Create a New Opportunity

Overview

In this section, you will find information about how to create a new opportunity (product qualified, product requiring qualification, recurrent business). In particular, how to:

- Select the right opportunity type
- Enter general opportunity information, such as opportunity name, GBU, BU, probability rate, stage,...
- Define the visibility of your opportunity
- Add a product and specify product information such as the end-use and the target unit price, contribution margin, etc.
- Enter the business potential for the next 5 years
- Create a task from an opportunity

> Best practice is to create an opportunity from the customer contact. This allows to automatically link the contact and account to the opportunity (information already prefilled).

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Concerned profiles:

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

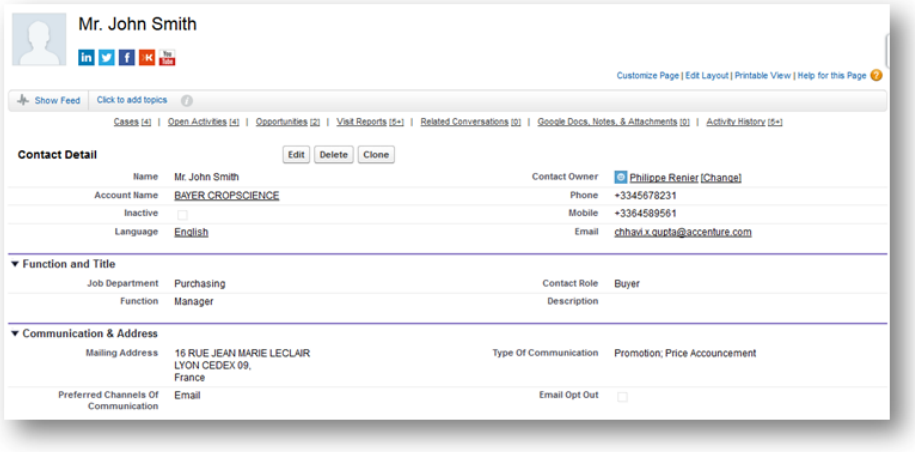
Step By Step

•David has multiple ways to start his opportunity. According to where he does it, Data can be prefilled as discribed here :

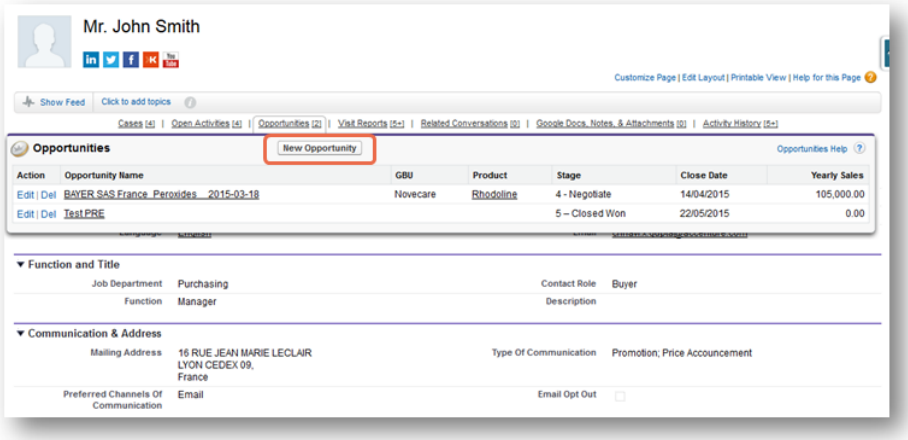
Created from	GBU	Account	Contact	Visit Report	Account Plan
Home Page	√	×	×	×	×
Account Page	√	√	×	×	×
Contact Page	√	√	√	×	×
Visit Report Page	√	√	×	√	×
Account Plan	√	×	×	×	√

Best Practice is to start form the contact, so that the account and the contact are already linked to the opportunity

