Data}hug

Adding Contacts to an Opportunity

Datahug gives you a single view all the relationships and sales activity with an Opportunity. Using Datahug you can now quickly and easily add key Contacts that you didn't know existed, as Contact Roles on an Opportunity.

With the Decision Makers and Influencers isolated you can then use the Datahug Activity Analytics to track and manage your interaction with these key people at the prospect.

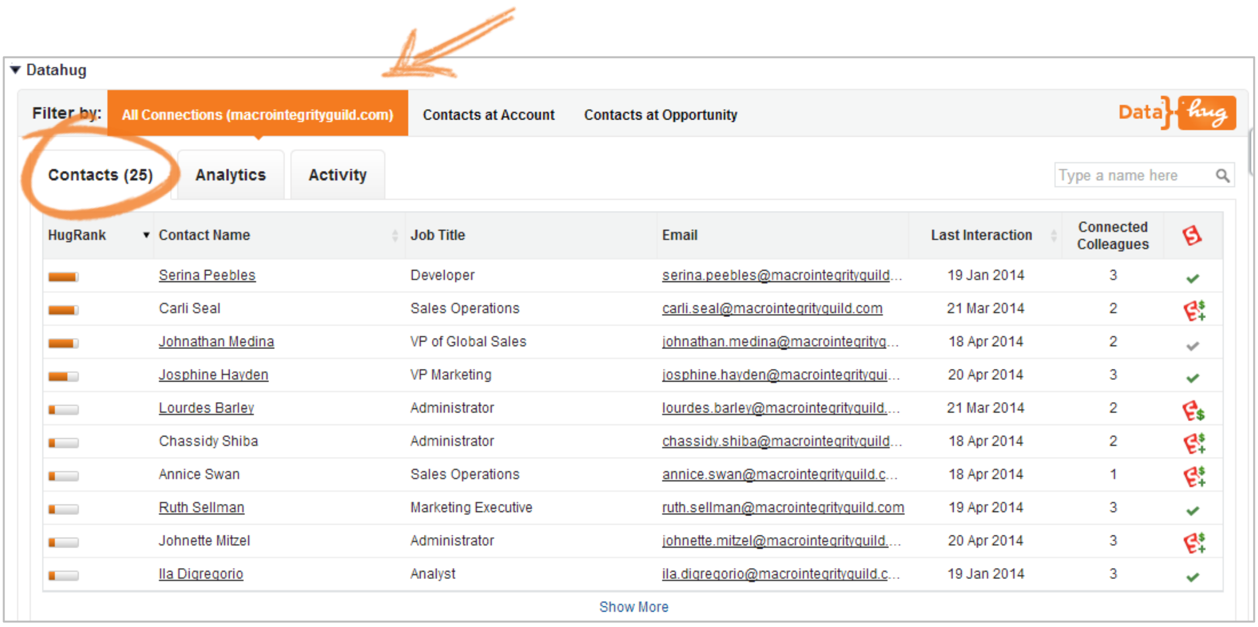
Let's Get Started

Scroll down to the Datahug widget on the Opportunity page in Salesforce.

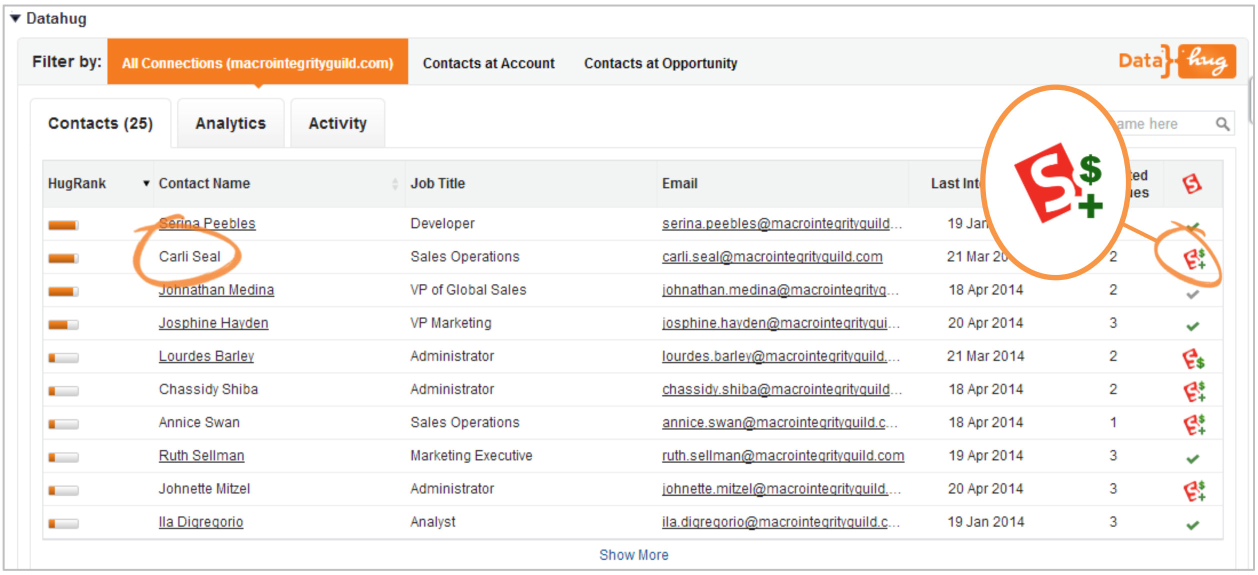
Datahug defaults to show you all the Connections between your organization and the target. These include people that don't even exist in Salesforce.

