01. Account & Contact Management

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From Prospect to Sales

Click on this link for the full training material (PowerPoint)

Added Value

Manage Accounts and Contacts will help you by:

- Giving you a 360° view on your customer
- Sharing visibility on history of interactions with contacts
- Allowing you to collaborate within your GBU and the others
- Being the single system to create and update customer related data
- All this in one single system

What you need to know to start...

Accounts:

- Accounts are Solvay's customers, partners and distributors
- Each account stores information such as a name, address, phone numbers and customer attributes ( ).
- For each account, you can link information such as opportunities, activities, cases, visit reports, notes and attachments.

Contacts:

- Contacts are any individual that Solvay interacts with inside an Account's organization, or related to it.
- Any Prospect / Customer in SFDC must have, at least, one Contact associated to it.
- Each contact is associated with a role:
    - Initiator, Influencer, Decider, Buyer, User
- Would a contact be part of an account, but active at another account, then he can be identified as an "Involved Contact" for this 2nd account

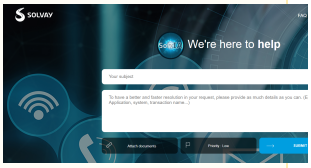
Video Tutorials

Table of Contents

- Account: Presentation
- Account: Account Update
- Account: Account Team
- Account: Change account owner
- Account: Create a Prospect
- Account: Convert a Prospect
- Account: Corporate Group Creation
- Account: Assign an Account to a Corporate Group
- Account: Mass update customer segmentation
- Account: Related Account
- Account : Attach files
- Account : Locked
- CSR Process - Customer Creation (SAP)
- Contact: Search a Contact
- Contact: Create a contact in Salesforce and from Lightning for Gmail
- Contact: Involved Contact
- Contact: Link a Product to a Contact

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