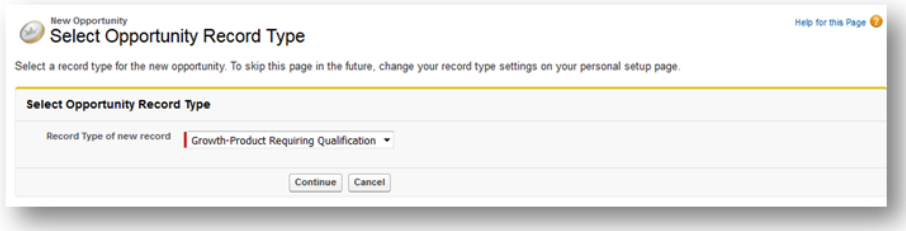
1 David *opens* John's **contact page** in Salesforce



2 He *hov ers* the related list **O pportunity** and *clicks* on **New Opportunity**



3 David has now the choice of the type of opportunity he wants to create

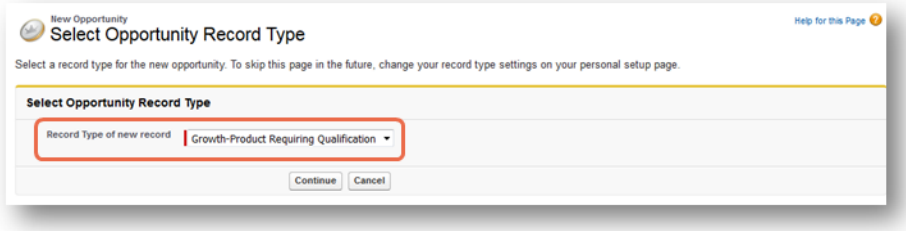


At the bottom of the page he can consult the definitions to better understand the types:

