SFDC Order Overview

Updated: 5/19/2017

Overview of Stage validation rules

	Fields Needed/Valitation Rules	Probability	Greater than $50K	Less than $50K	Comments
Creation	Opportunity Name Account Name Decision Date	10%	X	X	
At S1 you need	Deal Manager (Yes/No/Unknown)		X	X	Picklist
	Add Contact and Contact Role		X	X	
At S2 you need	Estimated Order Creation: Order Start Date Estimated Order Amount Forecast (Commit/Stretch/Too Early)	50%	X	X	All reports Q4 onwards will be adjusted to use these 3 data points to call the Order # for the quarter
	Product (Product Line, Family, Etc.) Quantity Sales Price		X		No more Schedules needed
	Project Management for Execution (Yes/No/Unknown)		X	X	Picklist
At S3 you need	Project Management Lane (Mega/Major/Unkown)	50%	X	X	Picklist
	Distributor (Yes/No/Unknown)		X	X	Picklist
At S4 you need	CATLOGIC OR SKU	50%	X		
	Agent (Yes/No/Unknown)		X	X	Picklist
At S5 you need	Estimated Order Amount must be $0 if moving to PO Received	90%	X	X	Validation rule in place
At PO Received	No closing requirments needed	100%			

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Everything in red are the NEW changes

Understanding Your Orders View

(A) (B)

This is a SF ID #. Ignore this #.

Estimated PO record types are created manually and Received PO record types are those from SAP

With Received PO SAP orders, this gets checked automatically when the Order is related to the Opportunity OR you can manually check the box on Estimated Order record types

Actual Order amount from SAP. Only populates if Order has been related to the Op. this feeds into total Order Amount & Order Received fields in detail section

This is the expected order amount that you have entered – This feeds into Total Orders & Estimated Orders to Go fields in detail section

Orders

New Order

Orders

Action	Salesforce Order Number	Order Record Type	PO Received	Order Start Date	GE Order NO	Order Amount	Estimated Order Amount	Forecast
Edit	Del	00178292	Estimated PO	☐	5/27/2016		USD 0.00	USD 680,406.50	Stretch
Edit	Del	00166932	Received PO	✓	6/24/2016	213621	USD 230,718.00		
Edit	Del	0014A834	Received PO	✓	7/18/2016	220486	USD 41,292.00		
Edit	Del	00156627	Received PO	✓	7/20/2016	221438	USD 7,528.00		
Edit	Del	00089622	Received PO	✓	7/29/2016	225166	USD 4,284.00		

Show 1 more » | Go to list (6) »

If the order is RECEIVED, then this is the actual order date. If the order is still ESTIMATED, then it's the date you put in. The Estimated Order Start Dates must be kept up-to date, as well (This date field also controls PO Receipt Date)

SAP Order #

This is what you enter as the Forecast Category

Commit – select if you are including this amount in your quarter call

Stretch – select this if this is a gap closer

Too Early to indicate
All Forecasts going forward will be pulled based on the selection above. These MUST be kept up-date

PO Receipt Date	10/25/2016
Total Order Amount	USD 750,000.00
Total Received PO	USD 0.00
Total Estimated Orders To Go	USD 750,000.00

→ Last Date from Order Start Date Column above
→ A + B
→ Sum of A
→ Sum of B

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How to enter an Order?

You can ENTER/CREATE Multiple Estimated Orders in a SINGLE Opportunity.

No need to close out the opportunity for what you have already received in PO's and open a new Opportunity for the balance amount! Benefit for you – fewer Opportunities to manage!

Order Edit   Save Cancel

Order Start Date [_____] [9/15/2016]   Order Record Type Estimated PO
Account Name General Motors 🔍   Opportunity GM Ft. Wayne T1 Truck Prog 🔍
Status Draft ▾   Estimated Order Amount [_____]
PO-Received ☐   Forecast --None-- ▾
                                   Order Currency USD - U.S. Dollar ▾

                        Save Cancel

Order Start Date: This is the date you expect the order **Estimated Order Amount**: This is the $ amount of the order you are expecting **Forecast**: You have to select Commit, Stretch, Too Early to Indicate

- **Commit**: *Select this if you have HIGH confidence/low risk factors in getting the order in the quarter.*
- **Stretch**: *Orders that have the best upside or gap closers. These orders are close to being a Commit but there is still some risk in getting the order in the quarter. Your confidence level on these orders is a MEDIUM. Stretch should be a shorter list of Opportunities*
- **Too Early to Indicate**: *These orders are early in selling cycle and/or risk factors preclude them from being a Stretch or Commit. As selling cycle progresses, these orders could become additional upside or be a backfill for Current quarter*

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Quarter Call = Commit

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What we need from you…

- Validate/Change/Update the Estimated Order Amount(s), Order Start Date(s), Forecast Category(ies). Focus on Q4
  - We loaded the Schedule Amount & Schedule Date from the Product Section into the Order section for you. We marked everything as STRETCH

- We added a chart to Enterprise and Account Manager dashboards to show what's reflecting today for Orders in Q4

- Clean up your Opportunities – mark them CLOSED LOST if needed.

Order Forecasts/QMI's will be pulled based on data in SFDC so the onus is on you to keep your Opportunities updated. Please!!

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