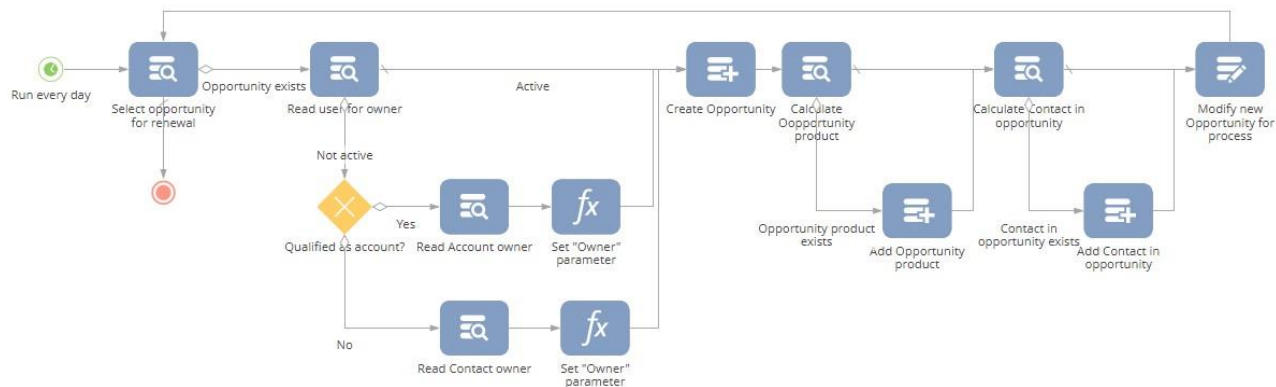# Renewal opportunity

Characteristic	Definition
Purpose	- Creating renewal opportunity based on successful deals - Bind parent and renewal opportunities - Change renewal date at anytime
Field of application	Renewal opportunity management

List of system objects in use	Basic sections:
	    • Opportunity
	    • Contacts
	    • Account
	    • Products
	    • Activities
	System section:
	    • Users

List of process users roles

Role	Description
Sales manager	Manages opportunities and renewal opportunities

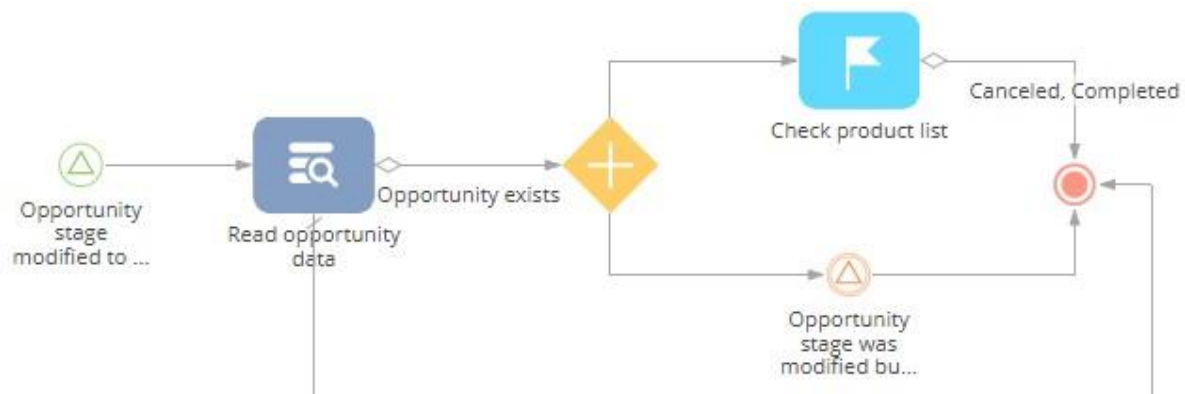## Process description – Create renewal opportunity

