

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 described here :

<u>Created from</u>	GBU	<u>Account</u>	Contact	<u>Visit Report</u>	<u>Account Plan</u>
<u>Home Page</u>	✓	✗	✗	✗	✗
<u>Account Page</u>	✓	✓	✗	✗	✗
<u>Contact Page</u>	✓	✓	✓	✗	✗
<u>Visit Report Page</u>	✓	✓	✗	✓	✗
<u>Account Plan</u>	✓	✗	✗	✗	✓

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

Mr. John Smith

Account Name: BAYER CROPSCIENCE

Job Department: Purchasing

Function: Manager

Job Title: Buyer

Mailing Address: 16 RUE JEAN MARIE LECLAIR, LYON CEDEX 09, France

Preferred Channels Of Communication: Email

Contact Owner: Philippe Renier (Change)

Phone: +3345678231

Mobile: +3364589561

Email: chhad.x.gupta@accenture.com

Type Of Communication: Promotion, Price Accouncement

Email Opt Out:

2

He hovers the related list Opportunity and clicks on New Opportunity

Mr. John Smith

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed | Click to add topics

Cases (4) | Open Activities (4) | Opportunities (2) | Visit Reports (5) | Related Conversations (0) | Google Docs, Notes, & Attachments (0) | Activity History (5)

Opportunities Opportunities Help ?

New Opportunity

Action	Opportunity Name	GBU	Product	Stage	Close Date	Yearly Sales
Edit Del	BAYER SAS France_Perovides_ 2015-03-18	Novicare	Rhodoline	4 - Negotiate	14/04/2015	105,000.00
Edit Del	TestPRE			5 - Closed Won	22/05/2015	0.00

▼ **Function and Title**

Job Department	Purchasing	Contact Role	Buyer
Function	Manager	Description	

▼ **Communication & Address**

Mailing Address	16 RUE JEAN MARIE LECLAIR LYON CEDEX 09, France	Type Of Communication	Promotion, Price Accouncement
Preferred Channels Of Communication	Email	Email Opt Out	<input type="checkbox"/>

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

New Opportunity Help for this Page ?

Select Opportunity Record Type

Select a record type for the new opportunity. To skip this page in the future, change your record type settings on your personal setup page.

Select Opportunity Record Type

Record Type of new record | Growth-Product Requiring Qualification ▼

[Continue](#) [Cancel](#)

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.

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

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

New Opportunity Help for this Page ?

Select Opportunity Record Type

Select a record type for the new opportunity. To skip this page in the future, change your record type settings on your personal setup page.

Select Opportunity Record Type

Record Type of new record | Growth-Product Requiring Qualification ▼

[Continue](#) [Cancel](#)

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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

The screenshot shows the 'Opportunity Edit' form with the following fields and callouts:

- Opportunity Information:**
 - Opportunity Owner: François Coussy
 - Opportunity Name: Ixper Product Sales
 - Account Name: BAYER CROP SCIENCE
 - GBU: Soda Ash & Derivatives
 - BU: Soda Ash
 - Visibility: Shared
 - Stage: 1 - Qualify
 - Stage Reason: -None-
 - Reason Level 2: -None-
 - Probability (%): 20
 - Close Date: 31/08/2016
 - Opportunity Currency: EUR - Euro
 - Canibalization?:
- Additional Information:**
 - Opportunity Type: Growth-Product Requiring Qualification
 - Region: EMEA
 - Product to be developed: [Empty]
 - Opportunity Description: Outcome Comments: no interest Quality
 - Product Description: Next Step
 - Priority: Normal
 - Priority Project:
 - Source Of Opportunity: Other Source Of Opportunity
 - Web Form Related:
 - Spot Opportunity:
 - Distributor:
 - New Market: Yes
 - Market share: [Empty]
 - GBU Classification: [Pick list]

Callouts and Release Information:

- Release R4.0:** New field : cannibalization to indicate if the opportunity will cannibalize actual business.
- Release R4.1:** If Fernando select "Other" as source of opportunity, he now has a text field to specify the source.
- Release R4.1:** Fernando now has a rich text filed to specify his next actions.
- Release R4.1:** Fernando now has a pick list field to specify the GBU classification: -Business development, -Budget, -Beyond Budget, -Commercial Excellence, -Fill the plant.

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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 v

*For Asian users the visibility is more restricted

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

The screenshot shows the 'Opportunity Edit' form with the following fields:

- Opportunity Owner: David Example
- Opportunity Name: IxPer Product Sales
- Account Name: test
- Visibility: GBU Restricted
- GBU: Peroxides
- BU: [Empty]
- Stage: 1 - Qualify
- Stage Reason: -None-
- Probability (%): 20
- Close Date: 26/03/2016
- Opportunity Currency: EUR - Euro

The 'Save & Add Product' button is highlighted with a red box.

