

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.

Table of content

- [Step By Step](#)
 - [Define the power map](#)
- [Related articles](#)
- [Need help?](#)

Concerned profiles:

ALL account owners

Step By Step

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

Customize Page | Printable View | Help for this Page

Show Feed | Click to add topics

Back to List: Groups

Cases | Competitive Insights | Cross.BU Leads | Involved Accounts | Involved Contacts | Opportunity Team | Products | Solutions | Visit Report Links | Quotes | Open Activities | Activity History | Stage History | Opportunity Field History

Opportunity Detail

Edit | Delete | Sharing | Add Products & Forecast | Create quote | Update Forecast | 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	Stage	1 - Qualify
Opportunity Name	Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05	Stage Reason	
Opportunity Conversion Name	YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_CO-FORMULANT_2017-04-04	Expected Yearly Revenues	EUR 1 070 000.00
Account Name	YANTAI ZHONGDE FERTILIZER LIMITED	Probability (%)	20 %
GBU	Novocare	Close Date	01/11/2015
BU	AG	Dummy Product Exists	
Visibility	GBU Restricted	Canibalization?	

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

Back to List: Groups

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 (%)	2%
GBU	Novecare	Close Date	01/01/2017

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://solvay-crm--uat.cs88.my.salesforce.com/_ui/common/data/LookupPage?lkm=editPage&lkn

Lookup

ABB AG Go!

Search Name All Fields

& RELEVANCE	Ship-to					
ABB SECHERON AG ZWEIGNIEDERLASSUNG PROCELETRA	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 WARENANNAHME 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

Involved Account
IA-0051
Back to List: Groups

Printable View | Help

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

Involved Account Detail

Account	AB B AG	Edit Delete Clone	
Created By	Charles Lechazze	04/04/2017 14:58	
		Edit Delete Clone	

Opportunity	Vital Zhovgale Slovcare FERTILIZER PROTECTION 2015-2020
Last Modified By	Charles Lechazze 04/04/2017 14:58

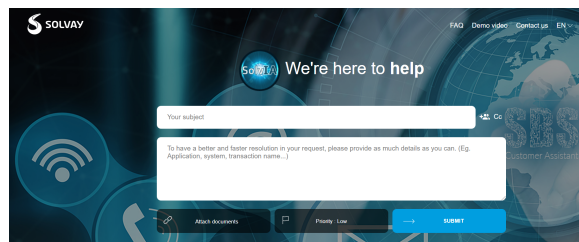
[Back to the top](#)

Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [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](#)
- [Introduction to Quote Process Management](#)

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