Brightstar Sales force 2.0: Technical Design Document

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# ***Project Overview and Objectives***

# ***Document Information***

## **Document History**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Version** | **Author** | **Description** |
| 04/02/2018 | 0.2 | HCL | Initial Draft |
| 04/20/2018 | 0.3 | HCL | Updated feedback from Brightstar |
|  |  |  |  |
|  |  |  |  |

## **Distribution List**

|  |  |  |
| --- | --- | --- |
| **Name** | **Company** | **Title/Role** |
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## **Overview**

This document will provide detailed insight into the Brightstar Salesforce 2.0 solution design. This document will provide an overview to the solution components relevant to the Salesforce.com platform, specifically the various Configuration, code, integration, and data customizations created to implement this solution.

## **Objectives and Area of Focus**

The document will provide readers with a functional and technical understanding of the key modules of the Salesforce 2.0 solution. These key modules and related components are as follows:

|  |  |
| --- | --- |
| **Module** | **Functionalities Delivered** |
| *Campaign management* | Campaigns creation and maintenance |
| Manage campaign members |
| *Lead management* | Lead creation |
| Lead enrichment |
| Lead qualification |
| Link Lead with existing account |
| Conversion |
| *Account management* | Account creation and maintenance |
| View hierarchy button |
| Account enrichment |
| Track ultimate Parent |
| Segmentation |
| Account Security |
| *Contact management* | Contact creation and maintenance |
| Prevent duplicate contact creation |
| Contact enrichment |
| Track key contact for an account |
| *Opportunity management* | Opportunity creation and maintenance |
| Ready for Qualification (Gate 1) |
| Ready for Proposal Signoff (Gate 2) |
| Ready for Final Business Signoff (Gate 3) |
| Business Case Financials |
| Change Record Type |
| *Account Plan* | Account Plan creation and maintenance |
| Add Products/Services to Account Plan for tracking |
| Account Plan Report |
| *Product management* | Product creation and maintenance |
| Opportunity Plan | Opportunity Plan creation and maintenance |
| Vulnerability Analysis |
| Opportunity Plan Report |
| *Project Management* | Project creation and maintenance |
|  | Different layout and process for internal and external projects |
| *Contract Management* | Contract creation and maintenance |
| *Approval Meeting Management* | Approval meeting creation and maintenance |
| Approval meeting for Opportunity and Project |
| *Activities* | Email communications |
| Frequently used buttons (Log a Call) |
| Notes and Attachments |
| *Outlook Management* |  |
| *Reports and Dashboards* | Salesforce reports |
| Dashboards |
| *Collaboration* | Chatter |
| Chatter Groups |
| Content Libraries |
| *Mobile* | Salesforce1 |
| *Lightning* |  |
| *Other* | AppExchange apps will be used for: |
|  |
| *General Setup* | Users |
| Security |
| Profiles |
| Roles |
| Queues |
| Public groups |

# ***Solution Design Overview***

## **Overview of Architecture**

It is a sales cloud based application. Primarily standard objects Campaign, Lead, Account and Opportunity are used. Some custom modules are also existing in the system to support the business processes of Brightstar. Key custom modules Account Plan, Opportunity Plan, BEC meetings and Contract.

The current architecture is to be upgraded to support the user adoption and address the pain points.

## **Integrations with Other Systems**

The current application is not integrated with any other system. Currently a contract management system is being setup based on Conga Novatus product. In future, this will be integrated with Salesforce to keep contract data of Salesforce in sync with contract data in “Conga Novatus”.

WalkMe is a Digital Adoption Platform (DAP) that works by overlaying information in "tip-balloons" in the browser window. There is plan to integrate WalkMe with Salesforce in future.

# ***Campaign and Campaign Member Management***

## **Overview**

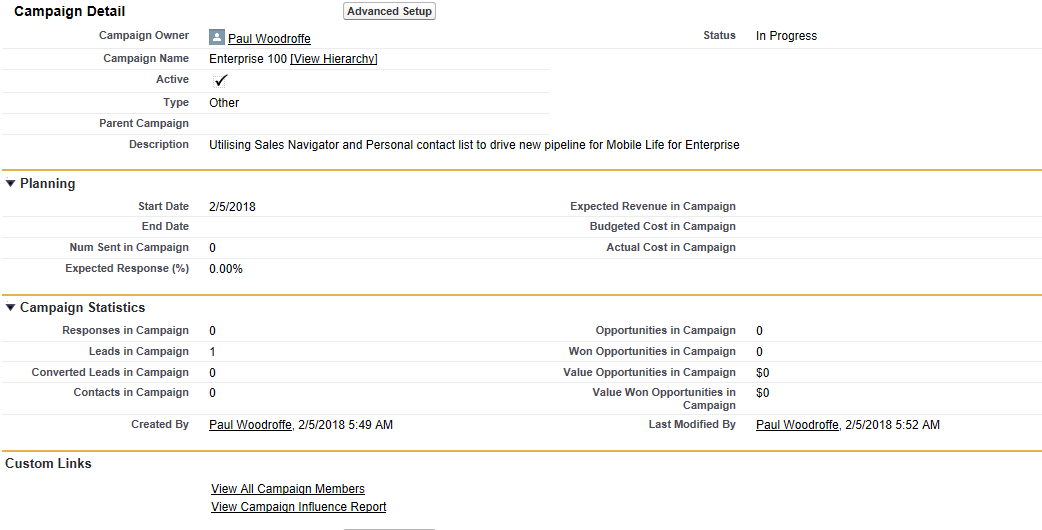
The campaign object is a standard salesforce object that is used to track the influence of marketing campaigns in many forms, as they relate to leads created, value in total opportunities, and ultimately the total value generated in Opportunities Won.

In Brightstar Campaigns are utilized to capture events. The Campaign Member object will track the individuals associated with a specific campaign. Currently Enterprise team is using campaign.

## **Object and Field definition**

No Change.

## **Page Layouts**



## **Configuration Functionalities**

No change required. Standard out of box features are used and already setup.

## **Customizations**

No change.

## **Other considerations**

None

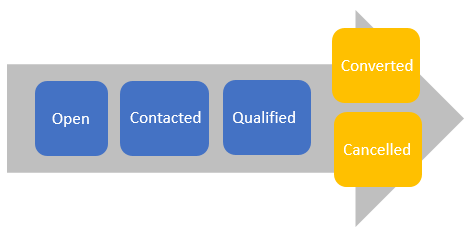
# ***Lead Management***

## **Overview**

Lead Management involves one process that is to create and track leads manually. Currently Enterprise team is using the Leads and in future other teams may also use it.

Lead can be created from Salesforce Browser and Salesforce One mobile. Leads can be created independently or related to an existing account. Lead convert process should prevent creation of duplicate account and contact.

Lead will have 5 Statuses: Open, Contacted, Qualified, Converted, Cancelled



|  |  |  |
| --- | --- | --- |
| **Lead Status** | **Information Required** | **Description** |
| Open | · Last Name  · Company  · Description  · Phone or Email | A Lead is open in the database and no activity has been logged |
| Contacted |  | Activities are being logged and/or interaction occurred but still trying to determine if the Lead is right buyer.  Status value to be changed manually. |
| Qualified |  | All information required to convert is available. |
| Cancelled |  | It is a cold lead. No need to focus on the lead. |
| Converted | Convert button is used to convert a Lead into Account, Contact and/or Opportunity | Leads are converted into new Opportunity as well as Account and Contact if necessary. |

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Existing\_Account\_\_c | Existing Account | Lookup (Account) |  |
| Status | Lead Status | Picklist | Add Option   * Cancelled   Remove Option   * Unqualified |
| Campaign | Event | Lookup (Campaign) |  |
| Active\_Account\_\_c | Active Account | Picklist | Rename as Opportunity Type |
| Main\_Category\_\_c | Main Category | Picklist | Add option   * Buy & Sell |
| Global\_Region\_\_C | Global Region | Picklist | Remove Option  Japan |
| Region\_\_C | Region | Picklist | Remove Option   * Venezuela * North Asia * USA * MEA * APAC * TMEA * LAN |
| Country\_\_C | Country | Picklist | Remove Option   * APAC * US&C * Venezuela * MIAMI USA * LATAM-Regional * North-Asia   Centro America |
| Campaign\_\_C | Event | Lookup (Campaign) |  |
| |  |  | | --- | --- | |  | AnnualRevenue | | Annual Revenue | |  |  | | --- | --- | |  | Currency (18, 0) | | Rename as Annual Revenue-OBSOLETE |
| Originator\_\_c | Originator | Lookup(User) | Rename as Originator-OBSOLETE |
| Originator\_Area\_\_c | Originator Area | Picklist | Rename as Originator Area-OBSOLETE |
| Key\_Stakeholders\_\_c | Key Stakeholders | Text Area (255) | Rename as Key Stakeholders-OBSOLETE |
| Rating | Rating | Picklist | Rename as Rating-OBSOLETE |

## **Page Layouts**

New Lead layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Lead Details | Lead Status | Required |
|  | Description | Required |
|  | Global Region | Value Auto-populated if existing account selected |
|  | Region | Value Auto-populated if existing account selected |
|  | Country | Value Auto-populated if existing account selected |
|  | Main Category |  |
|  | Account Name | Based on Company name, system should allow to select existing account |
|  | Last Name | Required |
|  | First Name |  |
|  | Title |  |
|  | Phone | Either Phone or Email required |
|  | Email |  |
|  | Website |  |
|  | Company | Required |
|  | Lead Source |  |
|  | Event |  |
|  | Channel Type |  |
|  | Opportunity Type |  |

“Ready to Convert” layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Lead Details | Lead Status | Required |
|  | Description | Required |
|  | Global Region | Required. Value Auto-populated if existing account selected |
|  | Region | Required. Value Auto-populated if existing account selected |
|  | Country | Required. Value Auto-populated if existing account selected |
|  | Main Category | Required |
|  | Existing Account | Based on Company name, system should allow to select existing account |
|  | Last Name | Required |
|  | First Name |  |
|  | Title |  |
|  | Phone | Either Phone or Email required |
|  | Email |  |
|  | Website |  |
|  | Company | Required |
|  | Lead Source |  |
|  | Event |  |
|  | Channel Type | Required |
|  | Opportunity Type | Required |

Remove following fields from existing layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Lead Details | Annual Revenue |  |
| Opportunity Information | Originator |  |
|  | Originator Area |  |
|  | Key Stakeholders |  |
| Additional Information | Rating |  |

Ready to Convert Layout would have the standard Convert button.