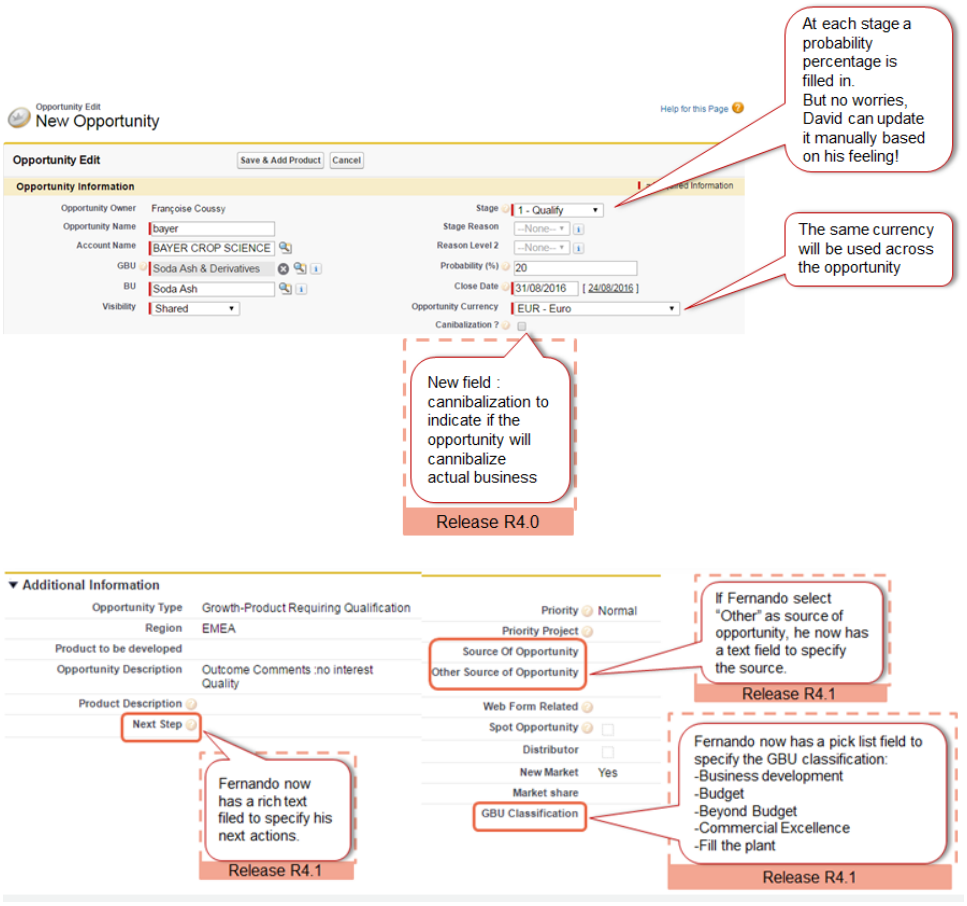
Available Opportunity Record Types

Record Type Name	Description
Growth-Product Qualified	Growth business on product qualified. Example: An existing customer increasing volumes of a product qualified to address a new market.
Growth-Product Requiring Qualification	Growth business on products to be developed. Example: An existing customer or a new customer asks for a product to be developed / innovation.

4 As the product still has to be tested by the customer, David *choos es* **Growth - Product Requiring Qualification** and *clicks* on **Continue**

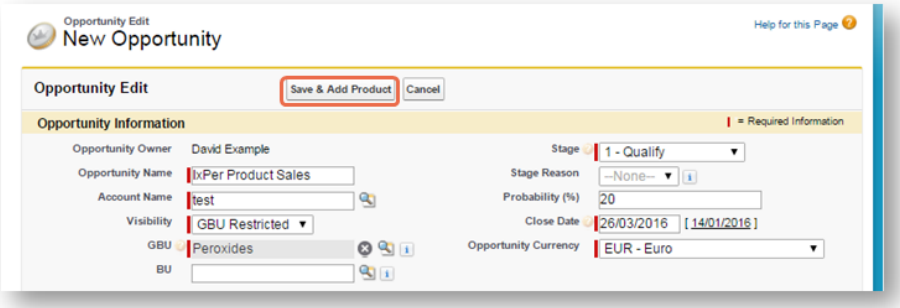


5 David must now enter the information of his opportunity.
-He *puts* "Ixper product Sales" as **Opportunity Name**, *selects* his **GBU** in the GBU field and **BU** in the BU field and *estimates* a **date** by when he should close the deal.
-For the stage of the opportunity, as he starts from the beginning, he *selects* "1 – Qualify" in the **stage** field

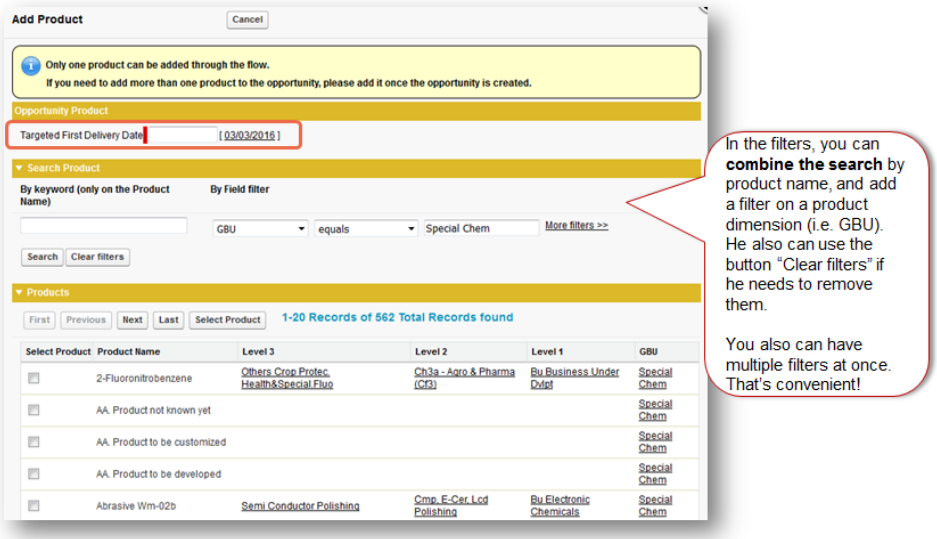


6 Next, David must then *select* a visibility option to define the **visibility** of the product sensible information.
•The visibility setting applies on the opportunity, the opportunity products, the products information, the business potential, the quote, quote lines and neg
•"**Shared**": it means the opportunity will be visible by any user from any GBU
•"**GBU restricted**": it means only the users in the GBU defined below are able to see the opportunity
•"**Confidential**": only the colleagues added in the "Opportunity Team" will be able to view the opportunity and the managers above in the role hierarchy w
*For Asian users the visibility is more restricted