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

Add Product Cancel

Only one product can be added through the flow.
If you need to add more than one product to the opportunity, please add it once the opportunity is created.

Opportunity Product

Targeted First Delivery Date: [03/03/2016]

Search Product

By keyword (only on the Product Name) By Field filter

GBU equals Special Chem [More filters >>](#)

Products

1-20 Records of 562 Total Records found

Select Product	Product Name	Level 3	Level 2	Level 1	GBU
<input type="checkbox"/>	2-Fluoronitrobenzene	Others Crop Protec, Health&Special Fluo	Ch3a - Agro & Pharma (CF)	Bu Business Under Dvd	Special Chem
<input type="checkbox"/>	AA Product not known yet				Special Chem
<input type="checkbox"/>	AA Product to be customized				Special Chem
<input type="checkbox"/>	AA Product to be developed				Special Chem
<input type="checkbox"/>	Abrasive Wm-02b	Semi Conductor Polishing	Cmp_E-Cer_Lcd Polishing	Bu Electronic Chemicals	Special Chem

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!

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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)

Add Product Cancel

Only one product can be added through the flow.
If you need to add more than one product to the opportunity, please add it once the opportunity is created.

Opportunity Product

Targeted First Delivery Date: [03/03/2016]

Search Product

By keyword (only on the Product Name) By Field filter

GBU equals Special Chem [More filters >>](#)

Products

1-20 Records of 562 Total Records found

Select Product	Product Name	Level 3	Level 2	Level 1	GBU
<input type="checkbox"/>	2-Fluoronitrobenzene	Others Crop Protec, Health&Special Fluo	Ch3a - Agro & Pharma (CF)	Bu Business Under Dvd	Special Chem
<input type="checkbox"/>	AA Product not known yet				Special Chem
<input type="checkbox"/>	AA Product to be customized				Special Chem
<input type="checkbox"/>	AA Product to be developed				Special Chem
<input type="checkbox"/>	Abrasive Wm-02b	Semi Conductor Polishing	Cmp_E-Cer_Lcd Polishing	Bu Electronic Chemicals	Special Chem

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. H2O2 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 developed => **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

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



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

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

Opportunity Product

Product Information

New End Use Needed End Use

[View All End Uses](#)

Information: *Please fill in the following mandatory fields: Target Unit Price, GBU, Expected Yearly Volume, Unit of Measure

GBU Currency

CM Calculation Method Target Unit price per UoM

Contribution Margin (%) Expected Yearly Volume

Contribution Margin (Amount) Unit of Measure

Manufacturing Plant Shipping Plant

Concentration (%) Pricing method (%)

[Save Product Information](#)

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

Release R5

Product Information

CM Calculation Method Unit of Measure

Contribution Margin (%) Target Unit price per UoM

Contribution Margin (Amount) Expected yearly volume

Concentration (%) Shipping Plant Code

Pricing method (%) Shipping Plant Name

Volume for 100% Concentration Manufacturing Plant Code

Price for 100% Concentration Manufacturing Plant Name

Value stream

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

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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 GBUs use Commercial Roadmap and on the current step of the

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

The first line is automatically populated with the values entered in the screen "Product Information". That's convenient!

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...

It's done! Fernando has now created his opportunity...

UPDATED R6

Opportunity **Testing**

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed Click to add topics

Cases | Cross RU Leads | Involved Accounts | Involved Contacts | Opportunity Team | Products (Solutions) | Visit Record Links | Account Plan 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 Update Competitive Insights

▼ Status

1 - Qualify 2 - Lab Testing 3 - Industrial testing 4 - Negotiate 5 - Closed Lost

Note

▼ Opportunity Information

Opportunity Number	C-00001613	Stage	2 - Lab Testing
Opportunity Owner	Julien Andreoli (Change)	Stage Reason	
Opportunity Name	Eng	Reason Level 2	
Opportunity Description	St. Marycare_2017-09-13	Expected Yearly Revenues	EUR 0.00
		Probability (%)	30 %
		Close Date	13/09/2017
		Dummy Product Exists	<input type="checkbox"/>
		Cannibalization	<input type="checkbox"/>
		Cannibalization Comments	

Now each opportunity are identified by a unique number

A big process picture helps Fernando to directly know the stage of his opportunity. That's great!

A text field is now available to give more details on cannibalization

Release R6

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

It's done! Fernando has now created his opportunity...

UPDATED R6

▼ Additional Information

Opportunity Type	Growth-Product Requiring Qualification	Priority	Normal
Region	LAM	Priority Project	
Product to be developed		Source Of Opportunity	-None-
Opportunity Description		Other Source of Opportunity	-None-
Product Description		Web Form Related	Prospect
Next Step		Distributor	Customer Request
		New Market	Marketing / Events
		Market share	Other
		GBU Classification	Tender
			Tech Day
			Market Day

Now sources of opportunity are now available

Release R6

▼ Product Information

Confidential Information.

