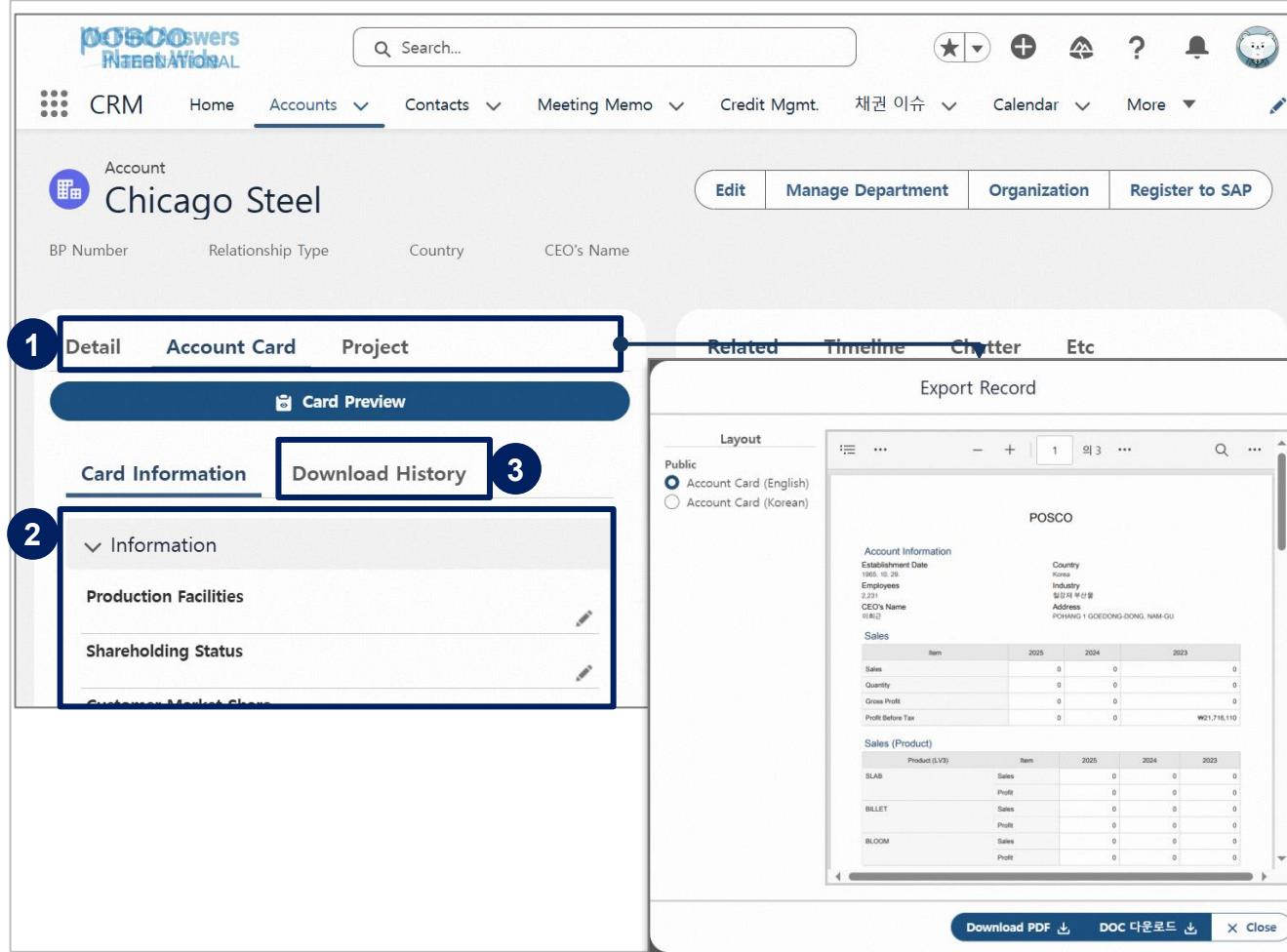
Parent Organization
Biz part

Cancel Save

1. Click “Add” for Organization
 - Opens a popup to register an organization, allowing you to set the organization name and its parent organization.
 - If no parent organization is entered, it will be registered as a top-level organization.
 - After selecting an organization, clicking the Add button will set it as the parent organization.
2. Click “Edit” for Organization
 - After selecting a saved organization and clicking "Edit", you can change its name and parent organization information.
3. Click “Delete” for Organization
 - Deletes the selected organization.
4. Click “Add” in the Contact List
 - You can link contacts to an organization
 - The contact must be associated with an Account to be related.
5. Click “Edit” in the Contact List
 - Modify the organization information linked to the contact.
6. Click “Delete” in the Contact List
 - Unlinks the contact from the organization.

Step 01. Account Management

Step (Lv.2)	01.02. Account Update	Step (Lv.3)	01.02.02 Create Account Card
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		



1. When Clicking “Preview Account Card”

- Opens a popup preview of the Account Card document, based on the account's basic information and the card details entered below.
- From the preview popup, the card can be downloaded as a PDF or DOC file.

2. Card Information Entry Section

- A description input area where both text and images can be pasted.

3. Download History Section

- Allows users to view the history of previously generated Account Cards.

Step 01. Account Management

Step (Lv.2)	01.03. Account Creation	Step (Lv.3)	01.03.01 Create an account not linked to BP
Menu	Account		(1/3)
Navigation	CRM App > Account > Account List > New Create Pop-up		

The screenshot shows the POSCO International CRM interface. In the main header, there is a search bar labeled "Search...". Below the header, there are several navigation links: CRM, Home, Accounts (which is currently selected), Contacts, Meeting Memo, Credit Mgmt., and more. On the right side of the header, there are icons for star, plus, tree, question mark, bell, and user profile.

The main content area displays a list of "All Accounts". A search bar at the top of this list has the placeholder "Search this list...". Below the search bar, there are filters for Account Name, Company/Institution Name, BP Number, VAT Reg. No., Registration No., Owner Last Name, and Department.

A modal window titled "Account Search" is open. It contains a message: "Please search for existing accounts before creating a new one. If a matching account is found, you can click the link to navigate to its detail page. You may also use the button at the top to search for company information if needed." At the top of this modal is a "New" button. Below the message, there is a search bar with the text "Chicago". The results table shows the following data:

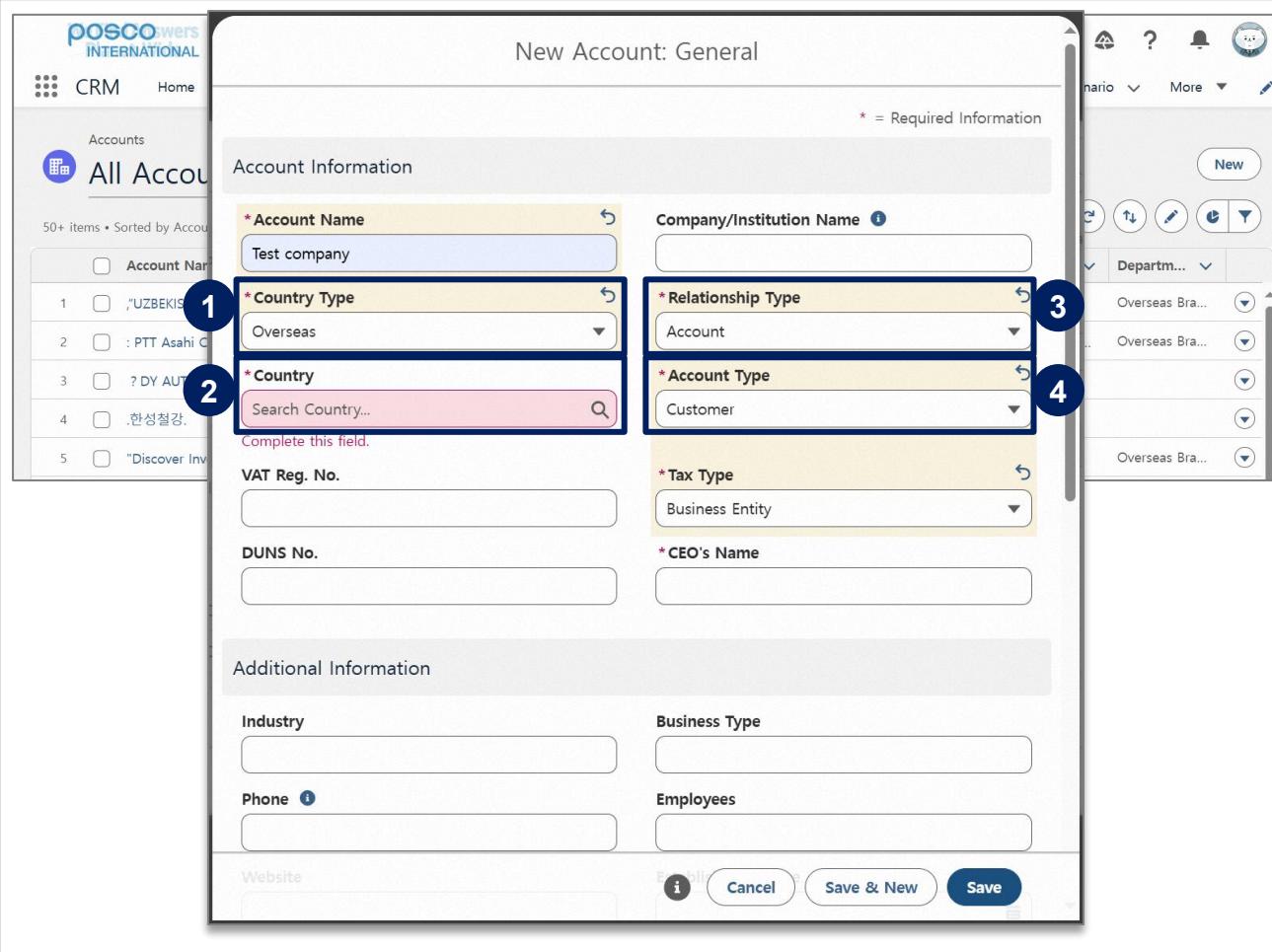
Account Name	BP Number	Country	Registration No.	VAT Reg. No.
CHICAGO BRIDGE AND IRON C...	0001358585	Netherlands / 네덜란드		NL805703354B01
Chicago Food Corp.		United States of America / 미국		
Chicago Steel				
COMBINED METALS OF CHICA...	0001343946	United States of America / 미국		
COMBINED METALS OF CHICA...	0002001381	United States of America / 미국		

At the bottom of the modal, there is a "Call" button and a "New" button. The entire modal is numbered "5" in a blue circle.

- Click "New" button**
 - Opens a popup to create a new Account. You can check existing records through search.
- Search Account Information Based on External Data**
 - Provides popups for Nice BizLine and Hoovers to pre-search company information.
- Account Name-Based Search Result Area**
 - Allows initial judgment on duplicate Accounts based on the Account name.
- Search Result List Provided**
 - Displays information to help determine duplication.
 - Criteria for duplication: Business Registration Number, VAT Identification Number
- Click "New" in the popup page**
 - When clicked, transitions to the next popup.
 - In the next popup, you can enter detailed Account information.

Step 01. Account Management

Step (Lv.2)	01.03. Account Creation	Step (Lv.3)	01.03.01 Create an account not linked to BP
Menu	Account		(2/3)
Navigation	CRM App > Account > Account List > New Create Pop-up		



New Account: General

* = Required Information

Account Information

1 *Account Name Test company

2 *Country Type Overseas

3 *Relationship Type Account

4 *Account Type Customer

VAT Reg. No.

DUNS No.

Additional Information

Industry

Business Type

Phone

Employees

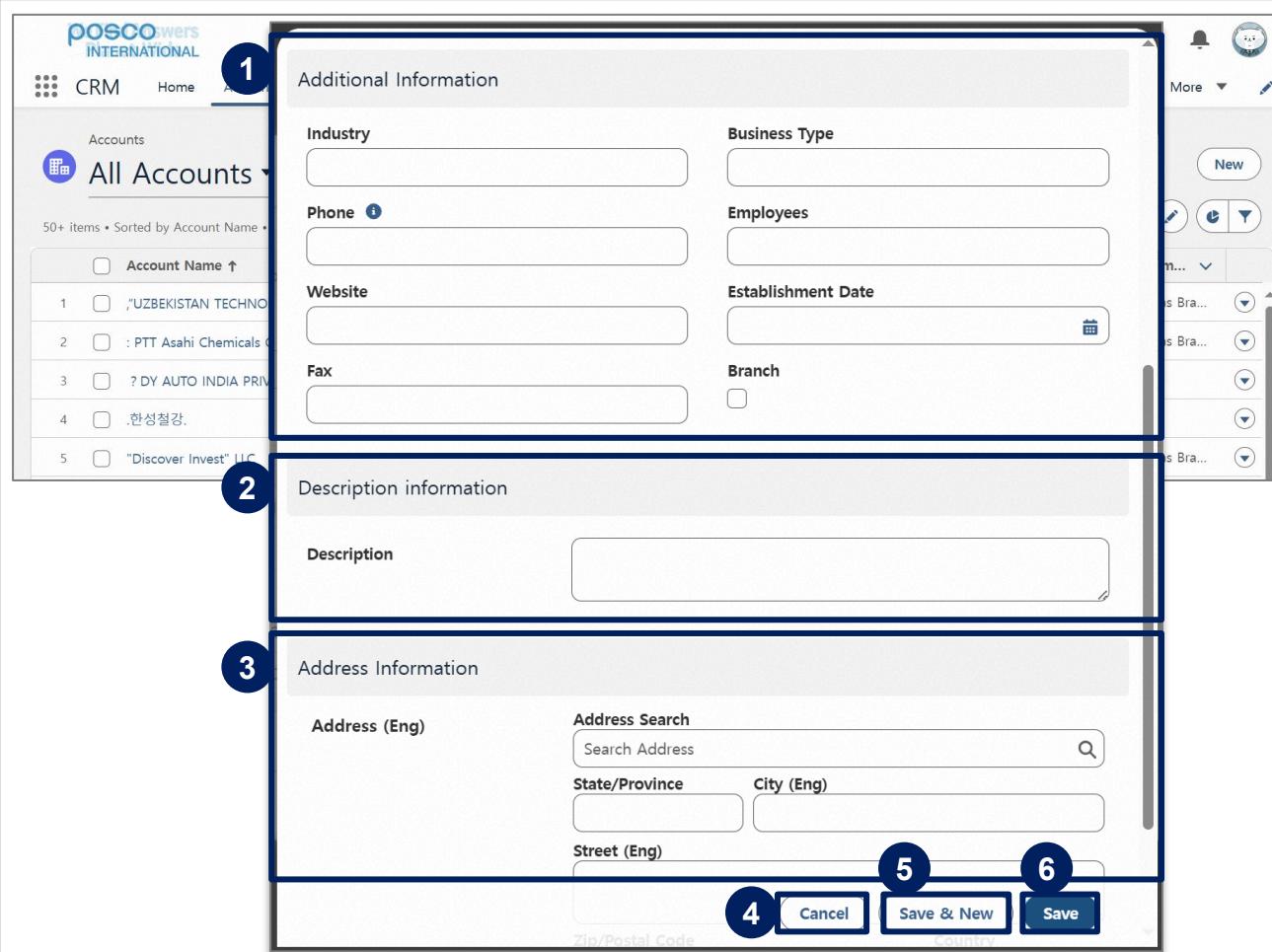
Website

Cancel Save & New Save

- Select Country Classification**
 - Choose between Domestic or Overseas
 - **Domestic:** Business Registration Number is required
 - **Overseas:** VAT ID is required (DUNS Number is provided as an optional)
- Select Country Type**
 - For Domestic, South Korea is automatically set
 - For Overseas, search and select the country manually
- Select Relationship Type**
 - Choose one of the following: Account, Partner, or Government Relations
 - If Account is selected, additional selection of Account Type is required
- Select Account Type**
 - Choose one: Customer, Vendor, or Both
 - If Customer is selected, Tax Type selection is required

Step 01. Account Management

Step (Lv.2)	01.03. Account Creation	Step (Lv.3)	01.03.01 Create an account not linked to BP
Menu	Account		(3/3)
Navigation	CRM App > Account > Account List > New Create Pop-up		

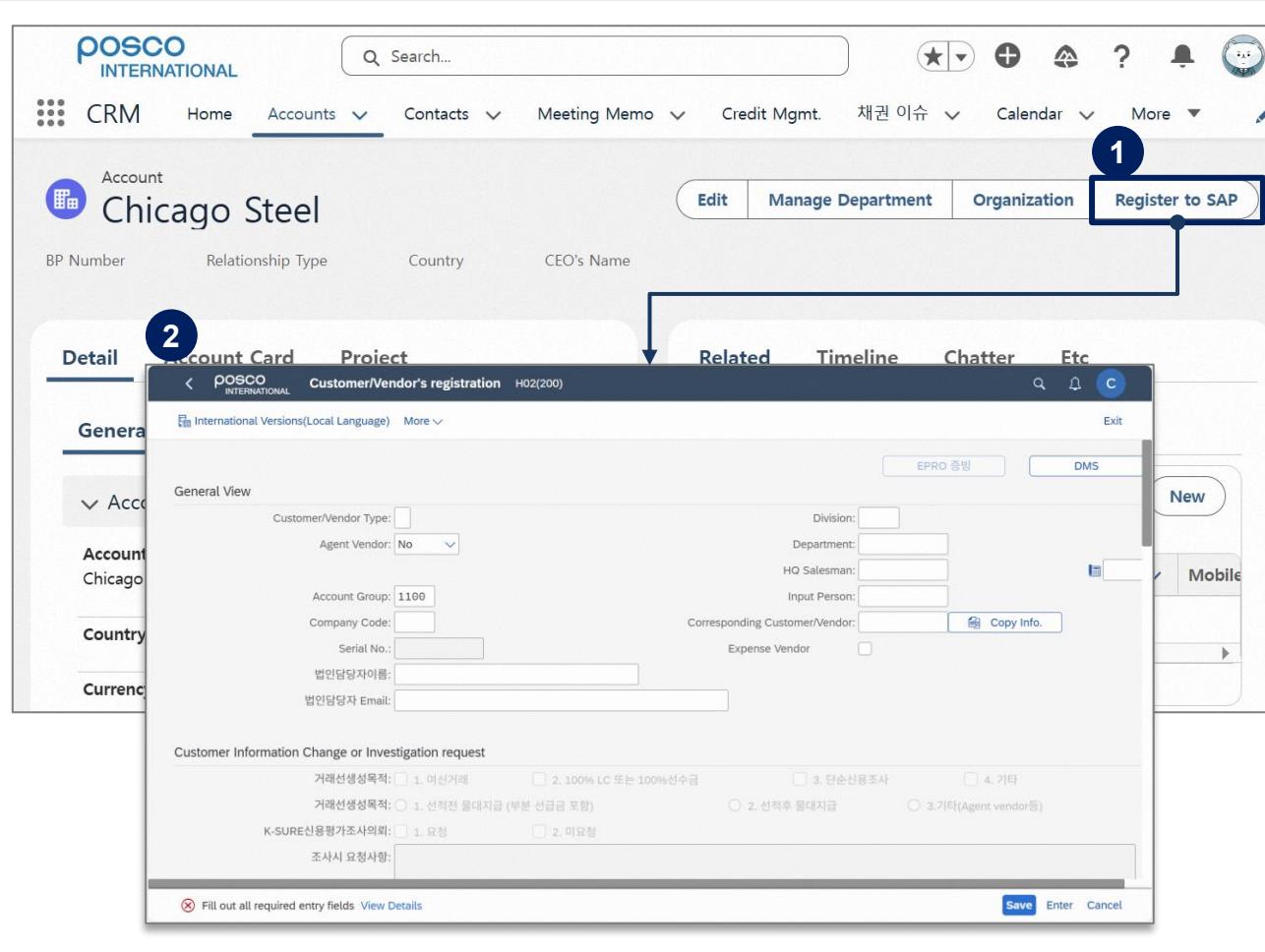


The screenshot shows the 'New Create Pop-up' window for account creation. The window is divided into three tabs: 'Additional Information', 'Description information', and 'Address Information'. The 'Additional Information' tab contains fields for Industry, Business Type, Phone, Employees, Website, Establishment Date, Fax, and Branch. The 'Description information' tab contains a single 'Description' field. The 'Address Information' tab includes an 'Address Search' section with fields for State/Province and City, and a 'Street (Eng)' field. At the bottom of the window are three buttons: 'Cancel', 'Save & New', and 'Save'.

- Enter Additional Information**
 - This area is for entering supplementary information for management purposes.
- Enter Description Text for the Account**
 - Write descriptive information about the Account.
- Address Information**
 - Address data will be linked when converting to SAP BP later.
- Click “Cancel”**
 - Returns to the previous popup.
- Click “Save and New”**
 - Saves the current entry and reopens the popup.
- Click “Save”**
 - Checks for duplicates before saving.
After saving, navigates to the screen of the newly created Account.
(* Once saved, a summary will be displayed on the home screen.)

Step 01. Account Management

Step (Lv.2)	01.03. Account Creation	Step (Lv.3)	01.03.02 Convert to a BP-linked account
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		



The screenshot shows the POSCO International CRM interface. At the top, there is a navigation bar with links for Home, Accounts, Contacts, Meeting Memo, Credit Mgmt., 채권 이슈 (Chaegeon Iseu), Calendar, and More. The main content area displays an account record for "Chicago Steel". The "Register to SAP" button in the top right corner of the account details card is highlighted with a blue circle labeled '1'. A callout arrow points from this button to a second callout labeled '2', which covers the "Customer/Vendor's registration" form. This form contains various input fields for customer information, such as Customer/Vendor Type, Agent Vendor, Account Group, Company Code, Serial No., Division, Department, HQ Salesman, Input Person, and Corresponding Customer/Vendor. It also includes sections for Expense Vendor, Copy Info., and Customer Information Change or Investigation request. Buttons at the bottom of the form include Save, Enter, and Cancel.

1. Click “Register in SAP”

- This button is only visible for Accounts not yet linked to a BP.
- When clicked, a popup for BP registration in SAP will appear.

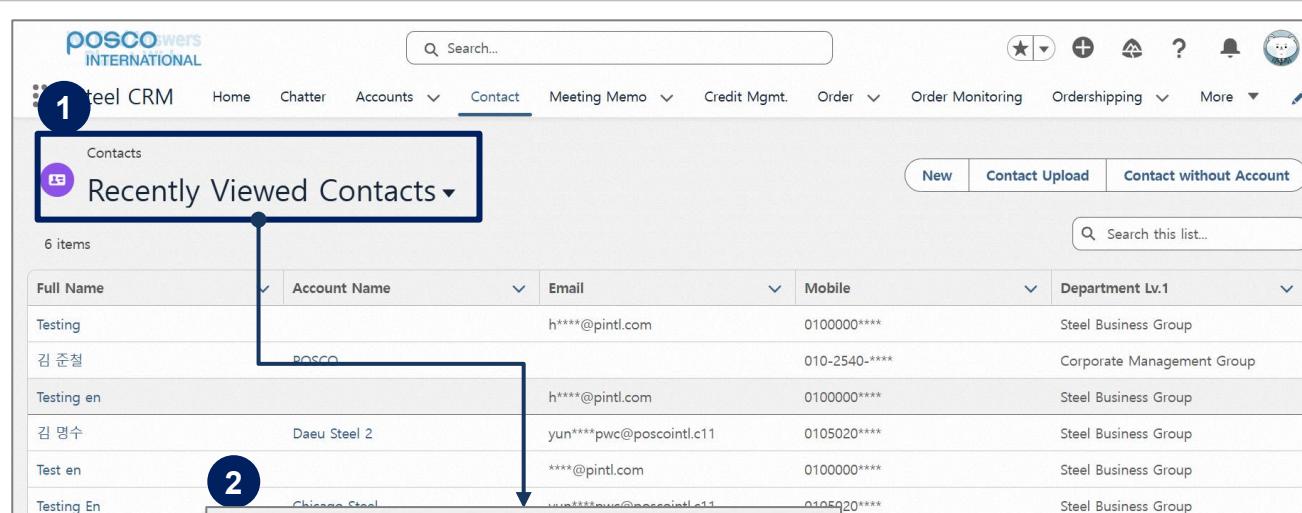
※ Access is not available in external networks, and only users who have been assigned an SAP ID can use it.

2. The BP registration screen will open after the SSO login popup appears (about 5–10 seconds)

- After saving BP information, the subsequent procedures must be carried out in SAP (e.g., approval request submission, BP approval, etc.)

Step 02. Contact Management

Step (Lv.2)	02.01. Contact View	Step (Lv.3)	02.01.01 View contact list
Menu	Contact		
Navigation	CRM App > Contact > Contact List		



Full Name	Account Name	Email	Mobile	Department Lv.1
Testing	POSCO	h****@pintl.com	0100000****	Steel Business Group
김 준철			010-2540-***	Corporate Management Group
Testing en		h****@pintl.com	0100000****	Steel Business Group
김 명수	Daeu Steel 2	yun****pwc@poscointl.c11	0105020****	Steel Business Group
Test en		****@pintl.com	0100000****	Steel Business Group
Testing En	Chicago Steel	yun****pwc@poscointl.c11	0105020****	Steel Business Group

- Click “Contact List”**
 - When clicked, a list of contacts is displayed based on the selected search criteria.
- Search Conditions by List View**
 - **All Contacts:** All Registered Contacts
 - **Contact (Department):** Contacts managed based on the user’s organization
 - **My Contacts:** Contacts created by the user
 - **Recently Viewed Contacts:** Contacts recently viewed (sortable)

Contact Access Permissions Are Based on the Following Groups:

- 1) Steel Division, Materials & Bio Division, Overseas Division
 - 2) Gas Business Division, Energy Business Division
 - 3) Corporate Support, Corporate Planning, Partners, Others
- (* According to company’s internal Privacy Policy, email addresses and mobile phone numbers are masked in the list view.)

