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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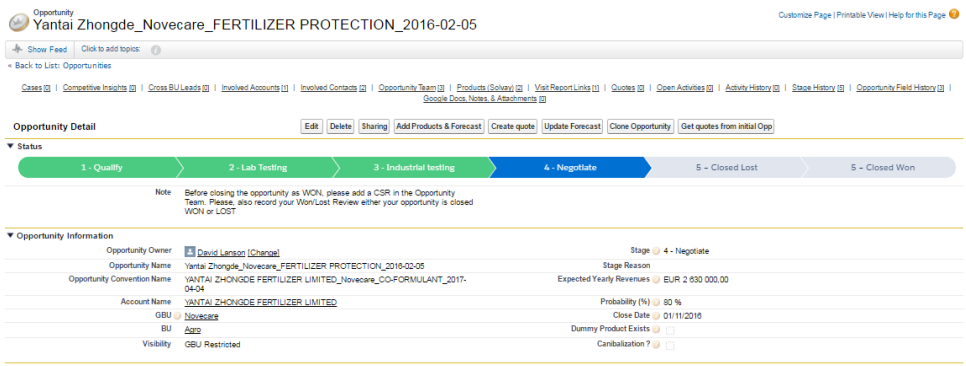
Concerned profiles:

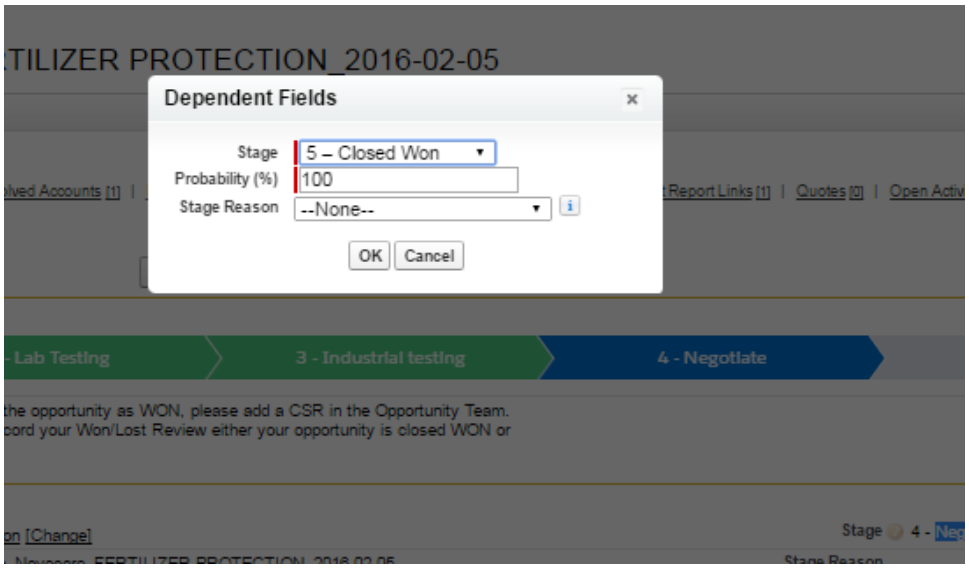
ALL opportunity owners

Step By Step

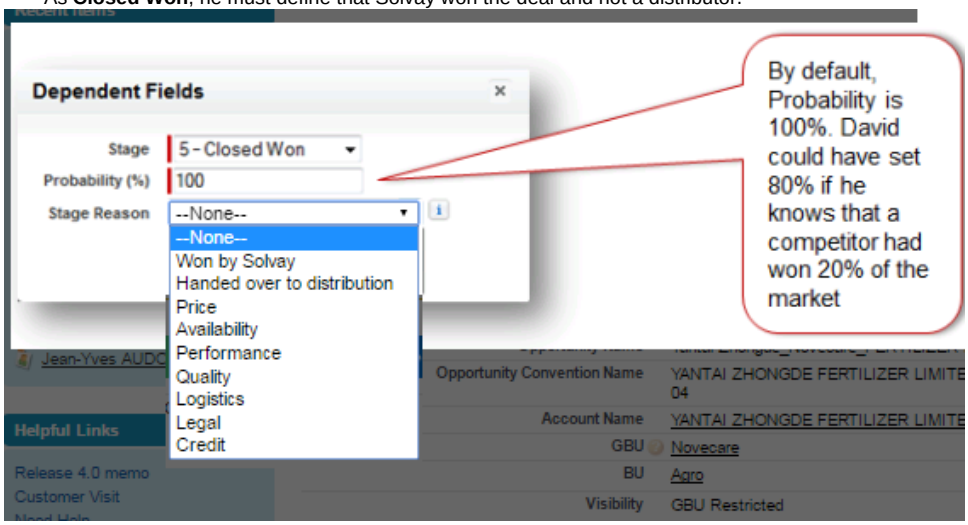
1 David *opens* the **opportunity** he wants to close the status.