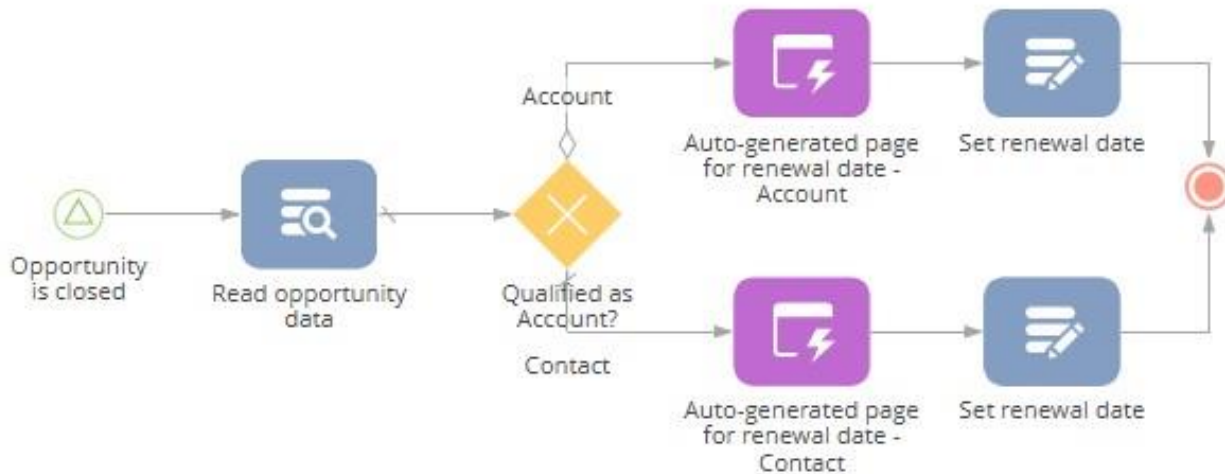| Process step	Assignee	Step description
Run every day	Creatio	Process starts every day at 12:00 AM.
Select opportunity for renewal	Creatio	Search for successfully closed opportunity with due renewal date.
Read user for owner	Creatio	Check if opportunity owner is active Creatio user.
Qualified as account?	Creatio	Check, whether customer is contact or account

Read Account owner	Creatio	Read account's owner
Read Contact owner	Creatio	Read contact's owner
Set "Owner" parameter	Creatio	Save contact from "Read Contact owner" element in process parameter.
Set "Owner" parameter	Creatio	Save account from "Read Account owner" element in process parameter.
Create opportunity	Creatio	Create opportunity with specific type named "renewal" and reference to parent opportunity.
Calculate Opportunity product	Creatio	Calculate list of products in a parent opportunity.
Add Opportunity product	Creatio	Copy products from parent to a new renewal opportunity.
Calculate Contact in opportunity	Creatio	Calculate list of contacts in a parent opportunity.
Add Contact in opportunity	Creatio	Copy list of contacts from parent to a new renewal opportunity.
Modify new Opportunity for process	Creatio	Set opportunity fields to trigger new corporate sale process.

Process description – Qualification for renewal

Process step	Assignee	Step description
Opportunity stage modified to Qualification	Sales manager	Change renewal opportunity stage to "Qualification".
Read opportunity data	Creatio	Read data from all columns in Opportunity.
Check product list	Sales manager	Opportunity manager checks the list of products, looks at the customer history and information about previous opportunity.
Opportunity stage was modified but not to Qualification	Sales manager	Change opportunity stage but not to "Qualification".

Process description – Opportunity closure for renewal

Process step	Step owner	Step description
Opportunity is closed	Sales manager	Change renewal opportunity stage to "Closed won"
Reead opportunity data	Creatio	Read data from all columns in Opportunity
Qualified as account?	Creatio	Customer verification on opportunity
Auto-generated page for renewal date - Account	Sales manager	Opportunity manager fills in field "renewal date" (optionally)
Auto-generated page for renewal date - Contact	Sales manager	Opportunity manager fills in field "renewal date" (optionally)
Set renewal date	Creatio	Set "renewal date" for opportunity as specified by user on the previous step

Implementation guidelines

1. Install the package using the [Installed applications] functionality in [System designer].

2. Add your sales manager as Creatio users.

3. How to set default value for renewal period? Change "RenewalDate" parameter in "Opportunity closure for renewal" business process. For example, if renewal period is 1 year, use function AddDays(365) to "Closed on" field from "Read opportunity date" element in "Opportunity closure for renewal" business process.