Step 02. Contact Management

Step (Lv.2)	02.01. Contact View	Step (Lv.3)	02.01.02 View detailed contact information
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		

The screenshot displays the POSCO International CRM interface for viewing contact details. Key elements include:

- Header:** CRM navigation bar with Home, Accounts, Contacts, Meeting Memo, Credit Mgmt., Calendar, More, and a search bar.
- Contact Information:** Main card showing Account Name (Chicago Steel), Name (Testing En), Email (yunsoo_pwc@poscointl.c11), and several mobile numbers.
- Details Section:** Contains fields for Account Name, Key Person, Biz Card/F2F, Country, and Department.
- Related Section:** Shows 'Meeting Attendees (0)' and 'Contact Department (1)'.
- File Upload Area:** Allows for file decryption on upload and adds files.

- Contact Detail Area**
 - Displays key information such as Account name, mobile phone number, and email.

(*For the “Department” field in Additional Information: if the contact is linked to the Account’s organizational chart, the department will be updated to match the mapped department in the chart. Department info can be modified within the organizational chart.)
- Related Meeting Notes Display Area**
 - Shows a list of meeting notes in which the contact participated.
- Responsible Organization Display Area**
 - Displays the organization responsible for the contact, which has permission to edit the contact information.
- File Upload Area Based on Contact**
 - Files can be uploaded with an option to select whether decryption is required.

Step 02. Contact Management

Step (Lv.2)	02.02. Contact Update	Step (Lv.3)	02.02.01 Update contact information(1/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		

1

2

- Click “Edit”**
 - Opens a popup that allows editing of the contact.
 - Only fields that are editable can be modified.

(*You can also edit fields like contact information by clicking the pencil icon next to each field.)
- Click “Save” After Filling Out the Edit Popup**
 - When saved, the contact information will be updated.

Step 02. Contact Management

Step (Lv.2)	02.02. Contact Update	Step (Lv.3)	02.02.01 Update contact information(2/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		

New Contact: General

Contact Information

* Account Name: Chicago Steel

* Name: Salutation: Ms., Last Name: Testing, First Name: En

Alias: [empty], *Country: United States of America / 미국

*Email: yunsoo_pwc@poscointl.c11, *Mobile: 01050202811, Mobile (International): + (1) 1050202811

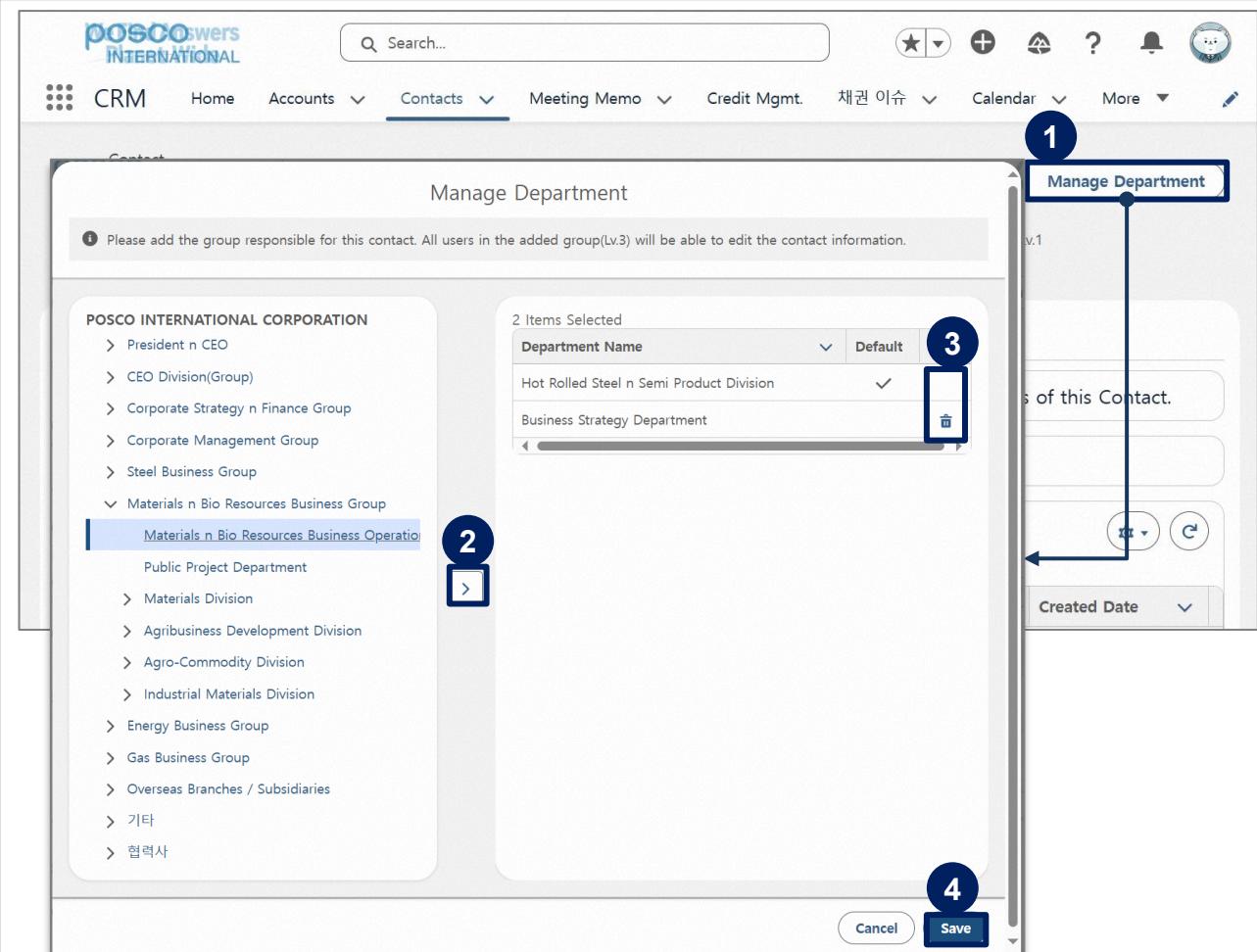
Additional Information

Buttons: Cancel, Save & New, Save

- Click “Duplicate”**
 - Opens a popup to create a new contact with the same information as the currently viewed contact.
- Click “Save” After Filling Out the Form**
 - Saves the entry as a new contact and navigates to the newly saved contact screen.
 - During saving, duplication is checked, so make sure the entered contact information is different from existing records.

Step 02. Contact Management

Step (Lv.2)	02.02. Contact Update	Step (Lv.3)	02.02.01 Update contact information(3/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		

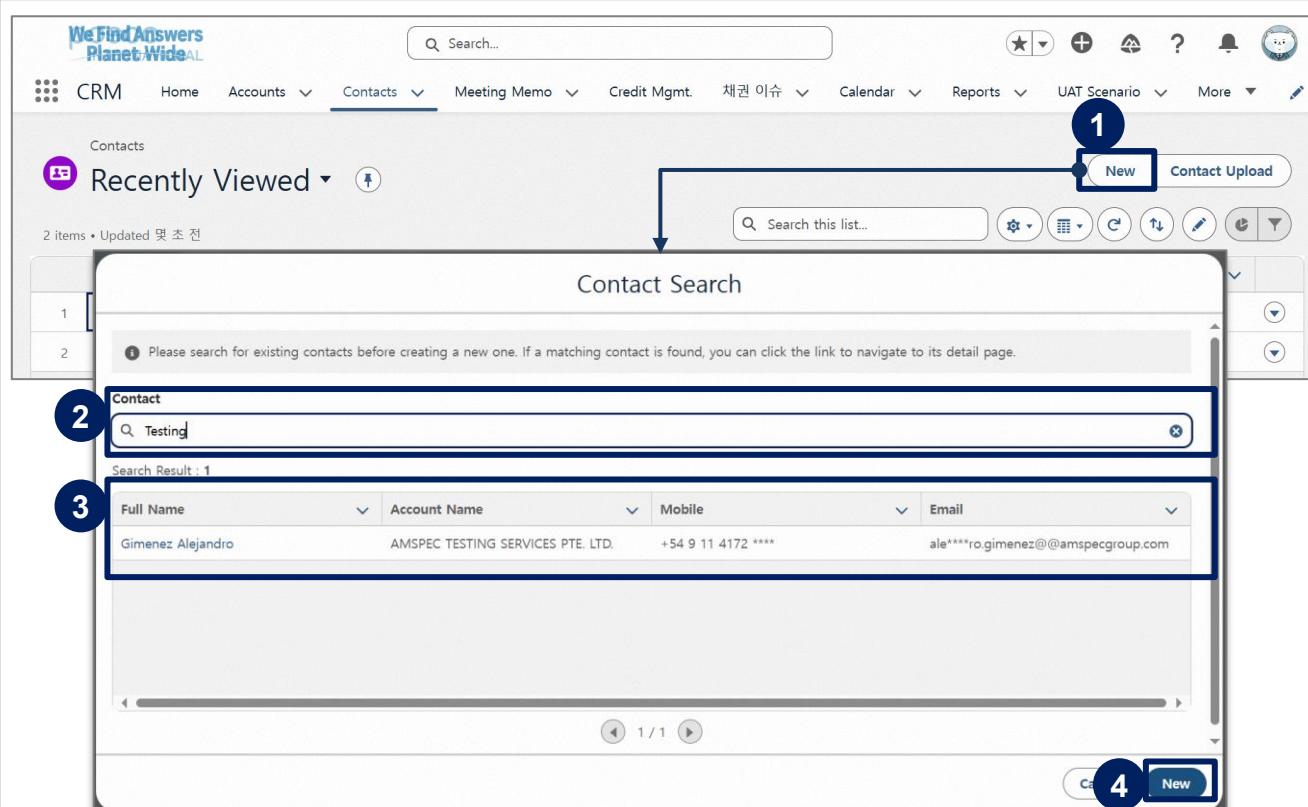


The screenshot shows the POSCO International CRM application interface. At the top, there's a navigation bar with links like CRM, Home, Accounts, Contacts, Meeting Memo, Credit Mgmt., and Calendar. Below the navigation is a search bar and a toolbar with various icons. The main area is titled 'Contact' and shows a 'Manage Department' dialog. This dialog has a list of '2 Items Selected' with 'Department Name' columns. One item is 'Hot Rolled Steel n Semi Product Division' and the other is 'Business Strategy Department'. There are arrows pointing from the left side of the list to the right, indicating selection. A delete icon is also visible. At the bottom of the dialog are 'Cancel' and 'Save' buttons. The background shows a list of available departments under 'Materials n Bio Resources Business Group'.

- Click “Manage Department”**
 - Opens a popup where responsible departments can be added or removed.
 - This button is only visible to the owner of the contact or the responsible organization.
- Click the Right Arrow After Selecting a Department**
 - The selected Department will be set as the responsible Department for the contact and will have permission to edit the contact.
 - By default, group-level Departments can be added, and direct group/section under headquarters or direct section under a division can also be added.
- Click the Delete Icon**
 - Removes the selected Department from the editable list.
- Click “Save”**
 - Applies the responsible Department settings.

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.01 Create a single contact (1/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > New Create Pop-up		



- Click “New”**
 - Opens the contact creation window. You can check existing records through search.
- Name-Based Search Result Area**
 - Allows initial judgment on whether duplicate contacts exist based on the entered name.
- Search Result List Provided**
 - Displays information to help determine duplication.
 - Duplication criteria:
Same Account–Name–Email combination or Same Account–Name–Phone Number combination
- Click “New” Within the Popup**
 - Transitions to the next popup.
In the next popup, you can enter detailed contact information.

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.01 Create a single contact (2/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > New Create Pop-up		

New Contact: General

* = Required Information

Contact Information

1. Account Name: Search Accounts... (Required)

2. Name: Salutation (None), Last Name, First Name (Required)

3. Alias: (Required)

4. Key Person: (checkbox)

5. Biz Card/F2F: (checkbox)

6. Country: Search Country..., Mobile (Required)

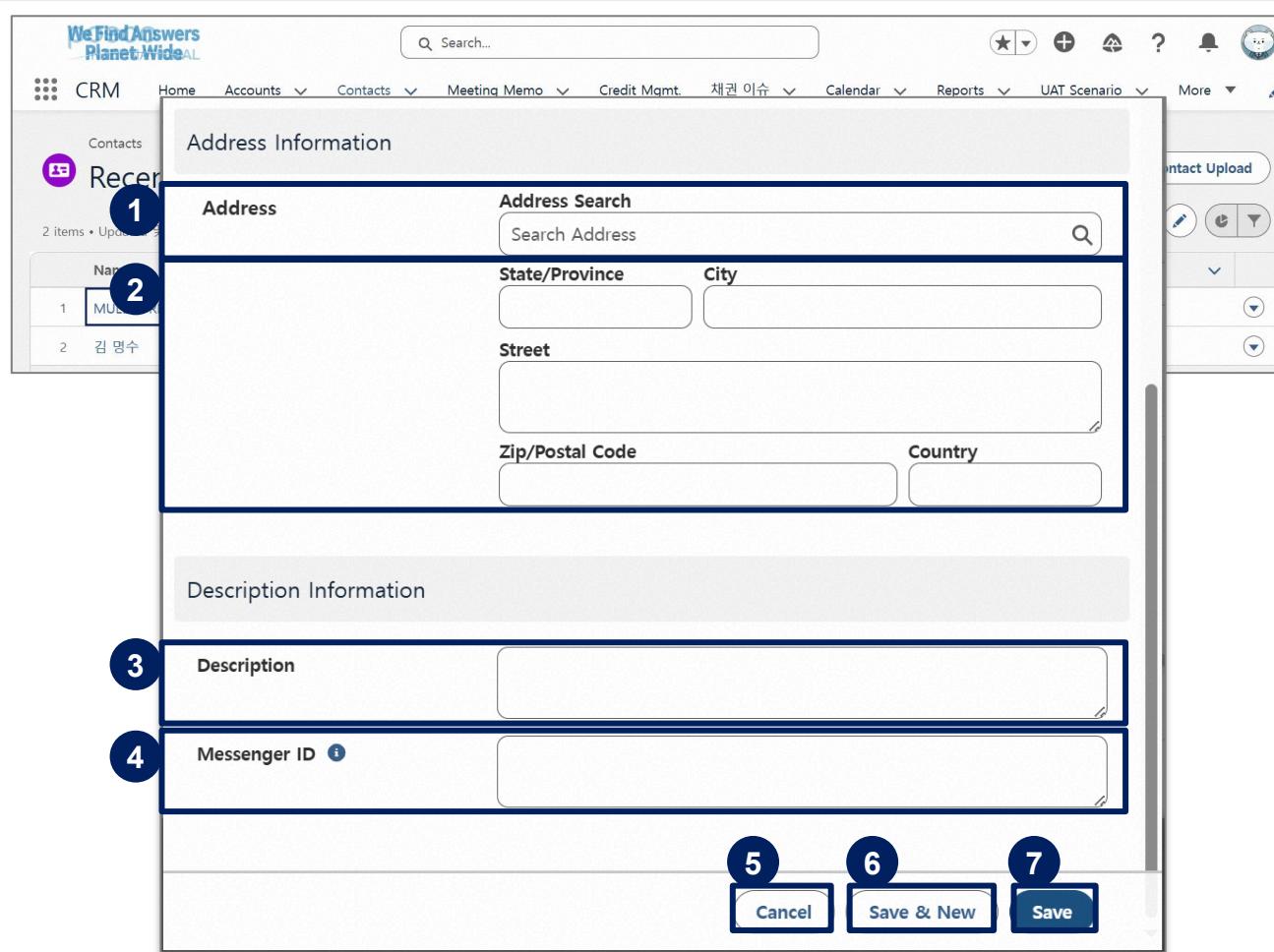
Additional Information

Department, Title, Phone, Fax, Cancel, Save & New, Save

- Enter the Account Linked to the Contact**
 - Search by name to select an Account. If no results are found, register a new Account.
- Enter Name**
 - Enter the last name and first name separately.
 - For domestic contacts, use Korean.
 - For overseas contacts, use English.
- Enter Alias**
 - Examples include: English name for Korean contacts, Korean name for foreign contacts, or names based on the local language.
- Mark as Key Person**
 - If checked, the contact will appear at the top of the contact list in the Account detail screen.
- Check Business Card / Face-to-Face Status**
 - If checked, the contact will be visible to all users within the same access group.
 - If unchecked, the contact will only be visible to the creator's assigned group.
- Enter Country / Phone Number**
 - Selecting a country automatically applies the country code, so manual entry is not required.

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.01 Create a single contact (3/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > New Create Pop-up		



The screenshot shows the 'Address Information' section of the 'New Create Pop-up'. It includes fields for Address, State/Province, City, Street, Zip/Postal Code, and Country. Below this is the 'Description Information' section with fields for Description and Messenger ID. At the bottom are three buttons: Cancel, Save & New, and Save.

- 1: Address Search input field
- 2: State/Province and City input fields
- 3: Description input field
- 4: Messenger ID input field
- 5: Cancel button
- 6: Save & New button
- 7: Save button

1. **Search Address**
 - When an address is selected through search, it is automatically filled in.
2. **Edit Address Information**
 - You can manually enter address information without using search, and you can also modify auto-filled data from search.
3. **Enter Additional Description**
 - Add supplementary notes or comments.
4. **Messenger ID Entry Area**
 - Enter the contact's messenger ID information.
 - Example format:
Messenger Type: Messenger ID
5. **Click “Cancel”**
 - Returns to the previous popup.
6. **Click “Save and New”**
 - Saves the current entry and reopens the popup.
7. **Click “Save”**
 - Closes the popup and navigates to the contact detail screen.
 - (* Once saved, a summary will be displayed on the home screen.)

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	Contact		Excel Form (1/2)
Navigation	CRM App > Contact > Contact List > Excel Upload Pop-up		

The screenshot shows the CRM application interface. At the top, there's a navigation bar with links like CRM, Home, Accounts, Contacts, Meeting Memo, Credit Mgmt., etc. Below it is a 'Recently Viewed' section. The main area displays a list of contacts with columns for Name, Account Name, Contact Owner, and Department. A 'Contact Bulk Upload' pop-up window is open over the list. The pop-up has a 'Select Template' dropdown (circled 2) which is set to 'Please select a template'. It also has an 'Upload Files' button (circled 4) and a 'Download Template' button (circled 3). A 'Caution' section at the bottom lists: You can upload up to 1,000 contacts, Please do not modify the format or column order of the template, and Make sure the file has no data protection enabled.

- Click “Upload Contact”**
 - Opens the contact upload popup.
- Select Template**
 - Choose a contact template to proceed.
 - Based on mobile contacts: Android, iOS
 - Based on business card apps: Remember
 - Based on email address book: Outlook
 - Based on Excel: Excel Template
- Click “Download Template”**

(*Refer to the guide slides for each contact extraction method.)
- Upload Completed Contact Excel File**

Once the upload is complete, an upload button will appear at the bottom.

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	Contact		Excel Form (2/2)
Navigation	CRM App > Contact > Contact List > Excel Upload Pop-up		

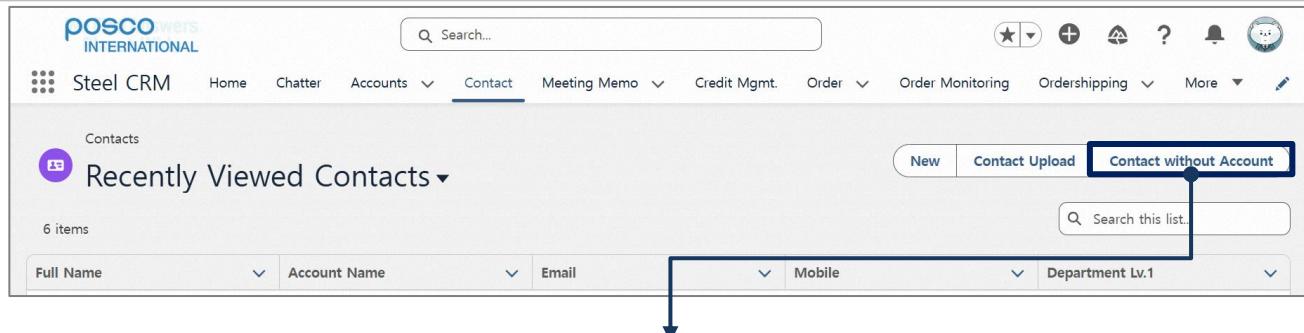
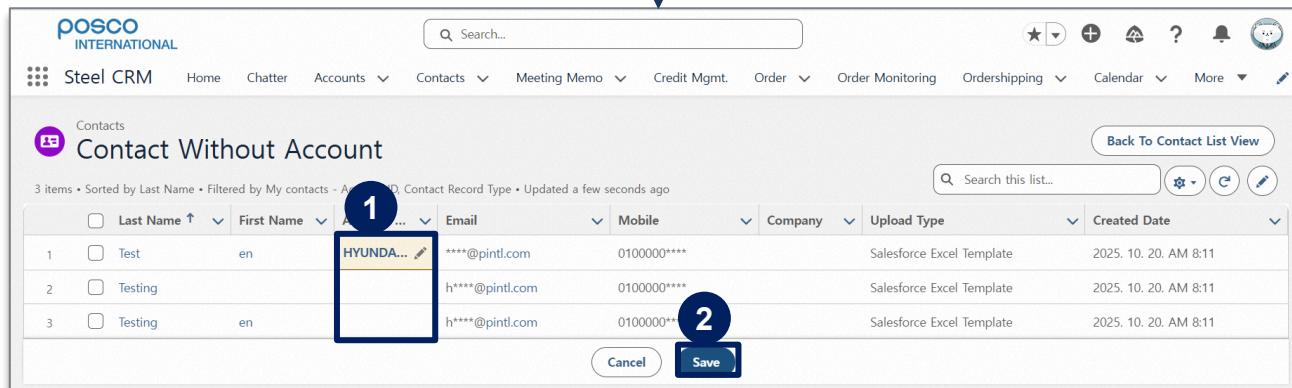
The screenshot shows the CRM application interface for Contact Bulk Upload. It consists of two main panels:

- Left Panel (Step 1):** Contains fields for "Select Template" (set to "Excel Template") and "Excel File Upload". It includes a "Caution" section with instructions: "You can upload up to 1,000 contacts.", "Please do not modify the format or column order of the template.", and "Make sure the file has no data protection enabled." A button labeled "1" is positioned above the "Detected Records" box.
- Right Panel (Step 2):** Shows the results of the upload: "Detected Records : Total 5 item(s)" and "Process Result : Success 3 item(s) Failed 2 item(s)". It includes "Download Template" and "Upload" buttons, and a "Caution" section identical to the left panel. A button labeled "2" is positioned above the "Detected Records" box, and a button labeled "3" is positioned above the "Process Result" box.

- Display Uploaded Excel Data**
 - When clicking Upload, the system checks for missing required fields in both the registered contacts and the Excel data.
- Click “Upload”**
 - Saves the contacts to Salesforce. Account information is not included.
 - (*Mapping must be performed using the Unmapped Account List.)
- Click “Download Result”**
 - Allows you to download the upload result as an Excel file.
 - You can check upload failures and reasons in columns I and J of the downloaded Excel.
 - After modifying the content in the “Upload” sheet of the Excel file, you can re-upload the same file.