7 Once the information filled in, David *clicks* on **Save & Add Product.**



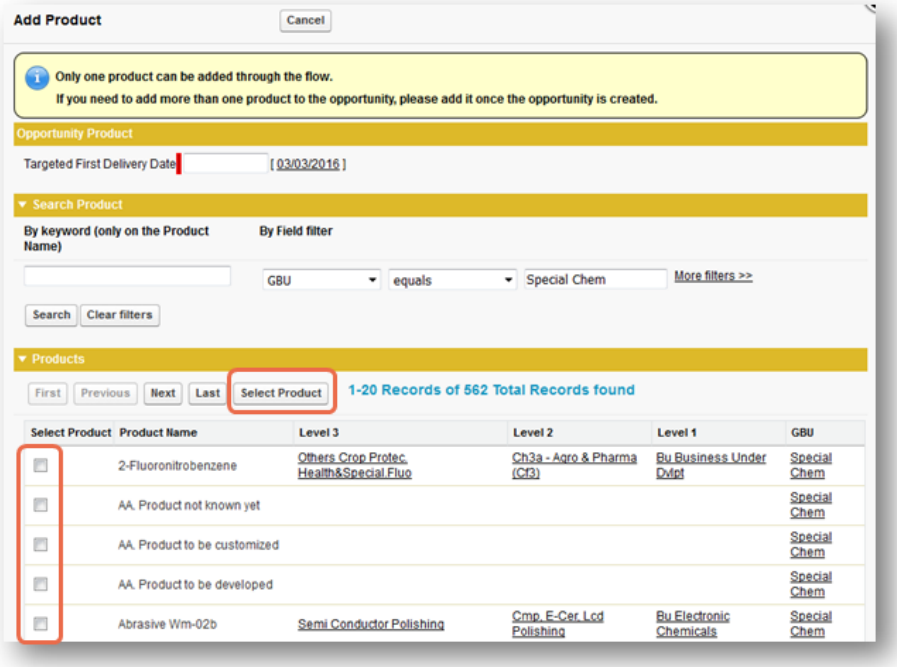
8 David must now define which product he' ll target to sell to Bayer -He *selects* the **Targeted first Delivery Date** in the calendar



In the filters, you can **combine the search** by product name, and add a filter on a product dimension (i.e. GBU). He also can use the button "Clear filters" if he needs to remove them.

You also can have multiple filters at once. That's convenient!

9 Once the Date of First Sales is defined, he *searches* for the **products**. To use the product, David *ticks* the **checkbox** next to the product name and *clicks* on **Select Product** •(products from level 4 or level 5 are available)



Level of the product:

At opportunity product selection, after having created the opportunity itself, user is able to select the product from level 4 or level 5, depending of the opp

•**Growth business opportunities:** for these opportunities (record type “Growth-Product Qualified” and “Growth-Product Requiring Qualification”), user c
product of the level 5. **=> New Winter 17' Release**

•**Recurrent business opportunities**: for these opportunities, user can select either a product of the level 4 or a product of the level 5.
Dummy Product:

David can search among all product references available. Nevertheless it may happen that the customer doesn’t know exactly the product yet or that the

- For theses situation, 3 “dummy” products have been defined in Salesforce:

-“Product not known yet”
-“Product to be developed”
-“Product to be customized”

- For Peroxides, 5 "dummy" products have been defined in Salesforce:

- AA. H202 grade to be developed
- AA. PCS grade to be developed
- AA. PAA grade to be developed
- AA. EURECO grade to be developed
- AA. IXPER grade to be developed

- For Soda Ash, 2 "dummy" products have been defined in Salesforce:

