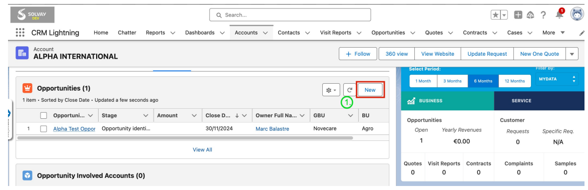
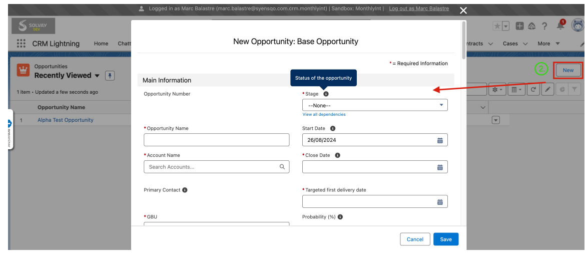
1. Create Opportunity

1. Create a new Opportunity

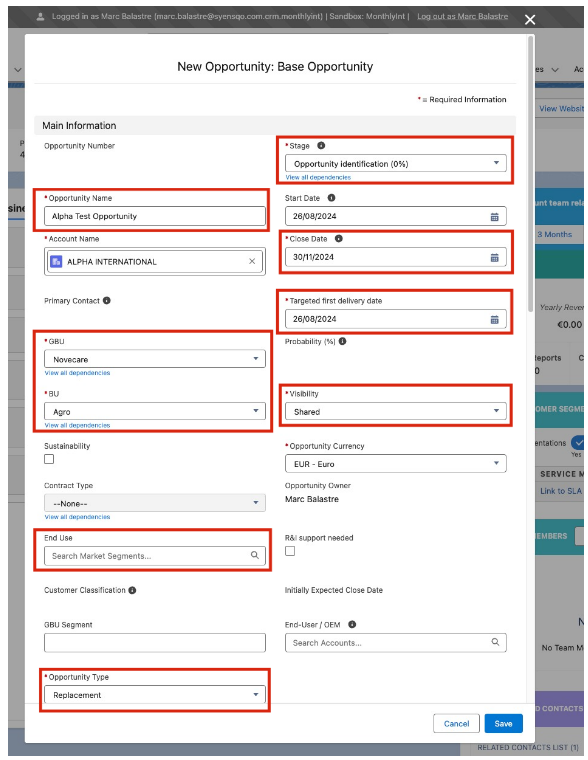
- From Account "**Business"** related list, press New button on Opportunities related list. **(1)**
- From Opportunities List view **(2)**





2. Mandatory Fields

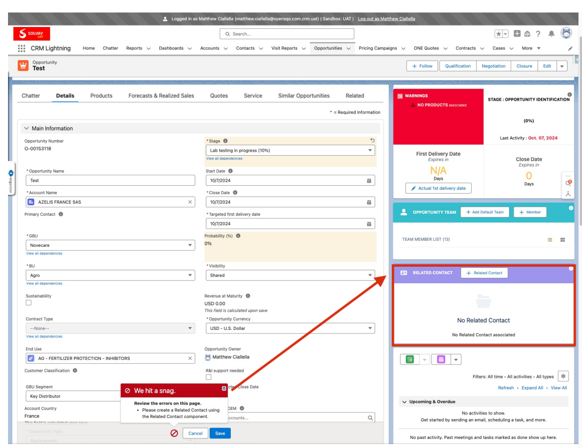
- **Following fields need to be filled in as mandatory:**



Field	Description
Opportunity Name	Not pre-filled, set by end user.
Stage	Set as --*None*–- by default. Validation Rules: ◦ Cannot change stage from "**Opportunity Identification**" to "**Lab test approved and industrial testing in progress**" ◦ Cannot change stage from "**Lab testing in progress**" to any of the "**Negotiation**" stages ◦ If Opportunity is closed (won, lost, abandoned etc...), then you cannot reopen it and move it to earlier stage or edit. ◦ You need to enter a Opportunity Loss Reason when Opportunity is Lost or Abandoned.
Account Name	Lookup field, pre-filled when created from Account page, User can select an account where: ◦ Account's Record Type Name is **not** "Corporate_Group," ◦ **OR** the current user's profile name is "System Administrator." This filter is **required**
Close Date	◦ Must be greater than today
Target First Delivery Date	◦ Must be greater than today, can be different from Close Date. ◦ It is relevant for creation of **Product Forecasts.** These will be created starting from they year set in this field.
Visibility	Validations: ◦ It is not possible to have MBU user as owner of confidential data. ◦ You cannot update this field to "**Confidential**" on a new record if the owner's user role name contains "Riga" or "TS-Global," unless you have the `Bypass_Validation_Rules` permission.
GBU	List of available GBU's
BU	◦ dependent towards **GBU**

Opportunity Type	Available selection: ◦ Replacement, ◦ Growth - Product, Process or Application Innovation, ◦ Growth - Business development (no Innovation) More details about each on Management page
End Use	◦ The `End Use: Type` must match the `End Use` type specified. ◦ The `End Use: Active` field must be `True`. ◦ The `Opportunity: GBU` must match the `End Use: GBU: Name`. ◦ Alternatively, if the current user's profile name is `System Administrator`, the filter bypasses these conditions and allows any `End Use` record to be selected.
Opportunity Currency	Filled in automatically based on user personal settings
Reoccurring Business	The "Reoccurring Business" tick box appears in the Opportunity module **only when the GBU is set to Oil & Gas.** Describes the opportunity type. It also affects the forecasts for added products. It will copy product quantity and price to all forecasted years by default

2. Add Related Contact(s)



When progressing to a next opportunity stage, users are asked to add Related Contact before they proceed. Contact can be added on Related Contact component to the right. To do so, user presses + icon which opens the new screen where user can select:

- **Opportunity** (required)- already set to opened opportunity by default,
- **Contact** (required) - existing contact can be selected, new one created.
- **Role -** One of available roles this contact plays towards the opportunity can be selected.
- **Primary -** a checkbox that will mark this contact as a primary one on opportunity

3. Log Next Steps (Reports)

Overview and Solution

The Oil & Gas (O&G) Global Business Unit (GBU) relies on Salesforce reports for monthly opportunity review meetings, with the "**Next Step**" field being critical for tracking upcoming actions. However, the current setup of this field prevents inline editing, forcing users to open individual records for updates.

To address this, the existing "Next Step" field will be complemented by a standard "**Log Next Step**" field that supports inline editing. This allows users to update opportunities directly within reports while automatically appending these updates to the original "Next Step" field, including metadata such as username and timestamp.

Key Features for Users

- **Inline Updates Made Simple**
  - You can now directly update the "Next Step" field within your Salesforce reports without leaving the report. This saves you time during monthly review meetings and keeps your focus on the big picture.
- **Automatic Tracking of Changes**
  - Every time you update the "Next Step," the system automatically records the update with your name and the exact time. This ensures a complete history of actions for easy reference and accountability.
- **Clear Record of Next Steps**
  - The updates you make are automatically added to the existing "Next Step" field, keeping a consolidated view of all past and current actions. No more searching through records to track what's been done.
- **Stay Organized Without Extra Steps**
  - After you update the "Next Step" field, your changes remain visible for a short time, so you can confirm everything looks good before moving on. No need to reopen the report.