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	Contact		Mapping Accounts
Navigation	CRM App > Contact > Contact List > Contact Without Account Pop-up		

1 HYUNDAI...
2 Save

序号	Last Name	First Name	Email	Mobile	Company	Upload Type	Created Date
1	Test	en	****@pintl.com	0100000***	Salesforce Excel Template	2025. 10. 20. AM 8:11	
2	Testing		h****@pintl.com	0100000***	Salesforce Excel Template	2025. 10. 20. AM 8:11	
3	Testing	en	h****@pintl.com	0100000**	Salesforce Excel Template	2025. 10. 20. AM 8:11	

- Click the Account Name Field**
 - Opens the Account search window.
 - Allows entry of Account information per row.
- Click “Save”**
 - Saves the changes made in the list.
 - By selecting rows using checkboxes, you can assign the same client to all selected rows at once

Step 1

Account Management

▶ 1. Account View

1. View list of accounts
2. View detailed account information

▶ 2. Account Update

1. Update account information
2. Create Account Card
3. Manage account organization chart

▶ 3. Account Creation

1. Create an account not linked to BP
2. Convert to a BP-linked account

Step 2

Contact Management

▶ 1. Contact View

1. View contact list
2. View detailed contact information

▶ 2. Contact Update

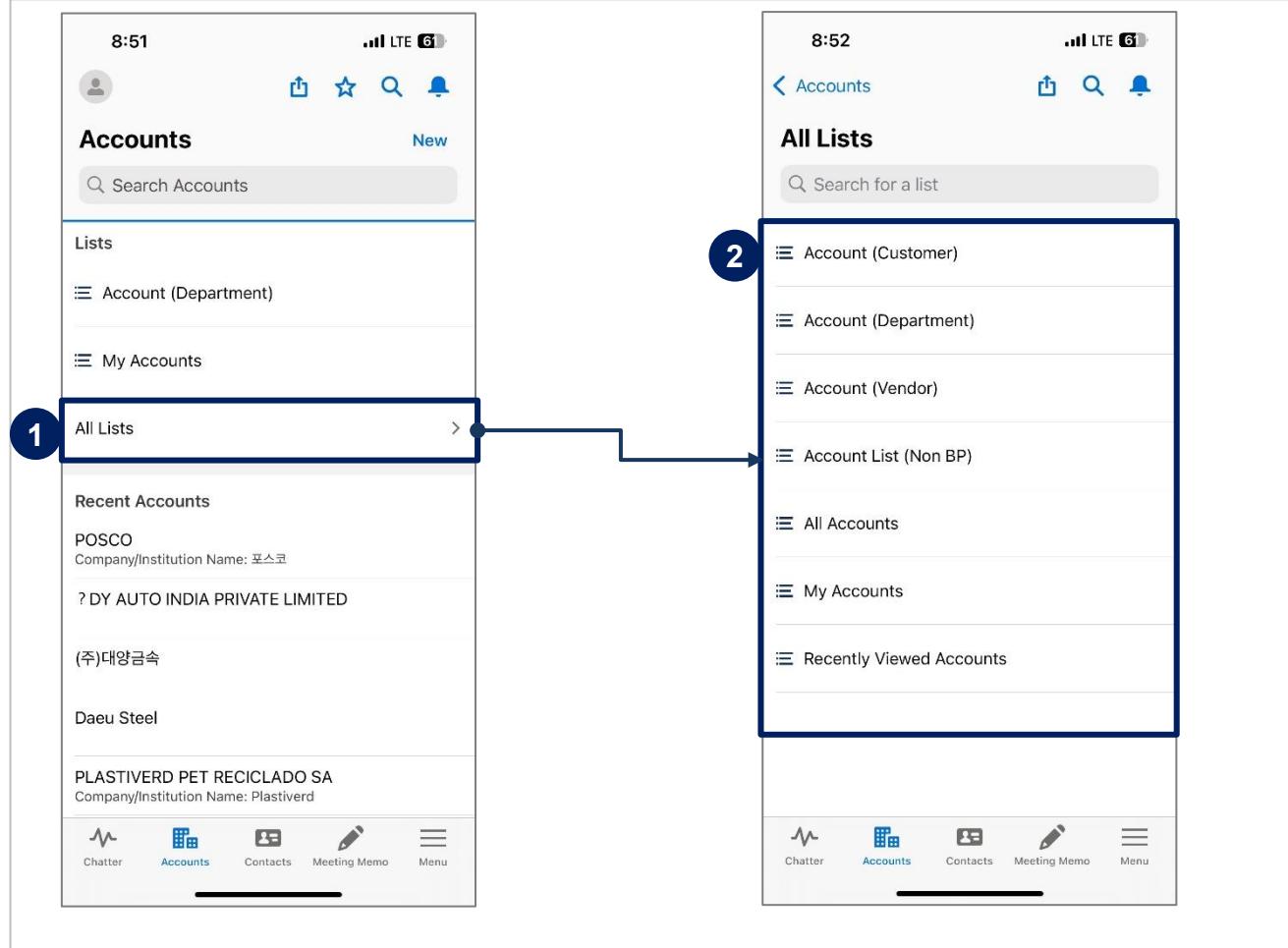
1. Update contact information

▶ 3. Contact Creation

1. Create a single contact
2. Create multiple contacts

Step 01. Account Management

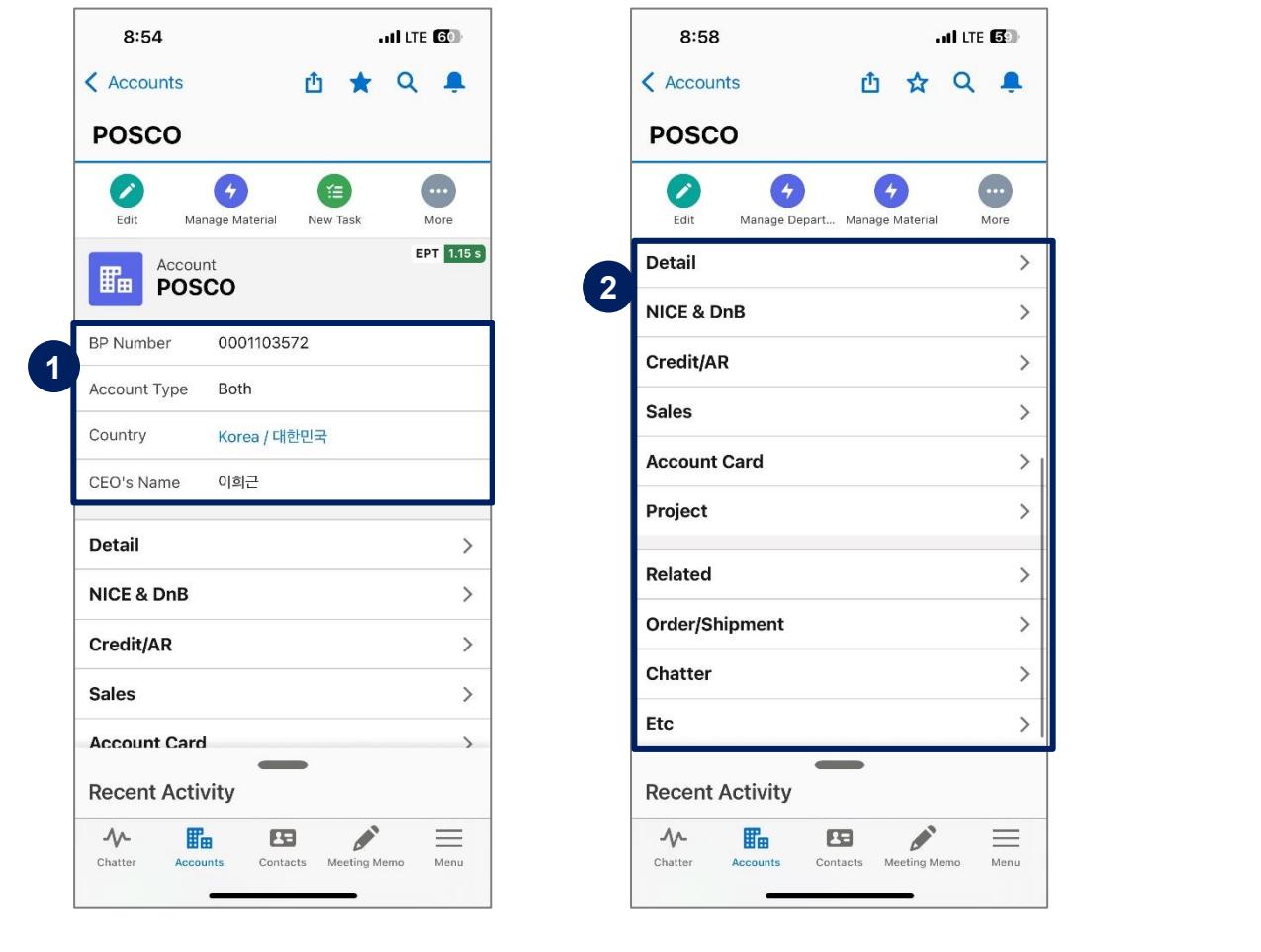
Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.01 View list of accounts
Menu	Account		
Navigation	CRM App > Account > Account List		



- 1. Click “Account List”**
 - When clicked, a list of accounts is displayed based on the selected search criteria.
- 2. List View Types**
 - My Accounts: Accounts created by the user
 - All Accounts: All registered accounts
 - Recently Searched Items: Accounts recently searched (Unsortable)
 - Recently Viewed Accounts: Accounts recently viewed (Sortable)
 - Account (Customer): Accounts categorized as Customer type
 - Account (Vendor): Accounts categorized as Vendor type
 - Account (Department): Accounts managed based on the user's organization
 - Account (Non BP): Accounts not yet linked to a Business Partner (BP)

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		

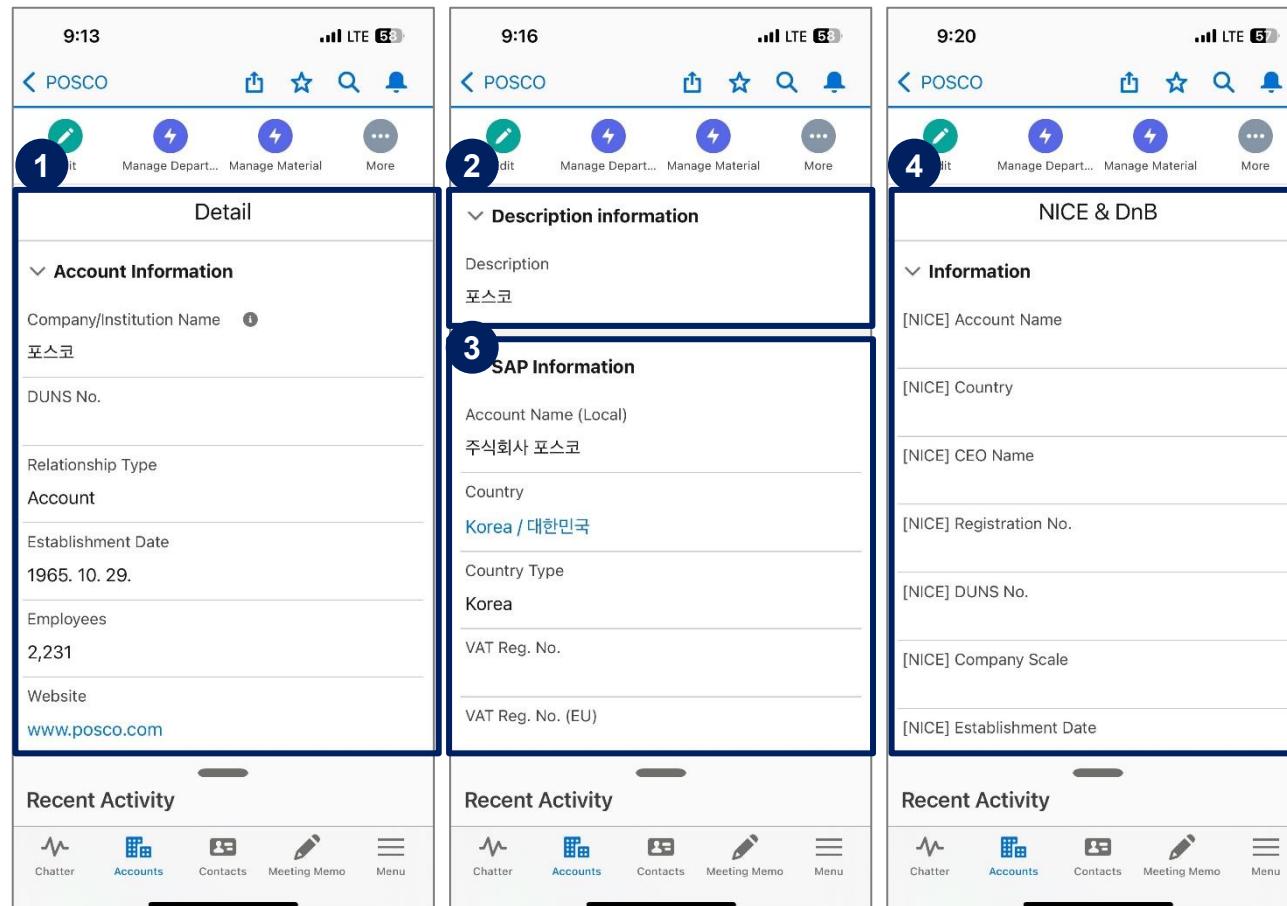


The image consists of two side-by-side screenshots of a mobile application interface. Both screens show a top navigation bar with icons for Accounts, Home, Star, Search, and Notifications. The left screen (Step 1) shows a list of accounts, with one account for 'POSCO' selected. The right screen (Step 2) shows a detailed view of the selected 'POSCO' account, listing tabs for Detail, NICE & DnB, Credit/AR, Sales, Account Card, Project, Related, Order/Shipment, Chatter, and Etc. The 'Detail' tab is currently active.

- 1. Top Key Information Area**
Displays key Account information at the top of the screen.
- 2. View Detailed Information by Tab**
- **Detail Tab:** Shows company basic information, SAP integration details, and Nice D&B data.
 - **Credit/AR Tab:** Displays credit and receivables information based on the Account.
 - **Sales Tab:** Shows sales data based on the Account.
 - **Account Card Tab:** Allows document creation and information entry based on Account details.
 - **Project Tab:** Displays information on projects and long-term contracts linked to the account.
 - **Related Tab:** Displays linked contacts, meeting notes, and gift information.
 - **Order/Shipment Tab:** Shows Order and Shipment data per Account.
 - **Chatter Tab:** Bulletin board for Account-related discussions.
 - **ETC Tab:** Displays additional information such as handled items and responsible organizations.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(General Information)
Navigation	CRM App > Account > Account List > Account Details View		



Screenshot 1: Main Account Details

- Company/Institution Name: 포스코
- DUNS No.
- Relationship Type: Account
- Establishment Date: 1965. 10. 29.
- Employees: 2,231
- Website: www.posco.com

Screenshot 2: Description information

Description: 포스코

Screenshot 3: SAP Information

- Account Name (Local): 주식회사 포스코
- Country: Korea / 대한민국
- Country Type: Korea
- VAT Reg. No.
- VAT Reg. No. (EU)

Screenshot 4: NiceD&B

- [NICE] Account Name
- [NICE] Country
- [NICE] CEO Name
- [NICE] Registration No.
- [NICE] DUNS No.
- [NICE] Company Scale
- [NICE] Establishment Date

1. Account Information Section

- This section contains the most basic and essential information about the account.
- Most fields in this section are mandatory.

2. Description Section

- This area displays a text-based description of the company.

3. SAP I/F Information

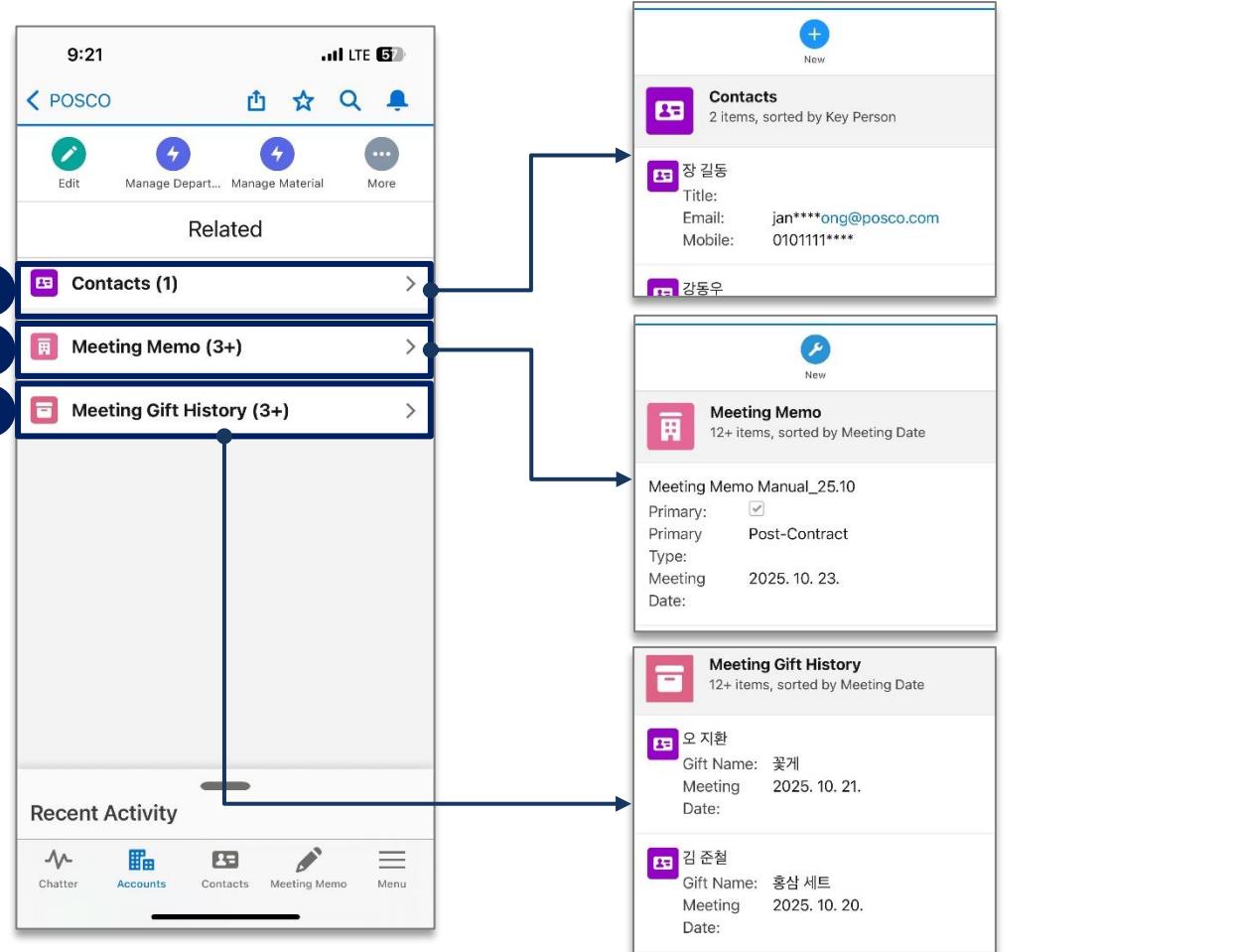
- Shows data retrieved from the SAP system during integration.
- This information is read-only and cannot be edited in Salesforce.

4. NiceD&B Information Tab

- When clicked, this tab displays company data integrated from NiceD&B.
- Users can view a company overview and financial information for the past three years.
- This information is also read-only and cannot be modified.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Related)
Navigation	CRM App > Account > Account List > Account Details View		



1. Connected Contacts List

- Displays name, job title, mobile phone number, email, and marks key contacts.
- Clicking the “New” button allows you to add a new contact.

2. Connected Meeting Notes List

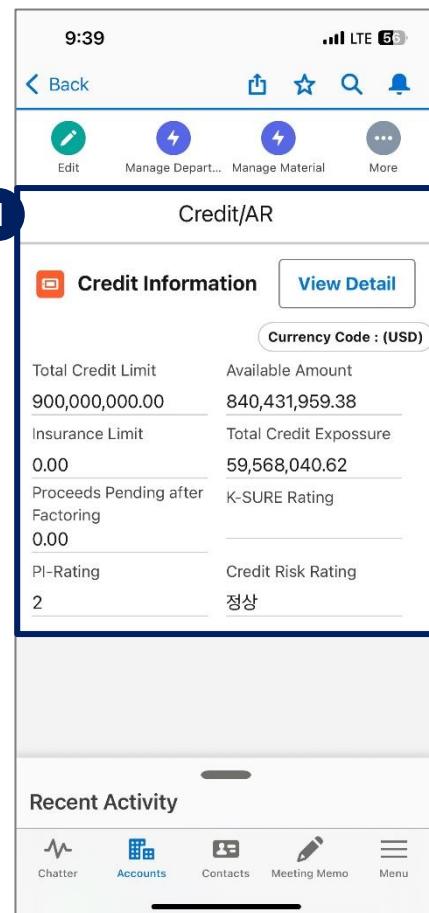
- Shows meeting note title, key account status, type, meeting date, department that created it, and summary information.
- Clicking the “New” button allows you to create a new meeting note.

3. Meeting Gift History List

- Displays the list of “Meeting Gift History” recorded in the connected meeting notes.
- Shows recipient, gift name, and meeting date.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Credit/ A/R)
Navigation	CRM App > Account > Account List > Account Details View		

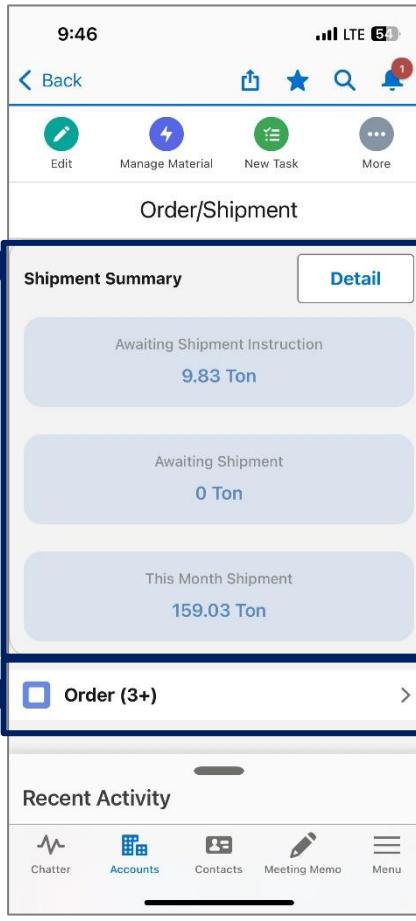


1. Credit Information Section

- Displays credit information of business partners based on the corporation the user belongs to.
- Clicking “View Details” switches to the Credit Monitoring Dashboard screen.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Order/Shipment)
Navigation	CRM App > Account > Account List > Account Details View		



1 Shipment Summary

Awaiting Shipment Instruction
9.83 Ton

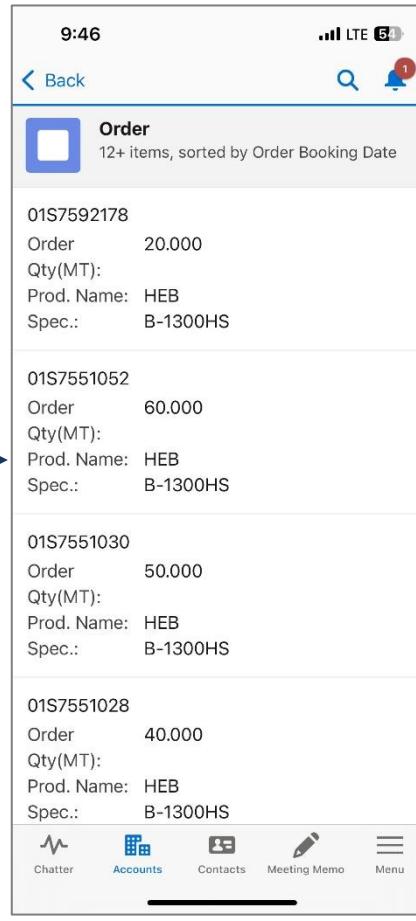
Awaiting Shipment
0 Ton

This Month Shipment
159.03 Ton

2 Order (3+)

Recent Activity

Chatter Accounts Contacts Meeting Memo Menu



Order 12+ items, sorted by Order Booking Date

01S7592178
Order 20.000
Qty(MT):
Prod. Name: HEB
Spec.: B-1300HS

01S7551052
Order 60.000
Qty(MT):
Prod. Name: HEB
Spec.: B-1300HS

01S7551030
Order 50.000
Qty(MT):
Prod. Name: HEB
Spec.: B-1300HS

01S7551028
Order 40.000
Qty(MT):
Prod. Name: HEB
Spec.: B-1300HS

Chatter Accounts Contacts Meeting Memo Menu

1. Shipment Status Information Section

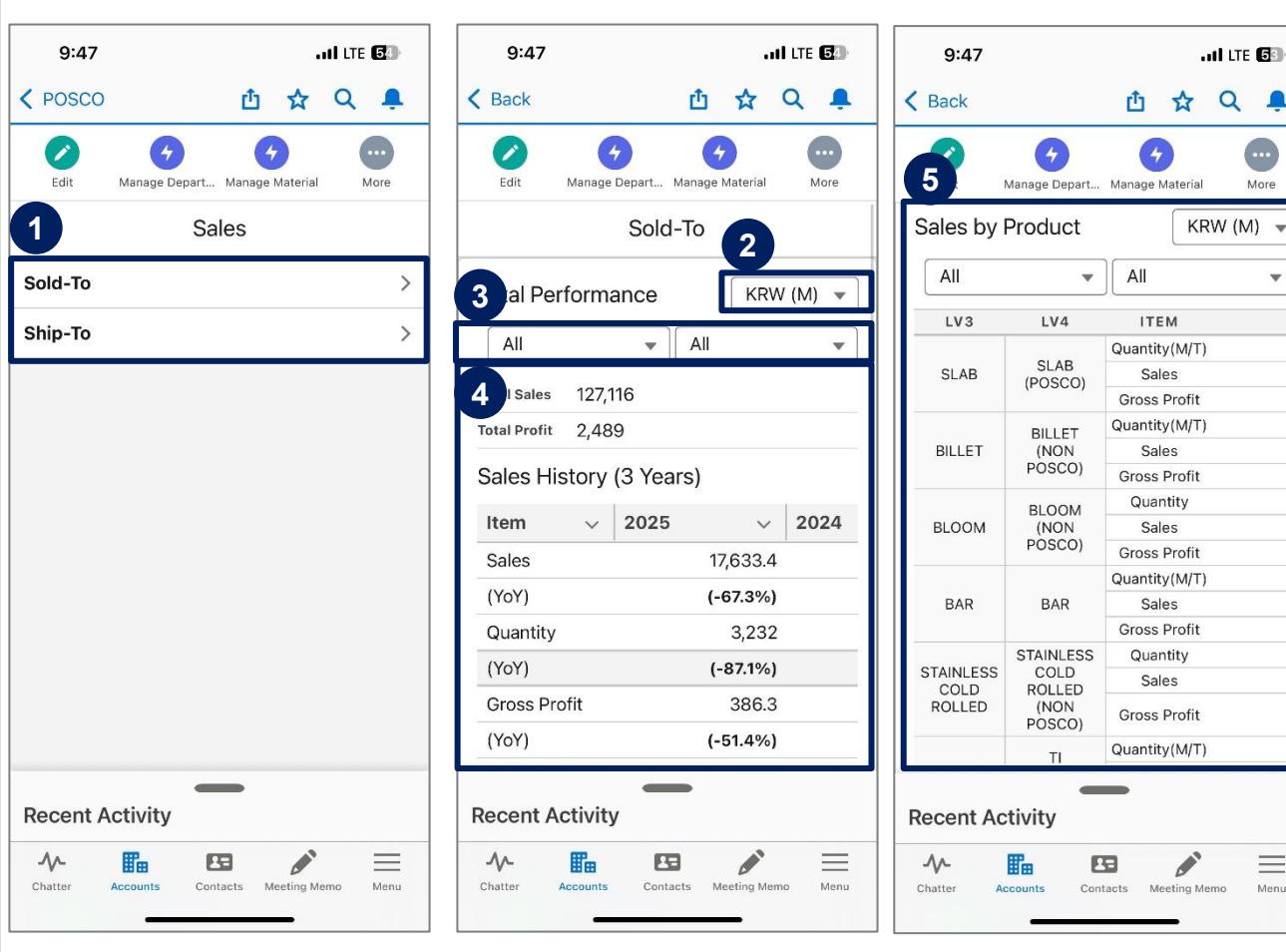
- Displays shipment information of business partners based on the organization the user belongs to (Only Steel Division).
- Clicking “Details” switches to the Order/Shipment Monitoring Dashboard screen.