## **Configuration Functionalities**

### **Phone or Email required**

Phone or email is required on lead

#### **Components**

* Create new validation Rule on Lead
* Rule name: Lead\_Phone&Email\_Required\_Validation
* Condition: Lead->Phone =Null or Lead->Email =Null
* Message: “To create a lead you need to provide either a phone number or an email address”

### **Cannot change Region details**

If lead is created for an existing account then value of Global Region, Region and Country will be auto-populated. System should not allow to change values manually.

### **Components**

* Create new validation Rule on Lead
* Rule name: Lead\_ExisitngAccount\_Validation
* Condition: Lead->Exisitng Account! = Null and (Lead->Global Region =is changed or Lead->Region= is changed or Lead->Country = is changed )
* Message: “You can’t change Global Region, Region and Country field value if lead is for an existing account”

### **Main Category field validation**

If Main Category field value is “Distribution” then Populate “Opportunity type” and “Channel Type” on the lead record

#### **Components**

* Update Existing validation rule “MainCategory\_Fields\_Validation. Remove Originator, Originator area field from validation rule

### **Change status “Qualified” from “Qualify for Covert” button**

Status should not be change to “Qualified” from new lead layout

#### **Components**

* Create new validation Rule on Lead
* Rule name: Qualified\_Status\_Change
* Condition: Lead->RecordType =New Lead or Lead->Status =”Qualified”

Message: “Go To "Qualify For Convert" button to change status "Qualified"

### **Change organisation-wide default**

#### **Components**

* + Change OWD to Public read/Write.

### **Create Record Type**

* Create following record types
* New Lead
* Ready To Convert.

#### **Components**

* Create new Record Type

Record Type Name: New Lead

Associated Page Layout: New Lead

* Create new Record Type

Record Type Name: Ready To Convert

Associated Page Layout: Ready To Convert

### **Lead Conversion**

Upon lead conversion

* Set Opportunity->Probability = 20% and Opportunity->Close Date=today+60 on new opportunity
* Update Process Builder “Opportunity Updates”
* Set Opportunity->Record Type = Lead->Main Category
* Update Process Builder “Opportunity Updates”
* Lead Mapping:

|  |  |
| --- | --- |
| **Lead Field** | **Map To** |
| Company | |  |  | | --- | --- | |  | * Account: Account Name * Opportunity: Opportunity Name | |
| Global Region | Account: Global Region |
| Sub Region | Account: Sub Region |
| Country | Account: Country |
| Lead Owner | * Account: Owner * Contact: Owner * Opportunity: Owner |
| Title | Contact:Title |
| Email | Contact:Email |
| Description | Contact: Description |
| Phone | Contact:Phone  Account:Phone |
| Last Name | Contact:Name |
| Active Account | Opportunity:Active Account |
| Main Category | Opportunity: Record Type |
| Channel Type | Opportunity: Channel Type |
| Event | [Primary Campaign Source](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--devcrm2.cs20.my.salesforce.com%2F_ui%2Fcommon%2Fconfig%2Ffield%2FStandardFieldAttributes%2Fd%3Fid%3DCampaign%26type%3DOpportunity%26retURL%3D%2Fp%2Fsetup%2Flayout%2FLayoutFieldList%3Ftype%253DOpportunity%2526retURL%253D%25252Fui%25252Fsetup%25252FSetup%25253Fsetupid%25253DOpportunity%2526setupid%253DOpportunityFields%26setupid%3DOpportunityFields&data=02%7C01%7Csangeeta.r%40hcl.com%7C9631954939a94f4b0d6608d5b17fb741%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636610084447740524&sdata=S%2BQBKIMBFhwo9JYd3xA2poX%2B7jx9L%2FF2l1FaCiIGLN4%3D&reserved=0) |

## **Customizations**

### **Create lead for existing account through Salesforce Interface**

System should allow to create lead for existing account. When creating a lead, user will enter value in “Company Name” field. On save, system will search accounts with “account name” contains “Company Name”. Following will happen

* If more than one account found in search, user select one. System auto-populate Global Region, Region and Country from selected account and account will get linked to lead. Company Name will be updated with selected account name.
* If only one account is found then System auto-populate Global Region, Region and Country from account and account will get linked to lead.

#### **Components**

* Override standard New Button with below VisualForcePage
* Create a new VisualForce page “LeadCreateEditPage” to manage lead creation and edit. The fields on this layout will be based on lead record type.
* An extension “LeadCreateEditControllerExt” to manage the following
  + Option to select existing account
  + auto-populate Global Region, Region and Country from selected account
  + link selected account to lead
  + Update Lead->RecordType = New Lead

Fields on the VF page – For “New Lead” Record type

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Lead Details | Lead Status | Required |
|  | Description | Required |
|  | Global Region | Value Auto-populated if existing account selected |
|  | Region | Value Auto-populated if existing account selected |
|  | Country | Value Auto-populated if existing account selected |
|  | Main Category |  |
|  | Account Name | Based on Company name, system should allow to select existing account |
|  | Last Name | Required |
|  | First Name |  |
|  | Title |  |
|  | Phone | Either Phone or Email required |
|  | Email |  |
|  | Website |  |
|  | Company | Required |
|  | Lead Source |  |
|  | Event |  |

### **Create lead through import**

During lead import, if one account is found with the “Company Name” exact match then lead should be linked to that account.

#### **Components**

* Create Lead Trigger - LeadTrigger on (Before insert, Before update) call below method from handler class.
* LeadTriggerHandler->populateExistingAccount
* Create a handler Class LeadTriggerHandler with a method- “populateExistingAccount” which does the following,
* Check Existing Account, if Existing Account = null then do the following
  + If Lead->Company Name matches Name of existing Account

Set Lead->Existing Account = matched Account

* + If existing account is not null then Set the followings

Lead->Global Region = Existing Account 🡪 Global Region

Lead->Region = Existing Account 🡪 Region

Lead->Country = Existing Account 🡪 Country

### **Populate Event on Lead**

On lead create/update populate Event(campaign).

#### **Components**

Create Lead Trigger - LeadTrigger on (After insert, After update) call below method from handler class.

* LeadTriggerHandler->populateEvent
* Create a handler Class LeadTriggerHandler with a method- “populateEvent” which does the following,
* If Lead->Event is!= null then link selected event(campaign) to Lead by creating a CampaignMember record as below,
* CampaignMember->LeadId = LeadId
* CampaignMember->CampaignId = Event(CampaignId)
* CampaignMember->Status = "Sent"

### **Qualify for Convert**

“Qualify for Convert” is new process. This is to ensure that user should provide all necessary information before converting a lead.

On lead detail page, a button “Qualify for Convert” will be available. On click of the button, a page will open. This page will have all fields which are required to move to convert.

After providing all information, user click on save. After save, detail page will open. The detail page will have “Convert” button.

#### **Components**

* Create Custom Button – “Qualify for Convert” which opens below VisualForce page. Place this button on New Lead Layout.
* Create new VisualForce page “QualifyForConvertPage”
* An extension “QualifyForConvertControllerExt” to manage the following
  + If Company Name is changed
    - Option to select existing account
    - auto-populate Global Region, Region and Country from selected account
    - link selected account to lead
  + Modify “Record Type” to “Ready to Convert”

Fields on VF page

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Lead Details | Lead Status | Required |
|  | Description | Required |
|  | Global Region | Required. Value Auto-populated if existing account selected |
|  | Region | Required. Value Auto-populated if existing account selected |
|  | Country | Required. Value Auto-populated if existing account selected |
|  | Main Category | Required |
|  | Existing Account | Based on Company name, system should allow to select existing account |
|  | Last Name | Required |
|  | First Name |  |
|  | Title |  |
|  | Phone | Either Phone or Email required |
|  | Email |  |
|  | Website |  |
|  | Company | Required |
|  | Lead Source |  |
|  | Event |  |

This VF page will be opened

* On click of “Qualify for Convert” button
* On click of edit button of lead with record type = “Ready to Convert”

### **Edit button override for “New” & “Qualify For Convert” page**

Open Edit layout for “New” and “Qualify For Convert”

#### **Components**

* Override “Edit” button with below visualforce page
* Create new VisualForce page “LeadEditPage”
* An extension “LeadCreateEditControllerExt” to manage the following
  + If Record Type is “New Lead”
    - Redirect to “New Lead” visualforce page
  + If Record Type is “Ready to Convert”
    - Redirect to “Qualify For Convert” visualforce page

### **Email Notification Custom Setting**

A custom setting - “Email Notification Settings” of type “List” would be created to make few parameters of notification configurable.

#### **Components**

* Custom setting fields

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Name | Name | Text | Standard field, identifies each entry as Unique |
| Object | Object | Text (80) |  |
| Is\_Active | Is\_Active | Checkbox | Notification turn on/off |
| Notify\_Manager | Notify Manager | Checkbox | Notify Manager turn on/off |
| Notifiaction\_Recurrence | Notifiaction Recurrence (In Days) | Number | Notifiaction Recurrence (In Days) |
| Initial Notification Days | Initial Notification Days | Number | No of days for initial notification |
| Description | Text (255) |  | Description about notification |
| ProspectingStage(Days) | ProspectingStage(Days) | Number | To configure Initial notification days for Prospecting Stage |
| ProposalStage(Days) | ProposalStage(Days) | Number | To configure Initial notification days for Proposal Stage |
| NegotiationStage(Days) | NegotiationStage(Days) | Number | To configure Initial notification days for Negotiation Stage |

* Custom setting entries for Lead notifications.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name | Object | Is Active | Notify Manager | Notification Recurrence (In Days) | Description | Initial Notification Days | ProspectingStage(Days) | ProposalStage(Days) | NegosiationStage(Days) |
| Notify\_For\_Aging\_Leads | Lead | True | True | 7 | Notification for Aging Leads | 30 |  |  |  |

* These entries will be referred in the code for the below mentioned notifications

### **Notification for Aging Leads**

If status of an active lead (Not “Cancelled” or “Converted”) is not changed from last 30 days then a notification will be sent to lead owner. And this notification repeats every week.