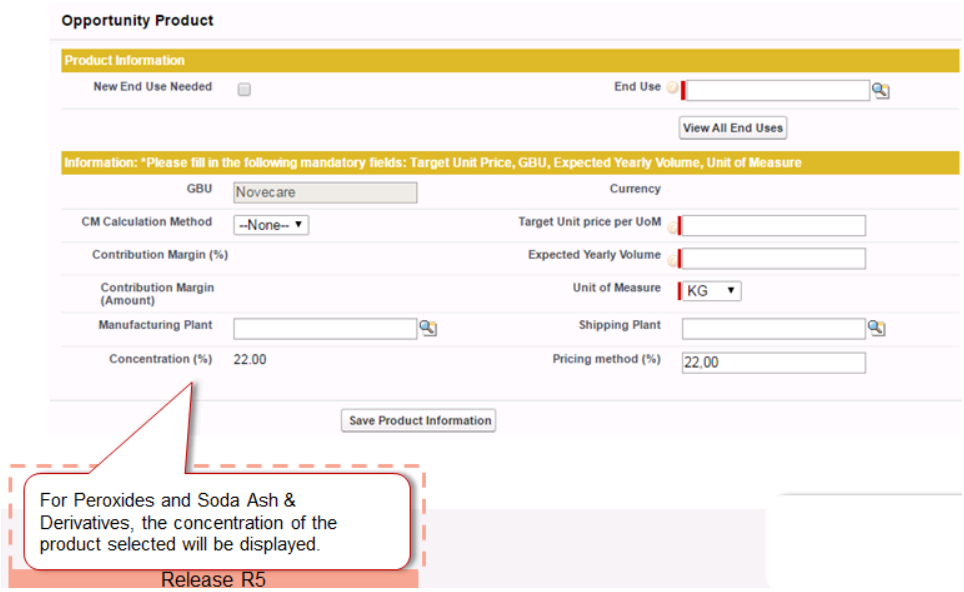
- AA. Product to be developped **=> New Winter 17' Release**
- AA. Product not known yet **=> New Winter 17' Release**

David can use these products for his opportunity, but to change the stage to "Negociate" or for closing a won opportunity a valid product reference will al

10 David must now search or the End Use and record the product detailed information:

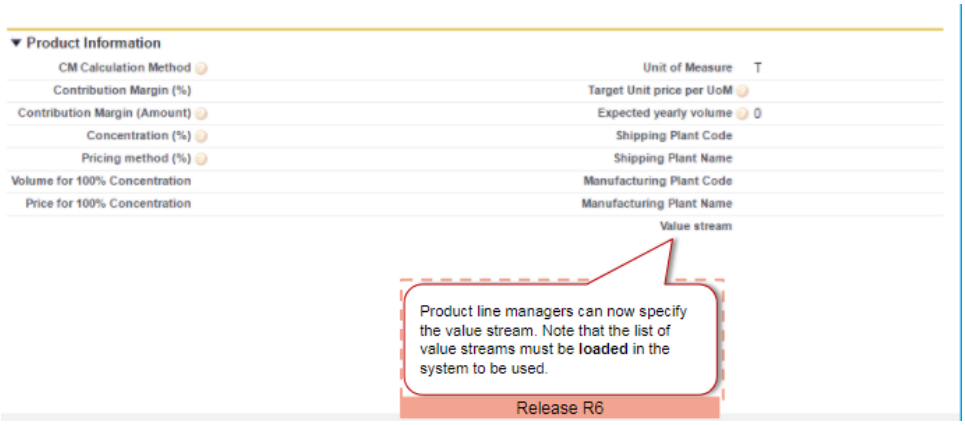
GBU field is automatically populated with the product's GBU. That's handy!

Fernando must now search or the End Use and record the product detailed information:



For Peroxides and Soda Ash & Derivatives, the concentration of the product selected will be displayed.

Release R5



Product line managers can now specify the value stream. Note that the list of value streams must be **loaded** in the system to be used.

