

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](#).

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Concerned profiles:

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

Step By Step

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

Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

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Opportunity Detail

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Status

1 - Qualify

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 Won/Lost Review either your opportunity is closed WON or LOST

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

Opportunity Edit

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

Save Save & New Cancel

The Cancel button allow to abort the creation

Opportunity Information

Opportunity Owner	Helen Gu	Stage	4 - Negotiate
Opportunity Name	Yantai Zhongde_Novocare	Stage Reason	-None-
Account Name	YANTAI ZHONGDE FERTI	Probability (%)	80
GBU	Novocare	Close Date	01/11/2016 24/04/2017
BU	Agro	Opportunity Currency	EUR
Validity	GBU Restricted	Dummy Product Exists	
		Capitalization	

Additional Information

Product to be developed	Yes	Priority	Critical
Opportunity Description	Bulk Blending fertilizer company and is blending slow release urea products (Sulfur coated urea, and urea+OMPP)	Priority Project	-None-
Product Description	Synergist need to be stable in Bulk Blending for up to 6 month	Source Of Opportunity	Prospect

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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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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

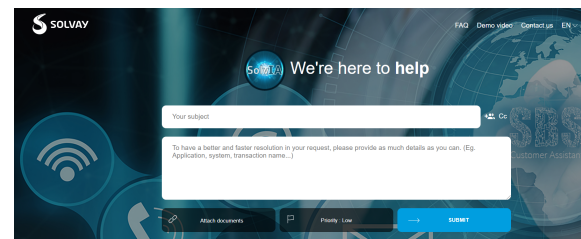
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Related articles

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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](#)
- [Competitive insights - Create a Competitive Insight](#)
- [Cross BU Leads – Create a Cross BU Lead](#)
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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