#### **Components**

* From Batch Job “SendNotificationsBatch”, Call method 🡪 notificationsForAgingLeads. Method will do the following
  + If Custom Setting 🡪 Notifications for Aging Leads = True Then
    - Get all leads with “Next Notification Date for Aging <= Today and Status <>“Cancelled” or “Converted”
    - For each lead
      * Send notification to Lead Owner based on email template “Lead:Notification For Aging Lead”
      * Send Notification to Lead Owner’s Manager if Custom setting->Send Notification to Manager for Aging Lead =true
    - Update “Next Notification Date for Aging” = Today + Custom Setting 🡪 Days for Next Notification for Aging Leads
* Create Lead Trigger Handler class “LeadTriggerHandler” method “settingNotificationsForAgingLeads”, the method will perform below actions on trigger’s before insert and before update events.
  + For new lead, Next Notification Date for Aging = Today + Custom Setting-> Initial Notification Days
  + For existing lead, if Status changes then Next Notification Date for Aging = Today + custom setting-> Initial Notification Days
* Email Template Name: Lead:Notification For Aging Lead
* Email Body:

EMAIL TEXT:

To:

[Lead Owner]

Subject:

Lead: [Lead Name] is aging

Body:

Dear [Lead Owner]

Status of your lead [Lead name] has not changed from last [Days from last status change] days. Please take necessary steps.

If you need any assistance, please contact your Regional Deal Desk.

CRM system administration

## **Data management**

* Update status picklist value "Cancelled" to "Qualified" on Lead to update the status value on existing lead records.
* For all open leads (Status = Open, Contacted), if Company = Exact match with existing account then
  + Update Existing Account
  + If Lead->company= Existing Account then
* Lead->Global Region = Existing Account-> Global Region
* Lead->Region= Existing Account->region
* Lead->Country = Existing Account->Country
* Update “Next\_Notification\_Date\_for\_Aging\_\_c” field on Lead for “Notification for Aging Lead” functionality

Update record type on lead record

## **Other considerations**

* All Leads are created manually or imported.
* During lead import, if one account is found with the “Company Name” exact match then lead should be linked to that account.
* Leads are created with default Lead Status = Open
* No queue will be setup. Also, there will not be any assignment rule.
* Configuration components such as existing validation rules should be reviewed and modified as per new changes proposed.
* Convert lead process should create Opportunity with Probability = 20%.
* Review and modify the dependency of Global Region, Region and Country as per appendix A
* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Account Management***

## **Overview**

The current account management module manages 1 level of relationship between Parent and child account but the system should allow to maintain up to 5 level of Parent and child account relationship. Any change in account hierarchy of an account should reflect on the opportunities linked to that account.

There will be no change in current Account Security model. The current Account sharing settings will work as it is.

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Ultimate\_Parent\_\_c | Ultimate Parent | Lookup (Account) | contain the top most account in hierarchy |
| VoC\_last\_date\_\_c | VoC last date | Date |  |
| Segmentation\_\_c | Segmentation | Picklist | Options-   * Pursuit * Develop * Manage * Optimise * Inactive |
| Key\_Global\_Account\_\_c | Key Global Account | Checkbox | * Rename this field to T25 * Security: * Visible to all roles * Editable only by CRM Admin |
| Is\_a\_parent\_account\_\_c | Is a parent account? | Picklist | Rename as Is a parent account?-OBSOLETE |
| Primary\_Contact\_\_c | Primary Contact | Lookup (Contact) | Rename as Primary Ccontact-OBSOLETE |
| Phone\_Primary\_Contact\_\_c | Phone (Primary Contact) | Formula (Text) | Rename as Phone (Primary Contact)-OBSOLETE |
| Target\_Account\_\_c | Target Account | Checkbox | Target Account-OBSOLETE |
| Partner Account | |  |  | | --- | --- | |  | Partner\_Account\_\_c | | Lookup(Account) |  |
| Global\_Region\_\_C | Global Region | Picklist | Remove Option  Japan |
| Region\_\_C | Sub Region | Picklist | Remove Option   * Venezuela * North Asia * USA * MEA * APAC * TMEA * LAN * MIAMI USA * CANADA * South East Asia * West Asia |
| Country\_\_C | Country | Picklist | Remove Option   * UK * Venezuela * MIAMI USA * LATAM-Regional * North-Asia * Centro America * USA |

## **Page Layouts**

Account Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Account Detail | Ultimate Parent | Read Only |
|  | Is a parent account? | Remove |
|  | Primary Contact | Remove |
|  | Phone (Primary Contact) | Remove |
|  | Target Account | Remove |
|  | Partner Account |  |
|  |  |  |
| Customer Segmentation | Segmentation |  |
|  | VoC last date |  |
|  | T 25 |  |

## **Configuration Functionalities**

### **Duplicate rules**

To stop duplicate account record creation on Account object, create duplicate rule where Account Name as criteria with exact match.

#### **Components**

* Create Account Duplicate Rule
* Rule Name: Account Duplicate Rule
* Criteria: Account Name exact match

## **Customizations**

### **Ultimate Parent Process**

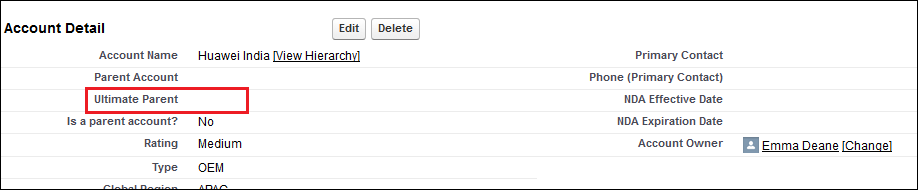
Process to identify top most account in account hierarchy based on Parent Account selected.

If any change occurs in Account hierarchy then it will update the parent and ultimate parent on all the related opportunities.

#### **Components**

* Create “"PopulateUltimateParent" method in “blogic\_Account” class, which does the following:
  + Set Account-> Ultimate Parent = Parent Account’s Top most Account (5th Level) in the account hierarchy.
  + Set Account (Child Level) -> Ultimate Parent = Parent Account’s Top most Account (5th Level) in the account hierarchy.
* Update “"Update Parent Account Field on Opportunity" process builder on Account which does the following:
  + Opportunity->Ultimate Parent = Opportunity->Account->Ultimate Parent

Opportunity->Parent Account = Opportunity->Account->Parent Account



## **Data management**

* Update ultimate Parent account for all accounts. Also update “Ultimate Parent account” for all opportunities.
* Create a new Batch Apex Class - “UltimateParentAccountUpdateBatch” which performs the following for existing Accounts,
* Set Account-> Ultimate Parent = Parent Account’s Top most Account in the account hierarchy.
* Opportunity->Ultimate Parent = Opportunity->Account->Ultimate Parent

Opportunity->Parent Account = Opportunity->Account->Parent Account

* Update Global Region, Region and country values on Account

## **Other considerations**

* Review and modify the dependency of Global Region, Region and Country as per appendix A
* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Contact Management***

## **Overview**

Contacts are the individual people that a Brightstar employee engages or interfaces with at the customer/prospect level.

System should provide ability to track the primary contact for an account. Also, system should prevent creation of duplicate contacts.

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Primary\_Contact\_\_c | Primary Contact | checkbox | Default - False |

## **Page Layouts**

Contact Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Contact Detail | Primary Contact |  |
|  | Make Primary Contact | Java script Button to show popup |
|  | Make Primary Contact | Lightening component to show popup |

## **Configuration Functionalities**

### **Duplicate rule**

Contact are uniquely identified by (First Name and Last Name and email id) OR (First Name and Last Name and Phone) System should prevent duplicate contacts.

#### **Components**

* Create Contact duplicate rule
* Rule Name: Contact Duplicate Rule
* Criteria:(First Name and Last Name and email id) OR (First Name and Last Name and Phone) exact match

## **Customizations**

### **Primary Contact**

System should allow to track primary contact for an account. There will be only one primary contact for an account.

#### **Components**

* Create a Contact Trigger “ContactTrigger” on (before insert, before update) call below handler class method,
* ContactTriggerHandler-> populatePrimaryContact
* Create a trigger handler class- ContactTriggerHandler with a method- “populatePrimaryContact” which does the following
* Check the count of Contacts for current contact’s related Account,
* If record count =1 then contact->Primary Contact =true
* Create custom java script button “Make Primary Contact” for Salesforce Classic and a quick Action(Lightening Component) “Make Primary Contact” for Salesforce Lightening -To make a Contact as Primary Contact. (If in case contact record count is more than 1)
* Show popup on click of button
* Two options in popup. Yes and no
* Click on Yes -> Contact->Primary Contact =true
* Click on No -> Contact -> Primary Contact =false and popup closed.

## **Data management**

* Update existing contact as follows
  + If there is only one contact then set it as primary contact by default.
* Run Summary or Matrix report and export contact data.
* update the data in csv file
* import file and update records
  + If more than one contact for an account then do not set primary contact field

## **Other considerations**

* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Opportunity Management***

## **Overview**

Opportunity is the key module used in Brightstar. Brightstar has 3 sales processes – Service, New MSA and Buy&Sell.

Processes for Service and New MSA opportunities are same. They go through the stages – Prospecting, Proposal, Negotiation and Won. Lost or Cancel stage can be set any time. To move through the stages, approvals required and this is called gating.

* Gate 1 (Prospecting to Proposal)
* Gate 2 (Proposal to Negotiation)
* Gate3 (Negotiation to Won)

The level of approval and approvers are decided based on the hurdle rate. The three approval levels of Opportunities are (Smallest to Largest):

* Regional
* Corporate
* CEO

Buy & Sell (PO) is the leaner version of opportunity and has following stage - Prospecting, Negotiation and Won. There will be not be any Gating process (Approval). Purpose is to capture the opportunity with minimum relevant fields and move through the stages quickly. A Buy and sell opportunity does not need to advance sequentially.

For Gate approvals, there are required fields to be updated. And this will be done from buttons available on Opportunity layout.



Below is the hurdle rate defined. Values in the hurdle rate decides the approval level. These values should be configurable so that it can be changed by CRM Admin.



## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Open\_Status | Open Status | Picklist | Options   * Suspect * In Pursuit * On Hold * Awarded |
| Budget\_Year\_\_c | Budget Year | Picklist | Rename as “In 5YP Year” |
| Budget | Budget | Picklist | * Rename as “In 5YP” * Default - No |
| Type | Type | Picklist | Rename as Type-OBSOLETE |
| Open\_Status \_Change\_Date | Open Status Change Date | Formula | If “Awarded” then Set “Open Status Date”= “Awarded Date” and If “On Hold” then Set “Open Status Date”= “Today” |
| Days\_OnHold | Days OnHold | Formula (Number) | If “On Hold” then Today - Open Status Change Date else 0 |
| RFX\_\_c | RFX | Picklist | Options   * Yes * No   Default – No |
| Active\_\_c | Active Account |  | Rename to “Opportunity Type” |
| Service\_Line\_New | LoB Summary | Text (100) | Label Change from Service Line to LoB Summary |
| Service\_Line\_\_c | Service Line | Picklist | Rename Service Line-OBSOLETE |
| BEC\_Approval\_Date\_\_c | BEC Approval Date | Date |  |
| Ultimate\_Parent\_\_c | Ultimate Parent | Lookup (Account) |  |
| Prospect\_Date\_\_c | Prospect Date | Date | If Stage = “Prospecting” And Ischange(Stage) then Today  This formula also considers that Open Status! = Suspect  This will be calculated from workflow, Rule Name: - Opportunity Prospect Date |
| Sales\_Cycle\_Time\_\_c | Sales Cycle Time | Formula (Number) | Existing Field.  Change to  Date\_of\_Won\_Lost\_\_c – Prospect Date |
| Closing\_Time\_\_c | Closing Time | Formula (Number) | Date\_of\_Won\_Lost\_\_c – Awarded Date |
| Negotiation\_Award\_Time\_\_c | Negotiation Award Time | Formula (Number) | Awarded Date - Gate 2 approval date |
| Proposal\_Time\_\_c | Proposal Time | Formula (Number) | If Opportunity record type is Service Then Gate 3 approval date - Gate 2 Approval date  Else if Distribution  Gate 3 Approval Date – Gate 1 Approval Date |
| Prospecting\_Time\_\_c | Prospecting Time | Formula (Number) | Gate 1 Approval Date -Prospect Date |
| Close Reason | Close Reason | Picklist | Add new options   * Cancelled by Customer * Duplicate/Raised in Error * Lost – Reason Not Given   Make Close reason field choices dependant to Opportunity Stage field  - Cancelled Opportunity   * Cancelled by Brightstar * Cancelled by Customer * Duplicate/Raised in Error   - Lost Opportunity   * Concluded Lost – Capacity * Concluded Lost – Pricing * Concluded Lost – Capability * Concluded Lost – Reason Not Given |
| Close\_Comments\_\_c | Close Comments | LongTextArea(500) |  |
| Gate\_2\_Approval\_Date\_\_c | Gate 2 Approval Date | Date | Rename “Solution Design Approval Date” |
| Gate\_2\_Approvers\_\_c | Gate 2 Approvers | Long Text Area (2000) | Rename “Solution Design Approvers” |
| Gate\_2\_Comments\_\_c | Gate 2 Comments | Long Text Area (2000) | Rename “Solution Design Comments-OBSOLETE” |
| Gate\_3\_Comments\_\_c | Gate 3 Comments | Long Text Area (2000) | Rename “Gate 2 Comments” |
| Gate\_3\_Approval\_Date\_\_c | Gate 3 Approval Date | Date | Rename “Gate 2 Approval Date” |
| Gate\_3\_Approvers\_\_c | Gate 3 Approvers | Long Text Area (2000) | Rename “Gate 2 Approvers” |
| Gate\_3\_Approval\_Process\_Approved\_\_c | Gate 3 Approval Process Approved | Checkbox | Rename “Gate 2 Approval Process Approved” |
| Gate\_3\_Required\_\_c | Gate 3 Required | Checkbox | Rename “Gate 2 Required” |
| Gate\_4\_Comments\_\_c | Gate 4 Comments | Long Text Area (2000) | Rename “Gate 3 Comments” |
| Gate\_4\_Approval\_Date\_\_c | Gate 4 Approval Date | Date | Rename “Gate 3 Approval Date” |
| Gate\_4\_Approvers\_\_c | Gate 4 Approvers | Long Text Area (2000) | Rename “Gate 3 Approvers” |
| Gate\_4\_Approval\_Process\_Approved\_\_c | Gate 4 Approval Process Approved | Checkbox | Rename “Gate 3 Approval Process Approved” |
| Gate\_4\_Required\_\_c | Gate 4 Required | Checkbox | Rename “Gate 3 Required” |
| Channel\_Type\_\_c | Channel Type | Picklist | Add Option   * OEM |
| Strategic\_Fit\_\_c | Strategic Fit | Long Text Area (500) |  |
| Product\_Fit\_\_c | Product Fit | Long Text Area (500) |  |
| Platform\_Alignment\_\_c | Platform Alignment | Long Text Area (500) |  |
| Profit\_Potential\_\_c | Profit Potential | Long Text Area (500) |  |
| Risk\_Evaluation\_\_c | Risk Evaluation | Long Text Area (500) |  |
| Financial\_Evaluation\_\_c | Financial Evaluation | Long Text Area (500) |  |
| Do\_we\_want\_it\_\_c | Do we want it | Long Text Area (500) |  |
| Can\_we\_win\_it\_\_c | Can we win it | Long Text Area (500) |  |
| Can\_we\_deliver\_\_c | Can we deliver | Long Text Area (500) |  |
| Complexity | Complexity | Long Text Area (500) |  |
| Risk | Risk | Long Text Area (500) |  |
| Compelling\_Event\_\_c | Compelling Event | Long Text Area (500) |  |
| Key\_Decision\_ Makers\_\_c | Key Decision Maker/s | Long Text Area (500) |  |
| Buying\_Group\_Stakeholders\_\_c | Buying Group / Stakeholders | Long Text Area (500) |  |
| Formal\_Informal\_Buying\_Criteria\_\_c | Formal & Informal Buying Criteria | Long Text Area (500) |  |
| Identify\_Threats\_\_c | Identify Threats | Long Text Area (500) |  |
| Competitive\_Landscape\_\_c | Competitive Landscape | Long Text Area (500) |  |
| How\_will\_we\_win\_\_c | How will we win | Long Text Area (500) |  |
| Resources\_Required\_\_c | Resources Required | Long Text Area (500) |  |
| Approvals | Approvals | Long Text Area (500) |  |
| Gaps | Gaps | Long Text Area (500) |  |
| Total\_Gross\_Profit\_USD | Total Gross Profit (USD) | Roll-Up Summary (SUM Opportunity Product) | Rollup Summary (Opportunity Product 🡪 [Gross\_Profit\_USD](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields)\_New) |
| Annual\_Gross\_Profit\_USD | Annual Gross Profit (USD) | Formula | Change formula to --  If Contract Length > 12 then  (Total\_Gross\_Profit\_USD Contract Length) \*12  Else Total\_Gross\_Profit\_USD |
| Annual\_Gross\_Profit\_USD\_percent | Annual Gross Profit % (USD) | Formula | Change formula to --  Annual Gross Profit (USD) / Annual Revenue (USD) |
| Total\_Net\_Revenue\_USD | Total Net Revenue (USD) | Roll-Up Summary (SUM Opportunity Product) | Rollup Summary (Opportunity Product 🡪 [Net\_Revenue\_USD](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields)\_New) |
| Annual\_Revenue\_USD | Annual Revenue (USD) | Formula | Change formula to --  If Contract Length > 12 then  (Total\_Net\_Revenue\_USD / Contract Length) \*12  Else Total\_Net\_Revenue\_USD |
| Total\_EBITDA\_USD | Total EBITDA (USD) | Roll-Up Summary (SUM Opportunity Product) | Rollup Summary (Opportunity Product 🡪 [EBITDA\_USD](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields)\_New) |
| Annual\_EBITDA\_USD | Annual EBITDA (USD) | Formula | Change formula to --  If Contract Length > 12 then  (Total\_EBITDA\_USD/Contract Length) \*12  Else Total\_EBITDA\_USD |
| Annual\_EBITDA\_USD\_PERCENT | Annual EBITDA % (USD) | Formula | Change formula to --  Annual EBITDA (USD)/ Annual Revenue (USD) |
| Total\_Gross\_Revenue\_USD | Total Gross Revenue USD | Currency (16,0) |  |
| Age | AGE | Formula | Replace “Close Date” with “Date\_of\_Won\_Lost” |
| Total\_EBIT\_USD | Total EBIT (USD) | Currency (16,0) |  |
| Total\_Net\_Income\_USD | Total Net Income USD | Currency (16,0) |  |
| CCC\_Total\_USD | CCC Total | Number (16, 0) | Rename "Average CCC (days)" |
| Total\_Investment\_USD\_New | Total Capital Employed (USD) | Formula(Currency) | Net Working Capital (USD)+CAPEX Total (USD) |
| Total\_Investment\_USD | Total Capital Employed (USD) | Currency (16, 0) | Rename “Total Capital Employed (USD)-OBSOLETE” |
| Leverage\_Ratio\_TCE\_EBITDA\_New | Leverage Ratio (TCE / EBITDA) | Formula(Currency) | Total Capital Employed(USD)/ Total EBITDA (USD) |
| Leverage\_Ratio\_TCE\_EBITDA\_\_c | Leverage Ratio (TCE / EBITDA) | Number (16, 1) | Rename “Leverage Ratio (TCE / EBITDA)- OBSOLETE” |
| EBIT\_USD\_percent\_New | EBIT % | Formula(Percent) | Total EBIT (USD) /Total Gross Revenue USD |
| EBIT\_USD\_percent | EBIT % | Percent | Rename “EBIT %- OBSOLETE” |
| EBITDA\_USD\_percent\_New | EBITDA % | Formula(Percent) | Total EBITDA (USD) /Total Gross Revenue USD |
| EBITDA\_USD\_percent | EBITDA % | Percent | Rename “EBITDA %- OBSOLETE” |
| Gross\_Profit\_USD\_percent\_New | Gross Profit % | Formula(Percent) | Total Gross Profit (USD) /Total Gross Revenue USD |
| Gross\_Profit\_USD\_percent | Gross Profit % | Percent | Rename “Gross Profit %- OBSOLETE” |
