

Define the Opportunity Team

Overview

In this section, you will find information about the process to add an Account Manager in the Opportunity Team

Concerned profiles:

ALL opportunity owners

Table of content

- [Step By Step](#)
 - [Opportunity Stages & Process Mapping](#)
 - [Fill in the Opportunity Team](#)
- [Related articles](#)
- [Need help?](#)

Step By Step

Opportunity Stages & Process Mapping

The "Qualify" stage gathers the following business activities

Business activity	Who?	How it translates in SFDC?
• Collection and analysis of Customer needs	Opportunity Owner	Opportunity
• Analyze context (contacts with decision power, influence, competition)	Opportunity Owner	Involved Contacts, Competitive insight
• Involve Team	Opportunity Owner	Opportunity Team
• Compare needs with existing product portfolio	Opportunity Owner + Technical Marketing	Opportunity Team + Team Roles
• First selection of product (s)	Opportunity Owner + Technical Marketing	Product
• Potential business assessment	Opportunity Owner	Potential Volume (Pipeline Forecasting)
• Scope assessment	Opportunity Owner	Market segmentation

Fill in the Opportunity Team

1 David opens his new opportunity for which he wants to add Pedro in the team

2 He hovers the Opportunity Team and discovers he's already in the team! He now clicks on Add in order to add Pedro in the team

3

David must now *click* on the **look-up** to open the search windows

Add Opportunity Team Members to Yantai Zhongde_Novecare_FERTILIZER PROTECTI

Team members' access level for this opportunity may be greater than your organization's default opportunity access settings. [Learn More](#)

save Save & More Cancel

User	Team Role	Opportunity Access
User <input type="text"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only

save Save & More Cancel

4

Once the window open, he *searches* for **Pedro** and *clicks* on Pedro's name

Lookup

pedro

Search Name All Fields

< Clear Search Results

Search Results

Users [1] [My Columns](#)

Full Name	Title	Phone	Email
Pedro Pinto	Commercial Excellence Process Manager	3222643405	pedro.pinto=solvay.com@example.com

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5

Before saving, David *defines* Pedro's role and Pedro's opportunity access. When he's finished, he *clicks* on **Save**.

Add Opportunity Team Members to Yantai Zhongde_Novecare_FERTILIZER

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save Save & More Cancel

User	Team Role	Opportunity Access
User <input type="text" value="Pedro Pinto"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only
User <input type="text"/>	--None--	Read Only

save Save & More Cancel



R e a d / W r i t e
: give the permission to the team members to edit the opportunity

R e a d Q u e r l y
: give visibility permission only

6

Roles are the following:

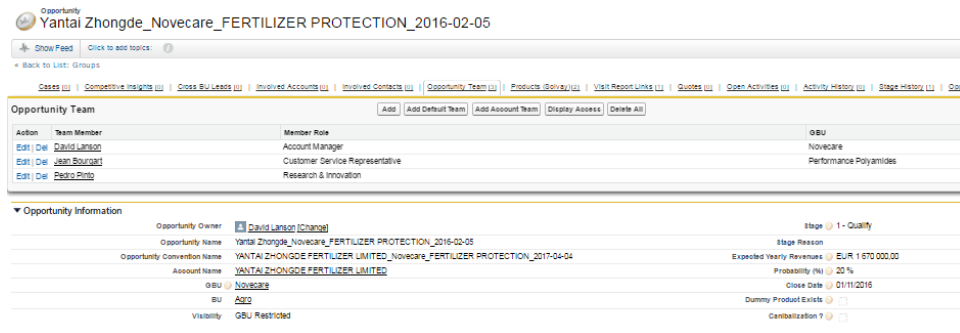
- | | |
|---------------------------------|----------------------------|
| Account Manager | Technical Marketing |
| Key Account Manager | Global Key Account Manager |
| Customer Service Representative | Research & Innovation |
| Sales Support | Strategic Marketing |
| Business Development | |

7

It's done! David has added Pedro in the team.

8

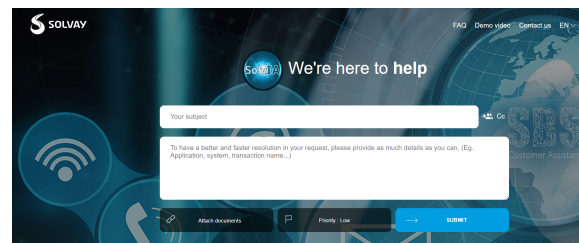
Pedro can now make the opportunity evolve and update some data



[Back to the top](#)

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

Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Follow the Opportunity Stages – Add Contacts in the Involved Contacts](#)
- [Follow the Opportunity Stages – Add Accounts in the Involved Accounts](#)
- [Negociate to win](#)
- [Close the Opportunity](#)
- [Competitive insights - Create a Competitive Insight](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
- [Introduction to Quote Process Management](#)