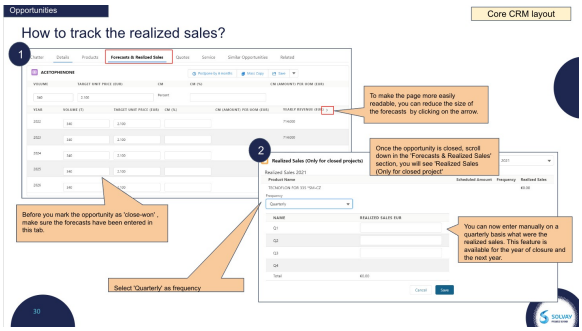
3. Realized Sales

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.

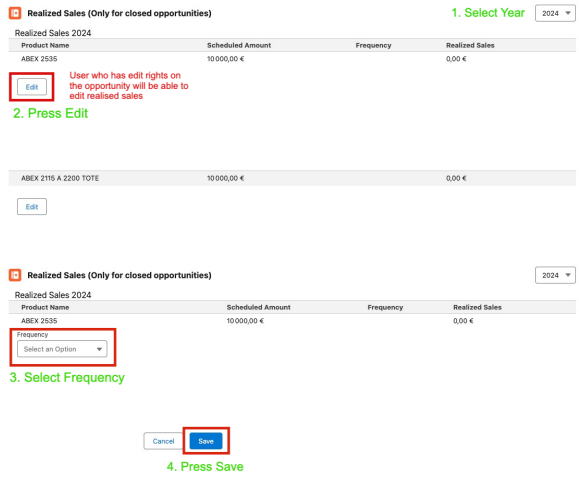
Additional Information
For more details on tracking Realized Sales, please refer to the link here.

Source: CRM (incl. cust 360, Opportunities)

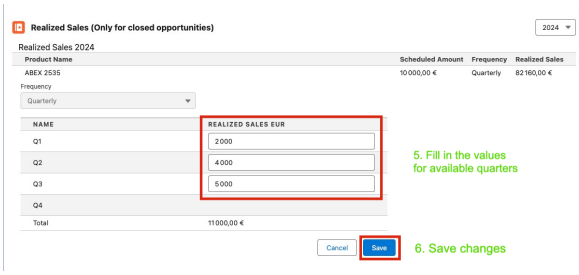
Functional Design:

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`

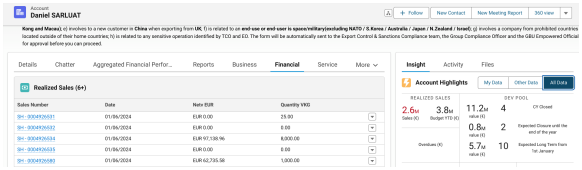
ortunity_Realized_Sales__c records. This cumulative total is then assigned to the Realized_Sales__c field on the Opportunity_Realized_Sales_Year__c record.

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:

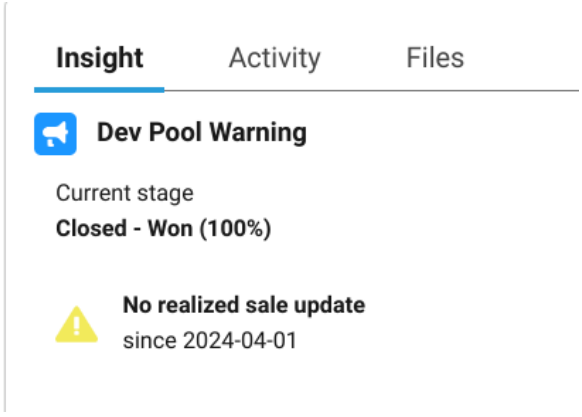
The component shows sales data based on the selected year. It defaults to showing the current year's data when loaded but allows users to switch years to compare past data.

- 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:

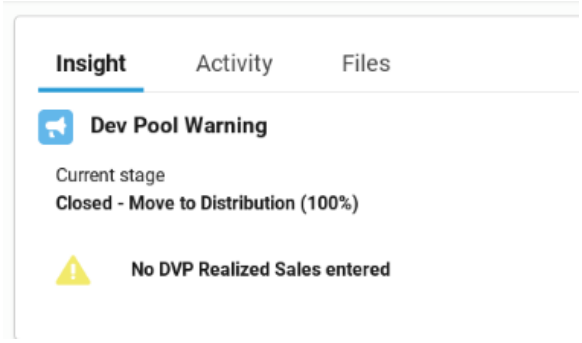
- The selection is based on the `opportunity ID` and `selected year`.

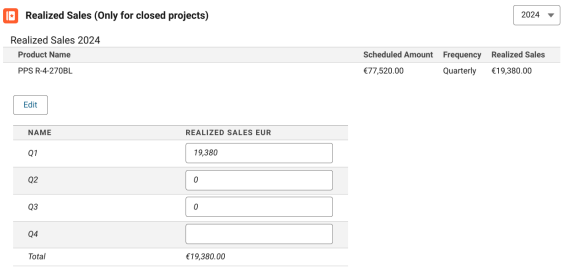


4. Realized Sales on Accounts (iCARe only)

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)