| Net\_Income\_USD\_percent\_New | Net Income % | Formula(Percent) | Total Net Income USD /Total Gross Revenue USD |
| Net\_Income\_USD\_percent | Net Income % | Percent | Rename “Net Income %- OBSOLETE” |
| ROIC\_Overall Opportunity | ROIC Overall Opportunity | Percent (16, 1) |  |
| Direct\_Cost\_of\_Sales\_Staffing | Direct Cost of Sales (Staffing) # | Number (18, 0) | Rename as Direct Cost of Sales (Staffing) #-OBS |
| Direct\_Cost\_of\_Sales\_Staffing\_USD | Direct Cost of Sales (Staffing) (USD) | Currency (16, 0) | Rename as Direct Cost of Sales (Staffing) (USD)-OBS |
| Direct\_SGA | Direct SGA # | Number (18, 0) | Rename as Direct SGA #-OBSOLETE |
| Direct\_SGA\_USD | Direct SGA (USD) | Currency (16, 0) | Rename as Direct SGA (USD)-OBSOLETE |
| Indirect\_SGA | Indirect SGA # | Number (18, 0) | Rename as Indirect SGA #-OBSOLETE |
| Indirect\_SGA\_USD | Indirect SGA (USD) | Currency (16, 0) | Rename as Indirect SGA (USD)-OBSOLETE |
| Suspect | Suspect | Formula (Text) | Rename as Suspect -OBSOLETE |
| On\_Hold | On Hold | Picklist | Rename as On Hold -OBSOLETE |
| Awarded | Awarded | Picklist | Rename as Awarded-OBSOLETE |
| Target\_Close\_Date | Target Close Date | Date | Rename as Target Close Date -OBSOLETE |
| Ready\_for\_Solution | Ready for Solution Sign Off | Checkbox | Rename as Ready for Solution Sign Off -OBSOLETE |
| Estimated\_Annual\_Revenue | Estimated Annual Revenue (USD) | Currency (18, 0) | Rename as Estimated Annual Revenue (USD)-OBSOLETE |
| Estimated\_Annual\_Gross\_Profit | Estimated Annual Gross Profit (USD) | Currency (18, 0) | Rename as Estimated Annual Gross Profit (USD)-OBS |
| Estimated\_Annual\_EBITDA | Estimated Annual EBITDA (USD) | Currency (18, 0) | Rename as Estimated Annual EBITDA (USD)-OBSOLETE |
| Estimated\_Annual\_Gross\_Profit\_percent | Estimated Annual Gross Profit % | Percent (16, 1) | Rename as Estimated Annual Gross Profit %-OBSOLETE |
| Estimated\_Annual\_EBITDA\_percent | Estimated Annual EBITDA % | Percent (16, 1) | Rename as Estimated Annual EBITDA %-OBSOLETE |
| |  |  | | --- | --- | |  | Forecast\_Revision | | Forecast Revision | Picklist | Rename as Forecast Revision-OBSOLETE |
| Forecast\_Year | Forecast Year | Picklist | Rename as Forecast Year-OBSOLETE |
| Latest Status Date | Latest\_Status\_ Date\_\_c | Date |  |
| Priority Score | Priority\_Score\_formula | Lookup(Account) | Priority Score-OBSOLETE |
| Proposal Service Coverage | Proposal\_Service\_Coverage\_\_c | |  |  | | --- | --- | |  | Picklist | | Proposal Service Coverage-OBSOLETE |
| Region\_Account | Region (Account) | Formula (Text) | Rename “Sub Region” |
| Complexity / Risk | Complexity\_Risk\_\_c | |  |  | | --- | --- | |  | Picklist | | Rename as Complexity / Risk-OBSOLETE |
| Contractual / Mandatory | Contractual\_Mandatory\_\_c | |  |  | | --- | --- | |  | Picklist | | Rename as Contractual / Mandatory-OBSOLETE |
| Profitability(Operating Income - Annual) | Profitability\_Operating\_Income\_Annual\_\_c | Formula (Number) | Rename as Profitability(OperatingIncomeAnnual)-OBS |
| Profitability Product (ROIC% - Annual) | Profitability\_Product\_ROIC\_Annual\_\_c | Formula (Number) | Rename as Profitability Product(ROIC%-Annual)-OBS |
| Profitability Services (ROIC% - Annual) | Profitability\_Services\_ROIC\_Annual\_\_c | Formula (Number) | Rename as Profitability Services(ROIC%-Annual)-OBS |
| Strategic Alignment (Regional Priority) | Strategic\_Alignment\_Regional\_Priority\_\_c | |  |  | | --- | --- | |  | Picklist | | Rename as Strategic Alignment(RegionalPriority)OBS |
| Opportunity Primary LoB | Opportunity\_Primary\_LoB\_\_c | Picklist | Rename as Opportunity Primary LoB-OBSOLETE |
| Originator | Originator\_\_c | Lookup(User) | Rename as Originator-OBSOLETE |
| Originator Area | Originator\_Area\_\_c | |  |  | | --- | --- | |  | Picklist | | Rename as Originator Area-OBSOLETE |
| Solution Sign-Off Approved? | Solution\_Sign\_Off\_Approved\_\_c | |  |  | | --- | --- | |  | Picklist | | Rename as Solution Sign-Off Approved? -OBSOLETE |
| Expected Go Live Date | Expected\_Go\_Live\_Date\_\_c | Date | Rename as Expected Go Live Date-OBSOLETE |
| Go Live Flexible | Go\_Live\_Flexible\_\_c | Picklist | Rename as Go Live Flexible-OBSOLETE |
| BC Delivery To Sales Team | BC\_Delivery\_To\_Sales\_Team\_\_c | |  |  | | --- | --- | |  | Date | | Rename as BC Delivery To Sales Team-OBSOLETE |
| Country CFO | Country\_CFO\_\_c | Lookup(User) | Rename as Country CFO-OBSOLETE |
| Country General Manager | Country\_General\_Manager\_\_c | Lookup(User) | Rename as Country General Manager-OBSOLETE |
| Country Level Approval | |  |  | | --- | --- | |  | Country\_Level\_Approval\_\_c | | Checkbox | Rename as Country Level Approval-OBSOLETE |
|  |  |  |  |
|  |  |  |  |
| PMO Requested Date | PMO\_Requested\_Date\_\_c | Date | Rename as PMO Requested Date-OBSOLETE |
| PMO Start Work Date | |  |  | | --- | --- | |  | PMO\_Start\_Work\_Date\_\_c | | Date | Rename as PMO Start Work Date-OBSOLETE |
| Sub Region Level Approval | Sub\_Region\_Level\_Approval\_\_c | Checkbox | Rename as Sub Region Level Approval-OBSOLETE |
| Sub Regional CFO | |  |  | | --- | --- | |  | Sub\_Regional\_CFO\_\_c | | Lookup(User) | Rename as Sub Regional CFO-OBSOLETE |
| Sub Regional Manager | Sub\_Regional\_Manager\_\_c | Lookup(User) | Rename as Sub Regional Manager-OBSOLETE |
| Undergoing Analysis | |  |  | | --- | --- | |  | Undergoing\_Analysis\_\_c | | Picklist | Rename as Undergoing Analysis-OBSOLETE |
| Gross Revenue YR1 (USD) | Gross\_Revenue\_YR1\_USD\_\_c | Currency (16, 0) | Rename as Gross Revenue YR1 (USD)-OBSOLETE |
| Gross Revenue YR2 (USD) | Gross\_Revenue\_YR2\_USD\_\_c | Currency (16, 0) | Rename as Gross Revenue YR2 (USD)-OBSOLETE |
| Gross Revenue YR3 (USD) | Gross\_Revenue\_YR3\_USD\_\_c | Currency (16, 0) | Rename as Gross Revenue YR3 (USD)-OBSOLETE |
| Gross Revenue YR4 (USD) | Gross\_Revenue\_YR4\_USD\_\_c | Currency (16, 0) | Rename as Gross Revenue YR4 (USD)-OBSOLETE |
| Gross Revenue YR5 (USD) | Gross\_Revenue\_YR5\_USD\_\_c | Currency (16, 0) | Rename as Gross Revenue YR5 (USD)-OBSOLETE |
| Gross Revenue YR6 (USD) | Gross\_Revenue\_YR6\_USD\_\_c | Currency (16, 0) | Rename as Gross Revenue YR6 (USD)-OBSOLETE |
| Net Revenue YR1 (USD) | Net\_Revenue\_YR1\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR1 (USD)-OBSOLETE |
| Net Revenue YR2 (USD) | Net\_Revenue\_YR2\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR2 (USD)-OBSOLETE |
| Net Revenue YR3 (USD) | Net\_Revenue\_YR3\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR3 (USD)-OBSOLETE |
| Net Revenue YR4 (USD) | Net\_Revenue\_YR4\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR4 (USD)-OBSOLETE |
| Net Revenue YR5 (USD) | Net\_Revenue\_YR5\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR5 (USD)-OBSOLETE |
| Net Revenue YR6 (USD) | Net\_Revenue\_YR6\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR6 (USD)-OBSOLETE |
| Gross Profit YR1 (USD) | Gross\_Profit\_YR1\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Gross Profit YR1 (USD)-OBSOLETE |
| Gross Profit YR2 (USD) | Gross\_Profit\_YR2\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Gross Profit YR2 (USD)-OBSOLETE |
| Gross Profit YR3 (USD) | Gross\_Profit\_YR3\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Gross Profit YR3 (USD)-OBSOLETE |
| Gross Profit YR4 (USD) | Gross\_Profit\_YR4\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Gross Profit YR4 (USD)-OBSOLETE |
| Gross Profit YR5 (USD) | Gross\_Profit\_YR5\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Gross Profit YR5 (USD)-OBSOLETE |
| Gross Profit YR6 (USD) | Gross\_Profit\_YR6\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Gross Profit YR6 (USD)-OBSOLETE |
| EBITDA YR1 (USD) | EBITDA\_YR1\_USD\_\_c | Currency (16, 0) | Rename as EBITDA YR1 (USD)-OBSOLETE |
| EBITDA YR2 (USD) | EBITDA\_YR2\_USD\_\_c | Currency (16, 0) | Rename as EBITDA YR2 (USD)-OBSOLETE |
| EBITDA YR3 (USD) | EBITDA\_YR3\_USD\_\_c | Currency (16, 0) | Rename as EBITDA YR3 (USD)-OBSOLETE |
| EBITDA YR4 (USD) | EBITDA\_YR4\_USD\_\_c | Currency (16, 0) | Rename as EBITDA YR4 (USD)-OBSOLETE |
| EBITDA YR5 (USD) | EBITDA\_YR5\_USD\_\_c | Currency (16, 0) | Rename as EBITDA YR5 (USD)-OBSOLETE |
| EBITDA YR6 (USD) | EBITDA\_YR6\_USD\_\_c | Currency (16, 0) | Rename as EBITDA YR6 (USD)-OBSOLETE |