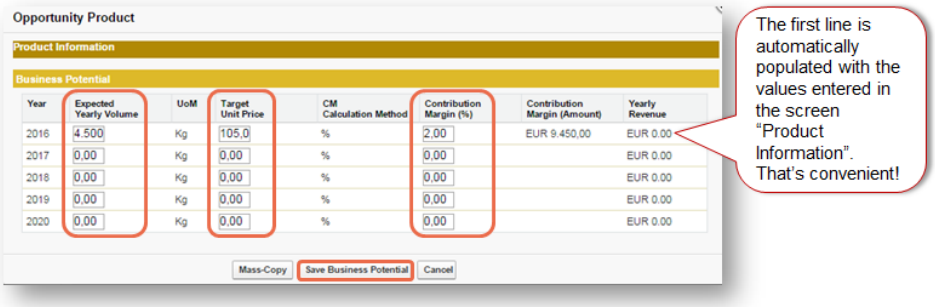
Release R6

11 David has now the final step to perform: defining the business potential. He double-clicks on each value he wants to modify among the following fi

Expected Yearly Volume | Target Unit Price | Contribution Margin

12 Once he has entered the values, he clicks on **Save Business Potential**

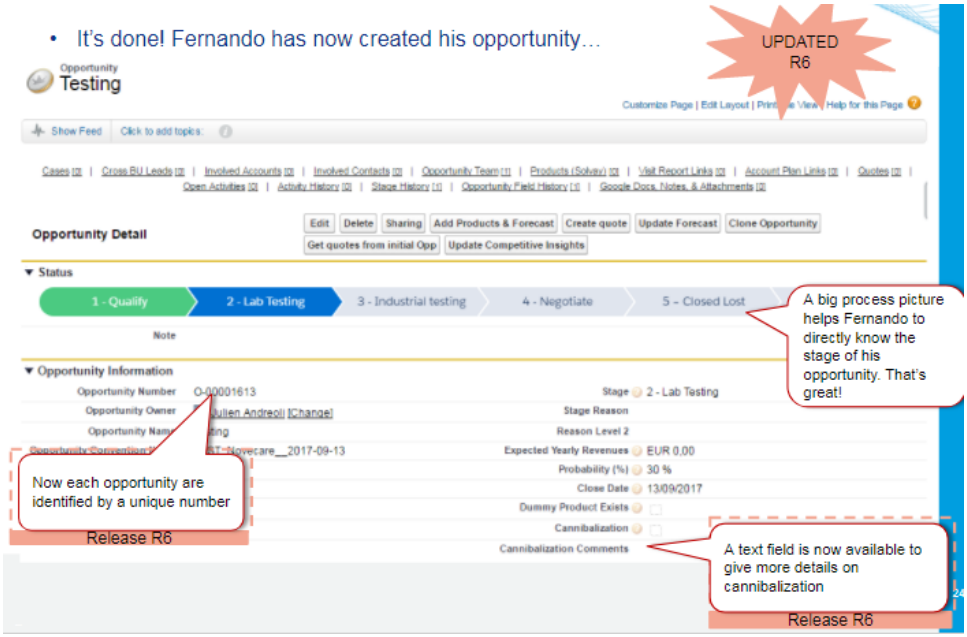
Business Potential can be updated at any time and the first year is required



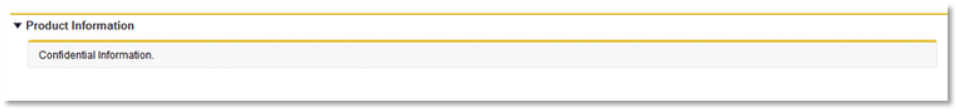
Depending on if your GBU uses Commercial Roadmap and on the current step of th

e Roadmap Timeline, these data can be synchronized both ways with the Commercial Roadmap data

