

Add Accounts in the Involved Accounts

Overview

In this section, you will find information about the process to add another account to the Involved Accounts list. This allows identifying “accounts” that could influence the deal, or should be considered for their influence.

Concerned profiles:

ALL account owners

Step By Step

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Define the power map

David can also identify “accounts” that could influence his deal, or should be considered for their influence. As an example, let's link AB B AG to this opportunity..

Opportunity

Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

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Edit

Delete

Sharing

Add Products & Forecast

Create quote

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Clone Opportunity

Get quotes from initial Opp

Status

1 - Qualify

2 - Lab Testing

3 - Industrial testing

4 - Negotiate

5 - Closed Lost

5 - Closed Won

Note

Opportunity Information

Opportunity Owner

David Larson

Change

Opportunity Name

Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Stage

1 - Qualify

Opportunity Convention Name

YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_CO-FORMULANT_2017-04-04

Stage Reason

Expected Yearly Revenues

EUR 1 670 000.00

Account Name

VANTAI ZHONGDE FERTILIZER LIMITED

Probability (%)

20 %

GBU

Novocare

Close Date

01/11/2019

BU

AG

Dummy Product Exists

Canibalization ?

Visibility

GBU Restricted

1

He hovers the Involved Accounts related list and clicks on New Involved Account to add ABB AG to the opportunity

Opportunity
Yantai Zhongde_Novecare_FERTILIZER PROTECTION_2016-02-05

Show Feed Click to add topics

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Cases Competitive Insights Cross BU Leads Involved Accounts Involved Contacts Opportunity Team Products (Solvay) Visit Report Links Quotes Ops

Involved Accounts New Involved Account

No records to display

1 - Qualify 2 - Lab Testing 3 - Industrial testing 4 - Negotiate

Note

▼ Opportunity Information

Opportunity Owner	David Larson [Change]	Stage	1
Opportunity Name	Yantai Zhongde_Novecare_FERTILIZER PROTECTION_2016-02-05	Stage Reason	
Opportunity Convention Name	YANTAI ZHONGDE FERTILIZER LIMITED_Novecare_CO-FORMULANT_2017-04-04	Expected Yearly Revenues	€
Account Name	YANTAI ZHONGDE FERTILIZER LIMITED	Probability (%)	20
GBU	Novecare	Close Date	01

2

David clicks on the lookup icon to search for ABB AG.

Involved Account Edit
New Involved Account

Involved Account Edit Save Save & New Cancel

Information

Account Opportunity Yantai Zhongde_Novecare

Save Save & New Cancel

3

Once found, he clicks on the name and finally clicks on Save

Search ~ Salesforce - Unlimited Edition - Google Chrome

https://solva-crm--uat.cs88.my.salesforce.com/_ui/common/data/LookupPage?lkfm=editPage&lkf=

Lookup

ABB AG Go!

Search Name All Fields

& MEINER	Ship-to
ABB SECHERON AG ZWEIGNIEDERLASSUNG PROLENTA	SAP Customer Sold-to & Ship-to ABB ZUZWIL Switzerland Admin
ABB SCHWEIZ AG	SAP Customer Ship-to ABB ZUERICH Switzerland Admin
ABB SCHWEIZ AG HIGH VOLTAGE TECHNOLOGY	SAP Customer Sold-to & Ship-to ABB ZUERICH Switzerland Admin
ABB AG MARKETING UND VERTRIEB ENERGIE-TECHN	SAP Customer Sold-to & Ship-to ABB MANNHEIM Germany Admin
ABB SCHWEIZ AG WARENNAHME TORO 2	SAP Customer Ship-to ABB ZUERICH Switzerland Admin
ABB AG	SAP Customer Sold-to & Ship-to ABB RATINGEN Germany Admin
ABB AG HOCHSPANNUNGSPRODUKTE	SAP Customer Sold-to & Ship-to ABB HANAU Germany Admin

4

Done!
David has successfully added ABB AG to the opportunity. He then clicks on the Opportunity name field to get back to his opportunity record

Involved Account

IA-0051

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Involved Account Detail

Account	ABB AG	Edit	Delete	Clone
Created By	Charles Lachaze	04/04/2017 14:58		

Opportunity

Detail: Zhongde 110vscare FERTILIZER PROTECTION 2015-2020

Last Modified By: Charles Lachaze 04/04/2017 14:58

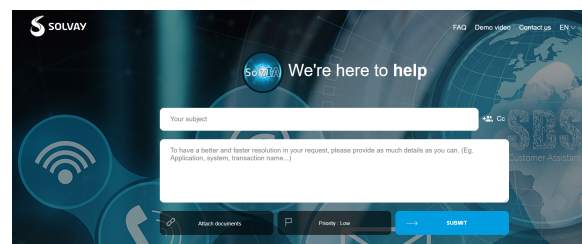
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- [Define the Opportunity Team](#)
- [Follow the Opportunity Stages – Add Contacts in the Involved Contacts](#)
- [Negociate to win](#)
- [Close the Opportunity](#)
- [Competitive insights - Create a Competitive Insight](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
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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