| EBIT YR1 (USD) | EBIT\_YR1\_USD\_\_c | Currency (16, 0) | Rename as EBIT YR1 (USD)-OBSOLETE |
| EBIT YR2 (USD) | EBIT\_YR2\_USD\_\_c | Currency (16, 0) | Rename as EBIT YR2 (USD)-OBSOLETE |
| EBIT YR3 (USD) | EBIT\_YR3\_USD\_\_c | Currency (16, 0) | Rename as EBIT YR3 (USD)-OBSOLETE |
| EBIT YR4 (USD) | EBIT\_YR4\_USD\_\_c | Currency (16, 0) | Rename as EBIT YR4 (USD)-OBSOLETE |
| EBIT YR5 (USD) | EBIT\_YR5\_USD\_\_c | Currency (16, 0) | Rename as EBIT YR5 (USD)-OBSOLETE |
| EBIT YR6 (USD) | EBIT\_YR6\_USD\_\_c | Currency (16, 0) | Rename as EBIT YR6 (USD)-OBSOLETE |
| Net Income YR1 (USD) | Net\_Income\_YR1\_USD\_\_c | Currency (16, 0) | Rename as Net Income YR1 (USD)-OBSOLETE |
| Net Income YR2 (USD) | Net\_Income\_YR2\_USD\_\_c | Currency (16, 0) | Rename as Net Income YR2 (USD)-OBSOLETE |
| Net Income YR3 (USD) | Net\_Income\_YR3\_USD\_\_c | Currency (16, 0) | Rename as Net Income YR3 (USD)-OBSOLETE |
| Net Income YR4 (USD) | Net\_Income\_YR4\_USD\_\_c | Currency (16, 0) | Rename as Net Income YR4 (USD)-OBSOLETE |
| Net Income YR5 (USD) | Net\_Income\_YR5\_USD\_\_c | Currency (16, 0) | Rename as Net Income YR5 (USD)-OBSOLETE |
| Net Income YR6 (USD) | Net\_Income\_YR6\_USD\_\_c | Currency (16, 0) | Rename as Net Income YR6 (USD)-OBSOLETE |
| Net Revenue YR1 (USD) | Net\_Revenue\_YR1\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR1 (USD)-OBSOLETE |
| Net Revenue YR2 (USD) | Net\_Revenue\_YR2\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR2 (USD)-OBSOLETE |
| Net Revenue YR3 (USD) | Net\_Revenue\_YR3\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR3 (USD)-OBSOLETE |
| Net Revenue YR4 (USD) | Net\_Revenue\_YR4\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR4 (USD)-OBSOLETE |
| Net Revenue YR5 (USD) | Net\_Revenue\_YR5\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR5 (USD)-OBSOLETE |
| Net Revenue YR6 (USD) | Net\_Revenue\_YR6\_USD\_\_c | Roll-Up Summary (SUM Opportunity Product) | Rename as Net Revenue YR6 (USD)-OBSOLETE |
| Contribution Margin YR1 (USD) | Contribution\_Margin\_YR1\_USD\_\_c | Currency (16, 0) | Rename as Contribution Margin YR1 (USD)-OBSOLETE |
| Contribution Margin YR2 (USD) | Contribution\_Margin\_YR2\_USD\_\_c | Currency (16, 0) | Rename as Contribution Margin YR2 (USD)-OBSOLETE |
| Contribution Margin YR3 (USD) | Contribution\_Margin\_YR3\_USD\_\_c | Currency (16, 0) | Rename as Contribution Margin YR3 (USD)-OBSOLETE |
| Contribution Margin YR4 (USD) | Contribution\_Margin\_YR4\_USD\_\_c | Currency (16, 0) | Rename as Contribution Margin YR4 (USD)-OBSOLETE |
| Contribution Margin YR5 (USD) | Contribution\_Margin\_YR5\_USD\_\_c | Currency (16, 0) | Rename as Contribution Margin YR5 (USD)-OBSOLETE |
| Contribution Margin YR6 (USD) | Contribution\_Margin\_YR6\_USD\_\_c | Currency (16, 0) | Rename as Contribution Margin YR6 (USD)-OBSOLETE |
| CCC YR1- | CCC\_YR1\_USD\_\_c | Number (16, 0) | Rename as CCC YR1-OBSOLETE |
| CCC YR2 | CCC\_YR2\_USD\_\_c | Number (16, 0) | Rename as CCC YR2-OBSOLETE |
| CCC YR3 | CCC\_YR3\_USD\_\_c | Number (16, 0) | Rename as CCC YR3-OBSOLETE |
| CCC YR4 | CCC\_YR4\_USD\_\_c | Number (16, 0) | Rename as CCC YR4-OBSOLETE |
| CCC YR5 | CCC\_YR5\_USD\_\_c | Number (16, 0) | Rename as CCC YR5-OBSOLETE |
| CCC YR6 | CCC\_YR6\_USD\_\_c | Number (16, 0) | Rename as CCC YR6-OBSOLETE |
| Net Working Capital YR1 (USD) | Net\_Working\_Capital\_YR1\_USD\_\_c | Currency (16, 0) | Rename as Net Working Capital YR1 (USD)-OBSOLETE |
| Net Working Capital YR2 (USD) | Net\_Working\_Capital\_YR2\_USD\_\_c | Currency (16, 0) | Rename as Net Working Capital YR2 (USD)-OBSOLETE |
| Net Working Capital YR3 (USD) | Net\_Working\_Capital\_YR3\_USD\_\_c | Currency (16, 0) | Rename as Net Working Capital YR3 (USD)-OBSOLETE |
| Net Working Capital YR4 (USD) | Net\_Working\_Capital\_YR4\_USD\_\_c | Currency (16, 0) | Rename as Net Working Capital YR4 (USD)-OBSOLETE |
| Net Working Capital YR5 (USD) | Net\_Working\_Capital\_YR5\_USD\_\_c | Currency (16, 0) | Rename as Net Working Capital YR5 (USD)-OBSOLETE |
| Net Working Capital YR6 (USD) | Net\_Working\_Capital\_YR6\_USD\_\_c | Currency (16, 0) | Rename as Net Working Capital YR6 (USD)-OBSOLETE |
| Capex YR1 (USD) | Capex\_YR1\_USD\_\_c | Currency (16, 0) | Rename as Capex YR1 (USD)-OBSOLETE |
| Capex YR2 (USD) | Capex\_YR2\_USD\_\_c | Currency (16, 0) | Rename as Capex YR2 (USD)-OBSOLETE |
| Capex YR3 (USD) | Capex\_YR3\_USD\_\_c | Currency (16, 0) | Rename as Capex YR3 (USD)-OBSOLETE |
| Capex YR4 (USD)- | Capex\_YR4\_USD\_\_c | Currency (16, 0) | Rename as Capex YR4 (USD)-OBSOLETE |
| Capex YR5 (USD) | Capex\_YR5\_USD\_\_c | Currency (16, 0) | Rename as Capex YR5 (USD)-OBSOLETE |
| Capex YR6 (USD) | Capex\_YR6\_USD\_\_c | Currency (16, 0) | Rename as Capex YR6 (USD)-OBSOLETE |
| Total Investment YR1 (USD) | Total\_Investment\_YR1\_USD\_\_c | Currency (16, 0) | Rename as Total Investment YR1 (USD)-OBSOLETE |
| Total Investment YR2 (USD) | Total\_Investment\_YR2\_USD\_\_c | Currency (16, 0) | Rename as Total Investment YR2 (USD)-OBSOLETE |
| Total Investment YR3 (USD) | Total\_Investment\_YR3\_USD\_\_c | Currency (16, 0) | Rename as Total Investment YR3 (USD)-OBSOLETE |
| Total Investment YR4 (USD) | Total\_Investment\_YR4\_USD\_\_c | Currency (16, 0) | Rename as Total Investment YR4 (USD)-OBSOLETE |
| Total Investment YR5 (USD) | Total\_Investment\_YR5\_USD\_\_c | Currency (16, 0) | Rename as Total Investment YR5 (USD)-OBSOLETE |
| Total Investment YR6 (USD) | Total\_Investment\_YR6\_USD\_\_c | Currency (16, 0) | Rename as Total Investment YR6 (USD)-OBSOLETE |
| Total Investment/CM YR1 | Total\_Investment\_CM\_YR1\_\_c | Number (16, 1) | Rename as Total Investment/CM YR1-OBSOLETE |
| Total Investment/CM YR2 | Total\_Investment\_CM\_YR2\_\_c | Number (16, 1) | Rename as Total Investment/CM YR2-OBSOLETE |
| Total Investment/CM YR3 | Total\_Investment\_CM\_YR3\_\_c | Number (16, 1) | Rename as Total Investment/CM YR3-OBSOLETE |
| Total Investment/CM YR4 | Total\_Investment\_CM\_YR4\_\_c | Number (16, 1) | Rename as Total Investment/CM YR4-OBSOLETE |
| Total Investment/CM YR5 | Total\_Investment\_CM\_YR5\_\_c | Number (16, 1) | Rename as Total Investment/CM YR5-OBSOLETE |
| Total Investment/CM YR6 | Total\_Investment\_CM\_YR6\_\_c | Number (16, 1) | Rename as Total Investment/CM YR6-OBSOLETE |
| ROIC YR1 | ROIC\_YR1\_\_c | Percent (16, 1) | Rename as ROIC YR1-OBSOLETE |
| ROIC YR2 | ROIC\_YR2\_\_c | Percent (16, 1) | Rename as ROIC YR2-OBSOLETE |
| ROIC YR3 | ROIC\_YR3\_\_c | Percent (16, 1) | Rename as ROIC YR3-OBSOLETE |
| ROIC YR4 | ROIC\_YR4\_\_c | Percent (16, 1) | Rename as ROIC YR4-OBSOLETE |
| ROIC YR5 | ROIC\_YR5\_\_c | Percent (16, 1) | Rename as ROIC YR5-OBSOLETE |
| ROIC YR6 | ROIC\_YR6\_\_c | Percent (16, 1) | Rename as ROIC YR6-OBSOLETE |
| FCF YR1 (USD) | FCF\_YR1\_USD\_\_c | Currency (16, 0) | Rename as FCF YR1 (USD)-OBSOLETE |
| FCF YR2 (USD) | FCF\_YR2\_USD\_\_c | Currency (16, 0) | Rename as FCF YR2 (USD)-OBSOLETE |
| FCF YR3 (USD) | FCF\_YR3\_USD\_\_c | Currency (16, 0) | Rename as FCF YR3 (USD)-OBSOLETE |
| FCF YR4 (USD) | FCF\_YR4\_USD\_\_c | Currency (16, 0) | Rename as FCF YR4 (USD)-OBSOLETE |
| FCF YR5 (USD) | FCF\_YR5\_USD\_\_c | Currency (16, 0) | Rename as FCF YR5 (USD)-OBSOLETE |
| FCF YR6 (USD) | FCF\_YR6\_USD\_\_c | Currency (16, 0) | Rename as FCF YR6 (USD)-OBSOLETE |
| Leverage Ratio (TCE /EBITDA)YR1 | Leverage\_Ratio\_TCE\_EBITDA\_YR1\_\_c | Number (16, 1) | Rename as Leverage Ratio (TCE /EBITDA)YR1-OBSOLETE |
| Leverage Ratio (TCE /EBITDA)YR2 | Leverage\_Ratio\_TCE\_EBITDA\_YR2\_\_c | Number (16, 1) | Rename as Leverage Ratio (TCE /EBITDA)YR2-OBSOLETE |
| Leverage Ratio (TCE /EBITDA)YR3 | Leverage\_Ratio\_TCE\_EBITDA\_YR3\_\_c | Number (16, 1) | Rename as Leverage Ratio (TCE /EBITDA)YR3-OBSOLETE |
| Leverage Ratio (TCE /EBITDA)YR4 | Leverage\_Ratio\_TCE\_EBITDA\_YR4\_\_c | Number (16, 1) | Rename as Leverage Ratio (TCE /EBITDA)YR4-OBSOLETE |
| Leverage Ratio (TCE /EBITDA)YR5 | Leverage\_Ratio\_TCE\_EBITDA\_YR5\_\_c | Number (16, 1) | Rename as Leverage Ratio (TCE /EBITDA)YR5-OBSOLETE |
| Leverage Ratio (TCE /EBITDA)YR6 | Leverage\_Ratio\_TCE\_EBITDA\_YR6\_\_c | Number (16, 1) | Rename as Leverage Ratio (TCE /EBITDA)YR6-OBSOLETE |
| Partner Account | Partner\_Account\_\_c | Lookup(Account) |  |
| Master Order | Master\_order\_\_c | Checkbox | New field |

