

Close the Opportunity

Overview

In this section, you will find information about how to close an opportunity within Salesforce, whether it is won or lost.

! In order to close an opportunity, you must make sure that you have selected an end-use. If you had selected a dummy product (e.g. product to be developed), make sure you select a real Solvay product before closing the opportunity.

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Concerned profiles:

ALL opportunity owners

Step By Step

1 David opens the opportunity he wants to close the status.

Opportunity
Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Opportunity Detail

Status

1 - Quality 2 - Lab Testing 3 - Industrial testing 4 - Negotiate 5 - Closed Lost 6 - Closed Won

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

Opportunity Information

Opportunity Owner	David Lanson (Change)	Stage	4 - Negotiate
Opportunity Name	Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05	Stage Reason	
Opportunity Convention Name	YANTAI ZHONGDE FERTILIZER LIMITED_Novocare_CO-FORMULANT_2017-04-04	Expected Yearly Revenues	EUR 2 630 000.00
Account Name	YANTAI ZHONGDE FERTILIZER LIMITED	Probability (%)	80 %
GBU	Novocare	Close Date	01/11/2016
BU	Azo	Dummy Product Exists	<input type="checkbox"/>
Visibility	GBU Restricted	Caribalization ?	<input type="checkbox"/>

2 He double-clicks on the Stage and updates the stage to 5 - Closed Won.

Dependent Fields

Stage: 5 - Closed Won

Probability (%): 100

Stage Reason: --None--

OK Cancel

3

As **Closed Won**, he must define that Solvay won the deal and not a distributor.

•Once the status updated, David scrolls down until the section **To complete before Negotiate / Closure** and double-clicks next to **Won/Lost Review** to

•Once the details in Won/Lost Review entered, David *clicks* on **Save**.

4

The Opportunity is won!

5 In case the opportunity was lost against competitor, David would have to first create a Competitive Insight from the opportunity, update the field **Competitor known** as "Yes" and finally close the opportunity as LOST.

▼ Additional Information

Opportunity Type	Growth-Product Requiring Qualification	Priority	Critical
Region	AF&C	Priority Project	
Product to be developed	Yes	Source Of Opportunity	Prospect
Opportunity Description	Bulk Blending fertilizer company and is blending slow release urea products (Sulfur coated urea, and urea+DMPP).	Other Source of Opportunity	
Product Description	Synergist need to be stable in Bulk. Blending for up to 6 month.	Web Form Related	
Next Step		Distributor	<input type="checkbox"/>
		New Market	Yes
		Market share	Gain
		GBU Classification	

▼ To complete before Negotiate / Closure

Negotiation Status		Competition Known	[-None-]
Won/Lost Review	Customer ok with the deal		

▼ Relationships

Account Plan	Visit Report	Sample follow up
WEGO ID		

6 When an opportunity is closed, the update of the forecast is now depending of the following rules:

Opportunity Product

Product Information

Business Potential

Year	Expected Yearly Volume	UoM	Target Unit Price	CM Calculation Method	Contribution Margin (%)	Contribution Margin (Amount)	Yearly Revenue
2016	4.500	Kg	105,0	%	2,00	EUR 9.450,00	EUR 0.00
2017	0,00	Kg	0,00	%	0,00		EUR 0.00
2018	0,00	Kg	0,00	%	0,00		EUR 0.00
2019	0,00	Kg	0,00	%	0,00		EUR 0.00
2020	0,00	Kg	0,00	%	0,00		EUR 0.00

Mass-Copy Save Business Potential Cancel

• For closed Windows: User scan not updated at the current year, but can update the following.

- For closed Lost Opps: User scan note delete for cast.

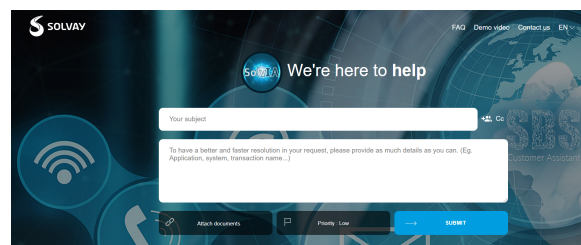
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Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)
- [Define the Opportunity Team](#)
- [Add Contacts in the Involved Contacts](#)
- [Add Accounts in the Involved Accounts](#)
- [Manage the Negotiation stage](#)
- [Competitive insights - Create a Competitive Insight](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
- [Introduction to Quote Process Management](#)

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