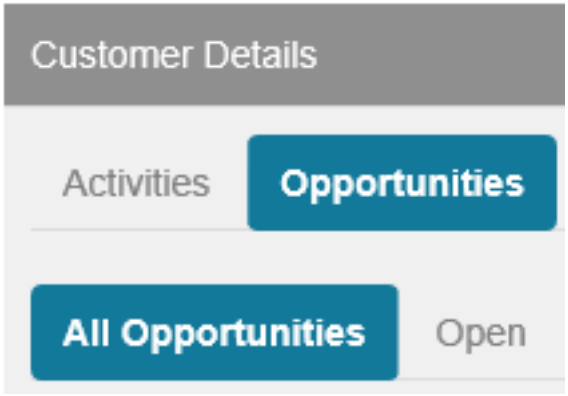
Opportunities

How do I close an open opportunity as won? How to change an Opportunity into a New Order or Booking?

If a customer has an opportunity that is opened and you wish to change this into a new order and/or booking do the following ...

When the customer calls back or you do a follow up call for this customer or a customer who has an opportunity schedule, all you need to do is click on the Opportunity Tab on the Customer Details Page.Â

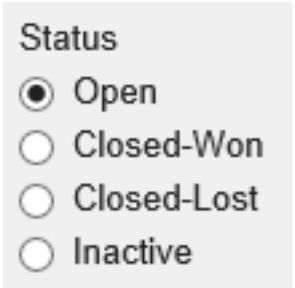


Click on the Opportunity Name you wish to close as **CLOSED-WON**.Â This will open up the Opportunity in a new page.Â

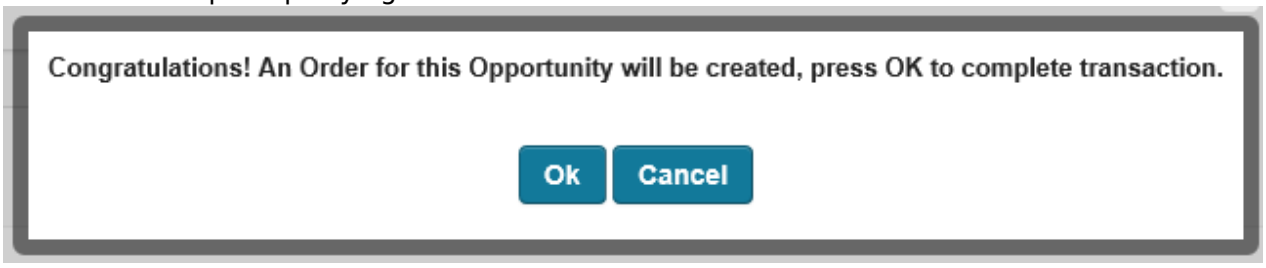
TOÂ CLOSE THEÂ OPPORTUNITY AS CLOSED-WON:

1. Check and make sure you have the correct opportunity open.

2. Click on **Closed-Won.**



3. A window will open up saying ...



4. If this is correct and you are ready to change the Open Opportunity to a **Closed-Won** then

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press the 

Â button.

5. If this is not correct or you need to make changes, or you accidentally pressed it.Â Click on .

6. The Add an Order Page will open up just like you were to add a new order or booking. Refer to How to Add New Order to complete the order process and booking from a **Closed-Won** Opportunity.

Attached files:

Unique solution ID: #1172
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