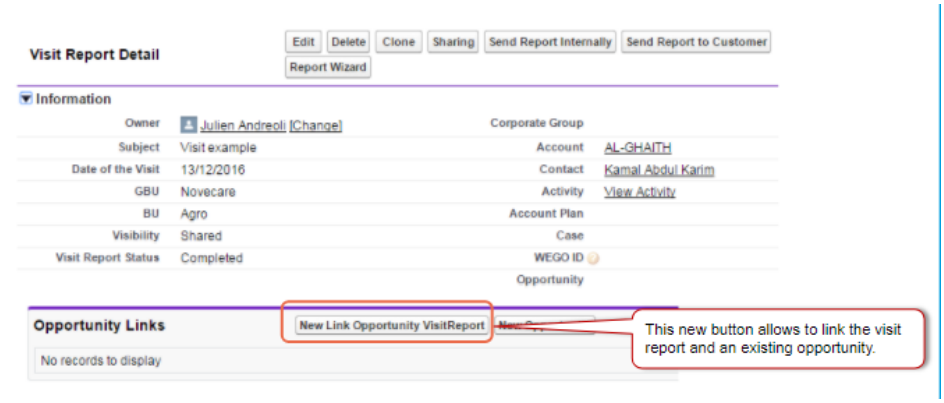
13 It's done! David has now created his opportunity…



14 As David defined the visibility as GBU restricted, non-Peroxides users will not see this opportunity.



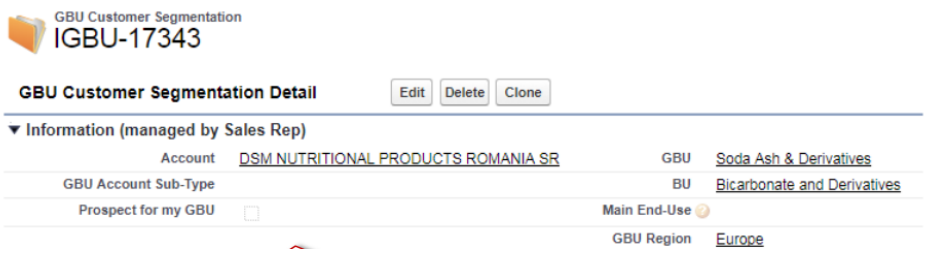
15 David can also can now associate s everal opportunitie s already created to the same visit reports. Finally an opportunity can be linked to several visit reports and a visit report can be linked to several opportunitie s.

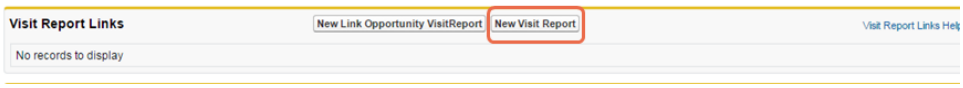
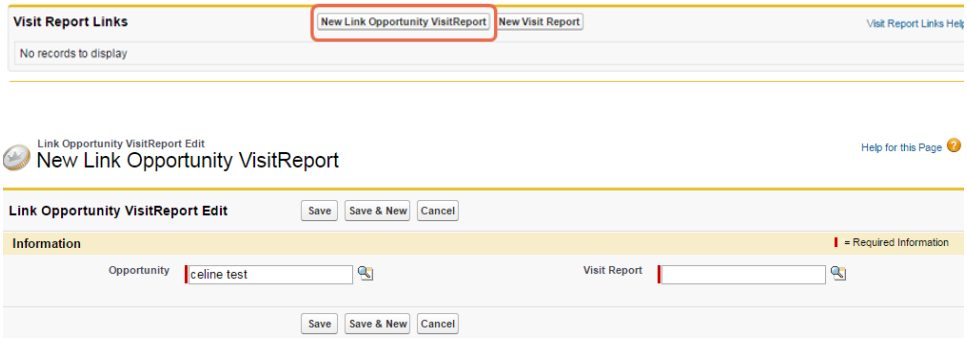
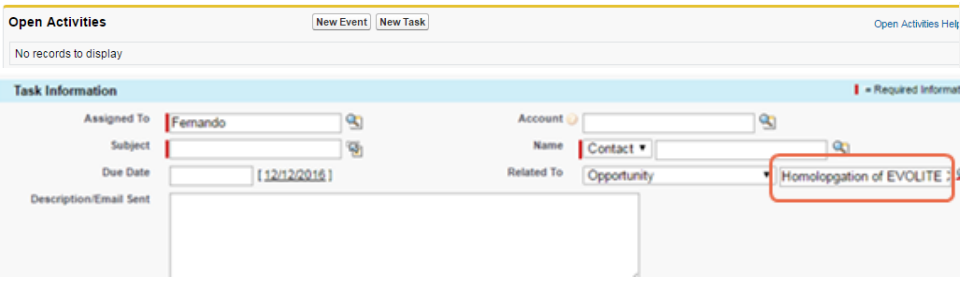


