

Manage the Negotiation stage

Overview

In this section, you will find information about how to manage the process step 'negotiate to win' in Salesforce.com. You will learn how to change the stage, how to updat price and volume, etc.

Concerned profiles:

ALL opportunity owners

Step By Step

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1

David opens the opportunity and updates the status to "4. Negotiate"

Opportunity

Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Customize Page | Printable View | Help for this Page

Show Feed Click to add topics

Cases Competitive Insights Cross-BU Leads Involved Accounts Involved Contacts Opportunity Team Products (Solve) Visit Report Links Quotes Open Activities Activity History Stage History Opportunity Field History 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 5 - Closed Won

Note

Opportunity Information

Opportunity Owner David Larson Change

Opportunity Name Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Opportunity Convention Name YANTAI_ZHONGDE FERTILIZER LIMITED_Novocare_CO-FORMULANT_2017-04-04

Account Name YANTAI_ZHONGDE FERTILIZER LIMITED

GBU Novocare

BU Asia

Visibility GBU Restricted

Stage 3 - Industrial testing

Stage Reason

Expected Yearly Revenues EUR 1 670 000.00

Probability (%) 60 %

Close Date 01/11/2016

Dummy Product Exists

Carbitalization ?

2

Would the price or volume change along the negotiation, David can reflect that by opening the product

Opportunity Product

ABEX AP 470 for Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Opportunity Yantai Zhongde_Novocare

Opportunity Product Detail Edit Delete Update Product Back to Opportunity New End Use Request Synchronize with Commercial Roadmap

Opportunity Product Information

Product Code 9009800

Product ABEX AP 470

Include in opportunity Amount

To be included in the CR

Opportunity GBU Novocare

Targeted first delivery date 04/05/2017

Product Total Amount EUR 1 440 000.00

Currency EUR

Last Commercial Roadmap Creation

Product Information

CM Calculation Method Percent

Contribution Margin (%) 65.00 %

Contribution Margin (Amount)

Concentration (%)

Pricing method (%)

Volume for 100% Concentration

Price for 100% Concentration

Unit of Measure KG

Target Unit price per UoM EUR 6 000.00

Expected yearly volume 240

Shipping Plant Code 7897

Shipping Plant Name 7811 Zhenjiang

Manufacturing Plant Code 7897

Manufacturing Plant Name 7811 Zhenjiang

3

He clicks on Edit and then updates the Target Unit Price

Opportunity Product Edit

ABEX AP 470

Help

Edit Opportunity Product details.

Opportunity Product Edit Save Cancel

Opportunity Product Information

Product Code 9009800

Product ABEX AP 470

Include in opportunity Amount

To be included in the CR

Opportunity GBU Novocare

Opportunity Yantai Zhongde_Novocare_FERTILIZER PROTECTION_2016-02-05

Targeted first delivery date 04/05/2017 08/04/2017

Last Commercial Roadmap Creation 08/04/2017

Product Information

CM Calculation Method Percent

Contribution Margin (%) 65.00

Contribution Margin (Amount)

Pricing method (%)

Unit of Measure KG

Target Unit price per UoM 11000.00

Expected yearly volume 240

Shipping Plant Code 7897

Manufacturing Plant Code 7897

Market Segmentation

End Use INNOVATIVE FORMULAT

End Use Detail --None--

Save Cancel

4 Once edited, David clicks on Save



David might have to repeat this operation multiple times, and needs the history of the evolution.

Product Information	
CM Calculation Method	Percent
Contribution Margin (%)	65.00
Contribution Margin (Amount)	
Pricing method (%)	
Unit of Measure	KG
Target Unit price per UoM	10000.00
Expected yearly volume	240
Shipping Plant Code	7897
Manufacturing Plant Code	7897

Market Segmentation	
End Use	INNOVATIVE FORMULAT
End Use Detail	--None--

Save

Cancel

5 To have this history, David scrolls down on the **Product Page** and identifies the related list **Negotiation History**.

-> At any Target Unit price or Expected Yearly Volume, a new line will be created. Very easy!



This functionalit y is so convenient for David!

Negotiation History						
Old Target Unit Price	New Target Unit Price	Old Expected Yearly Volume	New Expected Yearly Volume	Product	Requested By	Requested Date
EUR 8 000.00	EUR 10 000.00	240.00	240.00	ABEX AP 470	Charles Lachaze	05/04/2017

By updating price and volume, both Opportunity Value and Net Present Value are updated.

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Related articles

- [Definition, Objectives and Types of Opportunities](#)
- [Create a New Opportunity](#)
- [Clone an Existing Opportunity](#)

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/>

- Define the Opportunity Team
- Add Contacts in the Involved Contacts
- Add Accounts in the Involved Accounts
- Close the Opportunity
- Competitive insights - Create a Competitive Insight
- Cross BU Leads – Create a Cross BU Lead
- Introduction to Quote Process Management

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Your subject

To have a better and faster resolution in your request, please provide as much details as you can. (Eg. Application, system, transaction name,...)

Attach documents

Priority: Low

SUBMIT

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