Opportunity-> Sales Process >>Stage -> Removed-> Solution Design

## **Page Layouts**

Changes in Service Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Opportunity Information | Open Status |  |
|  | RFX | Default – No |
|  | Service Line | Read Only |
|  | BEC Approval Date | Read Only |
|  | Ultimate Parent | Read Only |
|  | Close Comments | Add below “Close Reason” field |
|  | Global Region | Read Only |
|  | Country | Read Only |
|  | Account Status | Read Only |
|  | Opportunity Type | Required |
|  | Account Name | Required |
|  | Awarded\_Date |  |
|  | In 5YP |  |
|  | In 5YP Year |  |
|  | Event |  |
|  | Category | Read Only |
|  | Close Reason |  |
|  | Close Date | Required |
|  | Coverage Countries |  |
|  | Decision Board | Read Only |
|  | Description | Required |
|  | Forecast Revision | Remove |
|  | Forecast Year | Remove |
|  | Key Global Opportunity | Required |
|  | Key Stakeholders | Required |
|  | Level of Effort |  |
|  | Opportunity Name | Required |
|  | Business Owner |  |
|  | Opportuntiy Owner |  |
|  | Record Id | Read Only |
|  | Parent Opportunity |  |
|  | Probability (%) |  |
|  | Sub Region |  |
|  | Stage | Required |
|  | Suspect | Remove |
|  | Target Close Date | Remove |
|  | Type | Remove |
|  | Channel Type |  |
|  | On Hold | Remove |
|  | Awarded | Remove |
|  | Service Leader | Remove |
|  | Partner Account |  |
|  |  |  |
| Opportunity Status | Latest Status Date | Read Only |
|  | Latest Status Log | Read Only |
|  | Opportunity Status |  |
|  | Opportunity Status Log | Read Only |
|  |  |  |
|  |  |  |
| Proposal Details |  | Combine Prospecting with Proposal Details into 1 Section called Proposal Details - position after the Opportunity Status section |
|  | Annual Revenue (USD) |  |
|  | Annual Gross Profit (USD) |  |
|  | Annual EBITDA (USD) |  |
|  | Annual Gross Profit % (USD) |  |
|  | Annual EBITDA % (USD) |  |
|  | Contract Length (in months) |  |
|  | Expected Business Case Approval Date |  |
|  | Expected Go Live Date | Remove |
|  | Go Live Flexible | Remove |
|  | Implementation Length (in weeks) |  |
|  | P&L Impact Date |  |
|  | Proposal Due Date |  |
|  | Strategic Importance |  |
|  |  |  |
| Business Case Financials (USD) |  |  |
|  | Total Gross Revenue (USD) | New Field |
|  | Total Net Revenue (USD) | New Field |
|  | Total Gross Profit (USD) | New Field |
|  | Total EBITDA (USD) | New Field |
|  | Total EBIT (USD) | New Field |
|  | Total Net Income (USD) | New Field |
|  | Average CCC (days) |  |
|  | Net Working Capital (USD) |  |
|  | Leverage Ratio (TCE / EBITDA) | New Field |
|  | Total Capital Employed (USD) | New Field |
|  | CAPEX IT (USD) |  |
|  | CAPEX Other (USD) |  |
|  | CAPEX Total (USD) |  |
|  | EBIT % | New Field |
|  | EBITDA % | New Field |
|  | Gross Profit % | New Field |
|  | Net Income % | New Field |
|  | ROIC Overall Opportunity | New Field |
|  |  |  |
|  | Direct Cost of Sales (Staffing) # | Remove |
|  | Direct Cost of Sales (Staffing) (USD) | Remove |
|  | Direct SGA # | Remove |
|  | Direct SGA (USD) | Remove |
|  | Indirect SGA # | Remove |
|  | Indirect SGA (USD) | Remove |
|  | Implementation IT (USD) |  |
|  | Implementation Total Budget (USD) |  |
|  | ROIC Product |  |
|  | ROIC Service |  |
|  |  |  |
|  | OpportunityFieldEditPage | Remove this VF page |
| Gate 3 - Proposal |  | Rename Section as Gate 2 – Proposal |
| Gate 2 – Proposal | Gate 2 Approval Date |  |
|  | Gate 2 Approvers |  |
|  | Gate 2 Comments |  |
|  | Optional ReApproval | Remove |
|  | Proposal Sign Off Approved? |  |
|  | Ready For Proposal Sign Off |  |
|  | Requires ReApproval | Remove |
|  | Solution Design Approval Date |  |
|  | Solution Design Approvers |  |
|  |  |  |
| Gate 4 – Business Case Final |  | Rename Section Gate 3 – Business Case Final |
| Gate 3 – Business Case Final | Final Business Sign Off Approved? |  |
|  | Gate 3 Approval Date |  |
|  | Gate 3 Approvers |  |
|  | Gate 3 Comments |  |
|  | Ready For Final Business Sign Off? |  |
|  |  |  |
|  |  |  |
| System Information | Date of Won/Lost | Editable only for Regional Admin and CRM Admin |
| Gate 2 – Solution Design |  | Remove this section |
| Prospecting |  | Remove this section |
|  | Ready for Solution Sign Off | Remove |
|  | Solution Design Comments | Remove |
|  | Solution Sign-Off Approved? | Remove |
| Proposal | Estimated Annual Revenue (USD) | Remove |
|  | Estimated Annual Gross Profit (USD) | Remove |
|  | Estimated Annual EBITDA (USD) | Remove |
|  | Estimated Annual Gross Profit % | Remove |
|  | Estimated Annual EBITDA % | Remove |
| Priority |  | Remove this Section |
| Priority | Complexity / Risk | Remove |
|  | Contractual / Mandatory | Remove |
|  | Profitability(Operating Income - Annual) | Remove |
|  | Profitability Product (ROIC% - Annual) | Remove |
|  | Profitability Services (ROIC% - Annual) | Remove |
|  | Strategic Alignment (Regional Priority) | Remove |
| Originator |  | Remove this Section |
| Originator | Opportunity Primary LoB | Remove |
|  | Originator | Remove |
|  | Originator Area | Remove |
|  |  |  |
| Gate 1 - Qualification | Gate 1 Approval Date |  |
|  | Gate 1 Approvers |  |
|  | Gate 1 Comments |  |
|  | Qualification Approved? |  |
|  | Ready for Qualification |  |
|  |  |  |
| Risk Assessment | Asset Complexity |  |
|  | Competitors |  |
|  | Customer Relationship |  |
|  | Other Legal/Finance Risks |  |
|  | IT Complexity |  |
|  | Unusual SPP600 Risks |  |
|  | Market Conditions |  |
|  | Tech/Operational/Service Delivery Risks |  |
|  | Unusual Risk? | Remove |
|  |  |  |
| System Information | BC Delivery To Sales Team | Remove |
|  | Country CFO | Remove |
|  | Country General Manager | Remove |
|  | Country Level Approval | Remove |
|  | Gate 1 Required | Remove |
|  | Gate 2 Required | Remove |
|  | PMO Requested Date | Remove |
|  | PMO Start Work Date | Remove |
|  | Sub Region Level Approval | Remove |
|  | Sub Regional CFO | Remove |
|  | Sub Regional Manager | Remove |
|  | Undergoing Analysis | Remove |