2. Order Information Section

- A list of order information linked to the related Account.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Sales)
Navigation	CRM App > Account > Account List > Account Details View		



The figure consists of three screenshots of a mobile CRM application interface, illustrating the flow from a general sales overview to a detailed product sales report.

- Screenshot 1:** Shows the main Sales screen with filters for Sold-To and Ship-To. A blue circle labeled "1" highlights the "Sales" section.
- Screenshot 2:** Shows the "Sold-To" details screen. A blue circle labeled "2" highlights the "KRW (M)" currency unit selection. Below it, a blue circle labeled "3" highlights the "Sales Performance" section, which displays annual sales (127,116) and total profit (2,489).
- Screenshot 3:** Shows the "Sales by Product" screen. A blue circle labeled "4" highlights the sales history table for the past 3 years. A blue circle labeled "5" highlights the top-level product categories: SLAB, BILLET, BLOOM, BAR, STAINLESS COLD ROLLED, and TI.

- 1. Sales Data Reference Standard**
 - Based on SAP Billing.
 - Can be viewed by both Sold-To and Ship-To.
- 2. Currency/Unit Selection Filter for Amount Display**
 - Provides 4 options: KRW (Won / million Won), USD (Dollar / thousand Dollar).
- 3. Organization Selection Filter**
 - For users with department head level or key roles, sales data can be viewed based on their affiliated department/division.
- 4. Sales by Account**
 - Displays annual sales, gross profit, and pre-tax profit (shown for the past 3 years).
- 5. Sales by Item per Account**
 - Displays annual sales by item.
 - Quantity, sales, and profit are shown per item.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Project)
Navigation	CRM App > Account > Account List > Account Details View		

The screenshots illustrate the flow from a general account view to a detailed project creation screen.

Screenshot 1: Account List View
 Shows a list of accounts. A specific entry for 'Project' is highlighted with a blue box and labeled '1'. Below it, two other entries are shown: '계약 테스트' and 'b 프로젝트'. Each entry displays Main, Material, Quantity, and Currency details.

Screenshot 2: Project Creation Popup
 A modal window titled 'New' is displayed. It has tabs for 'Information' and 'Contract'. The 'Information' tab is active, showing fields for Project Name, Currency (set to 'None'), Quantity, Main Material, Sales, Profit, and an 'Account' dropdown set to 'POSCO'. The 'Contract' tab is visible at the bottom. A blue box highlights the 'Information' tab and the 'Account' field, with the number '2' indicating the step.

1. Contract/Project Management Section

- To be filled out when there is a long-term contract or project-based transaction with the Account.
- Can only be modified or deleted if created by your own organization.
- Can be created regardless of the Account's managing organization, and can be mapped to order information via the Order Dashboard (Only Steel Division).

2. Contract/Project Creation Popup

- Duplicate Creation with the same contract/project name is not allowed.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Timeline)
Navigation	CRM App > Account > Account List > Account Details View		

The figure consists of three screenshots of the POSCO CRM application interface:

- Screenshot 1 (Left): Account View** shows the main account details for "Account POSCO". It includes fields for BP Number (0001103572), Account Type (Both), Country (Korea / 대한민국), and CEO's Name (이희근). Below this is a "Detail" section with links to NICE & DnB, Credit/AR, Sales, and Account Card.
- Screenshot 2 (Middle): Account Details View** shows the detailed account view for "Account POSCO". It includes fields for BP Number (0001103572), BP Group (1100), Relationship Type (Account), and Account Type (Both). A "More" button is highlighted with a blue box and a callout. A vertical arrow points from the "Actions" section in Screenshot 1 down to the "More" button in Screenshot 2.
- Screenshot 3 (Right): Timeline History Section** shows the "Chatter" timeline for the account. It displays posts from "Sales Rep 2" (Just now) and "test post". A "Recent Activity" section is shown below, listing "Upcoming & Overdue" tasks and events. A blue circle labeled "3" is placed over the "Recent Activity" section. A horizontal arrow points from the bottom of Screenshot 2 to the top of Screenshot 3.

1. When Clicking “New Event”

- Allows you to create a schedule related to the account.

2. When Clicking “New Task”

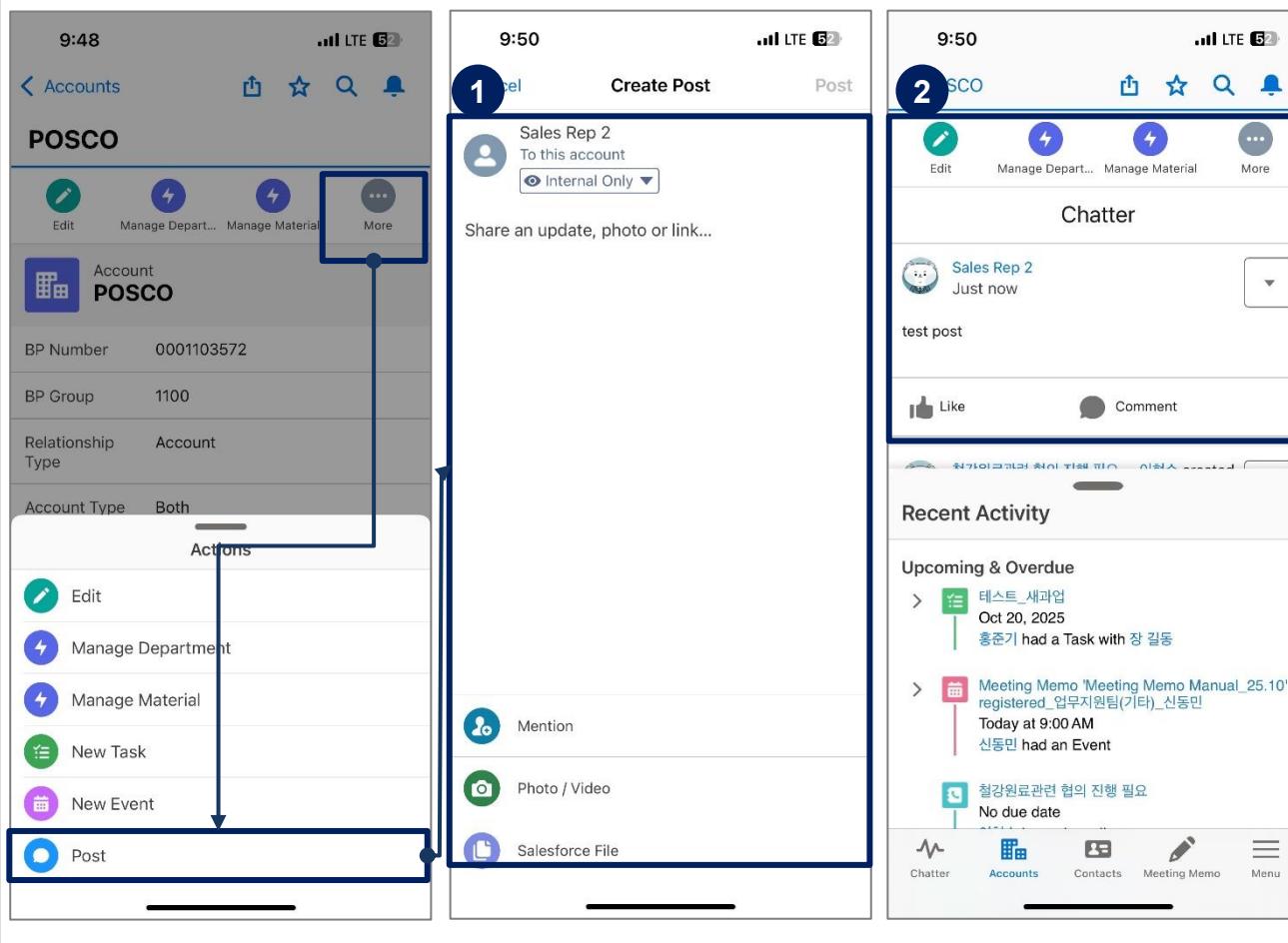
- Allows you to create a to-do item related to the account.

3. Timeline History Section

- Includes a TO-DO List area showing registered tasks and upcoming events, and a History area showing past events.

Step 01. Account Management

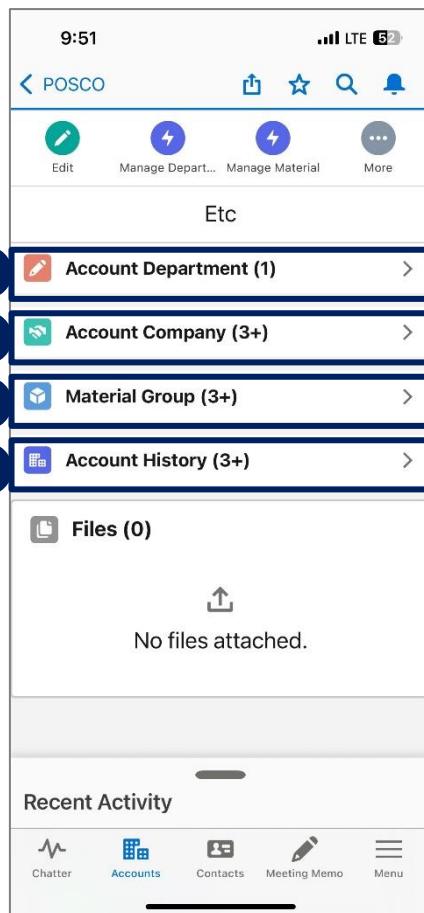
Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Chatter)
Navigation	CRM App > Account > Account List > Account Details View		



- 1. Post Creation Section**
 - Allows users to write work-related posts or questions based on the account.
 - All created posts are visible to everyone.
- 2. Sorting and Searching Created Posts**
 - Posts can be sorted and searched.
- 3. Created Posts**
 - Posts are displayed in reverse chronological order by default, and all posts allow comments.
- 4. Created Events/Tasks**
 - When an event or task is created, it appears in the chatter feed similar to a post, and comments can be added.

Step 01. Account Management

Step (Lv.2)	01.01. Account View	Step (Lv.3)	01.01.02 View detailed account information
Menu	Account		(Etc. Information)
Navigation	CRM App > Account > Account List > Account Details View		



1. Responsible Organization Display Section for the Account

- Shows the organization that has permission to edit the account information.

2. Company Code Information Display Section

- If the account is linked as a BP or extended to an overseas entity, the relevant corporate information is shown.

3. Exposed Items Handled by the Organization

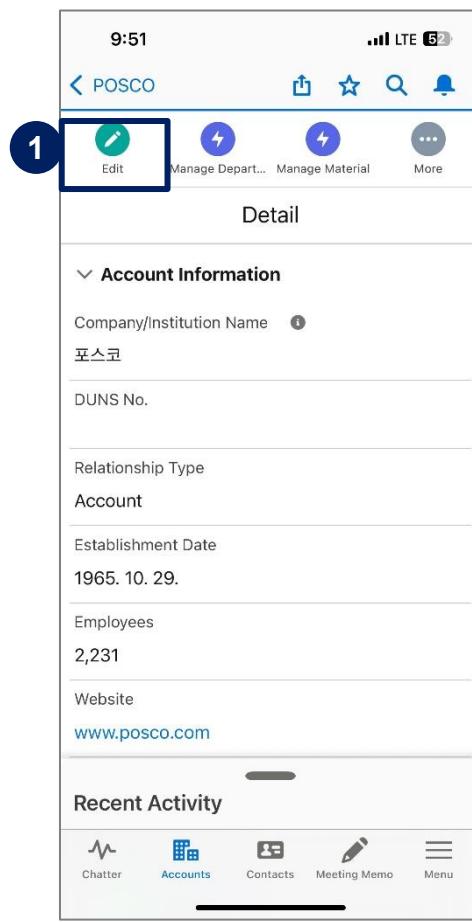
- Items that can be added based on the responsible organization.
- Follows the Material Group standard in SAP.

4. Account Modification History Section

- Displays the history of changes made to the account.

Step 01. Account Management

Step (Lv.2)	01.02. Account Update	Step (Lv.3)	01.02.01 Update account information(1/2)
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		



9:51 LTE 62

< POSCO ⌂ ⚡ 🔍 🔔

1 Edit Manage Depart... Manage Material More

Detail

✓ Account Information

Company/Institution Name ⓘ
포스코

DUNS No.

Relationship Type
Account

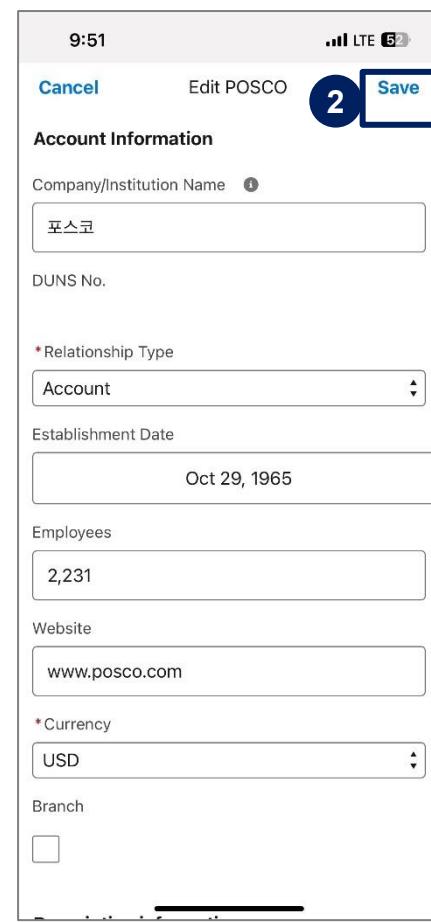
Establishment Date
1965. 10. 29.

Employees
2,231

Website
www.posco.com

Recent Activity

Chatter Accounts Contacts Meeting Memo Menu



9:51 LTE 62

Cancel Edit POSCO 2 Save

Account Information

Company/Institution Name ⓘ
포스코

DUNS No.

* Relationship Type
Account

Establishment Date
Oct 29, 1965

Employees
2,231

Website
www.posco.com

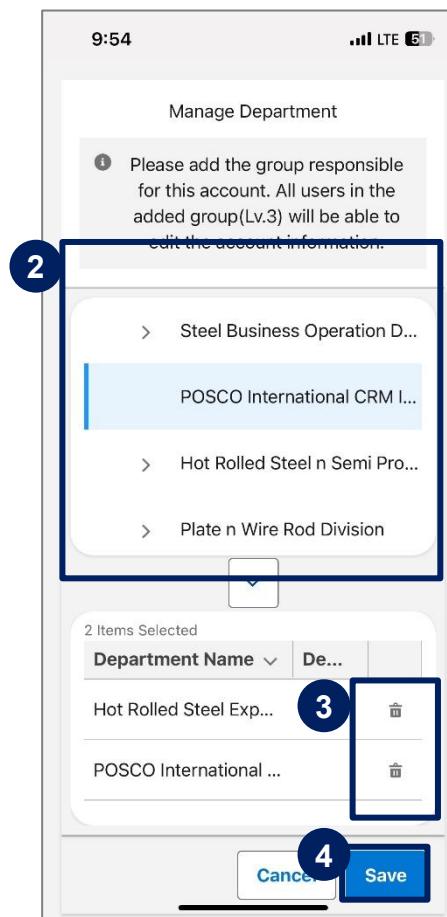
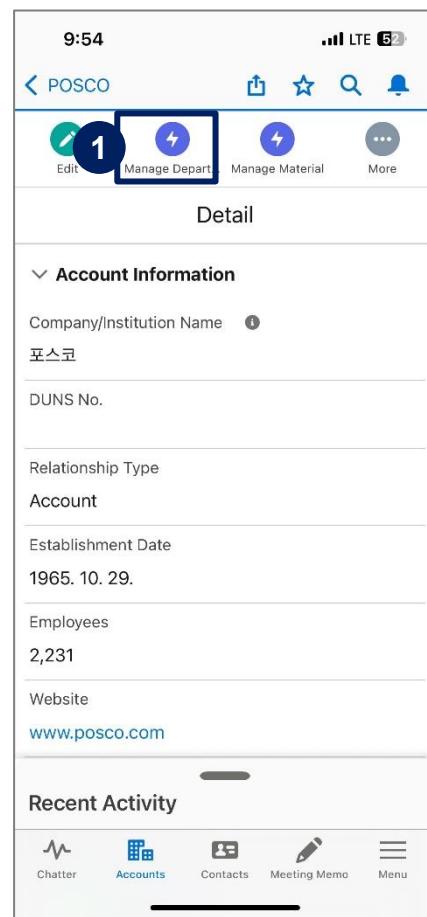
* Currency
USD

Branch

- 1. When Clicking the “Edit” Button**
 - Opens a popup that allows editing of the account.
 - Only editable data fields can be modified.
(* Fields like basic information can also be edited by clicking the pencil icon.)
- 2. After Filling Out the Edit Popup, Click “Save”**
 - Upon saving, the account information is updated.
 - Duplicate checks are performed during editing as well (e.g., when modifying business registration number or VAT ID).

Step 01. Account Management

Step (Lv.2)	01.02. Account Update	Step (Lv.3)	01.02.01 Update account information(2/2)
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		



1. When Clicking the “Manage Responsible Organization” Button

- Opens a popup where responsible organizations can be added or removed.
- This button is only visible to the owner of the account and its responsible organizations.

2. After Selecting an Organization, Click the Right Arrow

- Adds the selected organization (from the left) as a responsible organization for the account.
- The added organization gains editing permissions.
- By default, group-level organizations can be added, and direct groups/sections under the division or department can also be added.

3. Clicking the Delete Icon

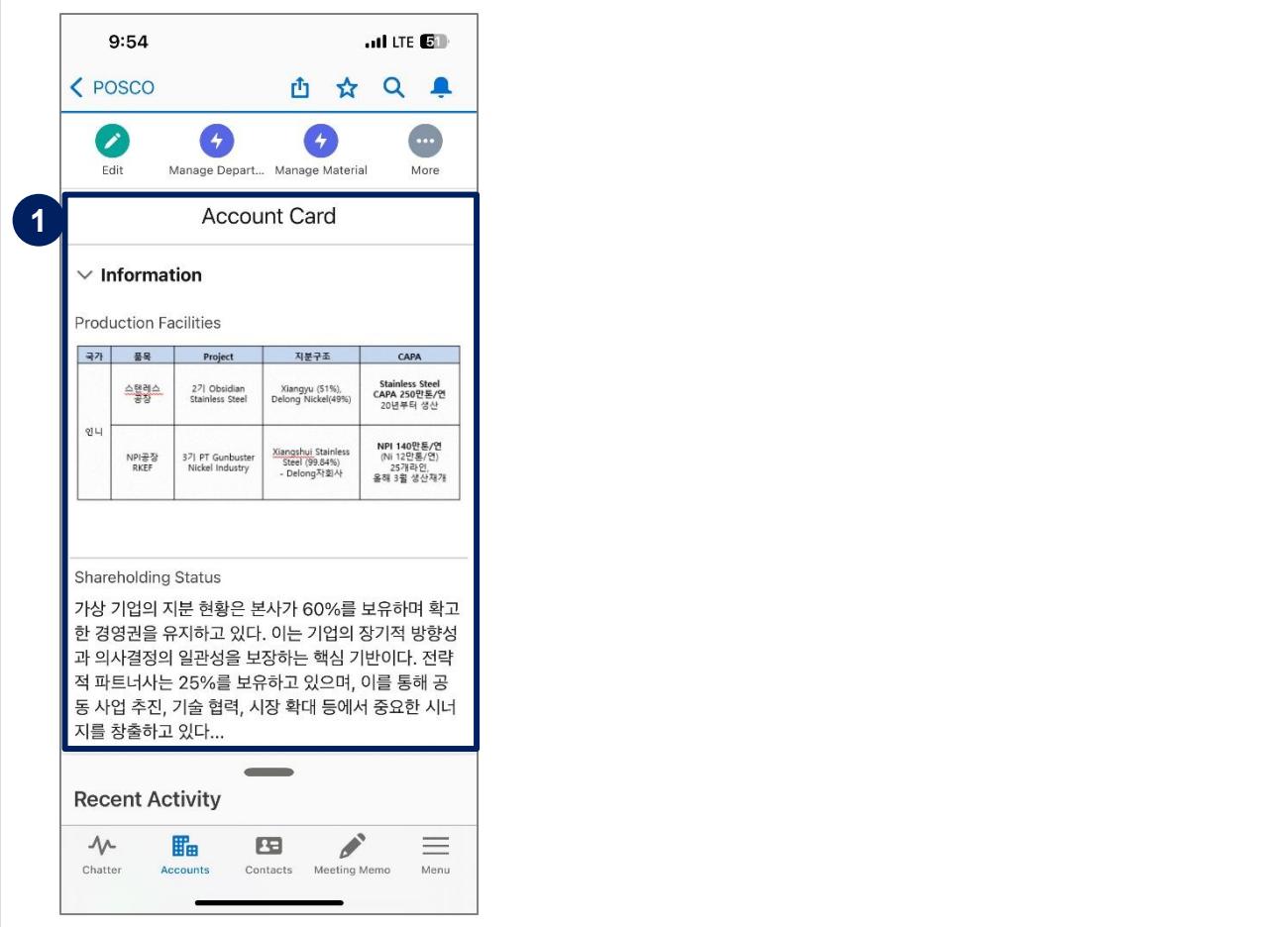
- Removes the selected organization from the editable list.

4. Clicking “Save”

- Applies the changes made to the responsible organization settings.

Step 01. Account Management

Step (Lv.2)	01.02. Account Update	Step (Lv.3)	01.02.02 Create Account Card
Menu	Account		
Navigation	CRM App > Account > Account List > Account Details View		



1

Account Card

Information

Production Facilities

국가	품목	Project	지분구조	CAPA
스텐레스 증정	27) Obsidian Stainless Steel	Xiangyu (51%), Delong Nickel(49%)	Stainless Steel CAPA 250만톤/연 20년부터 생산	
인니	NPI 증정 RKEF	37) PT Gunbuster Nickel Industry	Xiangzhu, Stainless Steel (89.84%) - Delong(10.16%)	NPI 140만톤/연 (NPI 125만톤/연) 25개라인 총 3200 장 단위 생산

Shareholding Status

가상 기업의 지분 현황은 본사가 60%를 보유하며 확고한 경영권을 유지하고 있다. 이는 기업의 장기적 방향성과 의사결정의 일관성을 보장하는 핵심 기반이다. 전략적 파트너사는 25%를 보유하고 있으며, 이를 통해 공동 사업 추진, 기술 협력, 시장 확대 등에서 중요한 시너지를 창출하고 있다...

Recent Activity

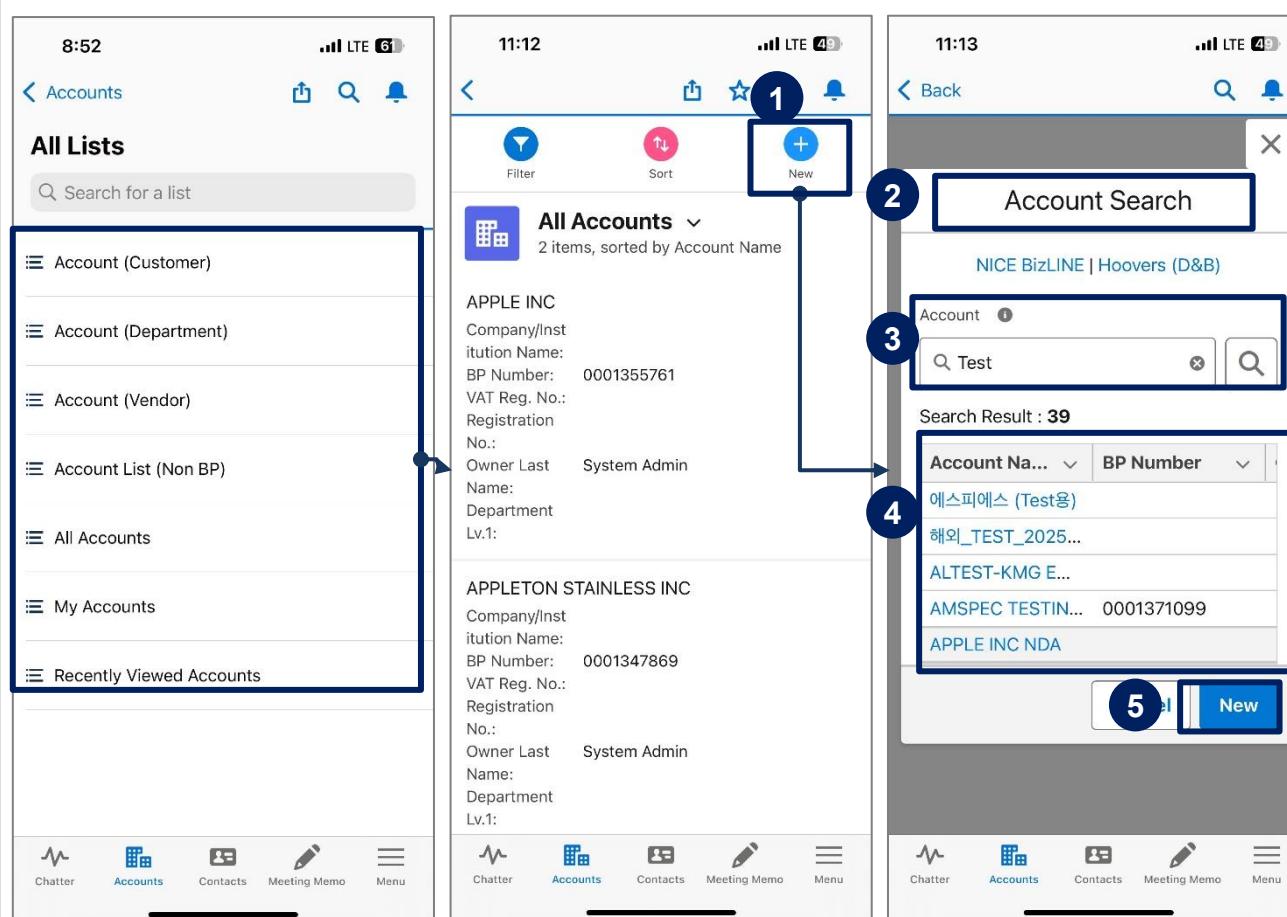
- Chatter
- Accounts
- Contacts
- Meeting Memo
- Menu

1. Account Card Information Viewing Section

- Displays the customer description information that has been entered.
- (* Creation is not supported due to solution limitations.)
- (** File download is not available due to security restrictions.)