Taking this Opportunity as an example we can see that we know 25 people at the organization. Some of these are in Salesforce as Contacts and some have been added as Contact Roles.

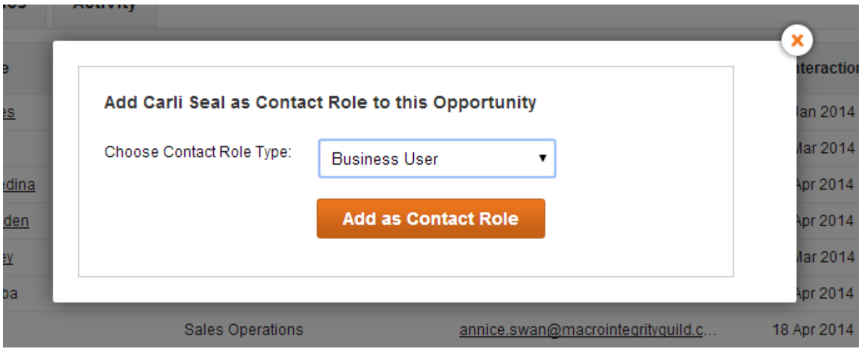
However, others like Carli Seal are not even in the CRM.



You can add Carli as a Contact to the Account and to the SOI by clicking on the "Add as Contact and Contact Role" icon.



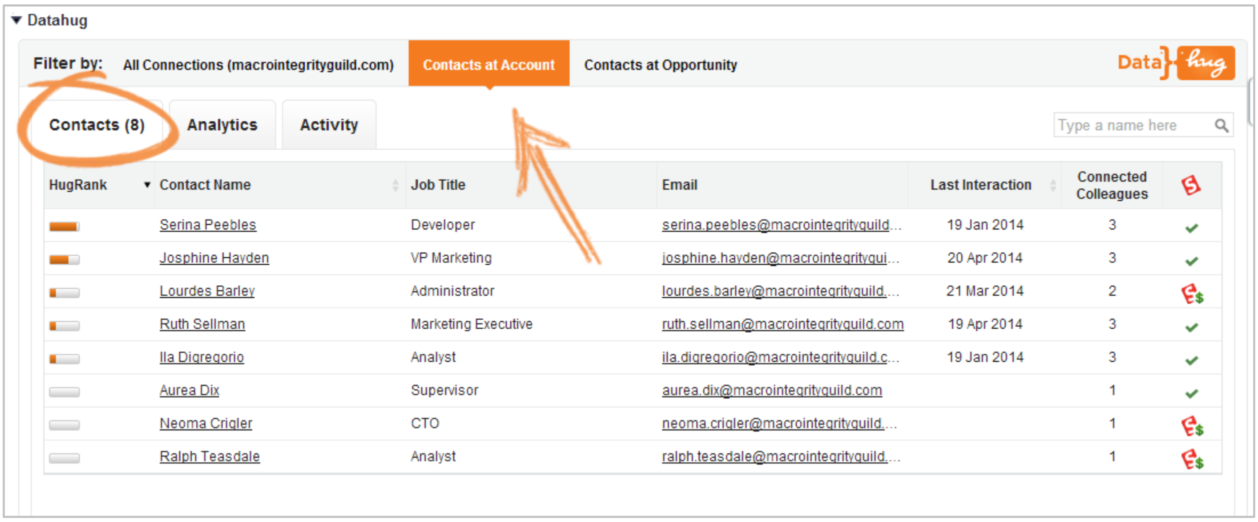
Simply select Carli's role on the Opportunity and hit Add as Contact Role



