

C&C Contact Onboarding

Overview

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Step by step process on how to onboard new

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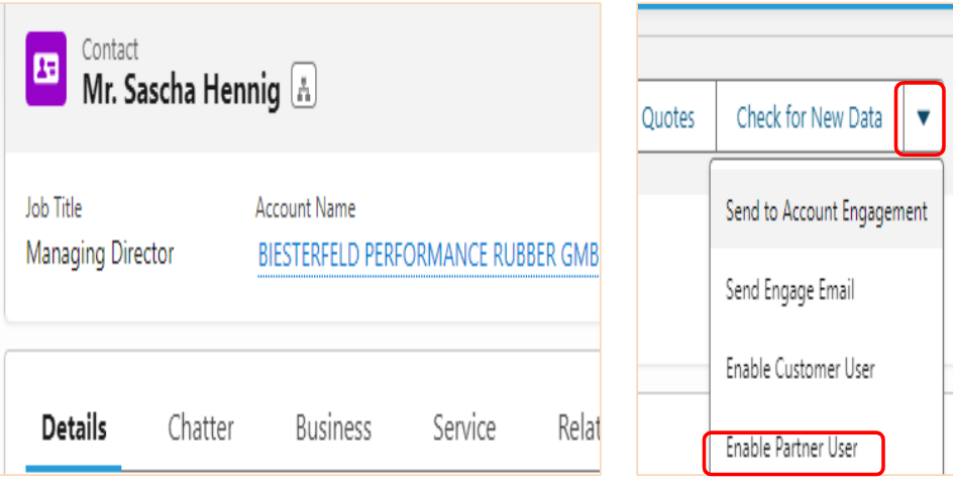
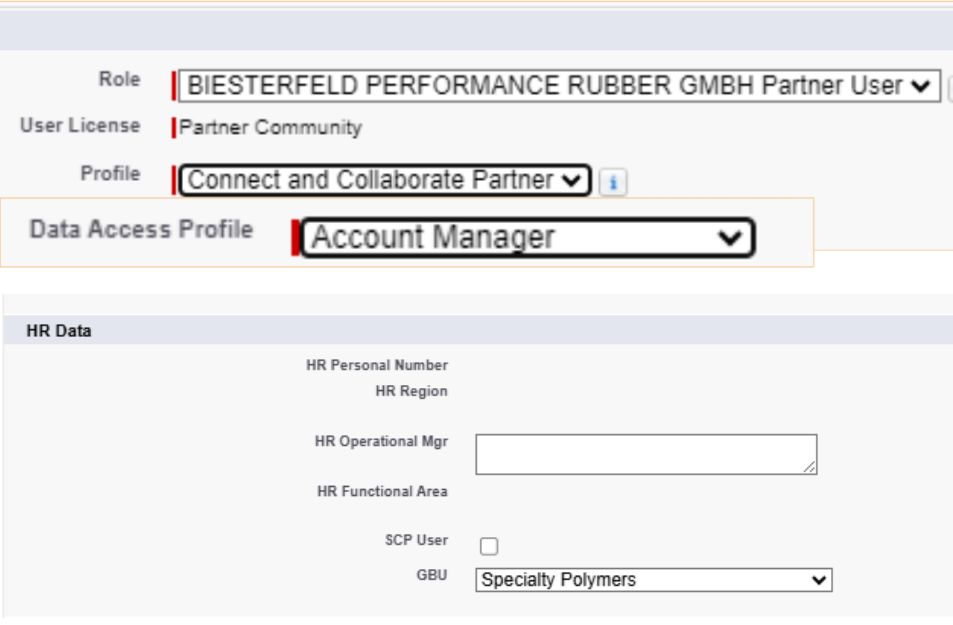
Concerned profiles:

SALES MGR / DIR

SALES REPS

Step-By-Step Onboard New Contact in C&C

Step 1 - In Icare	
<p>SALES REPS</p>	
<p>PREREQUI SITE</p>	
<ul style="list-style-type: none">• Verify• Contact is part of an account That is connected to a Parent Corporate Group.• And this Parent Group is set up for C&C. <p>If not, you need to Onbaord the Account on C&C</p> <p>C&C Onboarding Account</p>	<p>The screenshot shows the Icare Lightning interface. At the top, there's a navigation bar with 'Icare Lightning' and several menu items. Below that, there are two account cards. The first card is for 'Account CHASE PLASTICS SERVICES' with 'Account Owner Douglas Kelly' and 'GBU Segment Key Distributor'. The second card is for 'Corporate Group CHASE PLASTICS SERVICES - PARENT ACCOUNT' with 'Account Owner sfs Admin User' and 'GBU Segment Key Distributor'. Below the corporate group card, there's a 'Details' section with tabs for 'Chatter', 'Aggregated Financial Perfor...', 'Parent Overview', 'Related', and 'NPS Survey Results'. Under 'Account Information', there are fields for 'Account Name', 'Account Owner', 'Account Record Type', 'Corporate Group Record Type', 'PRS Code (Corporate)', 'RCS Code (Corporate)', and 'Partner Corporate Group'. The 'Partner Corporate Group' field has a checkbox that is checked and highlighted with a red box. Callouts with arrows point to the first account card ('Go the Account'), the corporate group card ('Click on the Corporate Group'), and the checked checkbox ('Ensure Partner Corporate Group is ticked').</p>

<p>1.5 Onboard new Contact</p>	<p>On the Contact, Select (top right arrow Enable Partner User). You will be redirected to User Record</p>	
<p>1.6 Onboard new Contact</p>	<ul style="list-style-type: none"> • On the User record, fill the missing info • Profile: 'Connect & Collaborate Partner' • Data Access profile is not relevant (you can select Account Manager) • Enter GBU: Specialty Polymers • Upon Saving, the user will receive an email to set his /her new password 	
<p>1.7 Onboard new Contact</p>	<p>This is a copy of the Email received by the contact</p>	<p>----- Forwarded message -----</p> <p>From: SpP Connect & Collaborate <connect-collaborate.support@syensqo.com> Date: Thu, Mar 7, 2024 at 9:03 AM Subject: Sandbox: Welcome to Connect & Collaborate To: noccito@gmail.com <noccito@gmail.com></p> <p>Hi Sascha,</p> <p>Welcome to Connect & Collaborate! To get started, go to https://syensqo-icare--uat.sandbox.my.site.com/partner/login?c=9sJrQkS4DLG59HPjQgcV54FejYmVMiSNk4qIRCIj6w53vMfksEXr5tC_ui7q,jffZLanYfvG.on0_iUIOm_s1maP6d59SvaeNRsNeDBB2C2JzOMzWZgCMXaXONcDI9youq.zoOhqUyJw1ASoTY7RWjXnzkwaebX7Kz5H0OyqYWU7fPiBRtp1uniam6nAPaOT2y0</p> <p>Username: noccito@gmail.com.invalid</p> <p>Thanks, Syensqo CRM</p>

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How to deactivate Contact in C&C		
How to give access to both C&C & Webshop		

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