Step 01. Account Management

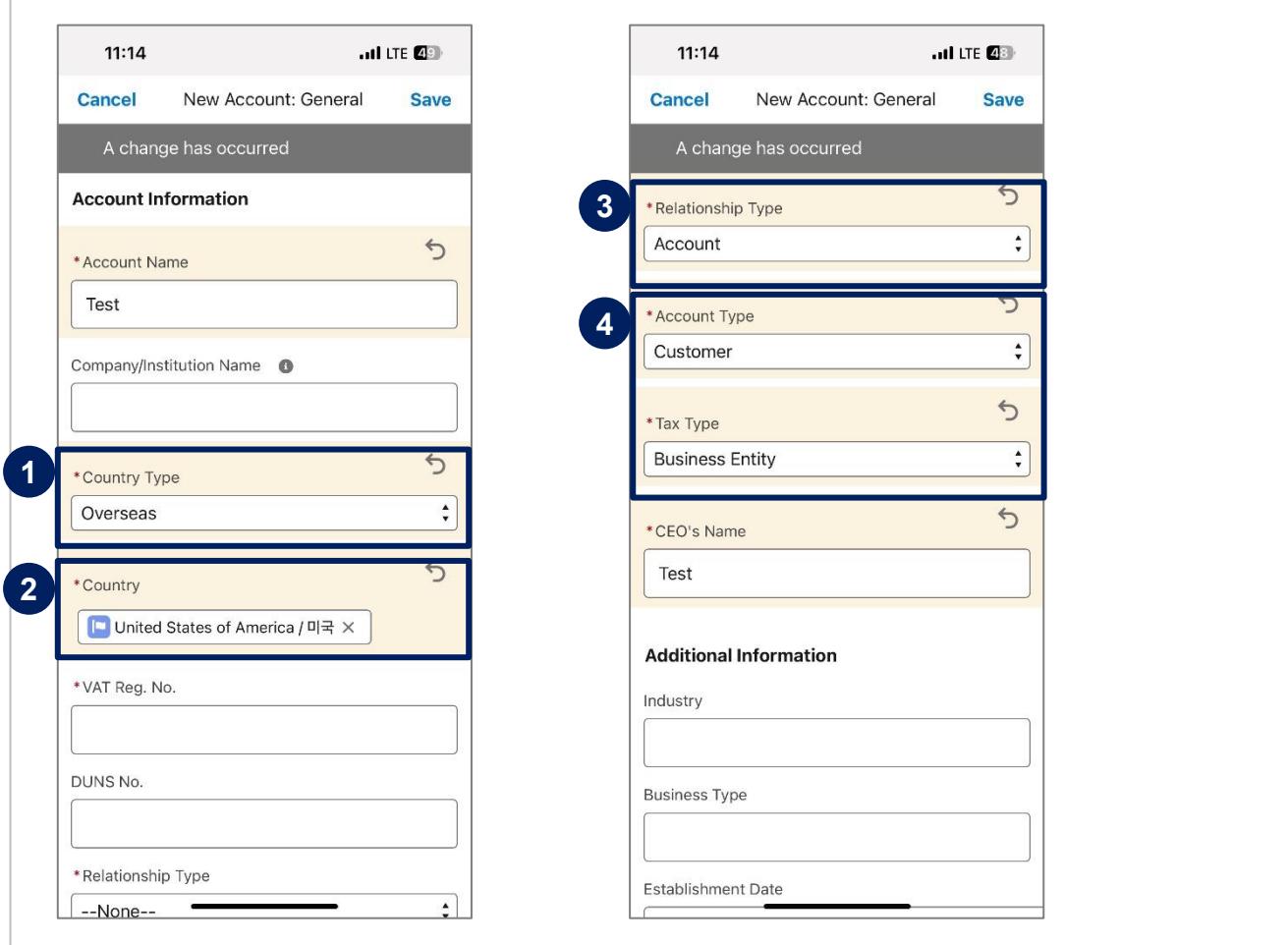
Step (Lv.2)	01.03. Account Creation	Step (Lv.3)	01.03.01 Create an account not linked to BP
Menu	Account		(1/3)
Navigation	CRM App > Account > Account List > New Create Pop-up		



- Click “New”**
 - Opens a popup to create a new Account. You can check existing records through search.
- Search Account Information Based on External Data**
 - Provides popups for Nice BizLine and Hoovers to pre-search company information.
- Account Name-Based Search Result Area**
 - Allows initial judgment on duplicate Accounts based on the Account name.
- Search Result List Provided**
 - Displays information to help determine duplication.
 - Criteria for duplication:
Business Registration Number
VAT Identification Number
- Click “New”**
 - When clicked, transitions to the next popup.
 - In the next popup, you can enter detailed Account information.

Step 01. Account Management

Step (Lv.2)	01.03. Account Creation	Step (Lv.3)	01.03.01 Create an account not linked to BP
Menu	Account		(2/3)
Navigation	CRM App > Account > Account List > New Create Pop-up		



Step 1: Select Country Classification

1. Choose between Domestic or Overseas.

Step 2: Select Relationship Type

2. Choose one of the following: Account, Partner, or Government Relations.

Step 3: Select Account Type

3. Choose one: Customer, Vendor, or Both.

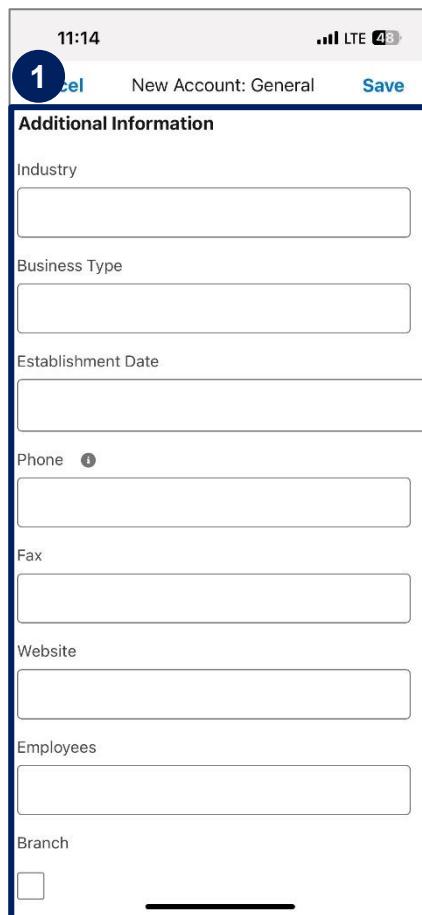
Step 4: Additional Information

4. Enter CEO's Name: Test.

- Select Country Classification**
 - Choose between Domestic or Overseas
 - **Domestic:** Business Registration Number is required
 - **Overseas:** VAT ID is required (DUNS Number is provided as an optional)
- Select Relationship Type**
 - Choose one of the following: Account, Partner, or Government Relations
 - If Account is selected, additional selection of Account Type is required
- Select Country Type**
 - For Domestic, South Korea is automatically set
 - For Overseas, search and select the country manually
- Select Account Type**
 - Choose one: Customer, Vendor, or Both
 - If Customer is selected, Tax Type selection is required

Step 01. Account Management

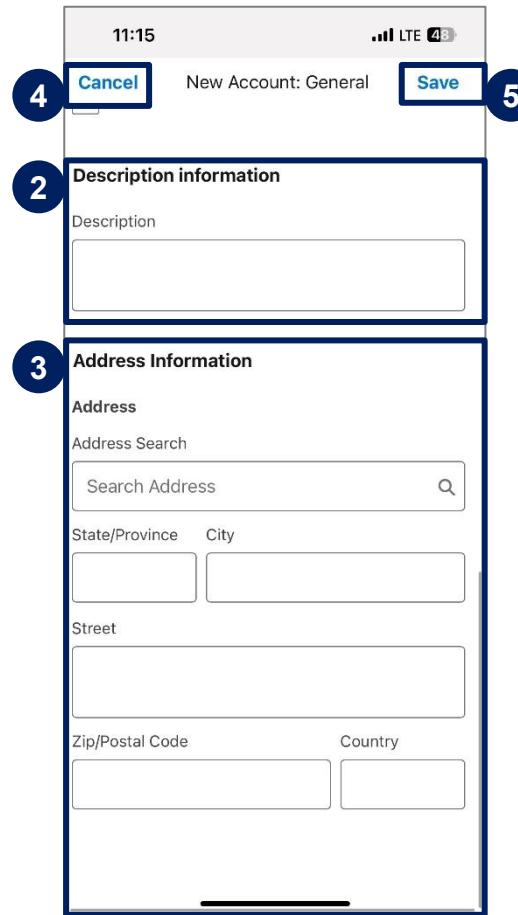
Step (Lv.2)	01.03. Account Creation	Step (Lv.3)	01.03.01 Create an account not linked to BP
Menu	Account		(3/3)
Navigation	CRM App > Account > Account List > New Create Pop-up		



1. Click 'Save' button.

2. Fill in 'Description information' field.

3. Fill in 'Address Information' fields: Address Search, State/Province, City, Street, Zip/Postal Code, and Country.

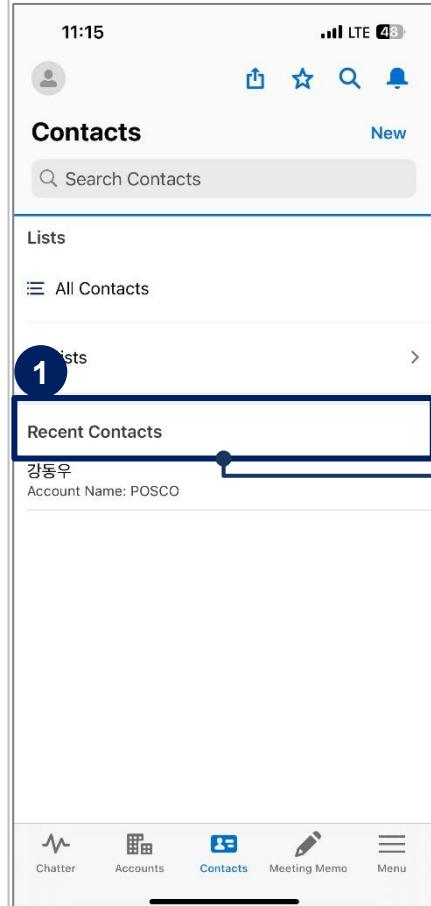
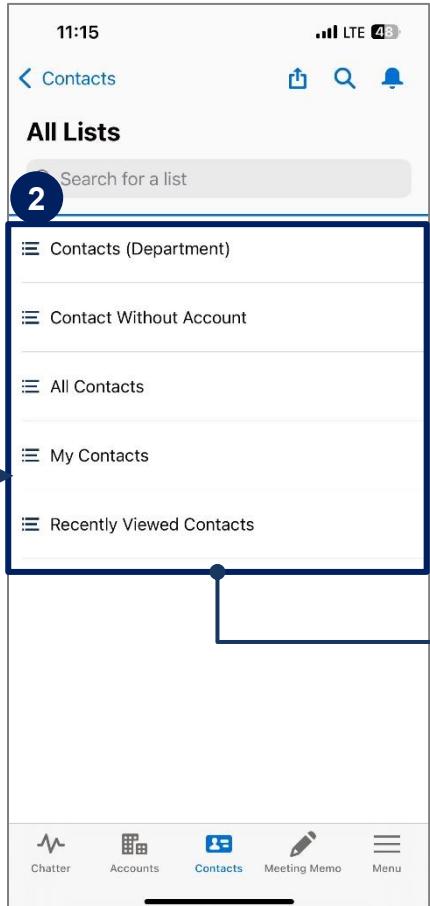
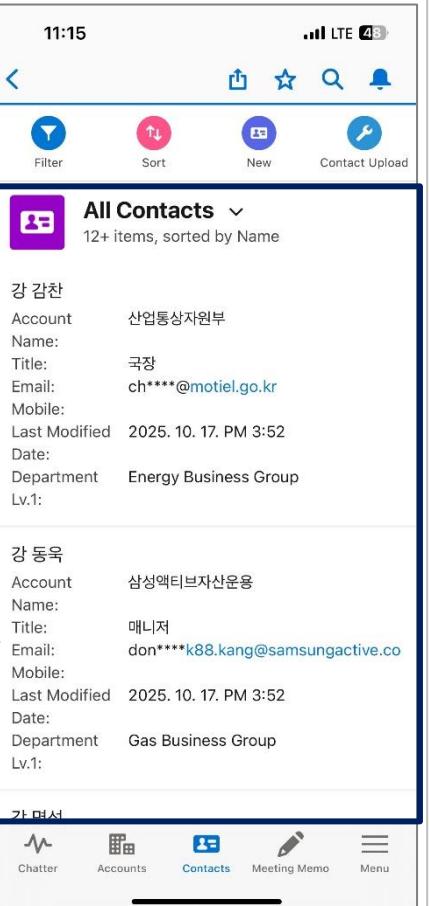


4. Click 'Cancel' button.

5. Click 'Save' button.

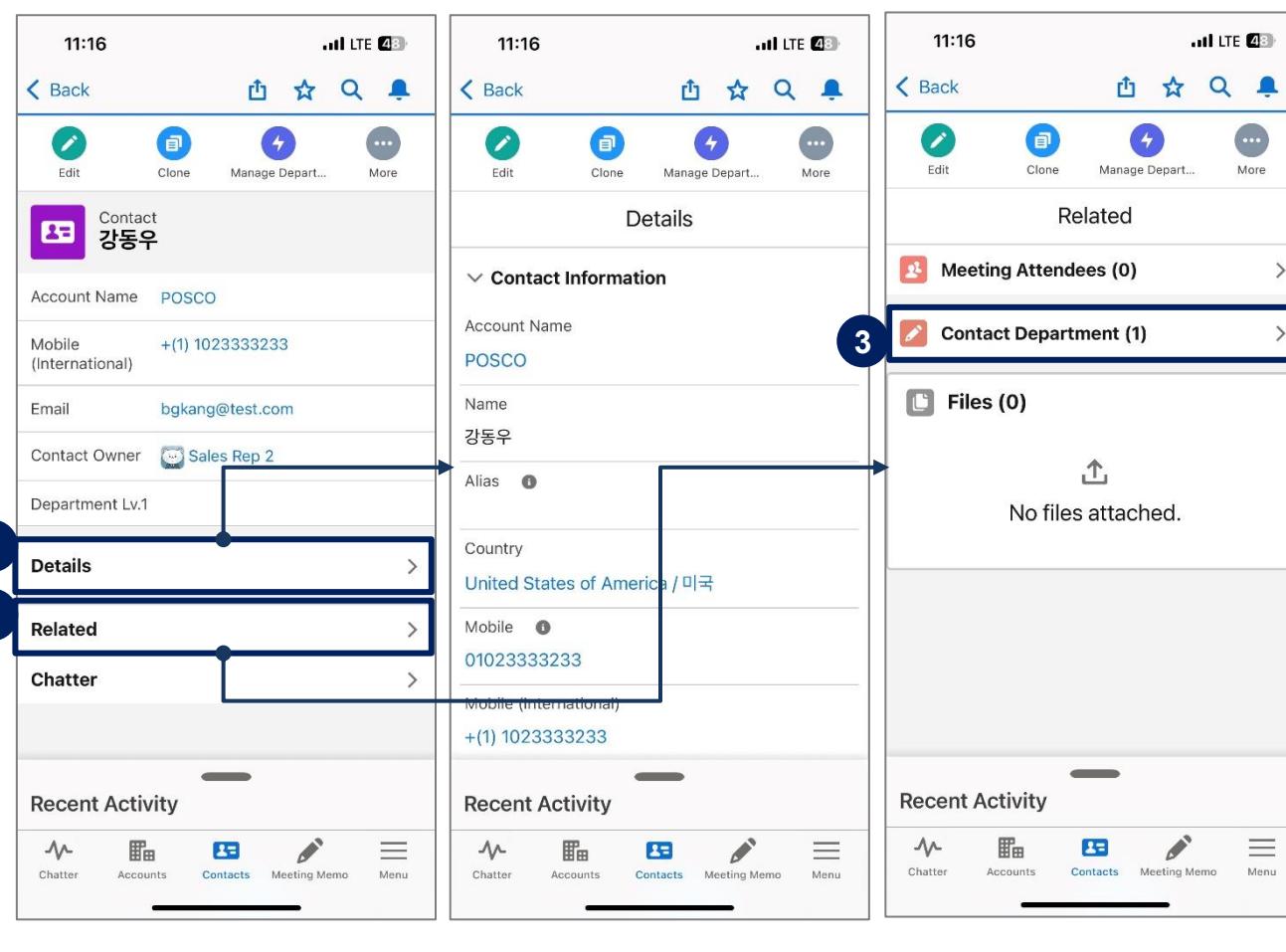
- Enter Additional Information**
 - This area is for entering supplementary information for management purposes.
- Enter Description Text for the Account**
 - Write descriptive information about the Account.
- Address Information**
 - Address data will be linked when converting to SAP BP later.
- Click "Cancel"**
 - Returns to the previous popup.
- Click "Save"**
 - Checks for duplicates before saving.
 - After saving, navigates to the screen of the newly created Account.
 - (* Once saved, a summary will be displayed on the home screen.)

Step 02. Contact Management

Step (Lv.2)	02.01. Contact View	Step (Lv.3)	02.01.01 View contact list
Menu	Contact		
Navigation	CRM App > Contact > Contact List		
 <p>1</p>	 <p>2</p>		<p>1. Click “Contact List”</p> <ul style="list-style-type: none"> - When clicked, a list of contacts is displayed based on the selected search criteria. <p>2. Search Conditions by List View</p> <ul style="list-style-type: none"> - My Contacts: Contacts created by the user - Recently Searched Items: Contacts recently searched (unsortable / latest first) - Recently Viewed Contacts: Contacts recently viewed (sortable) - Contact without Account: Contacts uploaded via “Contact Upload” that are not mapped to any Account - Contact (Department): Contacts managed based on the user’s organization <p>Contact Access Permissions Are Based on the Following Groups:</p> <ol style="list-style-type: none"> 1) Steel Division, Materials & Bio Division, Overseas Division 2) Gas Business Division, Energy Business Division 3) Corporate Support, Corporate Planning, Partners, Others <p>(* According to company’s internal Privacy Policy, email addresses and mobile phone numbers are masked in the list view.)</p>

Step 02. Contact Management

Step (Lv.2)	02.01. Contact View	Step (Lv.3)	02.01.02 View detailed contact information
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		



Screenshot 1: Main Contact Details

- Account Name: POSCO
- Mobile (International): +(1) 1023333233
- Email: bgkang@test.com
- Contact Owner: Sales Rep 2
- Department Lv.1: [Redacted]

Screenshot 2: Related Section

- Related: Meeting Attendees (0)
- Contact Department (1) [Highlighted with a blue box and circled number 3]

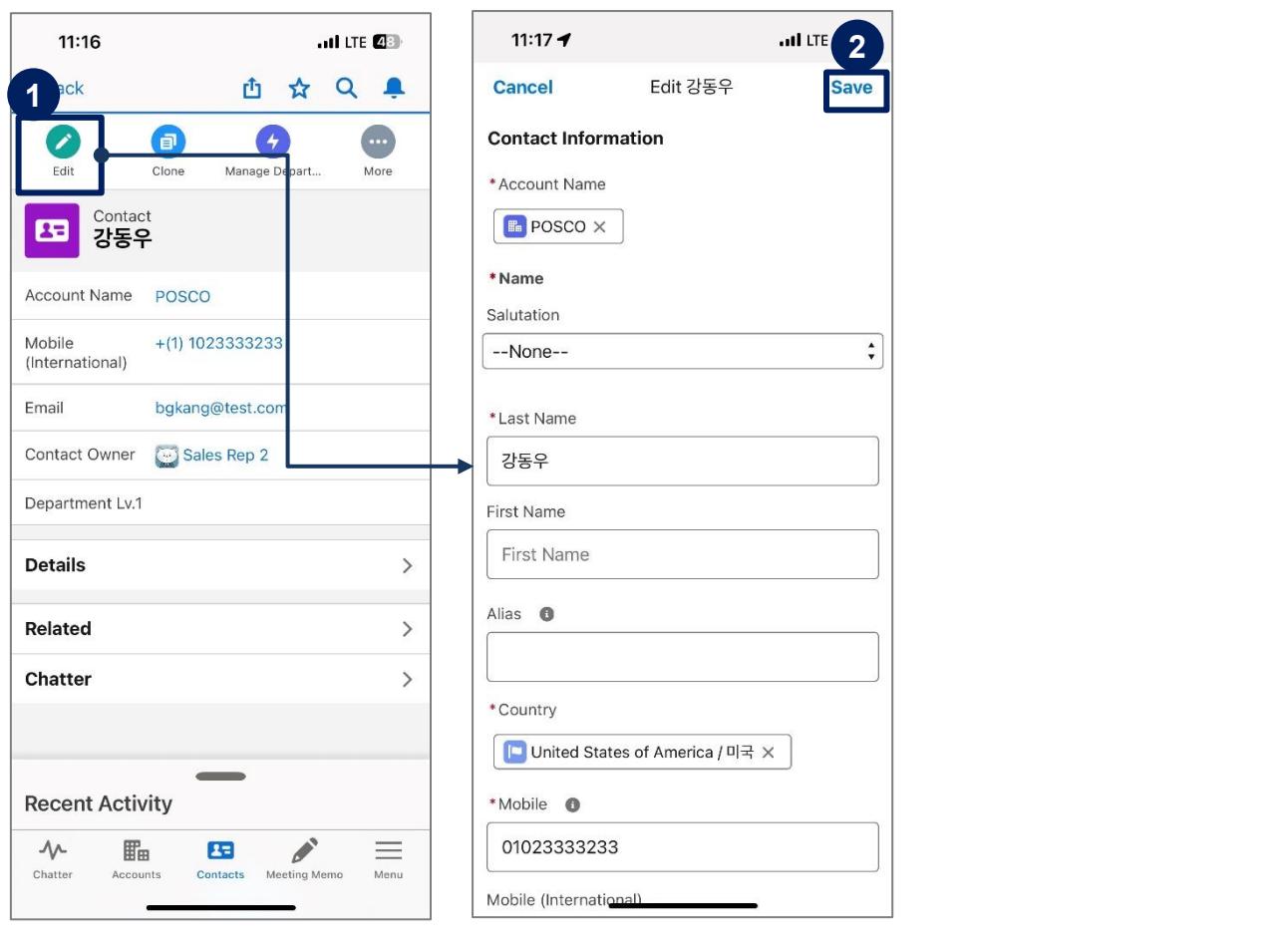
Screenshot 3: Contact Department Details

- Contact Department (1) [Highlighted with a blue box and circled number 3]
- Files (0): No files attached.

- Contact Detail Area**
 - Displays key information such as Account name, mobile phone number, and email.
- Related Meeting Notes Display Area**
 - Shows a list of meeting notes in which the contact participated.
- Responsible Organization Display Area**
 - Displays the organization responsible for the contact, which has permission to edit the contact information.
- File Upload Area Based on Contact**
 - Files can be uploaded with an option to select whether decryption is required.

Step 02. Contact Management

Step (Lv.2)	02.02. Contact Update	Step (Lv.3)	02.02.01 Update contact information(1/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		



The figure consists of two screenshots of a mobile CRM application. The left screenshot shows the 'Contact Detail View' for a contact named '강동우'. It displays basic information such as Account Name (POSCO), Mobile (International) number (+1) 1023333233, Email (bgkang@test.com), and Contact Owner (Sales Rep 2). The top navigation bar includes icons for Edit, Clone, Manage Department, and More. The right screenshot shows the 'Edit' modal window for the same contact. The modal has a title 'Edit 강동우' and a 'Save' button at the top right. It contains fields for 'Account Name' (POSCO), 'Name' (Salutation: --None--, Last Name: 강동우, First Name: First Name), 'Alias' (empty), 'Country' (United States of America / 미국), and 'Mobile' (number: 01023332333). The 'Mobile (International)' field is partially visible at the bottom.