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



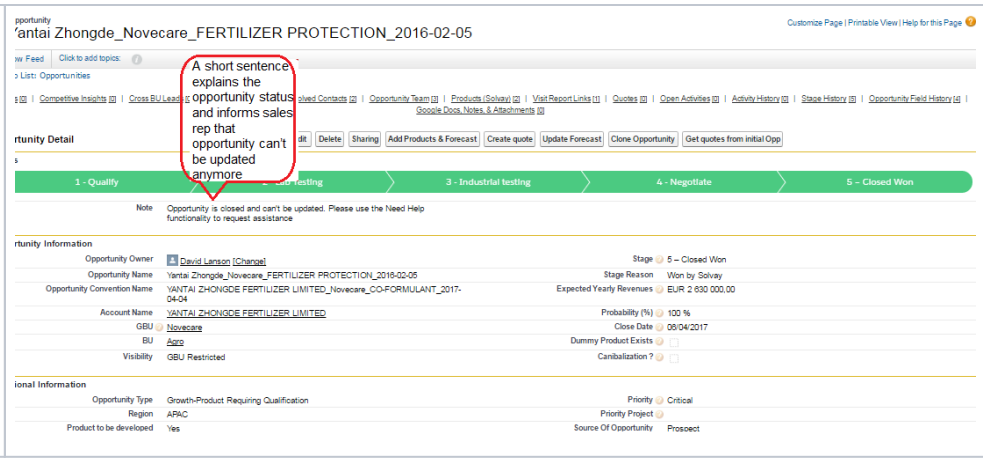
3 As **Closed Won**, he must define that Solvay won the deal and not a distributor.



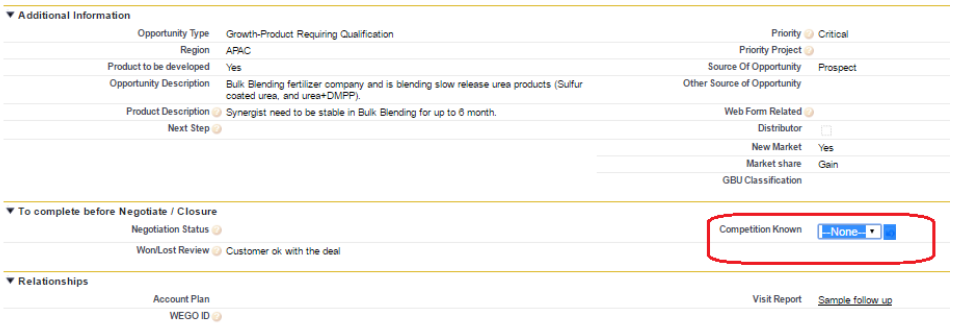
•Once the status updated, David scrolls down until the section **To complete before Negotiate / Closure** and double-clicks next to **Won/Lost Review** to

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

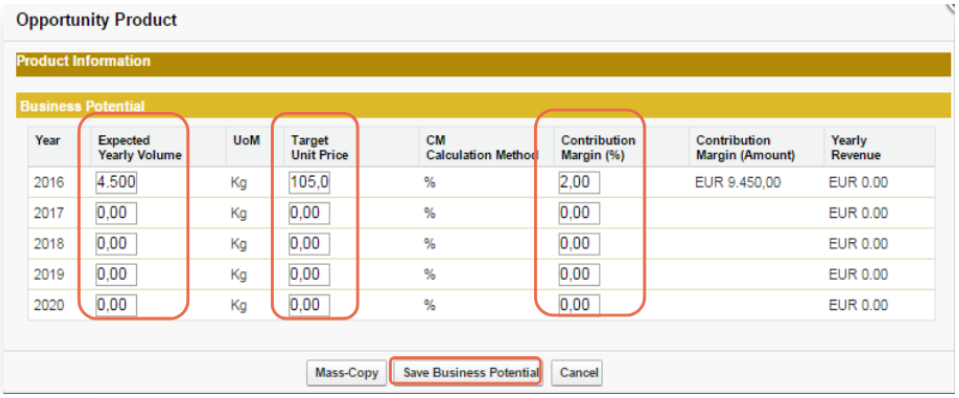
4 The Opportunity is won!



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.



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



- For closed Won opps: Users can not update the current year, but can update the following one.

- For closed Lost opps: Users cannot edit the forecasts.

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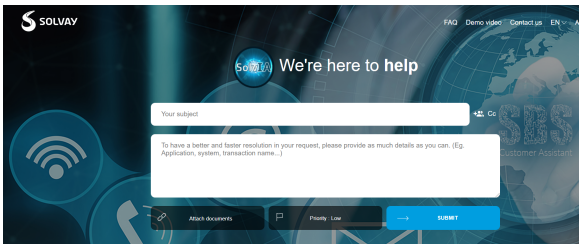
Related articles

- 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/



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