

Add Contacts in the Involved Contacts

Overview

In this section, you will find information about how to add customer contacts in the involved contacts of the opportunity. This functionality allows identifying key contacts that will have an influence in the opportunity process. For each contact, a "Role" defines the way the contact is involved on the deal (e.g. decision maker, technical buyer,...).

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Concerned profiles:

Sales - Customer Service (opportunity owner)

Step By Step

Define the power map

1

David opens his new opportunity for which he wants to add John and Michael as contact

Opportunity Owner: David Langlois (Closed)

Opportunity Name: Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Opportunity Convention Name: YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_CO-FORMULANT_2017-04-04

Account Name: YANTAI ZHONGDE FERTILIZER LIMITED

BU: Novocare

Visibility: ODU Restricted

Stage: 2 - Lab Testing

Stage Reason: Expected Yearly Revenue: EUR 1 670 000.00

Probability: 30%

Close Date: 21/11/2016

Dummy Product Entry

Centralization Y

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He hovers the **Involved Contacts** related list... Look! John is already linked! That's because David created his opportunity from John's contact page

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Opportunity
Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

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Cases | Competitive Insights | Cross BU Leads | Involved Accounts | **Involved Contacts** | Opportunity Team | Products (Solvia) | Visit Report Links | Quotes | Open Activities | Activity History | Stage History | Copy

Involved Contacts New

Action	Contact Name	Account Name	Email	Phone	Role
Edit Del	John SMITH	ROHM & HAAS CHEMICALS LLC	dummyemail53_dummys.com@invald.com.3452	999999999	Influencer

1 - Quality 2 - Lab testing 3 - Industrial testing 4 - Negotiate 5 - Closed Lost

Note

▼ Opportunity Information

Opportunity Owner: David Larson (Change)
 Opportunity Name: Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05
 Opportunity Convention Name: YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_CO-FORMULANT_2017-12-14
 Stage: 2 - Lab Testing
 Stage Reason:
 Expected Yearly Revenues: EUR 1 670 000.00

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David can now identify the key contacts that will influence the win of the opportunity

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Involved Contacts for Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Save Cancel

Primary	Contact	Role
<input type="checkbox"/>	No Primary Contact	
<input checked="" type="checkbox"/>	John SMITH	Influencer
<input type="checkbox"/>	Mark Thomas	--None--
<input type="checkbox"/>		--None--
<input type="checkbox"/>		Influencer
<input type="checkbox"/>		Business User
<input type="checkbox"/>		Decision Maker
<input type="checkbox"/>		Economic Buyer
<input type="checkbox"/>		Economic Decision Maker
<input type="checkbox"/>		Evaluator
<input type="checkbox"/>		Executive Sponsor
<input type="checkbox"/>		Technical Buyer
<input type="checkbox"/>		Other
<input type="checkbox"/>		--None--

Save Cancel

You can use the checkbox "Primary" on the left to define the primary contact of the opportunity.

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Opportunity
Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

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Involved Contacts New

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	John SMITH	ROHM & HAAS CHEMICALS LLC	dummysemail53_dummys.com@invald.com.3452	999999999	Influencer	<input type="checkbox"/>
Edit Del	Mark Thomas	INGREDIENT RESOURCES CORP	mark_ingredientresources_net@invald.com.1783	(800) 726-7200	Decision Maker	<input type="checkbox"/>

Note

▼ Opportunity Information

Opportunity Owner: David Larson (Change)
 Opportunity Name: Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05
 Stage: 2 - Lab Testing
 Stage Reason:

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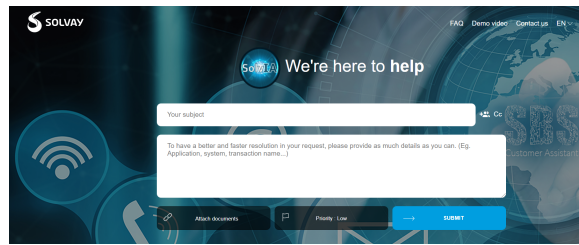
Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Define the Opportunity Team](#)

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/>

- Follow the Opportunity Stages – Add Accounts in the Involved Accounts
- Negotiate to win
- Close the Opportunity
- Competitive insights - Create a Competitive Insight
- Cross BU Leads – Create a Cross BU Lead
- Introduction to Quote Process Management



The screenshot shows a web form for SOLWAY. At the top left is the SOLWAY logo. In the top right corner, there are links for 'FAQ', 'Demo video', 'Contact us', and 'EN'. The main heading is 'We're here to help'. Below this is a 'Your subject' input field with a small 'x' icon on the right. Underneath the subject field is a larger text area with a placeholder text: 'To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name...)'. At the bottom of the form, there is an 'Attach documents' button with a paperclip icon, a 'Priority: Low' dropdown menu, and a blue 'SUBMIT' button.

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