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	Realized sales does not exists for the **last quarter** (daily process checking the realized sales created on a daily basis) This field indicates if the realized sales for the previous quarter is created. If true, the realized sales exists. If false, the realized sales is missing. 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. This field is updated only once per day (not right after the realized sales are entered). read-only for all except admins	Once per day, there is the batch **Opportunity_DevPool_ORSEntered**[a] 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. 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.
No realized sale update	**Not realized sales** checkbox	no realized sales for the **last quarter or past quarters** (controller class of the component) 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. 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 exists. If false, the realized sales doesn't belong to the previous quarter. read-only for all except admins	At the beginning of each quarter, the batch **Opportunity_DevPool_ORSfillingReminder*** can populate this field No realized sale update equals to false if the opportunity was selected to send email notification. If the opportunity was not selected, the field should be updated to true. 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** and populate the field No realized sale update equals to isOK (isOk is a variable which starts with false). **Important:** run the logic only for opportunities with record type developer name = Development_Pool_Opportunity

***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

7. Realized Sales deadlines in iCARe

The deadlines to populate Realized Sales quarterly in iCARe are:

Q1 - RS must be entered by the end of April

Q2 - RS must be entered by the end of July

Q3 - RS must be entered by the end of October

Q4 - RS must be entered by the end of January

Realized Sales Notifications on CORE CRM and iCARe:

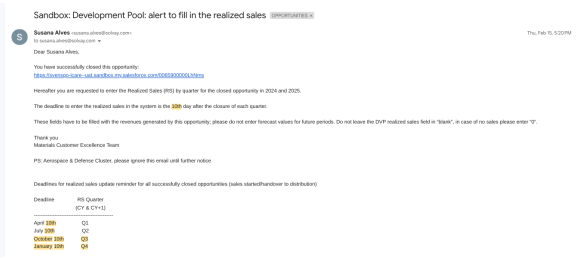
CORE CRM

For CORE CRM, the realized sales notifications are **disabled for all** the **GBUs**.

Realized Sales are not kept in CORE CRM. The GBUs are looking for sales information in Orderbook, Qliksense, etc.

Enter this information in CORE CRM is double-work and CSRs are not doing it.

However, for Novecare there is a scheduled report sent quarterly to Pamela Accardi (see below on Reports for Novecare).



Sandbox: Development Pool: alert to fill in the realized sales OPPORTUNITIES x

Susana Alves <susana.alves@scitoy.com> Thu, Feb 15, 5:20 PM
to susana.alves@scitoy.com

Dear Susana Alves,

You have successfully closed this opportunity:
https://aerospa-icare--uat.sandbox.my.salesforce.com/006I9000001LNHms

Hereafter you are requested to enter the Realized Sales (RS) by quarter for the closed opportunity in 2024 and 2025.

The deadline to enter the realized sales in the system is the 10th day after the closure of each quarter.

These fields have to be filled with the revenues generated by this opportunity; please do not enter forecast values for future periods. Do not leave the DVP realized sales field in "blank", in case of no sales please enter "0".

Thank you
Materials Customer Excellence Team

PS: Aerospace & Defense Cluster, please ignore this email until further notice

Deadlines for realized sales update reminder for all successfully closed opportunities (sales started/handover to distribution)

Deadline	RS Quarter (CY & CY+1)
April 10th	Q1
July 10th	Q2
October 10th	Q3
January 10th	Q4

iCARe CRM

In iCARe CRM, the system is calculating the opportunities that are missing the realized sales entered for the last quarter and notifying the opportunity owners. Document from reference CRM - Batch Jobs pp. 42-44. The realized sales expected to be entered are only the ones for the current year and current year + 1.

The system is only checking if the realized sales for the last quarter is missing. The system is not checking if there are realized sales missing also in the previous quarters.

Original requirements - DEVPOOL: add "No DVP Realized Sales entered" on the warning component

blocked URLSCME-1996: DEVPOOL: add "No DVP Realized Sales entered" on the warning componentClosed

blocked URLSCME-1159: DEVPOOL : Remind opportunity owner to populate DVP realized salesClosed

The notifications are sent in the first month of each quarter and they could be sent up to 3 notifications in that month (in the 1st week, 2nd week and 3rd week).

Technically we have the class below as a scheduled batch for the first month of each quarter, once per week during the first 3 weeks.

Apex Class - Opportunity_DevPool_ORSfillingReminder

Periodicity of the job execution - Quarterly

Scheduled Jobs

Name	Class	Frequency	Time (PT)

Opportunity_DevPool_ORSfilling Reminder - jan - 1week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 11 (January)	01:00
Opportunity_DevPool_ORSfilling Reminder - jan - 2week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 18 (January)	01:00
Opportunity_DevPool_ORSfilling Reminder - jan - 3week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 25 (January)	01:00
Opportunity_DevPool_ORSfilling Reminder - April - 1week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 11 (April)	01:00
Opportunity_DevPool_ORSfilling Reminder - April - 2week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 18 (April)	01:00
Opportunity_DevPool_ORSfilling Reminder - April - 3week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 25 (April)	01:00
Opportunity_DevPool_ORSfilling Reminder - july - 1week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 11 (July)	01:00
Opportunity_DevPool_ORSfilling Reminder - july - 2week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 18 (July)	01:00
Opportunity_DevPool_ORSfilling Reminder - july - 2week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 25 (July)	01:00
Opportunity_DevPool_ORSfilling Reminder - October - 1week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 11 (October)	01:00
Opportunity_DevPool_ORSfilling Reminder - October - 2week	Opportunity_DevPool_ ORSfillingReminder	Annually, on day 18 (October)	01:00
Opportunity_DevPool_ORSfilling Reminder - October - 3week	Opportunity_DevPool_ ORSfillingReminder	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 Novecare - 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 Novecare 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