

3. Realized Sales

Realized Sales Overview and Tracking

Definition and Criteria

Realized Sales refer to the invoiced amounts for goods shipped to customers for a won opportunity. An opportunity is considered "won" once the first commercial sale occurs, and there is a genuine expectation to achieve the forecasted sales.

Update Cycle

For closed projects, Realized Sales are tracked over a 2-year period: the current year (CY) and the following year (CY+1). Updates are not mandatory but must be entered manually. "Growth" businesses are required to update Realized Sales quarterly, with the goal of entering data into the CRM within 10 working days after the project closure.

Importance of Monitoring

Monitoring Realized Sales is essential for several reasons:

1. Ensures appropriate allocation of resources, especially for "Growth" businesses.
2. Supports the Sales Incentive Plan by making CRM the single source of truth for tracking opportunities.
3. Provides insights into budget alignment and initiates discussions if opportunities fall short of expectations, impacting future sales projections.

Additional Information

For more details on tracking Realized Sales, please refer to the [link here](#).

Source: CRM (incl. cust 360, Opportunities)

Functional Design:

Realized Sales Creation and Tracking

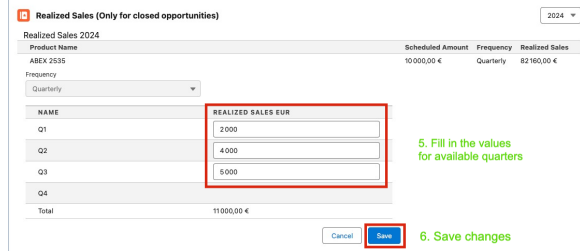
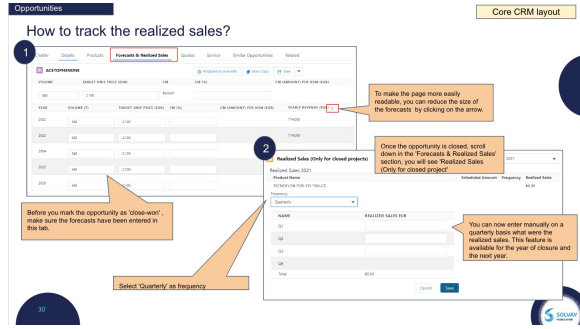
Realized Sales data is managed under the "Schedule & Realized Sales" tab, specifically within the "Realized Sales (Only for closed opportunities)" component. This tool allows opportunity owners to record actual sales achieved during the defined time frames:

- Forecasts are entered annually, while Realized Sales are recorded quarterly.
- Users can select current or past years using a picklist but cannot select future years.
- **Realized Sales can only be entered for opportunities marked as Closed Won.**

User has to scroll down to the bottom of **Forecasts & Realized Sales** tab to edit Realized Sales:

The table component shows 4 attributes:

- **Product Name**
 - It is retrieved from the opportunityLineItems list and is shown as a column in the table
- **Scheduled Amount**
 - This shows the amount that was scheduled for the product. It is formatted as a currency value.
 - The field `Yearly_Forecasted_Amount__c` on the `Opportunity_Realized_Sales_Year__c` custom object is where the forecasted or scheduled sales amount is stored.
- **Frequency**
 - Represents the frequency with which the realized sales are reported. It currently only includes logic for the "Quarterly" frequency.
- **Realized Sales**
 - It is filled from `Realized_Sales__c` field on `Opportunity_Realized_Sales_Year__c` by summing the `Realized_Sales__c` values from all related Opp



portunity_Realized_Sales__c records. This cumulative total is then assigned to the Realized_Sales__c field on the Opportunity_Realized_Sales__c record.

1.Component visibility:

The component is visible if fields:

- <Closed> = true
- <Probability (%)> = 100%
- User needs to have Edit rights on opportunity record to add/change Realized Sales

2.Year Selection Logic:

The component shows sales data based on the selected year. It defaults to showing the current year's data when loaded but allows users to switch years to compare past data.

- Extracts the close year from the opportunity's closeDate,
- Compares the close year with the current year:
 - It creates options for up to 2 years (including the current year and possibly the next year) if the close year is not greater than the current year.

Example: If the opportunity closes in 2023 and the current year is 2024, the options will be 2023 and 2024. It ensures that only relevant year options based on the close date and current date are displayed.

3. Opportunity Line items:

- The selection is based on the opportunity ID and selected year.

