

Opportunity Management

Make sure the Account Manager includes you in the Account team of the specific account. If you have to work on a development pool opportunity, the opportunity owner must include you in the Sales Team in the opportunity.

There are 3 Types of opportunity:

- **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.
- **Recurrent Business:** Contract Renewals / Baseline Business.

Input something that make sense for you and your business.

SFDC will automatically give another name to your opportunity following a naming convention (Account_GBU_End-use_Creation date). It will be managed in a separate field.

You need to change manually the status field of the opportunity and the process on top of page will change accordingly.

Quotes can be made at any stage of the opportunity process and must be updated at the Opportunity Product tab.

Yes, it is possible to do it at any stage of the opportunity process

You cannot change manually this field directly from Opportunity. It is a **formula field** based on **opportunity products** data.

Expected Yearly Revenues = SUM (Target Unit Price * Expected Yearly Volume) for all opportunity products of the opportunity.

i.e. If you change the **Expected Yearly Volume** in an Opportunity product, the **Product total amount** is updated. And **Expected Yearly Revenues** is also updated.

Yes, but make sure to, nevertheless, insert all information needed at the stage where you are starting the opportunity process

Yes, it is possible to do so to adjust win probability to the reality.

When selecting a product, you need to chose the option 'Product to be developed' or 'product not known yet'

Please contact your Data steward.

You can do so at the level of the Opportunity Product, thus restricting the visibility on the key information of your opportunity (Margin and Price). The different options are the following:

- **Shared** (by default): any user has access to information related to product

- **GBU Restricted:** only users in the same GBU as the GBU defined on the Product have access to the product details.

- **Confidential:** only the Owner and the users added in the Opportunity team have access to the product details.

Note that the opportunity itself, with general information (customer name, total amount, type, close date, probability, GBU, etc.), is visible to any users, without visibility option

Any internal stakeholder that takes active role in the process. Don't forget to include also your CSR, specially if you close successfully the opportunity!

The **End Use** is associated to the **product**, not directly to the **opportunity**. Products are associated to **opportunities**.

So, to create a report showing opportunities and end uses, you need to use a **report type** combining the 3 objects such as "Opportunities with Products".

1. In the **Reports** tab, select "**New report**"
2. Select "**opportunities with products**"
3. Select the correct field "**End Use**" to display => the correct one is displayed in "**Custom opportunity Product Information**" section
4. Drag and drop the fields you want to display, set up your filters

You can create one opportunity for multiple products if you believe that the process will follow the same way and speed. Otherwise, it is advised to clone the opportunity and change the product.

You can clone the Opportunity with the correct record type and close the "wrong one". You can then ask GBU Data steward to delete the opportunity closed.

The currency is defined in the opportunity, not in the opportunity product.

It can be edited only if the opportunity doesn't have any opportunity product. So you need to delete all the opportunity products, or directly delete the opportunity.