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David can also associate several opportunities 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 opportunities.

Visit Report Detail Edit Delete Clone Sharing Send Report Internally Send Report to Customer
Report Wizard

Information

Owner	Julien Andreoli (Change)	Corporate Group	
Subject	Visit example	Account	AL-GHAITH
Date of the Visit	13/12/2016	Contact	Kamal Abdul Karim
GBU	Novecare	Activity	View Activity
BU	Agro	Account Plan	
Visibility	Shared	Case	
Visit Report Status	Completed	WEGO ID	
		Opportunity	

Opportunity Links New Link Opportunity VisitReport New...

No records to display

This new button allows to link the visit report and an existing opportunity.

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

GBU Customer Segmentation
IGBU-17343

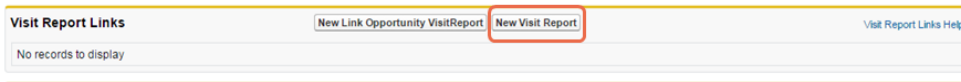
GBU Customer Segmentation Detail Edit Delete Clone

Information (managed by Sales Rep)

Account	DSM NUTRITIONAL PRODUCTS ROMANIA SR	GBU	Soda Ash & Derivatives
GBU Account Sub-Type		BU	Bicarbonate and Derivatives
Prospect for my GBU	<input type="checkbox"/>	Main End-Use	
		GBU Region	Europe

You can create and link a Visit Report directly from your Opportunity.

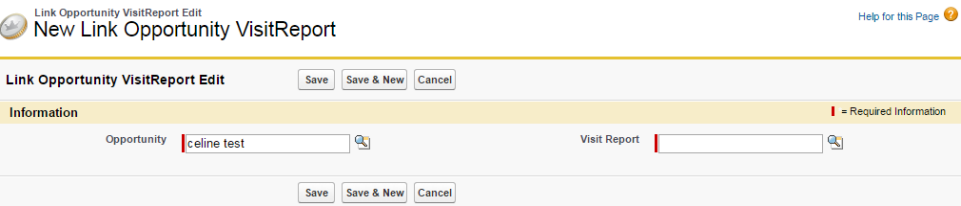
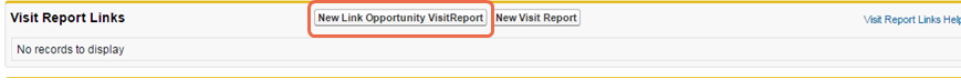
Click on the "New Visit Report" button and the Visit Report creation process begins



You can also link your Opportunity to an existing Visit Report by clicking on "New Link Opportunity VisitReport" button.

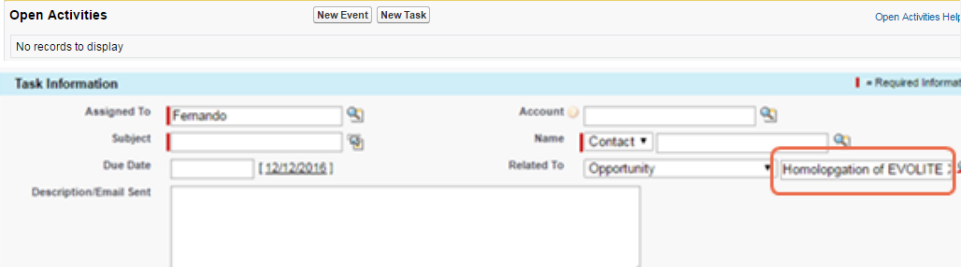
Using the Opportunity lookup, search the opportunity you want to link to your Visit Report

An opportunity can be linked to several Visit Reports Once



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.

▼ Product Information		Unit of Measure	T
CM Calculation Method		Target Unit price per UoM	EUR 100,00
Contribution Margin (%)		Expected Yearly Volume	1 000,00
Contribution Margin (Amount)		Shipping Plant	
Concentration (%)	22,00 %	Shipping Plant Name	
Pricing method (%)	22,00 %	Manufacturing Plant	
Volume for 100% Concentration	220,00	Manufacturing Plant Name	
Price for 100% Concentration	EUR 454,55		

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

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uct (product as such).

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


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- 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.

▼ Relationships

Account Plan
Visit Report

Innovation Delivery
Wego Name
Wego Id

WEGO ID Old 

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.

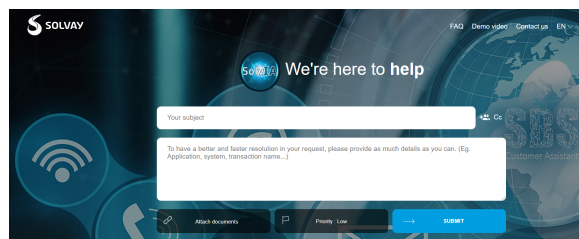
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Related articles

- [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](#)
- [Negotiate 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