Sales Number	Date	Nett EUR	Quantity WMS
0014000001	01/04/2024	EUR 0.00	23.80
0014000002	01/04/2024	EUR 0.00	0.00
0014000003	01/04/2024	EUR 97.336.96	4.000.00
0014000004	01/04/2024	EUR 0.00	0.00
0014000005	01/04/2024	EUR 42.765.00	1.000.00

REALIZED SALES	BEST POOL
2.6m	3.8m
11.2m	4
0.8m	2
5.7m	10

Insight
Activity
Files

Dev Pool Warning

Current stage
Closed - Won (100%)

No realized sale update
since 2024-04-01

4. Realized Sales on Accounts (iCARE only)

For iCARE the realized sales are linked to the accounts and they can be seen and controlled in the Accounts -> Financial tab.

The field Calendar_year_month__c refers to the month and year of the sales record (Sales__c) (example: 10.2024)

Insight
Activity
Files

Dev Pool Warning

Current stage
Closed - Move to Distribution (100%)

No DVP Realized Sales entered

Realized Sales (Only for closed projects) 2024 ▾

Product Name	Scheduled Amount	Frequency	Realized Sales
PPS R-4-2708L	€77,520.00	Quarterly	€19,380.00

[Edit](#)

NAME	REALIZED SALES EUR
Q1	19,380
Q2	0
Q3	0
Q4	
Total	€19,380.00

5. Dev Pool Warning Component - Realized Sales Warning Messages in iCARE

Message in the component	Field in opportunity	Meaning	Implementation
No DVP Realized Sales entered	Empty realized sales checkbox	<p>Realized sales does not exist for the last quarter (daily process checking the realized sales created on a daily basis)</p> <p>This field indicates if the realized sales for the previous quarter is created.</p> <p>If true, the realized sales exist.</p> <p>If false, the realized sales are missing.</p> <p>It means that the opportunity was closed won in the last quarter, we are in the first day of the month from the new quarter, and for the last quarter there are no realized sales entered yet.</p> <p>This field is updated only once per day (not right after the realized sales are entered).</p> <p>read-only for all except admins</p>	<p>Once per day, there is the batch Opportunity_DevPool_ORSEntered running that can populate this new Realized Sales Entered? field equals to true if there are realized sales linked to the opportunity for the quarter. Keep it false, otherwise.</p> <p>When a realized sales is created, updated or deleted the system should run the logic defined in the batch Opportunity_DevPool_ORSEntered that populates the field Empty_Realized_Sales__c to also populate this new field.</p>
No realized sale update	Not realized sales checkbox	<p>no realized sales for the last quarter or past quarters (controller class of the component)</p> <p>t means that the opportunity was closed won and already has realized sales created but the last realized sales does not belong to the last quarter closed.</p> <p>This field indicates if the last realized sales entered belong to the previous quarter. or not If true, the realized sales for the previous quarter exist. If false, the realized sales doesn't belong to the previous quarter.</p> <p>read-only for all except admins</p>	<p>At the beginning of each quarter, the batch Opportunity_DevPool_ORSEntered can populate this field No realized sale update equals to false if the opportunity was selected to send email notification.</p> <p>If the opportunity was not selected, the field should be updated to true.</p> <p>When a realized sales is created, updated or deleted the system should run the logic defined in the class LTN_Opportunity_DevPool_Warning, method noRealized</p> <p>and populate the field No realized sale update equals to isOK (isOK is a variable which starts with false).</p> <p>Important: run the logic only for opportunities with record type developer name = Development_Pool_Opportunity</p>

***Opportunity_DevPool_ORSFillingReminder** is a batch running in the first day from every quarter and is sending email notifications to the opportunity owners that have missed Realized Sales or have the Realized Sales for the last quarter empty or 0 (lines 153-176).

***LTN_Opportunity_DevPool_Warning.noRealized** contains the logic to verify if the realized sales are missing or not. ~~We want to also have this logic in the realized sales trigger.~~

***Opportunity_DevPool_ORSEntered** is a batch that is running once per day and identifies when there are no realized sales entered. This batch populates the field Empty_Realized_Sales__c. If Empty_Realized_Sales__c = false, there are realized sales for the devpool (lines 110 - 141).

Original requirement: [iCARE - DevPool - Allow reporting on DevPool Warning](#)

When the realized sales value is zero, the system assumes zero as a valid value, so is flagging the opportunity as missing the realized sales.

6. Realized Sales Quarterly Checks for CORE CRM and iCARE

There is the process that quarterly checks the realized sales to highlight the ones that are missing for the opportunities already closed.

