

# 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"

Opportunity  
Yantai Zhongde\_Novocare\_FERTILIZER PROTECTION\_2016-02-05

Opportunity Detail

Status

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

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

Opportunity Information

Opportunity Owner: Helen Gu

Opportunity Name: Yantai Zhongde\_Novocare

Account Name: YANTAI ZHONGDE FERTI

GBU: Novocare

BU: Agro

Viability: GBU Restricted

Stage: 4 - Negotiate

Stage Reason: -None-

Probability (%): 80

Close Date: 01/11/2016 [ 04/04/2017 ]

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

**Save** **Save & New** **Cancel**

The Cancel button allow to abort the creation

3

It's done! David could simply duplicate the existing opportunity with the product's association. 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 Quotations Open Activities Activity Mail Google Docs Notes & Attachments

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

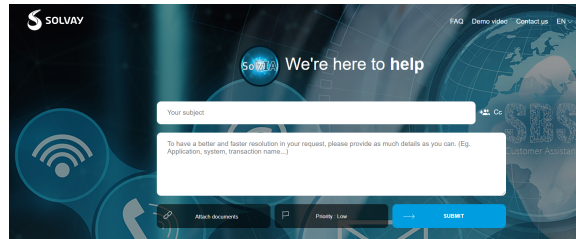
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## Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Define the Opportunity Team](#)
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- [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](#)
- [Introduction to Quote Process Management](#)

## Need help?

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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*