

# 01. Account & Contact Management

## 01. Account & Contact Management



Click [on this link](#) for the full training material (PowerPoint)



**From Prospect to Sales**

### Added Value

Manage Accounts and Contacts will help you by:

- Giving you a 360° view on your customer
- Sharing visibility on history of interactions with contacts
- Allowing you to collaborate within your GBU and the others
- Being the single system to create and update customer related data
- All this in one single system

### What you need to know to start...

#### Accounts:

- Accounts are Solvay's customers, partners and distributors
- Each account stores information such as a name, address, phone numbers and customer attributes ( ).
- For each account, you can link information such as opportunities, activities, cases, visit reports, notes and attachments.

#### Contacts:

- Contacts are any individual that Solvay interacts with inside an Account's organization, or related to it.
- Any Prospect / Customer in SFDC must have, at least, one Contact associated to it.
- Each contact is associated with a role:
  - Initiator, Influencer, Decider, Buyer, User
- Would a contact be part of an account, but active at another account, then he can be identified as an "Involved Contact" for this 2nd account

### Video Tutorials

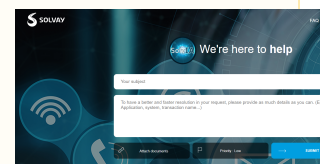
### Table of Contents

- [Account: Presentation](#)
- [Account: Account Update](#)
- [Account: Account Team](#)
- [Account: Change account owner](#)
- [Account: Create a Prospect](#)
- [Account: Convert a Prospect](#)
- [Account: Corporate Group Creation](#)
- [Account: Assign an Account to a Corporate Group](#)
- [Account: Mass update customer segmentation](#)
- [Account: Related Account](#)
- [Account : Attach files](#)
- [Account : Locked](#)
- [CSR Process - Customer Creation \(SAP\)](#)
- [Contact: Search a Contact](#)
- [Contact: Create a contact in Salesforce and from Lightning for Gmail](#)
- [Contact: Involved Contact](#)
- [Contact: Link a Product to a Contact](#)



#### Need Help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvay.com/>



*you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example*