Knowing the closed date (year and month), the system checks the realized sales for the next quarter, after the opportunity close date or targeted first delivery date, whichever is the latest.

The process that manages this logic is named Opportunity_ORSFillingReminder and the main behavior is:

- On January 1, the system checks the RS missing for Q4 from the last year
- On April 1, the system checks the RS missing for Q1
- On July 1, the system checks the RS missing for Q2
- On October 1, the system checks the RS missing for Q3
- On the other months, the process does not run at all

If none realized sales were entered, the system flags the checkbox "**Empty Realized Sales**" in the opportunity

When there is one realized sales entered, the system removes the flag "**Empty Realized Sales**" in the opportunity

if the realized sales from the previous quarter are missing, the system flags the checkbox "**Not Realized Sales**" in the opportunity

When the realized sales from the previous quarter is entered, the system removes the flag "**Not Realized Sales**" in the opportunity

Opportunity_DevPool_ORStillingReminder - jan - 1week	Opportunity_DevPool_ORStillingReminder	Annually, on day 11 (January)	01:00
Opportunity_DevPool_ORStillingReminder - jan - 2week	Opportunity_DevPool_ORStillingReminder	Annually, on day 18 (January)	01:00
Opportunity_DevPool_ORStillingReminder - jan - 3week	Opportunity_DevPool_ORStillingReminder	Annually, on day 25 (January)	01:00
Opportunity_DevPool_ORStillingReminder - April - 1week	Opportunity_DevPool_ORStillingReminder	Annually, on day 11 (April)	01:00
Opportunity_DevPool_ORStillingReminder - April - 2week	Opportunity_DevPool_ORStillingReminder	Annually, on day 18 (April)	01:00
Opportunity_DevPool_ORStillingReminder - April - 3week	Opportunity_DevPool_ORStillingReminder	Annually, on day 25 (April)	01:00
Opportunity_DevPool_ORStillingReminder - july - 1week	Opportunity_DevPool_ORStillingReminder	Annually, on day 11 (July)	01:00
Opportunity_DevPool_ORStillingReminder - july - 2week	Opportunity_DevPool_ORStillingReminder	Annually, on day 18 (July)	01:00
Opportunity_DevPool_ORStillingReminder - july - 2week	Opportunity_DevPool_ORStillingReminder	Annually, on day 25 (July)	01:00
Opportunity_DevPool_ORStillingReminder - October - 1week	Opportunity_DevPool_ORStillingReminder	Annually, on day 11 (October)	01:00
Opportunity_DevPool_ORStillingReminder - October - 2week	Opportunity_DevPool_ORStillingReminder	Annually, on day 18 (October)	01:00
Opportunity_DevPool_ORStillingReminder - October - 3week	Opportunity_DevPool_ORStillingReminder	Annually, on day 25 (October)	01:00

In iCARE, the email notification and email template for Realized Sales are:

- **Workflow rule:** [Dev Pool Won - Sales Alert](#)
- **Template Unique Name:** [Dev_Pool_Closed_Realized_Sales](#)
- **Email Alert:** [Dev Pool - Closed - Alert to fill Sales](#)

Reports on Realized Sales for CORE CRM:

1)

[Joined Report - Opportunities x Products x Schedules](#) using the following reports

Opportunities with Product Forecasts and Product

Opportunities with Products

2)

Report used by Novacare - [Realized Sales check for Sales Team 2024](#)

and

[6710 Report of Opportunities RS](#) only sent to Pamela Accardi with the missing realized sales

This report is sent quarterly in a specific date (Feb 1, May 1, August 1, November 1)

Since for Novocare is allowed one month after each quarter to populate realized sales, the report should be sent on the following dates:

Feb 1 (for Q4 + January to populate RS)

May 1 (for Q1 + April to populate RS)

August 1 (for Q2 + July to populate RS)

November 1 (for Q3 + October to populate RS)

The report check if the Realized Sales are filled for each quarter (not only previous quarter) after 'targeted first delivery date' and/or 'close date', whichever date is the latest.

3)

Report used by Technology Solutions - [Opps Realized Sales TS](#)

Reports on Realized Sales for iCARE:

Report used by SpP - [DevPool_Materials_Scheduled>=This Year](#)

Realized Sales Report types in iCARE:

- Accounts with Realized Sales & linked Product
- Realized Sales with Account and Product

Template to create Realized Sales in CORE CRM: [Opportunity Realized Sales - Mass Upload Template](#)