- Click “Edit”**
 - Opens a popup that allows editing of the contact.
 - Only fields that are editable can be modified.
 - (*You can also edit fields like contact information by clicking the pencil icon next to each field.)
- Click “Save” After Filling Out the Edit Popup**
 - When saved, the contact information will be updated.

Step 02. Contact Management

Step (Lv.2)	02.02. Contact Update	Step (Lv.3)	02.02.01 Update contact information(2/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		

11:16

Back Edit Clone Manage Depart... More

Contact 강동우

Account Name POSCO

Mobile (International) +(1) 1023332323

Email bgkang@test.com

Contact Owner Sales Rep 2

Department Lv.1

Details >

Related >

Chatter >

Recent Activity

Chatter Accounts Contacts Meeting Memo Menu

11:17

Edit 강동우 Save

Contact Information

* Account Name
POSCO

* Name
Salutation
--None--

* Last Name
강동우

First Name

Alias ⓘ

* Country
United States of America / 미국

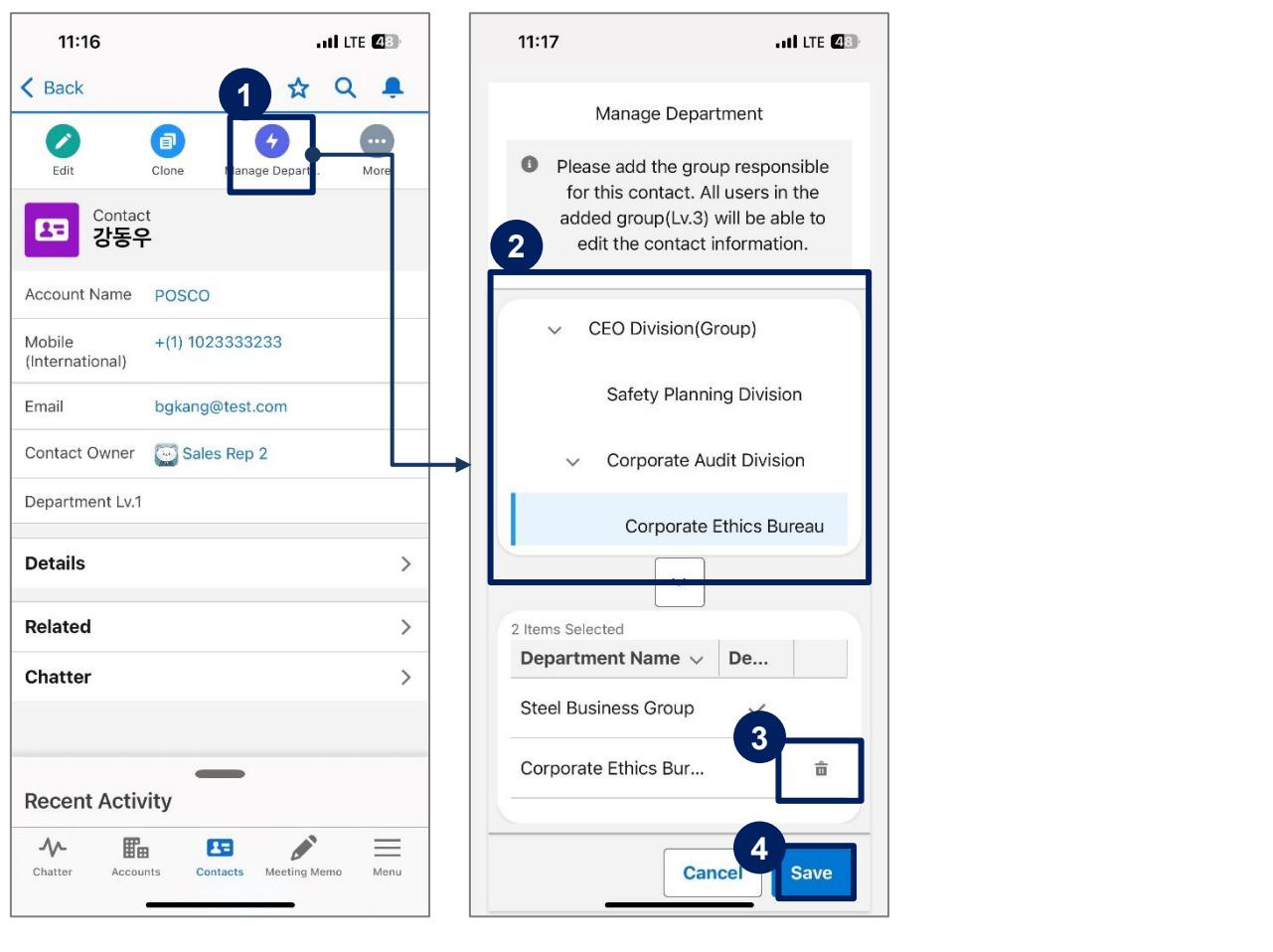
* Mobile ⓘ
01023332323

Mobile (International)

- Click “Duplicate”**
 - Opens a popup to create a new contact with the same information as the currently viewed contact.
- Click “Save” After Filling Out the Form**
 - Saves the entry as a new contact and navigates to the newly saved contact screen.
 - During saving, duplication is checked, so make sure the entered contact information is different from existing records.

Step 02. Contact Management

Step (Lv.2)	02.02. Contact Update	Step (Lv.3)	02.02.01 Update contact information(3/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > Contact Detail View		

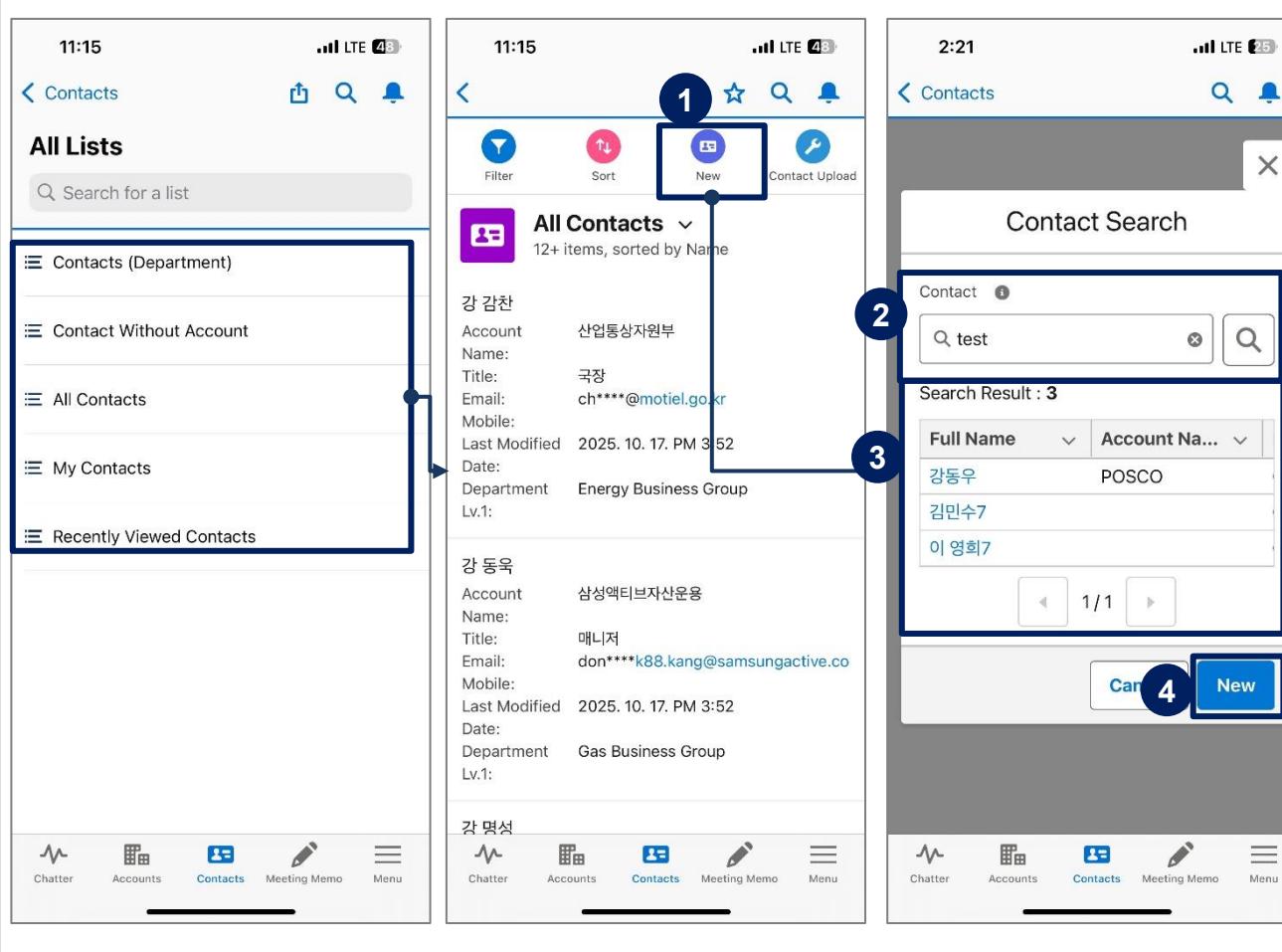


The screenshots illustrate the process of managing responsible organizations for a contact. In the first step, the user selects the 'Manage Department...' option from the contact's toolbar. This opens a modal window titled 'Manage Department' which lists available organizations. The user then selects the 'Corporate Ethics Bureau' and removes it from the list. Finally, the user saves the changes.

- Click “Manage Responsible Organization”**
 - Opens a popup where responsible organizations can be added or removed.
 - This button is only visible to the owner of the contact or the responsible organization.
- Click the Right Arrow After Selecting an Organization**
 - The selected organization will be set as the responsible organization for the contact and will have permission to edit the contact.
 - By default, group-level organizations can be added, and direct group/section under headquarters or direct section under a division can also be added.
- Click the Delete Icon**
 - Removes the selected organization from the editable list.
- Click “Save”**
 - Applies the responsible organization settings.

Step 02. Contact Management

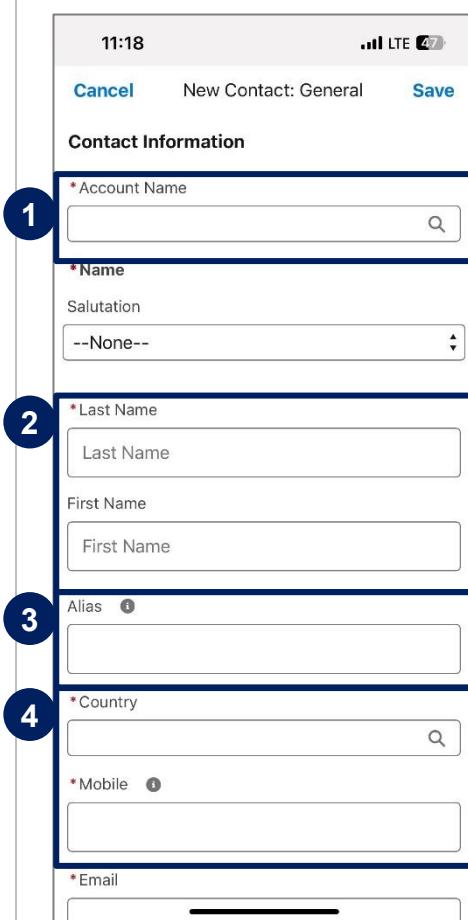
Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.01 Create a single contact (1/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > New Create Pop-up		



- Click "New"**
 - Opens the contact creation window. You can check existing records through search.
- Name-Based Search Result Area**
 - Allows initial judgment on whether duplicate contacts exist based on the entered name.
- Search Result List Provided**
 - Displays information to help determine duplication.
 - Duplication criteria:
 - Same Account–Name–Email combination
 - Same Account–Name–Phone Number combination
- Click "New" Within the Popup**
 - Transitions to the next popup.
 - In the next popup, you can enter detailed contact information.

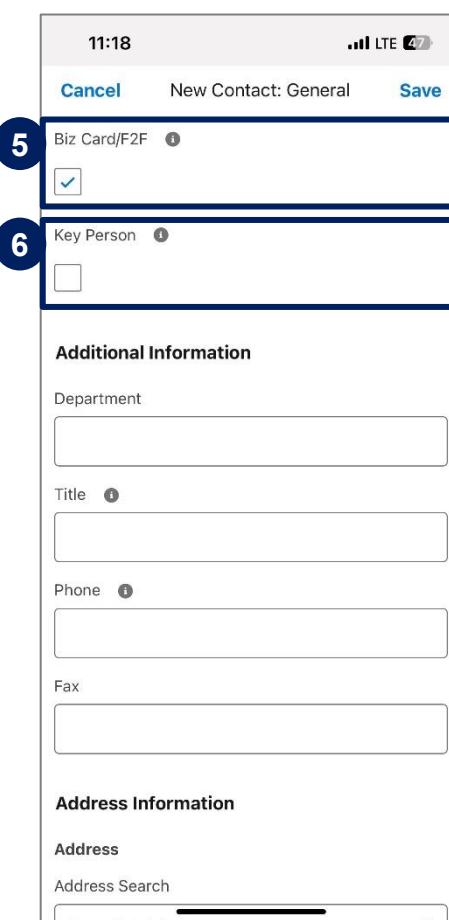
Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.01 Create a single contact (2/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > New Create Pop-up		



This screenshot shows the initial steps of creating a new contact:

- Step 1: Account Information** - The user has selected an account named "Biz Card/F2F".
- Step 2: Name** - The user has entered their last name ("Last Name") and first name ("First Name").
- Step 3: Alias** - The user has entered an alias.
- Step 4: Contact Details** - The user has selected a country ("Country"), mobile number ("Mobile"), and email address ("Email").



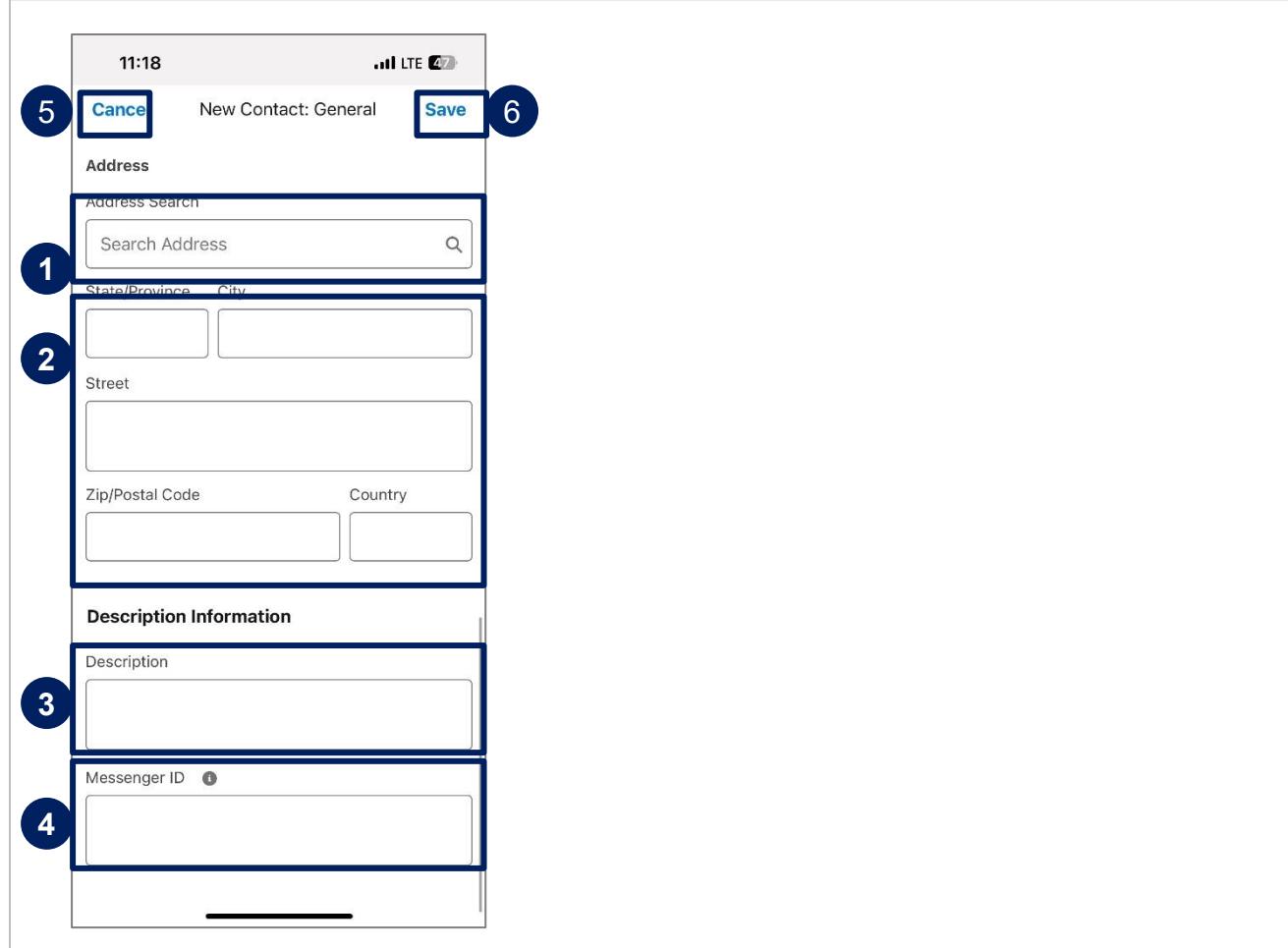
This screenshot shows the continuation of the contact creation process:

- Step 5: Business Card / Face-to-Face Status** - The "Biz Card/F2F" checkbox is checked.
- Step 6: Key Person** - The "Key Person" checkbox is unchecked.

- Enter the Account Linked to the Contact**
 - Search by name to select an Account. If no results are found, register a new Account.
- Enter Name**
 - Enter the last name and first name separately.
 - For domestic contacts, use Korean.
 - For overseas contacts, use English.
- Enter Alias**
 - Examples include: English name for Korean contacts, Korean name for foreign contacts, or names based on the local language.
- Enter Country / Phone Number**
 - Selecting a country automatically applies the country code, so manual entry is not required.
- Check Business Card / Face-to-Face Status**
 - If checked, the contact will be visible to all users within the same access group.
 - If unchecked, the contact will only be visible to the creator's assigned group.
- Mark as Key Person**
 - If checked, the contact will appear at the top of the contact list in the Account View.

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.01 Create a single contact (3/3)
Menu	Contact		
Navigation	CRM App > Contact > Contact List > New Create Pop-up		

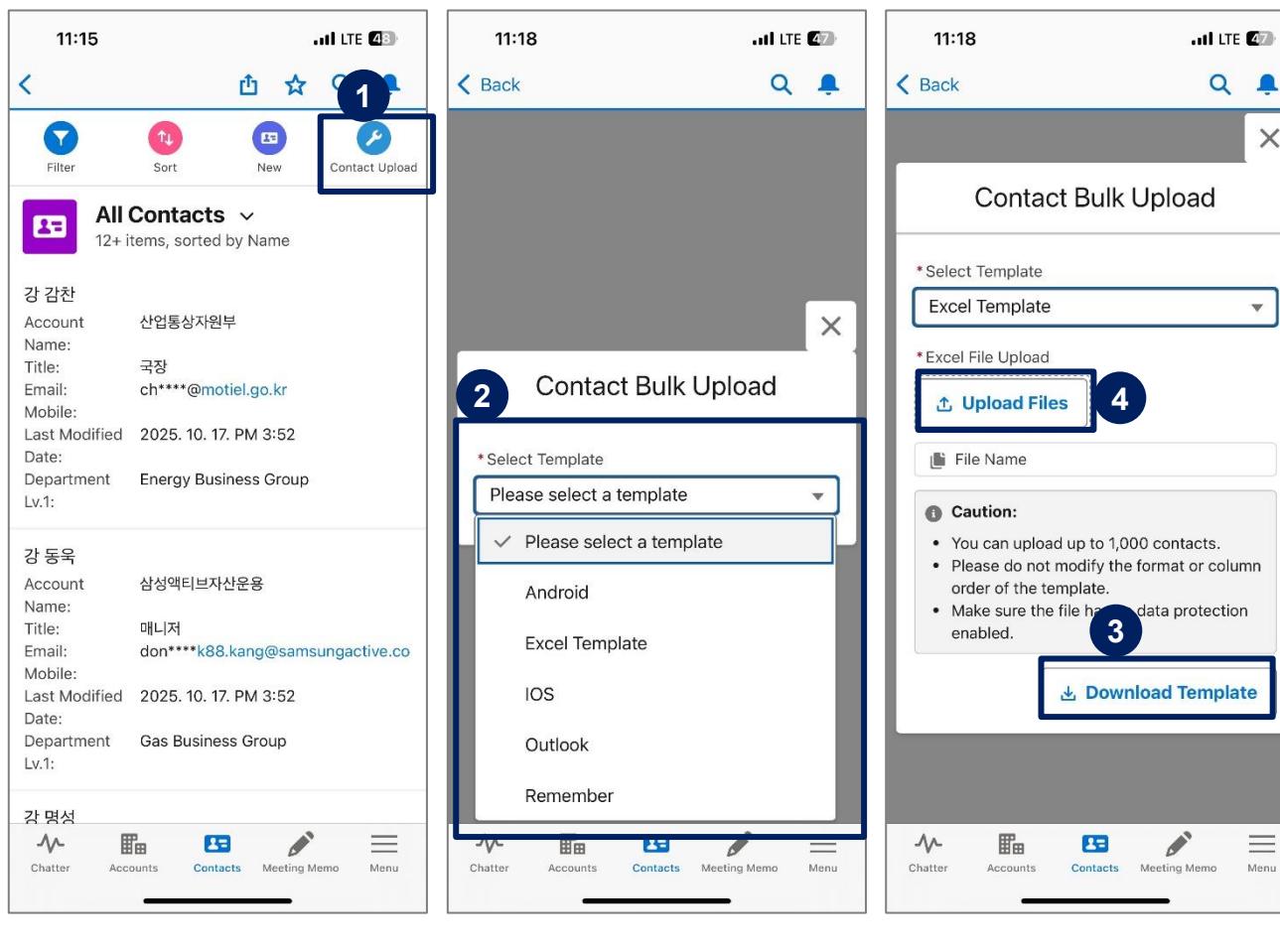


The screenshot shows the 'New Contact: General' pop-up window. At the top left is the time '11:18' and signal strength '4G LTE'. On the right are 'Cancel' and 'Save' buttons. The main area has sections for 'Address' (with 'Address Search' and 'Search Address' input), 'Description Information' (with 'Description' input), and 'Messenger ID' (with 'Messenger ID' input). A progress bar at the bottom indicates the process is complete.

- 1. Search Address**
 - When an address is selected through search, it is automatically filled in.
- 2. Edit Address Information**
 - You can manually enter address information without using search, and you can also modify auto-filled data from search.
- 3. Enter Additional Description**
 - Add supplementary notes or comments.
- 4. Messenger ID Entry Area**
 - Enter the contact's messenger ID information.
 - Example format:
Messenger Type: Messenger ID
- 5. Click "Cancel"**
 - Returns to the previous popup.
- 6. Click "Save"**
 - Closes the popup and navigates to the contact detail screen.
 - (* Once saved, a summary will be displayed on the home screen.)

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	Contact		Excel Form (1/2)
Navigation	CRM App > Contact > Contact List > Excel Upload Pop-up		



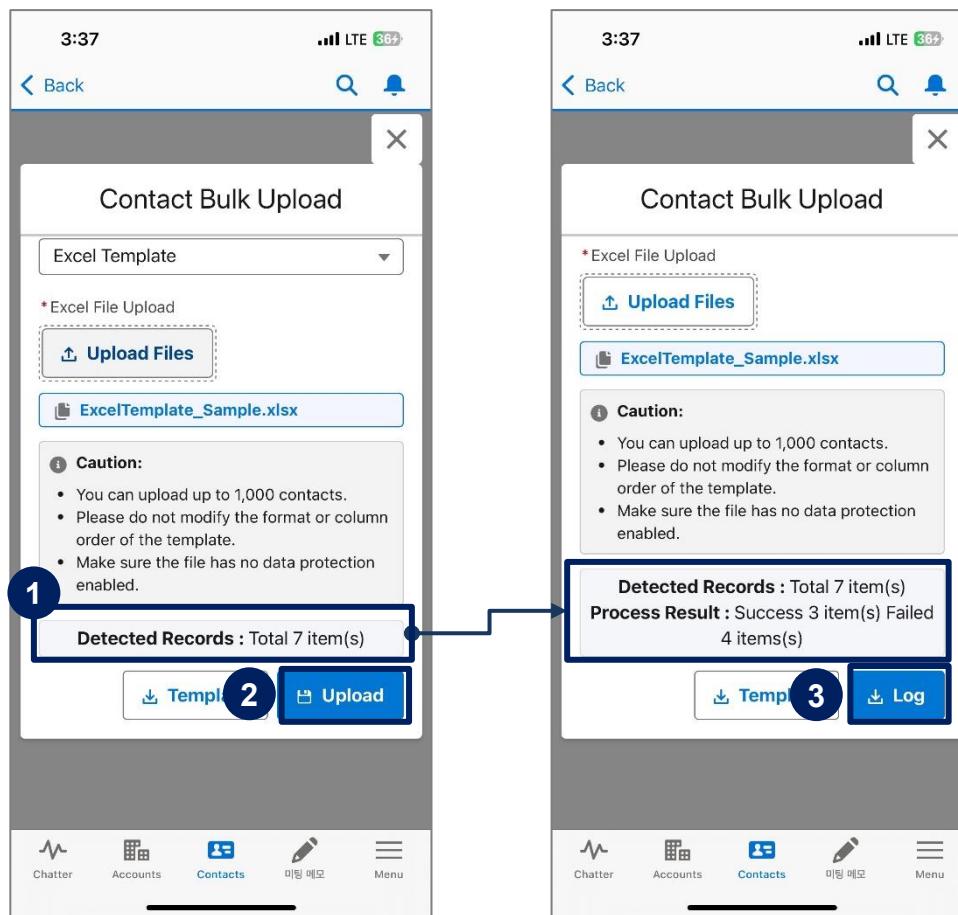
- Click “Upload Contact”**
 - Opens the contact upload popup.
- Select Template**
 - Choose a contact template to proceed.
 - Based on mobile contacts: Android, iOS
 - Based on business card apps: Remember
 - Based on email address book: Outlook
 - Based on Excel: Excel Template
- Click “Download Template”**

(*Refer to the guide slides for each contact extraction method.)
- Upload Completed Contact Excel File**

Once the upload is complete, an upload button will appear at the bottom.