Formula

SAVE   CANCEL   (i) Read more about formula

[#Read opportunity data.First item of resulting collection.Closed on#].AddDays(365)

| < PROCESS ELEMENTS | PROCESS PARAMETERS | LOOKUP | SYSTEM SETTINGS | SYSTEM VARIABLES | FUNCTIONS | DATE AND TIME | > |

Search process element 🔍 | Search element parameter 🔍

Opportunity is closed	Account
Read opportunity data	Closed on
Auto-generated page for renewal date - Contact	Contact
Auto-generated page for renewal date - Account	Id
Set renewal date	Name
Set renewal date	0.5 Opportunity amount
	Renewal date
	Stage

4. How to start the business process?
   a) Create successfully closed opportunity or change existing opportunity stage to "closed won" and provide renewal date in auto-generated page;

b) Provide renewal date for already successfully closed opportunity;
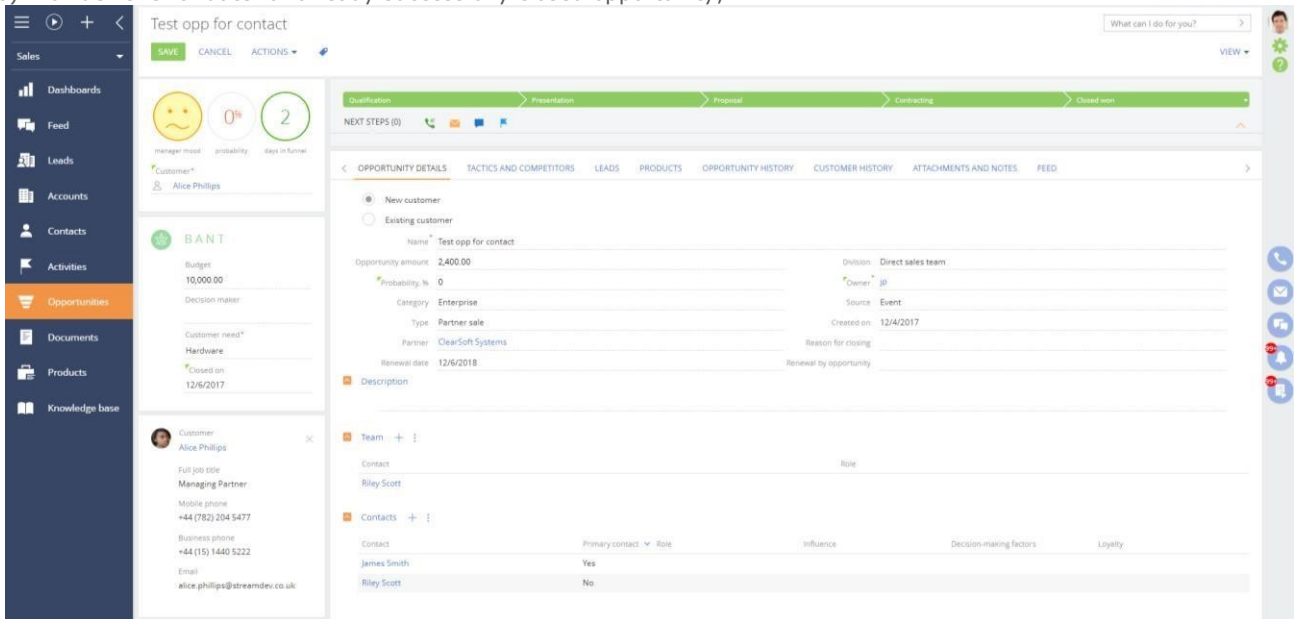
Start "Create renewal opportunity" business process from the sidebar or "Create renewal opportunity" business process will be started automatically on date specified as "renewal date".

Process start

RUN   CANCEL   VIEW ▼

| Title   ▼ | | | SEARCH |

Title ⌃

Create renewal opportunity

ESN notification

Get number of reminders

Hash Updater Process

Opportunity closure for renewal

ProcessNotificationsUpdateScenario

Qualification for renewal

Qualification v7.8.0

Send push notification

Synchronization with Google Contacts

Synchronize activities with Exchange