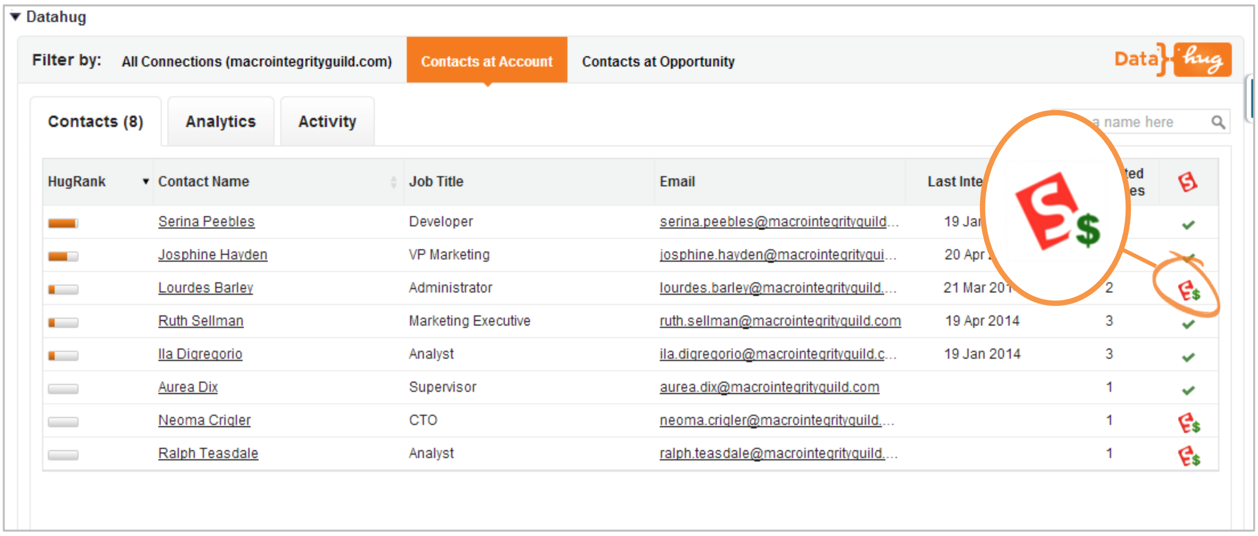
Contacts at the Account

If you are happy to work off the Contacts that are already in Salesforce you can switch the toggle to "Contacts at Account".

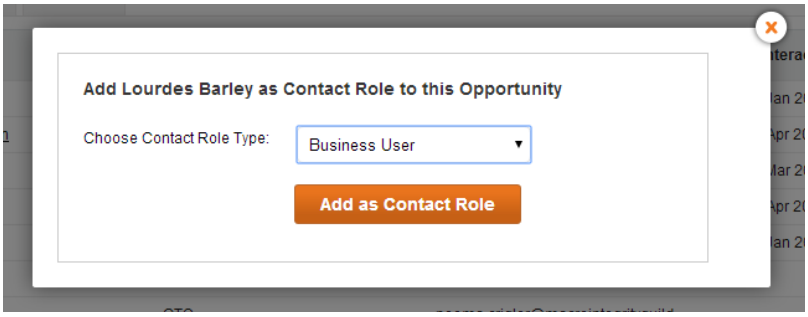
In this case you can see that we have 8 Contacts at the Account.



These Contacts can be added as Contact Roles by clicking on the "Add as Contact Role" icon:

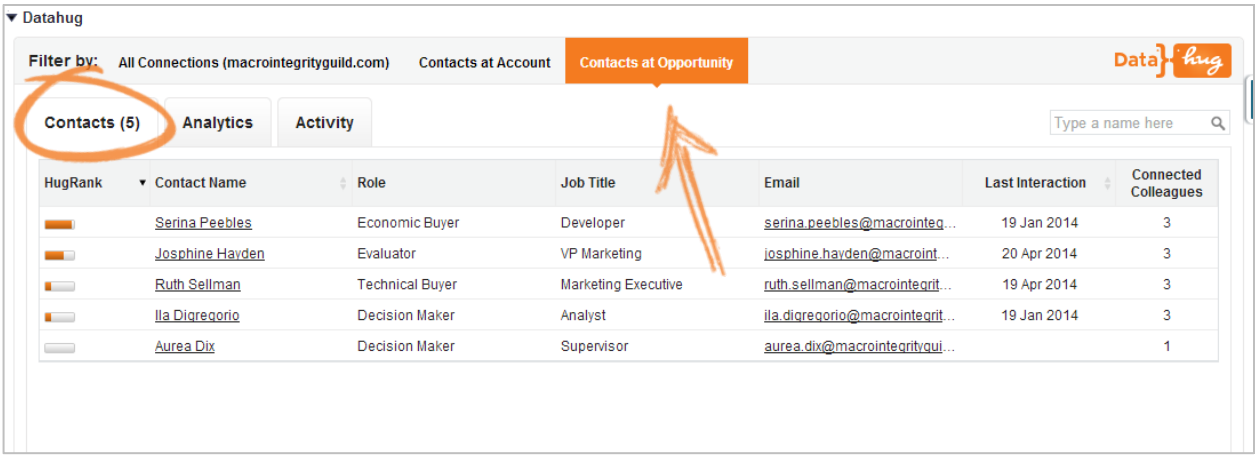


Select the Contact Role type and then click "Add as Contact Role"



Contacts at the Opportunity

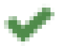
This toggle now shows you all the Contacts that have been added as the various roles on the Opp.



Now that you have added all the key Contacts to the Opp using Datahug you can start tracking your selling activity. Read the "Datahug for Salesforce – Monitor your Sales Activity" doc to find out more.

Icon Key

If you are unsure of the action you can hover over the icon and read the tool-tip.

	Add existing Contact as Contact Role to the Opportunity
	Add person outside of Salesforce as a Contact and as a Contact Role on the Opportunity
	This person is a Contact in Salesforce and is a Contact Role on the Opportunity
	This person is a Contact on another Account or the person exists as a Lead in Salesforce. The tool-tip will tell you the exact details