Step 02. Contact Management

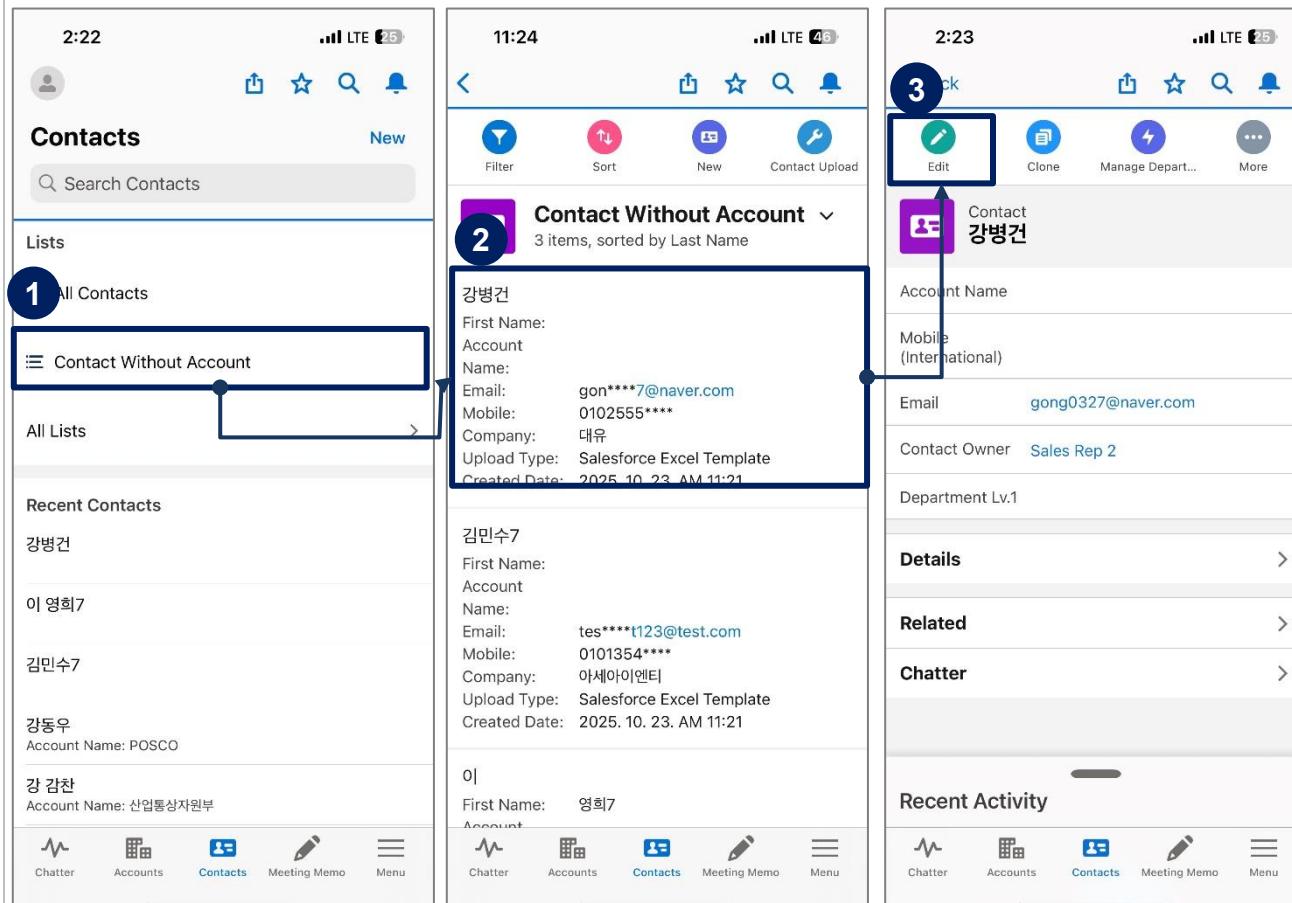
Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	Contact		Excel Form (2/2)
Navigation	CRM App > Contact > Contact List > Excel Upload Pop-up		



- Display Uploaded Excel Data**
 - When clicking Upload, the system checks for missing required fields in both the registered contacts and the Excel data.
- Click “Upload”**
 - Saves the contacts to Salesforce. Account information is not included.
 - (Mapping must be performed using the Unmapped Account List.)
- Click “Download Result”**
 - Allows you to download the upload result as an Excel file.
 - You can check upload failures and reasons in columns I and J of the downloaded Excel.
 - After modifying the content in the “Upload” sheet of the Excel file, you can re-upload the same file.

Step 02. Contact Management

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	Contact		Mapping Accounts
Navigation	CRM App > Contact > Contact List > Contact With Missing Information List		



The figure consists of three screenshots of a mobile CRM application interface, illustrating the steps for contact creation:

- Screenshot 1 (Left):** Shows the main "Contacts" screen with a list of contacts. A blue circle labeled "1" highlights the "All Contacts" button. Below it, a blue box highlights the "Contact Without Account" section.
- Screenshot 2 (Middle):** Shows the "Contact Without Account" list. A blue circle labeled "2" highlights the first contact entry for "강병건". Below it, a blue box highlights the contact details card for "강병건".
- Screenshot 3 (Right):** Shows the contact detail screen for "강병건". A blue circle labeled "3" highlights the "Edit" button. The contact details include First Name: 강병건, Email: gon****7@naver.com, Mobile: 0102555****, Company: 대유, Upload Type: Salesforce Excel Template, and Created Date: 2025. 10. 23. AM 11:21.

1. Accessing “Contact without Account”
2. Click on a contact that does not have associated Account information.
3. Click the “Edit” button to proceed with adding an Account.

[Appendix] Accounts Permission Settings

Function	Create Access	View Access	Edit Access
Accounts	Create All Users	All Users Can View All Accounts	Only Assigned Team Can Edit Account
Sales	Read Only	View Sales Data for Own and Subordinate Teams	Read Only
Credit/AR	Read Only	View Credit and AR for Own Company	Read Only
Order/Shipment	Read Only	Steel Division Only	Read Only
Project	Create All Users	All Users Can View All Projects	Only Assigned Team Can Edit Project
NDA Accounts	Create Admin User	Only users with access permission can view the account	Only users with access permission can Edit Account

[Appendix] Contact Permission Settings

Default Contact View Access

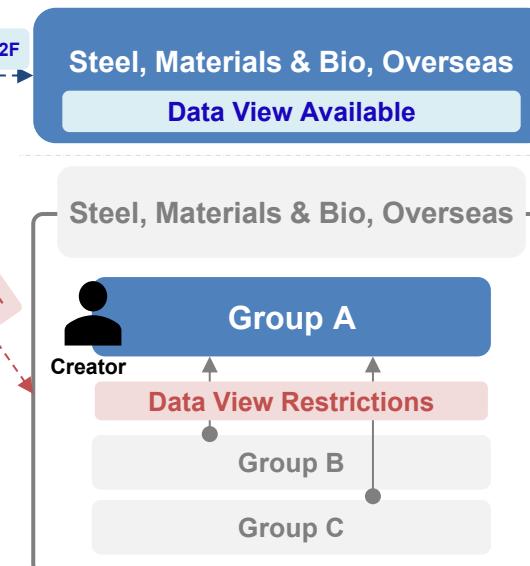
View Access Granted Based on Separate Organizational Classification
 (Changes according to personal data protection review)



View Access Based on Biz Card / F2F

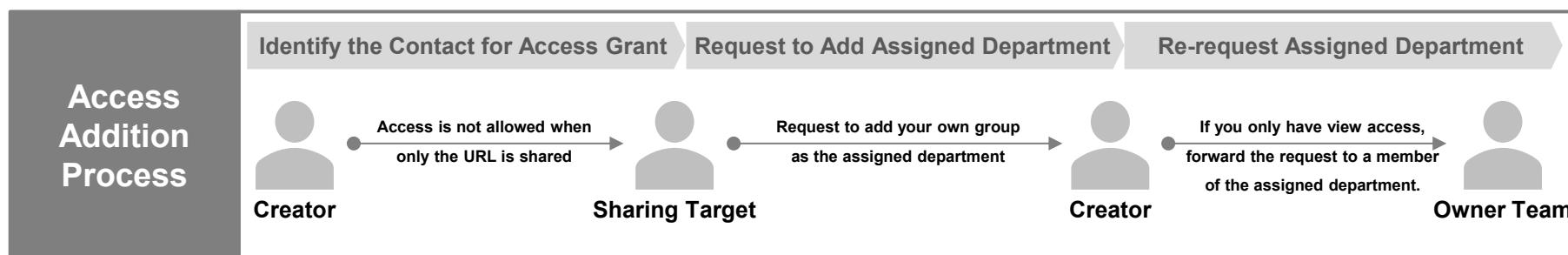
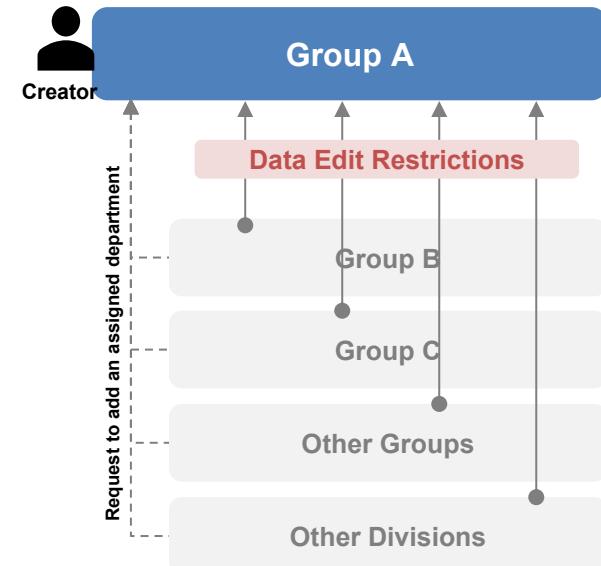
Check
 View Access Granted for Same Organizational Classification

UnCheck
 View Access Granted Only to the Creator's Organization



Contact Edit Access

Edit Access Granted to Creator's Organization (Group) and Responsible Department

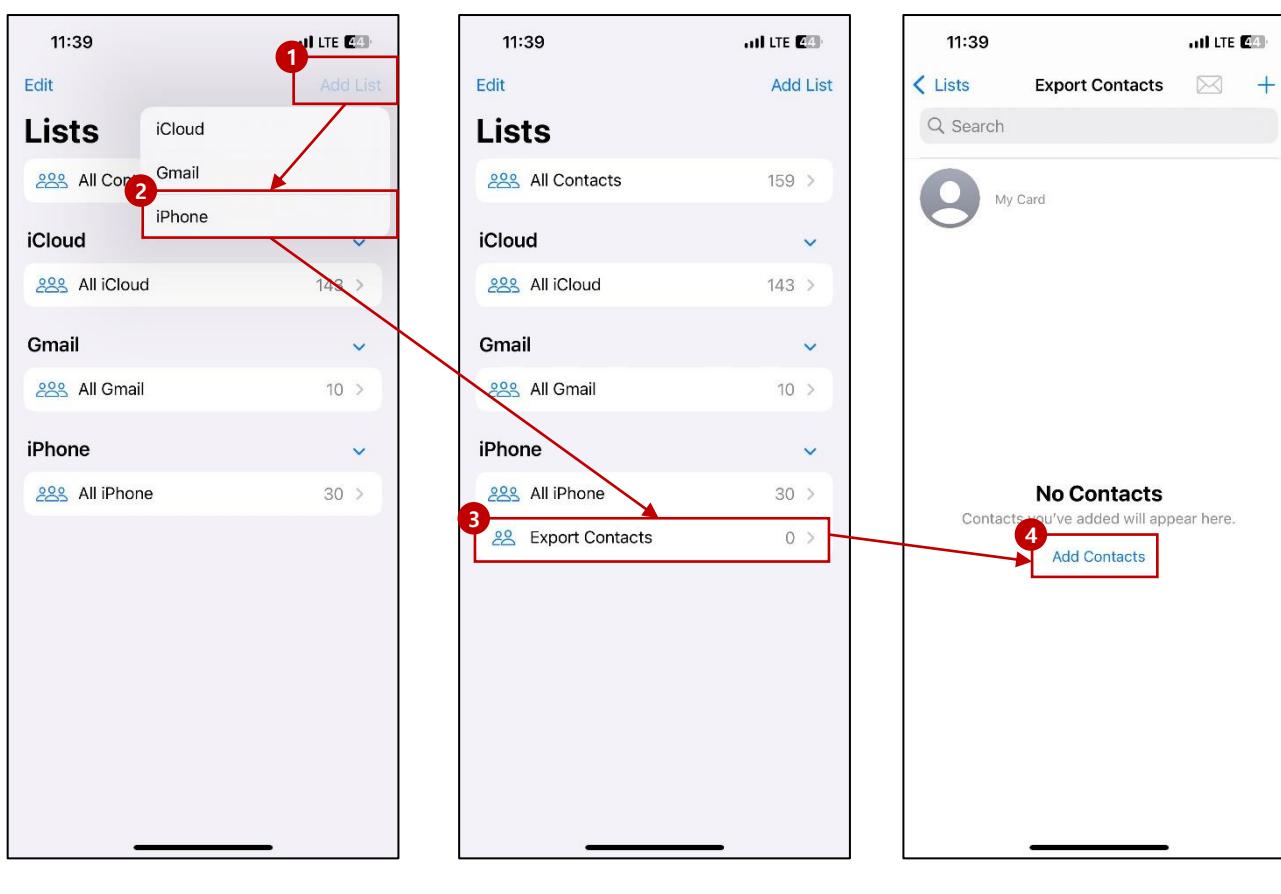


[Appendix] List of Functions Not Supported on Mobile

Area	Feature	Feature Details	Reason for Mobile Exclusion
Common	File Download	<ul style="list-style-type: none"> Download files uploaded to Salesforce. 	<ul style="list-style-type: none"> File download is fundamentally restricted by POSCO International security policy.
	Home Dashboard	<ul style="list-style-type: none"> Organization-based and personal-based views on the home screen. 	<ul style="list-style-type: none"> Difficult to ensure usability in mobile layout; low demand; requires heavy custom development.
Account & Contact	Customer Card Generation	<ul style="list-style-type: none"> Generate customer cards (PDF, Word) based on account info; includes history. 	<ul style="list-style-type: none"> File download restricted on mobile; task unsuitable for mobile execution.
	SAP BP Request	<ul style="list-style-type: none"> Display SAP BP registration screen for accounts not registered in BP. 	<ul style="list-style-type: none"> SAP BP registration is not supported on mobile.
	Account Organization Chart	<ul style="list-style-type: none"> Create and edit organization charts; map contacts. 	<ul style="list-style-type: none"> Task unsuitable for mobile; feature limited to authorized users.
Sales Support	NDA Account Meeting Notes Sharing	<ul style="list-style-type: none"> Share NDA meeting notes with other team members. 	<ul style="list-style-type: none"> Standard sharing not supported on mobile; available on PC only.
Order & Fulfillment	POSCO Customer Mapping	<ul style="list-style-type: none"> Select multiple orders for same POSCO customer and map BP. 	<ul style="list-style-type: none"> Mobile UI does not support multi-record selection in List View.
	Monthly Shipment Report	<ul style="list-style-type: none"> View monthly shipment volume report by shipment year. 	<ul style="list-style-type: none"> Matrix-type report not supported on mobile; only detailed info viewable.

[Appendix] Download iOS Contacts(1/3)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		iOS Contact(1/3)
Navigation	-		

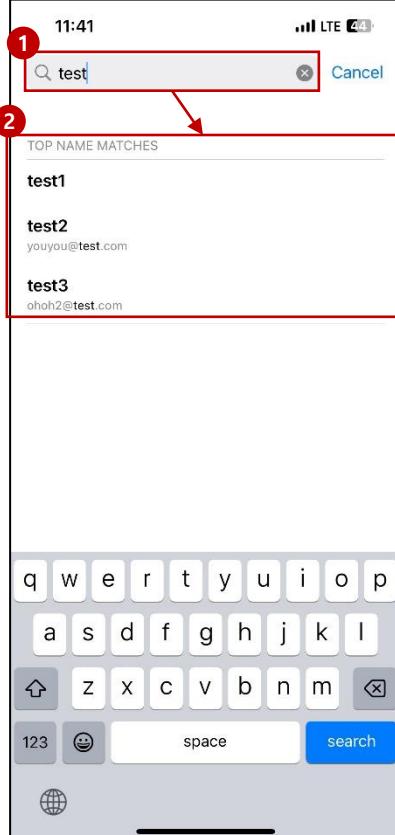
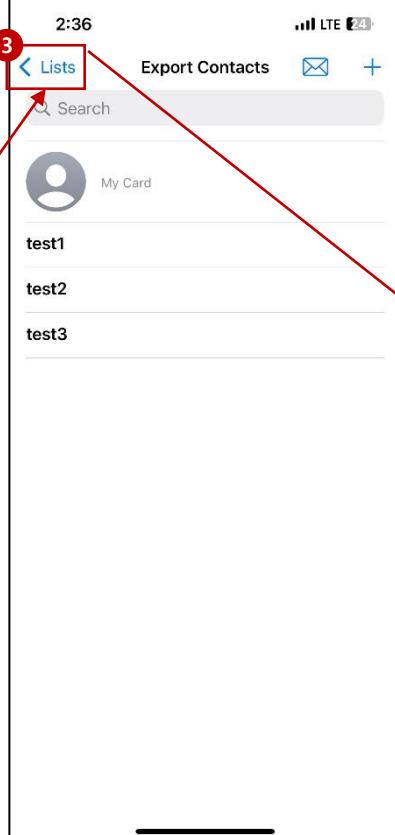


1. Open the “Contacts” App on iPhone (iOS)
Tap the “Add List” button at the top right.
2. Tap the “iPhone” Option
Create a list to export specific contacts.
3. Tap the Created Contact List, Then Tap “Add Contacts”
Add contacts to the newly created list.

If you export all contacts, personal contacts may be included.

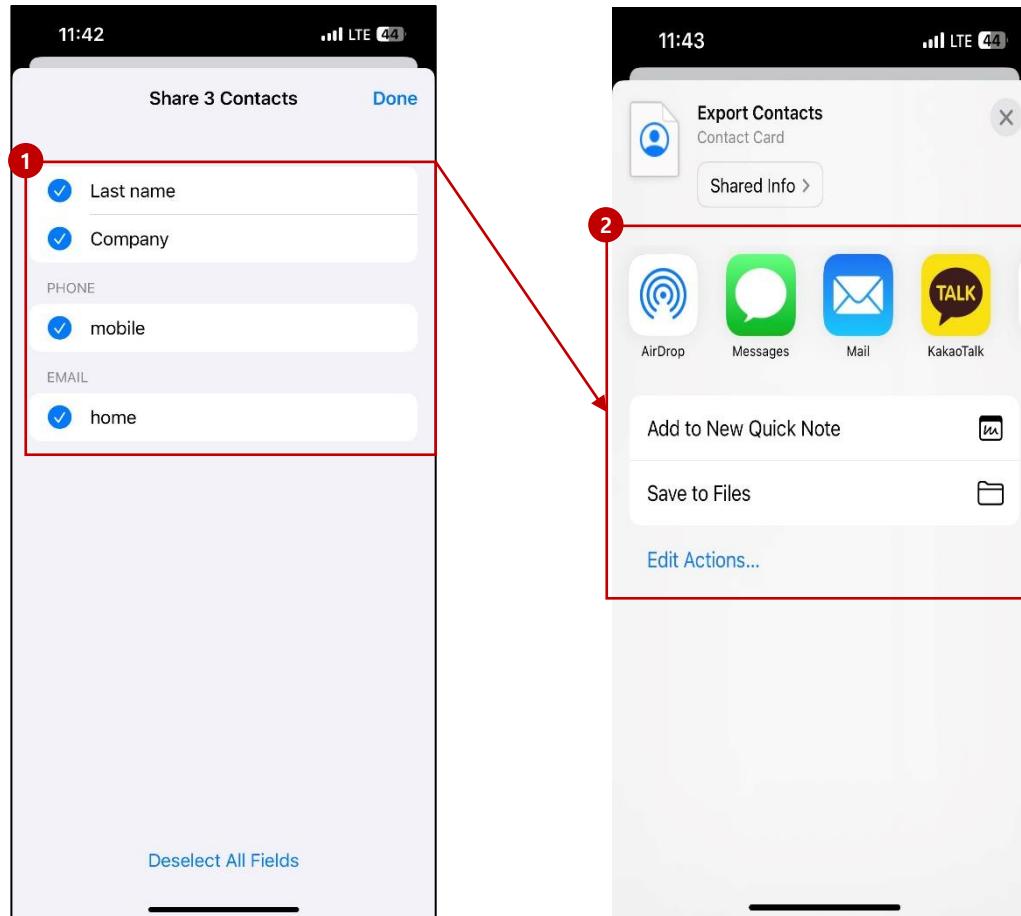
Please make sure to create a separate group for work-related contacts before exporting.

[Appendix] Download iOS Contacts(2/3)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		iOS Contact(2/3)
Navigation	-		
	 <p>1. Search for Desired Contacts Search and select contacts to add to the export list.</p> <p>2. Add to Export List After selecting, add the contacts to the export list.</p> <p>3. Click the “List” Button After Adding Contacts Tap the list to proceed with export.</p> <p>4. Long Press the Export Contact List From the displayed menu, tap “Export”.</p>	 <p>5. Search for Desired Contacts Search and select contacts to add to the export list.</p> <p>6. Add to Export List After selecting, add the contacts to the export list.</p> <p>7. Click the “List” Button After Adding Contacts Tap the list to proceed with export.</p> <p>8. Long Press the Export Contact List From the displayed menu, tap “Export”.</p>	<p>1. Search for Desired Contacts Search and select contacts to add to the export list.</p> <p>2. Add to Export List After selecting, add the contacts to the export list.</p> <p>3. Click the “List” Button After Adding Contacts Tap the list to proceed with export.</p> <p>4. Long Press the Export Contact List From the displayed menu, tap “Export”.</p> <p><i>If you export all contacts, personal contacts may be included. Please make sure to create a separate group for work-related contacts before exporting.</i></p>

[Appendix] Download iOS Contacts(3/3)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		iOS Contact(3/3)
Navigation	-		



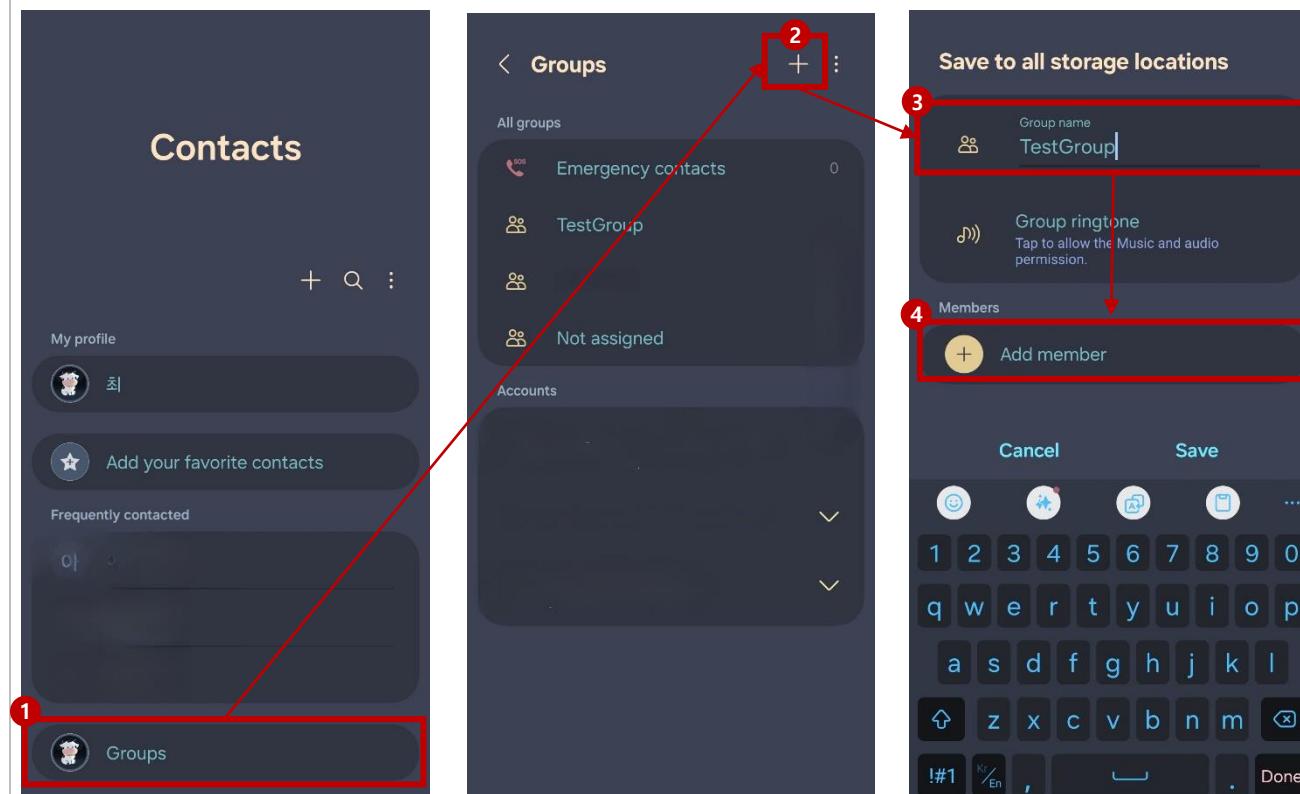
- Select Fields to Share, Then Click "Done"**
 - The fields shown may vary depending on the contact information.
- Save the Generated Contact File (.vcf)**

You can either save the file to your phone or select an email app to send it to yourself, then download it on your desktop.

