Opportunities

What does Closed-Lost mean in Opportunity Page?

CLOSED-LOST is used when an opportunity that was open has been lost for a reason.Â If a customer has an opportunity that is openedÂ they call or you lost the opportunity you would close the opportunity by click on the **CLOSED-LOST**Â radio button in Status.

To close an opportunity as LOST - 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.

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

TO CLOSE THE OPPORTUNITY AS CLOSED-LOST:

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

2. Click on **Closed-Lost.**

Â field, select the reason for losing the opportunity.

Â field, select the competitor if the opportunity was lost because the customer went with our competitor.

5. Click on Save Changes.

Questions Asked and Answered:

1. David Phillip | 06-May-2020 09:47 | What does Closed-Lost mean in Opportunity Page?
   Question: I there a list of reason as to why an opportunity may have been lost?
   a. answered by @barbara.green | 06-May-2020 14:20 |
      a. is your question "is there a list".Â If that is what you meant to write the answer is many.Â There are many reasons why an opportunity may be lost.Â From the customer not having the budget, or too expensive, or found a competitor, or not happy with our customer service.Â The many reasons are listed to staff for them to select the most suitable when the Opportunity Lost button is selected.

Attached files:

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URL: https://staff.iconic.productions/KB/content/0cat=49/174/en/what-does-closed_lost-mean-in-opportunity-page.html

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Unique solution ID: #1173
Author: Event Managers
Last update: 03-Feb-2016 01:44

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