

Mobility Scope

Concerned profiles

"ALL"

Supported features

Account / Contact

- Create / Edit
- Request Corporate Group Creation
- Associate Account Plan
- Manage Account Team (add Members)
- Create Activities (Task/Event)
- Create a Sample Request
- Create a New Customer Request
- Create a Contact from an Account
- Create a Visit Report
- Log a Call
- Clone a Contact
- Associate a Contact to a Product

Opportunities

- Create / Edit
- Create a Visit Report from an Opportunity
- Create a Cross BU Lead
- Add Involved Accounts/Contacts
- Manage Opportunity Team
- Associate an existing Visit Report

Quote

- Create / Edit / Clone
- Submit for approval

Visit Report

- Create / Edit
- Send Visit Report Internally
- Send Visit Report to Customer

Account plan

- Create / Edit
- Create Milestones

Cross BU Lead

- Create / Edit
- Create Milestones

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Competitor

- Create / Edit / Clone
- Create Competitor

Contract

- Create / Edit / Clone
- Submit for approval

Complaint / Sample Request / Customer Request

- Read only
- Collaboration with Chatter
- Create a Sample Request from an Account
- Create a Customer Request from an Account

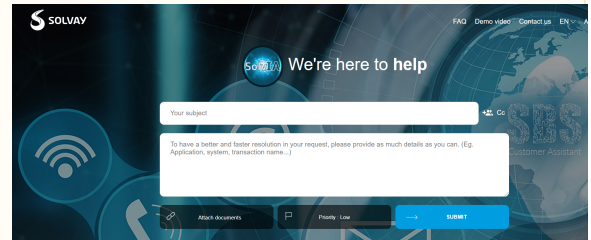
Related articles

Need help?



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