

Contact: Involved Contact

Overview

In this section, you will find information about how to involve to link to an Account a contact that is employed by another Account. This functionality allows you to get a global overview of all non Solvay contacts that play a role in Solvay's relationship with an account (even contacts that are working for another account).

Concerned profiles:

ALL

Step By Step

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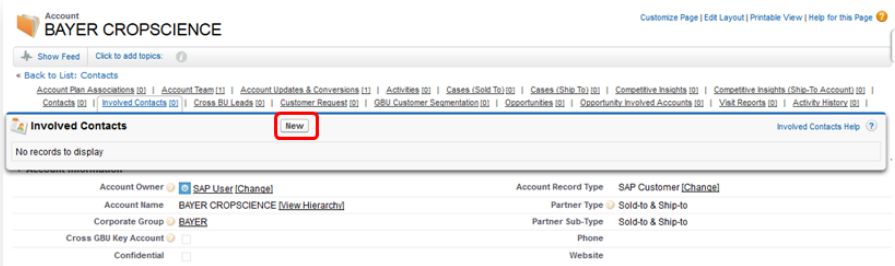
- [Step By Step](#)
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"Involved Contact" allows you to link to an Account a contact that is employed by another Account

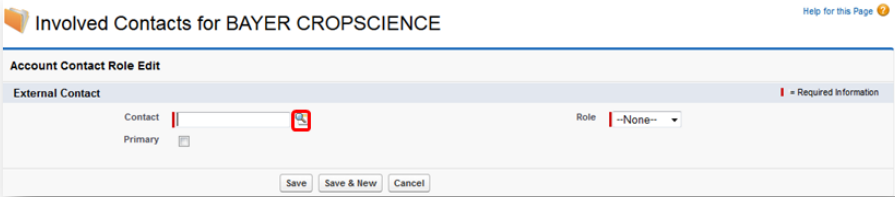
1

To link an existing contact to another account, hover on "Involved Contacts" and click "New"



2

Click on the lookup icon to search for your contact



3

Once you find him, click on his name

The screenshot shows the Salesforce 'Lookup' interface. At the top, there is a search bar with 'michael' entered, and buttons for 'Go!' and 'New'. Below the search bar, a message states: 'You can use "*" as a wildcard next to other characters to improve your search results.' A link '< Clear Search Results' is present. The 'Search Results' section displays a table with two columns: 'Name' and 'Account Name'. The first row shows 'Michael Baltani' under 'Name' and 'BAYER CROPSCIENCE' under 'Account Name'. The 'Michael Baltani' text is highlighted with a red box. At the bottom, a copyright notice reads: 'Copyright © 2000-2015 salesforce.com, inc. All rights reserved.'

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Before clicking on Save, define the role of this contact for the new Account

The screenshot shows the 'Involved Contacts for BAYER CROPSCIENCE' page. The 'Account Contact Role Edit' form is displayed. It includes a section for 'External Contact' with a 'Contact' field containing a search icon and a 'Role' dropdown menu. The 'Role' dropdown is currently set to '--None--' and is highlighted with a red box. There is also a 'Primary' checkbox. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'. A red exclamation mark icon and the text 'Required Information' are visible on the right side of the form.

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The roles are the following

- INITIATOR**: first identifies the need to buy a particular product or service to solve an organizational problem;
- INFLUENCER**: (their) views influence the buying center's buyers and deciders;
- DECIDER**: ultimately approves all or any part of the entire buying decision – whether to buy, what to buy, how to buy, and where to buy;
- BUYER**: holds the formal authority to select the supplier and to arrange terms of condition;
- USER**: consumes or uses the product or service

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Finally, click on Save

The screenshot shows the 'Involved Contacts for BAYER CROPSCIENCE' page. The 'Account Contact Role Edit' form is displayed. In this step, the 'Contact' field now shows 'Michael Baltani' and the 'Role' dropdown menu is set to 'Influencer'. The 'Save' button at the bottom is highlighted with a red box. The 'Primary' checkbox remains unchecked. The 'Required Information' indicator is still present.

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Account **BAYER CROPSCIENCE** Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Back to List: Contacts

Account Plan Associations (0) | Account Team (1) | Account Updates & Conversations (1) | Activities (0) | Cases (Sold To) (0) | Cases (Ship To) (0) | Competitive Insights (0) | Competitive Insights (Ship-To-Account) (0) | Contacts (0) | Involved Contacts (1) | Cross BU Leads (0) | Customer Request (0) | GBU Customer Segmentation (0) | Opportunities (0) | Opportunity Involved Accounts (0) | Visit Reports (0) | Activity History (0)

Involved Contacts New Involved Contacts Help

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Delete	Thomas O'Malley	LES ARISTOCHATS	denewen@outlook.com denepro		Influencer	

Account Name BAYER CROPSCIENCE [View Hierarchy](#)

Corporate Group **BAYER**

Cross GBU Key Account ☐

Confidential ☐

Partner Type ☐ Sold-to & Ship-to

Partner Sub-Type ☐ Sold-to & Ship-to

Phone

Website

Address Information

Address RUE DE RANSBEEK
BRUSSELS, Bruxelles 1120
Belgium

House Number 1 315

House Number 2

Region EMEA

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 **John Smith - BAYER CROPSCIENCE - Diegem** Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Cases (0) | Open Activities (0) | Opportunities (0) | Visit Reports (0) | Related Conversations (0) | Google Docs, Notes, & Attachments (0) | Activity History (0)

Contact Detail Edit Delete Clone

Name	John Smith - BAYER CROPSCIENCE - Diegem	Contact Owner	David Rampel Change
Account Name	BAYER CROPSCIENCE	Phone	+32 2 262 12 04
Inactive	☐	Mobile	+32 479 47 27 08
Language	English	Email	john.smith@bayer.com

Function and Title

Job Department	Purchasing	Contact Role	Decider
Function	Manager	Description	

Account Contact Role

Account Name	Record Type	PRS ID	RCS ID
BAYER CROP SCIENCES	Non SAP Customer	2035784	
BAYER PHARMA AG	Non SAP Customer	1021442	

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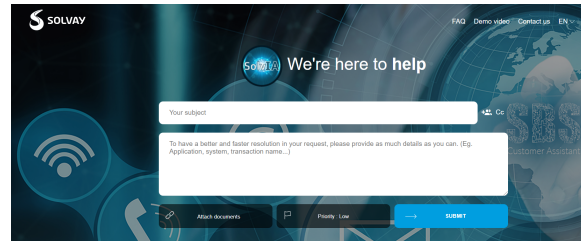
Related articles

- [Contact: Create a contact in Salesforce and from Lightning for Gmail](#)

Need help?

- [Contact: Link a Product to a Contact](#)
- [Contact: Search a Contact](#)

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/>

The image shows a web interface for creating a support ticket. At the top left is the 'S SOLVIA' logo. In the top right corner, there are links for 'FAQ', 'Demo video', 'Contact us', and 'EN'. The main heading is 'We're here to help' with a Solvia logo icon. Below this is a text input field labeled 'Your subject:'. Underneath the subject field is a larger text area with a placeholder text: 'To have a better and faster resolution in your request, please provide as much details as you can (Eg. Application, system, transaction name...)'. At the bottom of the form, there is an 'Attach documents' button with a paperclip icon, a 'Priority: Low' dropdown menu, and a blue 'SUBMIT' button.

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