

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.

▼ 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 | WEGO ID | Visit Report | Sample follow up |
|--------------|---------|--------------|----------------------------------|

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.

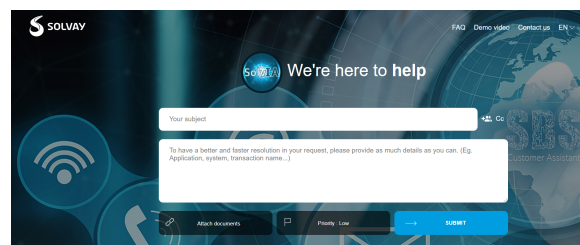
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Related articles

- [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