

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,...).

Concerned profiles:

Sales - Customer Service (opportunity owner)

Step By Step

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Define the power map

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Opportunity

Yantai Zhongde_Novicare_FERTILIZER PROTECTION_2016-02-05

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CRM (0) | Competitive Analysis (0) | Close Business (0) | Manage Accounts (0) | Manage Contacts (0) | Opportunity Tasks (0) | Product Details (0) | Visit Feedback (0) | Quotes (0) | Open Activities (0) | Activity History (0) | Stage History (0) | Opportunity Feed History (0) | Manage Deals, Notes & Attachments (0)

Opportunity Detail

Edit | Delete | Starting | Add Products & Forecast | Create Quote | Update Forecast | Close Opportunity | Get Quotes from Initial Deal

Status

1 - Quality

2 - Lab Testing

3 - Industrial testing

4 - Negotiate

5 - Closed Lost

6 - Closed Won

Note

Opportunity Information

Opportunity Owner: David Langlois (Closed)

Opportunity Name: Yantai Zhongde_Novicare_FERTILIZER PROTECTION_2016-02-05

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

Account Name: YANTAI ZHONGDE FERTILIZER LIMITED

BU: Novicare

BU: AEG

Visibility: ODU Restricted

Stage: 2 - Lab Testing

Stage Reason

Expected Yearly Revenue: EUR 1 670 000.00

Probability: 30 %

Close Date: 01/11/2016

Dummy Product Enable: ☐

Centralization Y: ☐

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

3

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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 (Solvay) Visit Report Links Quotes Open Activities Activity History Stage History

Involved Contacts

New

Action	Contact Name	Account Name	Email	Phone	Role
Edit Del	John SMITH	ROHM & HAAS CHEMICALS LLC	dummysmail53_dummys.com@invalid.com.3452	9999999999	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-NA/NA

Stage 2 - Lab Testing

Stage Reason

Expected Yearly Revenues EUR 1 670 000,00

4

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

5

For
each
contact,
a
"Role"
defines
the
way
the
contact
is
involved
on
the
deal

Involved Contacts for Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Save Cancel

Primary Contact Role

No Primary Contact

John SMITH Influencer

Mark Thomas

--None--

--None--

Influencer

Business User

Decision Maker

Economic Buyer

Economic Decision Maker

Evaluator

Executive Sponsor

Technical Buyer

Other

--None--

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

Save Cancel

6

David
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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 (Solvay) Visit Report Links Quotes Open Activities Activity History Stage History Opportunity Field History

Involved Contacts

New

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	John SMITH	ROHM & HAAS CHEMICALS LLC	dummysmail53_dummys.com@invalid.com.3452	9999999999	Influencer	☐
Edit Del	Mark Thomas	INGREDIENT RESOURCES CORP	mark_ingredientresource_net@invalid.com.1783	(800) 726-7200	Decision Maker	☐

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

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