

## 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 on 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

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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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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 | dummysmail53_dummys.com@invalid.com.3452     | 9999999999     | Influencer     | <input type="checkbox"/> |
| Edit   Del | Mark Thomas  | INGREDIENT RESOURCES CORP | mark_ingredientresource_net@invalid.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

*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*