"Reason Lost" - Moving Opps to Closed Lost

When moving an Opportunity into the "Closed Lost" stage, a few fields may be required, including:

- Reason Lost
- Sub Reason
- Closed Lost Detail
  - *As of 12/18/2023, this field is now required to Close Lose any deal.

It is important that users understand the differences and definitions of these reasons. Please see the table below:

"Reason Lost"	"Sub Reason"	"Closed Lost Detail"	Notes/Definitions
Legacy End of Life	Internal Server Errors	(optional)	We received server errors
	Customer Corrupted Files	(optional)	The customer had corrupted files
	Firewall Issues	(optional)	The customer had firewall issues
	Misunderstanding	(optional)	The customer misunderstood what was happening with migration (*i.e. they thought we were going out of business instead of just sunsetting products*)
Buying Committee	Out of Business	(optional)	
	Acquired/Sold Business	(optional)	Our current customer is no longer associated with the business but there is an opportunity to prospect new management.

	Disconnected	(optional)	You were ghosted or were no longer able to get in touch
	Champion Left Company	(optional)	
	Procurement/Legal	(optional)	
Customer Requirements	Only Wants Storage	(optional)	
	Outside our Product Scope	(optional)	**Do not confuse this with a product limitation**. When the customer's requirements are outside our product scope, this means something they are wanting is not something our product does and likely will never do. (i.e. they are looking to purchase a used car and that is not what our company does)
	On-Prem Requirement	(optional)	
	Timeline Too Far Out	(optional)	
	Budget/Pricing	(optional)	
	Consolidation	(optional)	The customer is consolidating their tech stack.
Product - Limitations	Functionality Missing	*required	**Please elaborate on the product limitation; not to be confused with a bug/technical challenge NOR product scope.** This should be selected when there is something our product c*ould* do but doesn't today.
Product - Technical Challenges	Bug/Something Not Working	*required	

	Downtime/Not Stable	*required	
	Slow Product Experience	*required	
Service Issues	Customer Education	*required	
	Onboarding Expectations	*required	The customer did not finish onboarding or did not receive the onboarding experience they expected.
	Support	*required	
Adoption	Product Utilization	(optional)	The customer did not use the product enough.
	License Utilization	(optional)	The customer's end users did not use the product enough.
Auto-Terminated	Customer Cancelled	(optional)	**NEVER to be selected by users; this is selected by automation in Salesforce**
Duplicate Opportunity	Duplicate Created by Mistake	(optional)	When a duplicate opp was created by mistake (by a user or by the system)

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