Optional Opportunity Information

When creating an Opportunity via Account, if there is no account GBU segmentation, a **GBU Customer Segmentation** is automatically generated with the following parameters:

- GBU = GBU of the Opportunity
- BU = BU of the Opportunity



You can create and link a Visit Report directly from your Opportunity. Click on the "New Visit Report" button and the Visit Report creation process begins	
You can also link your Opportunity to an existing Visit Report by clicking on "New Link Opportunity VisitReport" button. Using the Opportunity lookup, search the opportunity you want to link to your Visit Report An opportunity can be linked to several Visit ReportsOn ce	
Once the opportunity is created, you can create an Event or a Task. When you create a New Task, the link between the task and the opportunity is already filled	

Peroxides and Soda Ash can now manage diluted /pure product this way:

- Concentration (read only): It displays the real concentration of the product.
- Pricing method: determines the way you will do your quotation.

- The field can only have 2 values: ‘the concentration of the product’ (displayed above) or ‘100%’ (pure product).
- If y

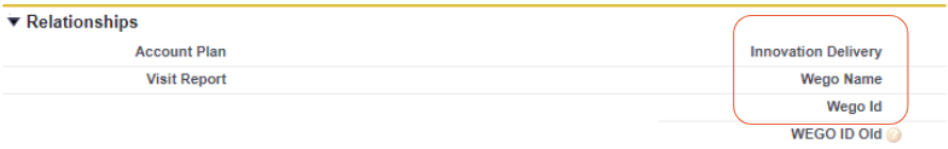
ous et the ‘product concentration’, it means the Target Unit price and Expected Yearly Volume are set for a diluted prod

uct (product as such).

- If you set '100%', it means the Target Unit price and Expected Yearly Volume are set for a pur

oduct(Reporting Unit product).

- Volume for 100% Concentration (read only): is updated with Expected Yearly volume and Pricing method.
- Price for 100% Concentration (read only):
- is updated with Target Unit Price and Pricing method.



The **Innovation Delivery** and the **Wego ID** can be set in 2 new fields in the Opportunity. These fields are lookups, so data must be loaded to use them. These fields allow to make a link between innovation projects and opportunities:

- **Innovation delivery** (lookup): Name of the innovation delivery - list must be loaded in SFDC.
- **Wego Name** (lookup): Name of the Wego project loaded - the list must be loaded in SFDC.
- **Wego Id** (formula) - read only field which displays the Wego Id number associated to the Wego project set.

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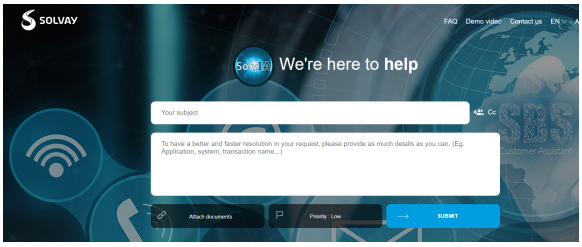
Related articles

- Definitions, Types of Opportunities & Process
- Clone an Existing Opportunity
- Follow the Opportunity Stages – Add an Account Manager in the Opportunity Team
- Follow the Opportunity Stages – Add Contacts in the Involved Contacts
- Follow the Opportunity Stages – Add Accounts in the Involved Accounts
- Opportunity Stages & Process Mapping
- Negociate to win
- Close the Opportunity
- Competitive insights - Create a Competitive Insight
- Cross BU Leads – Create a Cross BU Lead

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