

Closing an Opportunity for a Lost Sale

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If the salesperson was not successful in closing the sale with the Prospect, the Opportunity/Prospect record should be resolved so that it will be removed from the Prospect Queue and Opportunity Queue. If the Prospect returns in the future, the Prospect may be retrieved and reactivated.

Follow the instructions below to Resolve an Opportunity and Inactivate.

1. Navigate to the Sales Management/Prospect menu option from the Main Application menu.
2. Open the Prospect record containing the Opportunity that will be resolved.
3. Once a Prospect record is open, click the Opportunities button from the Prospect toolbar.
4. Highlight the Opportunity to be resolved in the upper section of the Opportunity form.
5. Click the Resolve button located at the lower left of the Opportunity form.
6. The Opportunity Resolution form will be displayed. Each data entry field is described below.
 - Resolution Code - Select the Resolution code from the drop-down list.
 - Resolution Date - will default to today's date; this field is used to record the date the opportunity was lost. You may override the defaulted date if necessary.
 - Competition - If the salesperson was competing against another company for the business, select the Competition code from the drop-down list. If there was no competition or the competitor is unknown, your company should setup codes for these purposes to be available for selection.
 - Close Opportunity - select this option. This will inactivate the Opportunity so that it will no longer appear in the Opportunity Queue.
 - Inactivate Prospect - If there are no other Opportunities to be resolved, select this option.

Click the Save button when finished.