

Clone an Existing Opportunity

Overview

In this section, you will find information about the procedure to clone the opportunity. To know more about how to create an opportunity, please go to this page: [Create a New Opportunity](#).

Concerned profiles:

Sales - Customer Service - All except Strategic Marketing and Supply Chain & Quality

Step By Step

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David can also create a new opportunity from an existing one by clicking on the button "Clone"

Opportunity

Yantai Zhongde_Novecare_FERTILIZER PROTECTION_2016-02-05

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Clone Opportunity

Get quotes from Initial Opp

Status

1 - Quality

2 - Lab Testing

3 - Industrial testing

4 - Negotiate

5 - Closed Lost

Note

Before closing the opportunity as WON, please add a CSR in the Opportunity Team. Please, also record your Win/Lost Review either your opportunity is closed WON or LOST

For security purpose, only David and the other Opportunity Team Member(s) can use the clone functionality.

2 David can then update the data of the opportunity and clicks on Save

Opportunity Edit

Yantai Zhongde_Novecare_FERTILIZER PROTECTION

The Cancel button allow to abort the creation

To change the currency, you must first delete all the products from the opportunity. All the products on the

Opportunity Edit

Save

Save & New

Cancel

Opportunity Information

Opportunity Owner: Helen Gu

Opportunity Name: Yantai Zhongde_Novecare

Account Name: YANTAI ZHONGDE FERTI

GBU: Novecare

BU: Agro

Validity: GBU Restricted

Stage: 4 - Negotiate

Stage Reason: -None-

Probability (%): 80

Close Date: 01/11/2016

Opportunity Currency: EUR

Dummy Product Exists:

Capitalization ? :

Additional Information

Product to be developed: Yes

Opportunity Description: Bulk Blending fertilizer company and is blending slow release urea products (Sulfur coated urea, and urea+DMPP).

Product Description: Synergist need to be stable in Bulk Blending for up to 6 month.

Priority: Critical

Priority Project: -None-

Source Of Opportunity: Prospect

3

It's done! David could simply duplicate the existing opportunity with the products associated. The status is updated to **Qualify**. That's an easy way to start!

Opportunity
Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

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Cases Competitive Insights Cross BU Leads Involved Accounts Involved Contacts Opportunity Team **Products (Solvay)** Visit Report Links Quotes Open Activities Activity Mail
Google Docs Novocare's customers

Opportunity Detail Edit Delete Sharing Add Products & Forecast Create quote Update Forecast Clone Opportunity Get quotes from Initial Opp

▼ Status

1 - Qualify 2 - Lab Testing 3 - Industrial testing 4 - Negotiate 5 - Closed Lost

Note

▼ Opportunity Information

Opportunity Owner	Charles Lachaise (Change)	Stage	1 - Qualify
Opportunity Name	Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05	Stage Reason	
Opportunity Convention Name	YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_FERTILIZER PROTECTION_2016-02-05	Expected Yearly Revenues	EUR 1 070 000,00

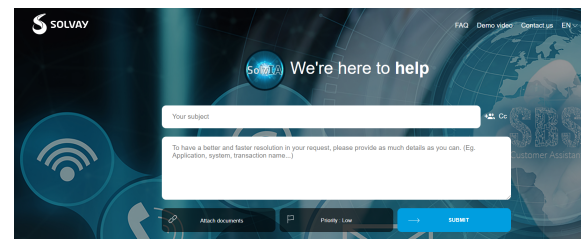
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Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
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- [Follow the Opportunity Stages – Add Contacts in the Involved Contacts](#)
- [Follow the Opportunity Stages – Add Accounts in the Involved Accounts](#)
- [Opportunity Stages & Process Mapping](#)
- [Negotiate to win](#)
- [Close the Opportunity](#)
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- [Cross BU Leads – Create a Cross BU Lead](#)
- [Introduction to Quote Process Management](#)

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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