*If you export all contacts, personal contacts may be included.
Please make sure to create a separate group for work-related contacts before exporting.*

[Appendix] Download AOS Contacts(1/3)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		AOS Contact(1/3)
Navigation	-		



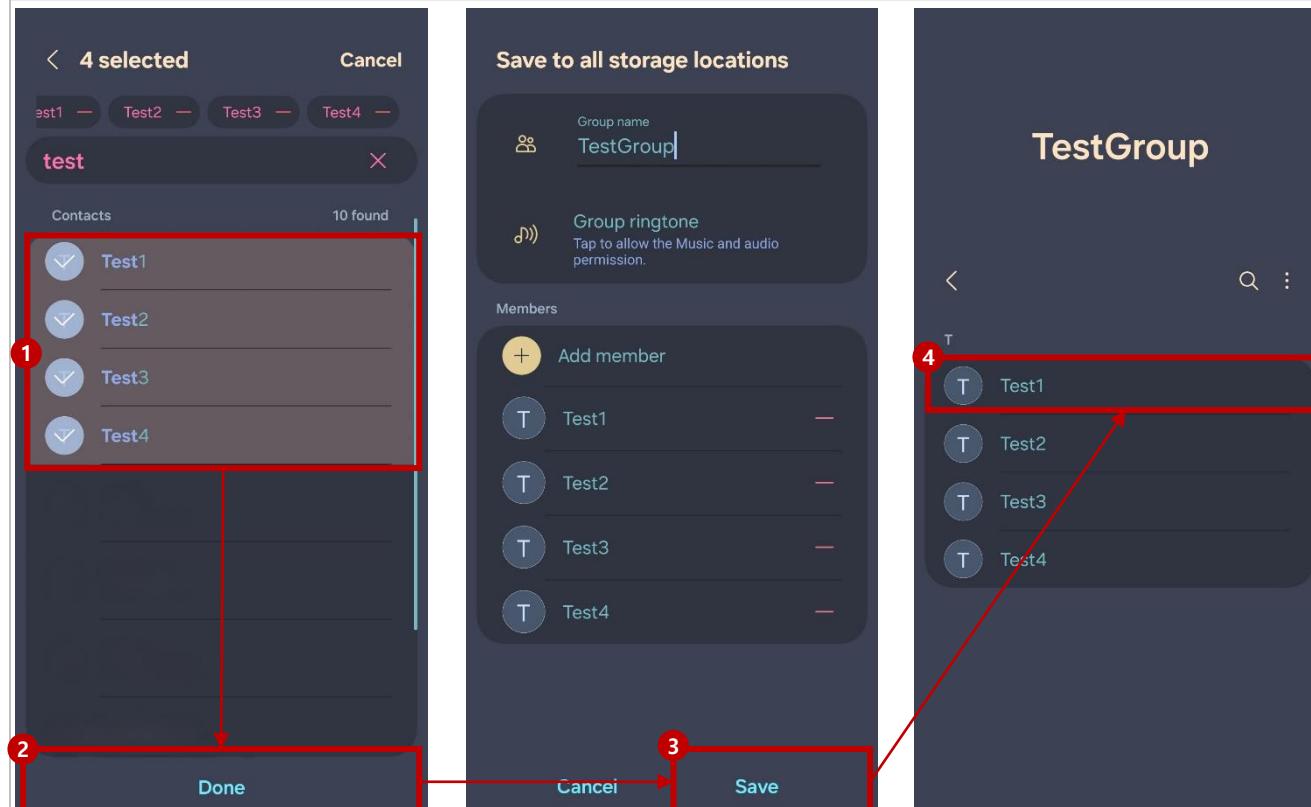
1. Open the “Contacts” App and Tap “Groups”
2. Tap the “+” button at the top right of the screen.
3. Enter Group Name
For example: Work Contacts for Export.
4. Tap “Add Members to Group”
Add contacts to the newly created group.

If you export all contacts, personal contacts may be included.

Please make sure to create a separate group for work-related contacts before exporting.

[Appendix] Download AOS Contacts(2/3)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		AOS Contact(2/3)
Navigation	-		

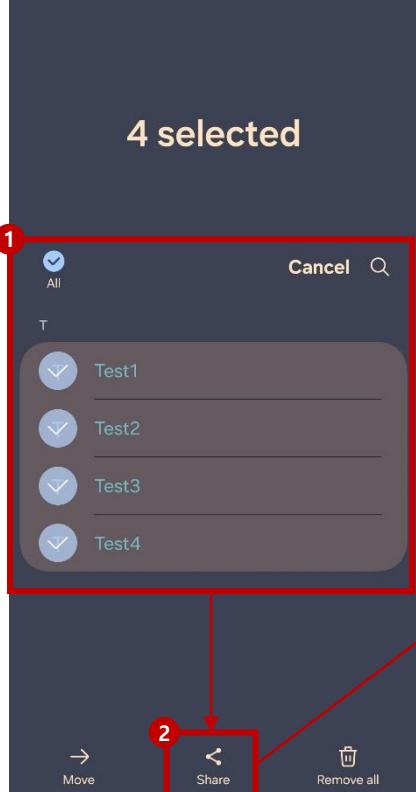
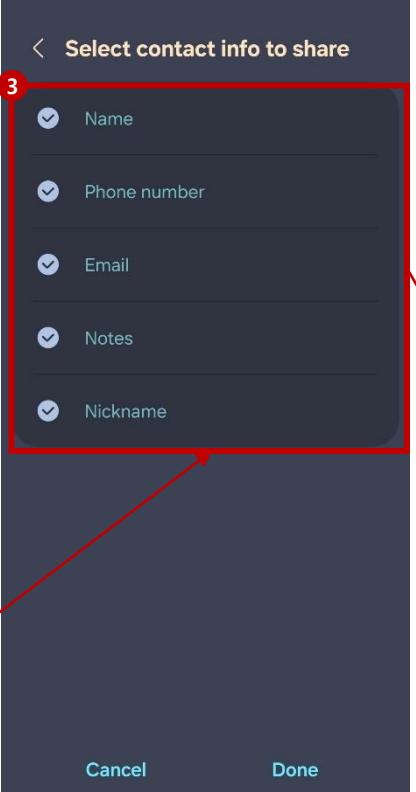
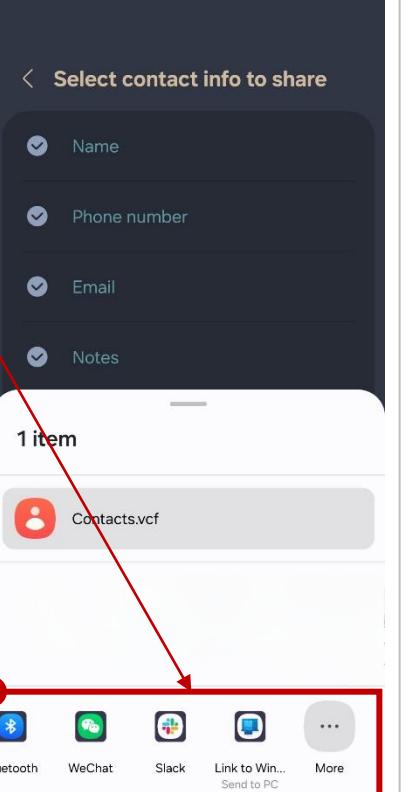


1. Select Contacts to Add to the Group
2. Tap the “Done” Button at the Bottom of the Screen
3. After Verifying the Added Contacts, Tap the “Save” Button at the Bottom Right
Saves the group with the selected contacts.
4. Long Press Any Contact to Activate the Selection List
Allows multiple contacts to be selected for further actions.

If you export all contacts, personal contacts may be included.

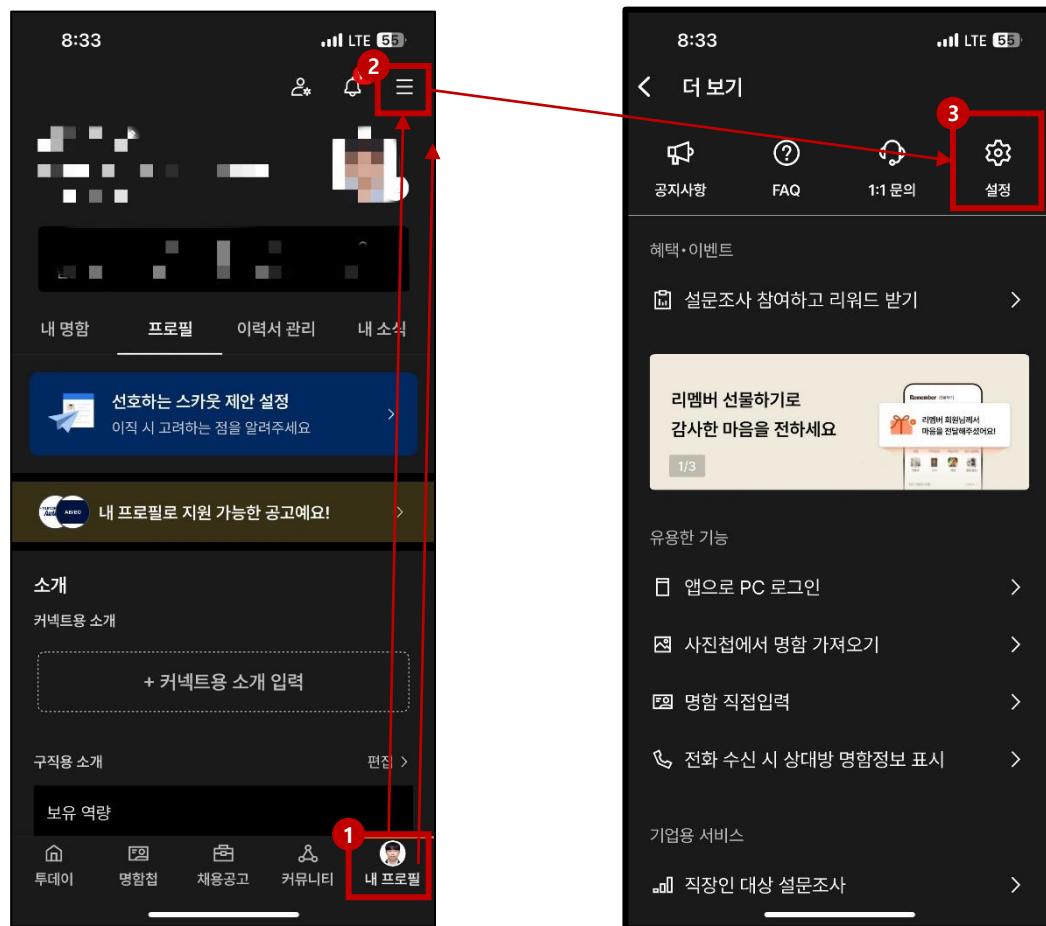
Please make sure to create a separate group for work-related contacts before exporting.

[Appendix] Download AOS Contacts(3/3)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact	
Menu	-		AOS Contact(3/3)	
Navigation	-			
	 <p>4 selected</p> <p>1 All</p> <p>Cancel Q</p> <p>Test1 Test2 Test3 Test4</p> <p>Share Remove all</p>	 <p>Select contact info to share</p> <p>3 Name Phone number Email Notes Nickname</p> <p>Cancel Done</p>	 <p>Select contact info to share</p> <p>Name Phone number Email Notes</p> <p>1 item Contacts.vcf</p> <p>4 Bluetooth WeChat Slack Link to Win... More</p>	<ol style="list-style-type: none"> Select Contacts to Export - Select the desired contacts (select all if needed). Tap the “Share” Button at the Bottom Left of the Screen Select Fields to Share, Then Tap “Done” at the Bottom - Name, phone number, and email must be selected. (The fields shown may vary depending on the contact information entered.) Send the Generated Contact File (.vcf) - Choose your email app and send the file to yourself. - Download it on your desktop or mobile device. <p>If you export all contacts, personal contacts may be included.</p> <p>Please make sure to create a separate group for work-related contacts before exporting.</p> <p>Note: On Android devices, saving contact files directly to the phone is not supported. You must send the file to your email and download it from there.</p>

[Appendix] Download Remember Contacts(1/2)

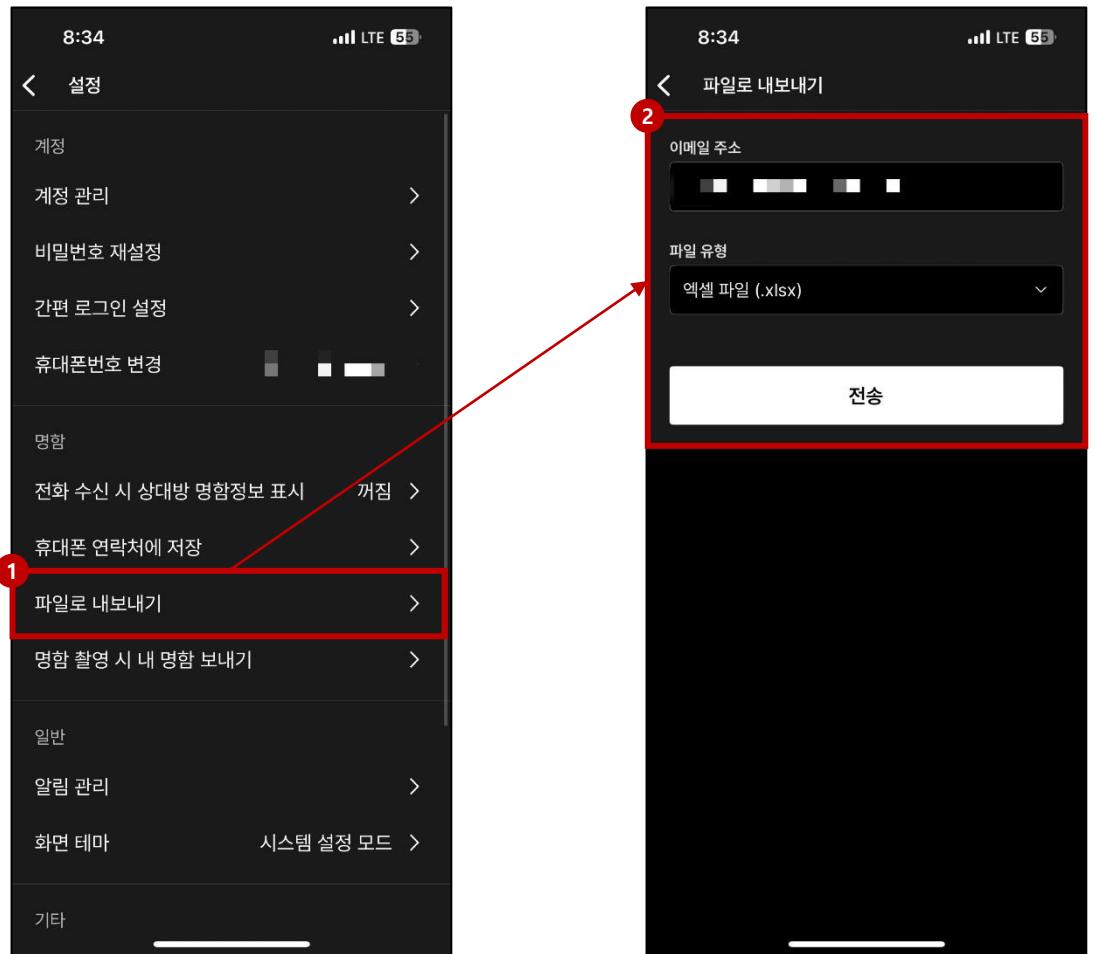
Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		Remember(1/2)
Navigation	-		



1. Open the Remember App and Tap “My Profile” at the Bottom
2. Tap the menu icon at the top right.
3. Tap the Settings Button at the Top
Opens the settings screen.

[Appendix] Download Remember Contacts(2/2)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		Remember(2/2)
Navigation	-		

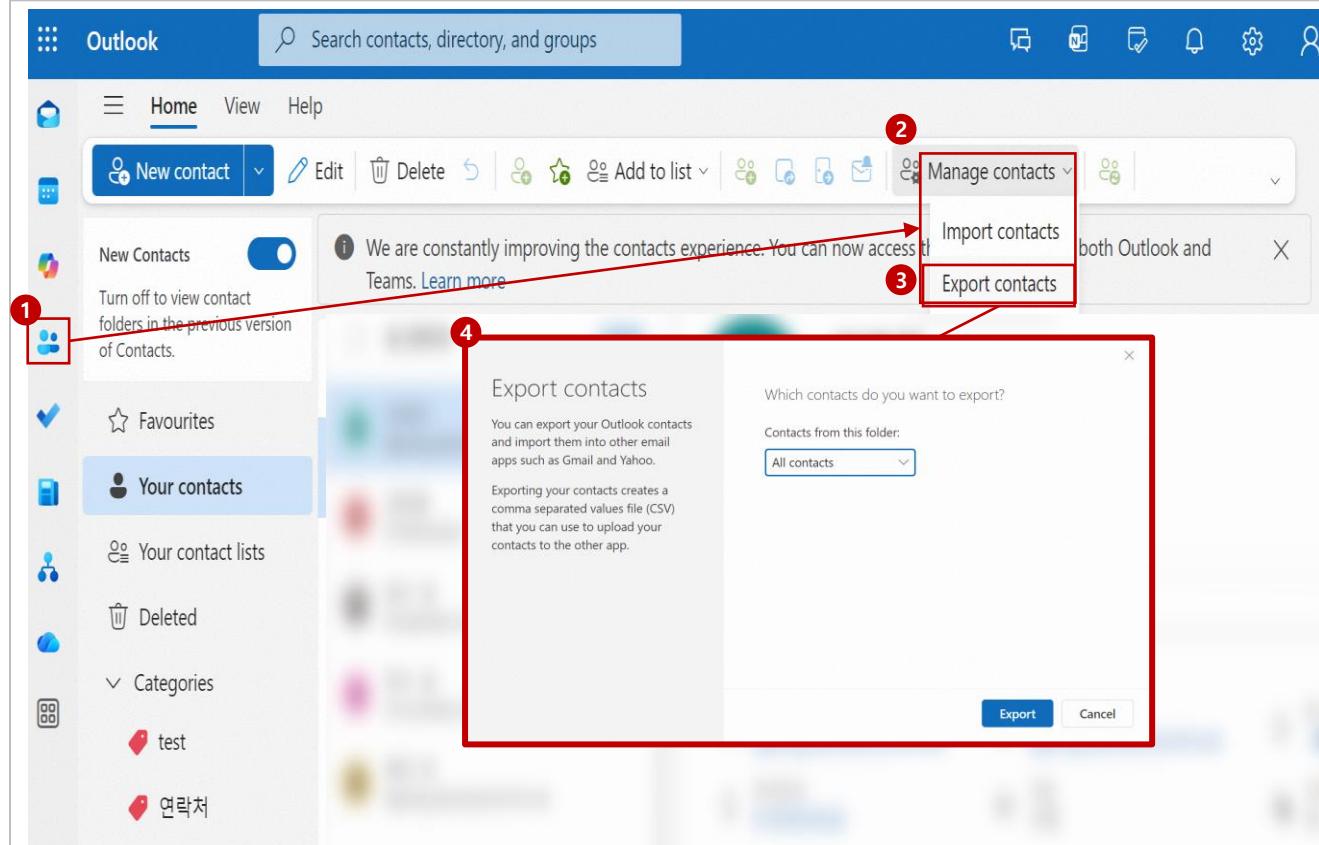


1. Click the “Export to File” Menu
2. Select the file type as “Excel File (.xlsx)” and send it to your email address.

For exporting business cards from the Remember app (iOS/Android), the file will be sent to your own email address for download.

[Appendix] Download Outlook Contacts

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		Outlook
Navigation	-		



1. Access MS Outlook (Web Version) and Click the “Contacts” Icon on the Left
 - Navigate to the Contacts section.
2. Click the “Manage Contacts” Menu
 - Opens the contact management options.
3. Click the “Export Contacts” Menu
 - Opens the export interface.
4. Click the “Export” Button and Download the File
 - Check your Downloads folder for the exported file.

[Appendix] Explanation Excel Template(1/2)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		Excel(1/2)
Navigation	-		

업로드 엑셀 서식

A	B	C	D	E	F	G	H
1 LastName *성	1 FirstName 이름(성 없이)	1 MobilePhone *휴대전화	Email *이메일	Phone 유선전화	Department 부서	Title 직급	Company__c 회사
2	2	2	2	2	2	2	2
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

1. Last Name, Email, and Phone Number Are Required Fields

- If not entered, the contact will be excluded from the Excel upload.

2. Company Information

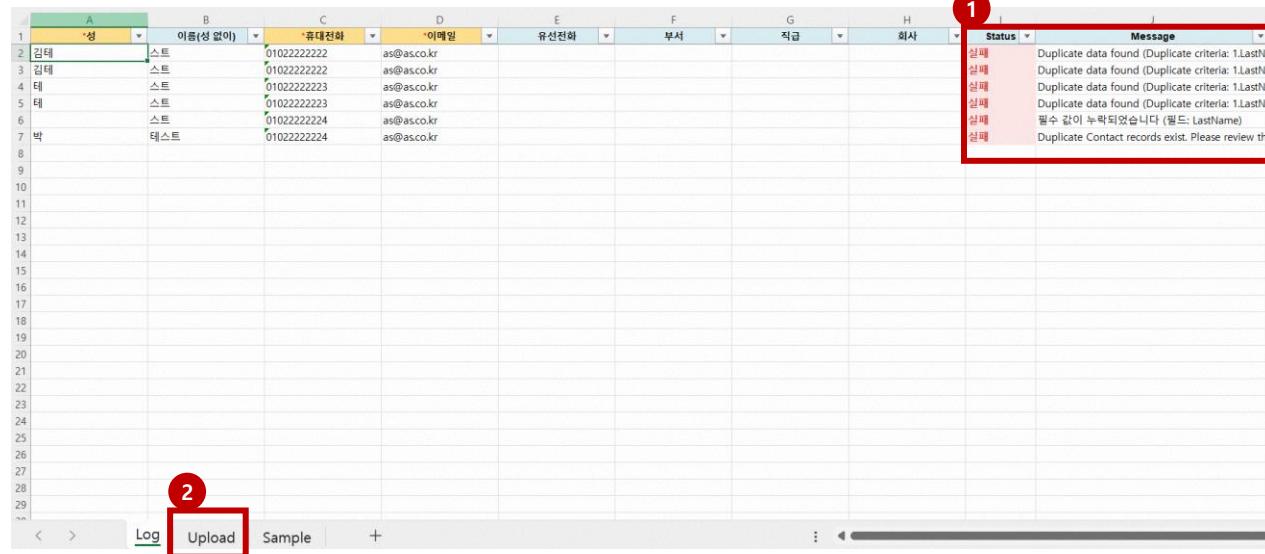
- This is temporarily saved as plain text, unrelated to actual registered Accounts, and can be used as reference during Account mapping.

* Do not delete rows 1–3 or remove columns from the Excel file, as this will cause errors.

[Appendix] Explanation Excel Template(2/2)

Step (Lv.2)	02.03. Contact Creation	Step (Lv.3)	02.03.02 Create multiple contact
Menu	-		Excel(2/2)
Navigation	-		

업로드 결과 엑셀 서식



The screenshot shows a contact creation interface with an Excel upload result. At the top, there's a table with columns: 성(A), 이름(성 없이)(B), 휴대전화(C), 이메일(D), 유선전화(E), 부서(F), 직급(G), 회사(H). Below the table, a message box is displayed with a red border and a red circle labeled '1'. It contains several entries: 'Duplicate data found (Duplicate criteria: 1.LastName)' repeated five times, followed by '될수 갈이 누락되었습니다 (필드: LastName)'. At the bottom left, there's a toolbar with buttons: Log, Upload (highlighted with a red box and red circle '2'), Sample, and a plus sign.

1. Status and Failure Reason Area for Upload Results

- You can check the reason for failure, and if the contact is already registered in Salesforce, the reason will be indicated separately.

2. After Editing the Content, Move the Main Fields (Last Name, First Name, Mobile Phone, Email, etc.) to the Upload Sheet and Re-upload

- You can correct the data and re-upload the Excel file using the modified “Upload” sheet.