Changes in New MSA Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Opportunity Information | Open Status |  |
|  | RFX | Default – No |
|  | Service Line | Read Only |
|  | BEC Approval Date | Read Only |
|  | Ultimate Parent | Read Only |
|  | Close Comments | Add below “Close Reason” field |
|  | Global Region | Read Only |
|  | Country | Read Only |
|  | Channel Type |  |
|  | Account Status | Read Only |
|  | Account Name | Required |
|  | Awarded\_Date |  |
|  | In 5YP |  |
|  | In 5YP Year |  |
|  | Event |  |
|  | Category | Read Only |
|  | Close Reason |  |
|  | Close Date | Required |
|  | Coverage Countries |  |
|  | Decision Board | Read Only |
|  | Description | Required |
|  | Forecast Revision | Remove |
|  | Forecast Year | Remove |
|  | Key Global Opportunity | Required |
|  | Key Stakeholders | Required |
|  | Level of Effort |  |
|  | Opportunity Name | Required |
|  | Business Owner |  |
|  | Opportuntiy Owner |  |
|  | Record Id | Read Only |
|  | Parent Opportunity |  |
|  | Priority Score | Remove |
|  | Probability (%) |  |
|  | Proposal Service Coverage | Remove |
|  | Sub Region |  |
|  | Service Leader | Remove |
|  | Stage | Required |
|  | Suspect | Remove |
|  | Target Close Date | Remove |
|  |  |  |
|  | On Hold | Remove |
|  | Awarded | Remove |
|  | Partner Account |  |
|  |  |  |
| Opportunity Status | Latest Status Date | Read Only |
|  | Latest Status Log | Read Only |
|  | Opportunity Status |  |
|  | Opportunity Status Log | Read Only |
|  |  |  |
| Proposal Details |  | Combine Prospecting with Proposal Details into 1 Section called Proposal Details - position after the Opportunity Status section |
|  |  |  |
|  | Contract Length (in months) |  |
|  | Proposal Due Date |  |
|  | Annual Revenue (USD) |  |
|  | Annual Gross Profit (USD) |  |
|  | Annual EBITDA (USD) |  |
|  | Annual Gross Profit % (USD) |  |
|  | Annual EBITDA % (USD) |  |
| Business Case Financials (USD) |  |  |
|  | Total Gross Revenue (USD) | New Field |
|  | Total Net Revenue (USD) | New Field |
|  | Total Gross Profit (USD) | New Field |
|  | Total EBITDA (USD) | New Field |
|  | Total EBIT (USD) | New Field |
|  | Total Net Income (USD) | New Field |
|  | Average CCC (days) |  |
|  | Net Working Capital (USD) |  |
|  | Leverage Ratio (TCE / EBITDA) | New Field |
|  | Total Capital Employed (USD) | New Field |
|  | CAPEX IT (USD) |  |
|  | CAPEX Other (USD) |  |
|  | CAPEX Total (USD) |  |
|  | EBIT % | New Field |
|  | EBITDA % | New Field |
|  | Gross Profit % | New Field |
|  | Net Income % | New Field |
|  | ROIC Product |  |
|  |  |  |
|  |  |  |
|  | OpportunityFieldEditPage | Remove this VF page |
| Gate 3 - Proposal |  | Rename Section as Gate 2 – Proposal |
| Gate 2 – Proposal | Gate 2 Approval Date |  |
|  | Gate 2 Approvers |  |
|  | Gate 2 Comments |  |
|  |  |  |
|  | Proposal Sign Off Approved? |  |
|  | Ready For Proposal Sign Off |  |
|  | Solution Design Approval Date |  |
|  | Solution Design Approvers |  |
|  |  |  |
| Gate 4 – Business Case Final |  | Rename Section Gate 3 – Business Case Final |
| Gate 3 – Business Case Final | Final Business Sign Off Approved? |  |
|  | Gate 3 Approval Date |  |
|  | Gate 3 Approvers |  |
|  | Gate 3 Comments |  |
|  | Ready For Final Business Sign Off? |  |
|  |  |  |
|  |  |  |
| System Information | End Customer |  |
| Prospecting |  | Remove this section |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| Proposal | Estimated Annual Revenue (USD) | Remove |
|  | Estimated Annual Gross Profit (USD) | Remove |
|  | Estimated Annual EBITDA (USD) | Remove |
|  | Estimated Annual Gross Profit % | Remove |
|  | Estimated Annual EBITDA % | Remove |
| Originator |  | Remove this Section |
| Originator | Opportunity Primary LoB | Remove |
|  | Originator | Remove |
|  | Originator Area | Remove |
|  |  |  |
| Gate 1 - Qualification | Gate 1 Approval Date |  |
|  | Gate 1 Approvers |  |
|  | Gate 1 Comments |  |
|  | Qualification Approved? |  |
|  | Ready for Qualification |  |
|  |  |  |
| Risk Assessment |  |  |
|  | Competitors |  |
|  | Customer Relationship |  |
|  | Other Legal/Finance Risks |  |
|  | Market Conditions |  |
|  | Tech/Operational/Service Delivery Risks |  |
|  |  |  |

Buy&Sell layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Opportunity Information | Open Status |  |
|  | RFX | Default – No |
|  | Service Line | Read Only |
|  | BEC Approval Date | Read Only |
|  | Ultimate Parent | Read Only |
|  | Close Comments | Add below “Close Reason” field |
|  | Global Region | Read Only |
|  | Country | Read Only |
|  | Quantity |  |
|  | Account Status | Read Only |
|  | Account Name | Required |
|  | In 5YP |  |
|  | In 5YP Year |  |
|  | Event |  |
|  | Category | Read Only |
|  | Close Reason |  |
|  | Close Date | Required |
|  | Coverage Countries |  |
|  |  |  |
|  | Description | Required |
|  | Forecast Revision | Remove |
|  | Forecast Year | Remove |
|  | Key Global Opportunity | Required |
|  | Key Stakeholders | Required |
|  | Master Order | New Field |
|  | Level of Effort |  |
|  | Opportunity Name | Required |
|  | Business Owner |  |
|  | Opportuntiy Owner |  |
|  | Priority Score | Remove |
|  | Parent Opportunity |  |
|  | Probability (%) |  |
|  | Sub Region |  |
|  | Stage | Required |
|  | Suspect | Remove |
|  | Target Close Date | Remove |
|  | On Hold | Remove |
|  | Partner Account |  |
|  | Channel Type |  |
|  | Sell from Existing Inventory | Remove |
|  | PO# | Remove |
|  |  |  |
| Originator |  | Remove this Section |
|  | Originator | Remove |
|  | Originator Area | Remove |
| Opportunity Status |  |  |
|  | Latest Status Log | Read Only |
|  | Opportunity Status |  |
|  | Opportunity Status Log | Read Only |
| Proposal Details |  | Combine Prospecting with Proposal Details into 1 Section called Proposal Details - position after the Opportunity Status section(For Buy&Sell No Proposal Detail section exists only Prospecting section is present) |
|  | Contract Length (in months) |  |
| Business Case Financials (USD) |  |  |
|  | Total Gross Revenue (USD) | New Field |
|  | Total Net Revenue (USD) | New Field |
|  | Total Gross Profit (USD) | New Field |
|  | Total EBITDA (USD) | New Field |
|  |  |  |
|  | EBITDA % | New Field |
|  | Gross Profit % | New Field |
|  |  |  |
|  | ROIC Product |  |
|  |  |  |
| System Information |  |  |
|  | End Customer |  |
|  |  |  |
| Proposal | Estimated Annual Revenue (USD) | Remove |
|  | Estimated Annual Gross Profit (USD) | Remove |
|  | Estimated Annual EBITDA (USD) | Remove |
|  | Estimated Annual Gross Profit % | Remove |
|  | Estimated Annual EBITDA % | Remove |

## **Configuration Functionalities**

### **Opportunity Close process**

When an opportunity stage is set to “Lost Opportunity” or “Cancelled Opportunity”, it is mandatory to have values in “Close Reason” and “Close Comments” fields.

#### **Components**

* Create a new validation rule on Opportunity,
* Rule Name: Opportunity\_Close\_Process\_Validation
* Condition: Opportunity->Stage = “Lost Opportunity” or “Cancelled Opportunity” and Opportunity->Close Reason = blank and Opportunity->Close Comments = blank
* Message: “ Please complete Close Reason and Close Comments”

### **Days OnHold field value update**

When an opportunity stage is set to “On Hold” then Days\_OnHold field value will be count the on hold days for Opportunity.

#### **Components**

* Workflow Rule :- Updated On Hold Date
* Workflow field Update :- Update\_On\_Hold\_Date
* Custom fields :- Opportunity.Open\_Status\_Change\_Date\_\_c, On\_Hold\_Date\_\_c, Days\_OnHold\_\_c

### **Update Latest status date**

When user provide status update in “Opportunity Status” section then set Latest Status Date = Today

#### **Components**

* Modify workflow rule “Opportunity Status Log”, Added a Workflow Field Update:-Opportunity Latest Status Date Update to update the following,
* Latest Status Date = Today

### **Update Opportunity Prospect Date**

If Stage = Prospect and Ischange (Stage) and Open Status! = Suspect then Update Prospect Date = Today

#### **Components**

Create workflow rule “Opportunity Prospect Date”, and workflow field update-“Opportunity Prospect Date Update” to do the following,

Opportunity-> StageName = ‘Prospect’ and ISCHANGED(StageName) and Opportunity->Open\_Status! = 'Suspect' then Update Prospect Date = Today

## **Customizations**

### **Reopen Opportunity**

* A close opportunity could be reopen by the Regional Admin or CRM Admin
* This will update the opportunity as :-

Stage = Prospecting

Qualify for Qualification = False

Ready for Proposal Signoff = False  
Ready for Final Business Signoff = False

#### **Components**

* Create “"Reopen\_Opportunity" validation rule to show message to user “Regional Admin or CRM Admin can reopen Opportunity”
* Update “blogic\_Opportunity” to update Opportunity as:  
  Stage = Prospecting  
  Qualify for Qualification = False  
  Ready for Proposal Signoff = False  
  Ready for Final Business Signoff = False

### **Update Ultimate Parent Account**

On Opportunity, a new field “Ultimate Parent” is introduced. The account linked to opportunity, this is the top most account in the account hierarchy

#### **Components**

* Create “"PopulateUltimateParent" method in “blogic\_Account” class, which does the following:
  + Set Account-> Ultimate Parent = Parent Account’s Top most Account (5th Level) in the account hierarchy.
  + Set Account (Child Level) -> Ultimate Parent = Parent Account’s Top most Account (5th Level) in the account hierarchy.
* Update “"Update Parent Account Field on Opportunity" process builder on Account which does the following:
  + Opportunity->Ultimate Parent = Opportunity->Account->Ultimate Parent

Opportunity->Parent Account = Opportunity->Account->Parent Account

### **Suspect**

If Probability = 0% then Set Open Status = Suspect. If Probability > 0% and Open Status = Suspect then Set Open Status = “In Pursuit”

#### **Components**

* Modify Opportunity trigger- “OpportunityTrigger”, on Before Insert and Before Update event call the below method from trigger handler class.
* blogic\_opportunity->populateMonitoredOpportunityStatus
* Modify Opportunity trigger handler class- “blogic\_opportunity” and add a new method- “populateMonitoredOpportunityStatus” which performs the following
* If Opportunity->Probability = 0% then,

Opportunity->Open Status = Suspect

* If Opportunity->Probability > 0% and Opportunity->Open Status = Suspect then,

Opportunity->Open Status = “In Pursuit”

### **Gate1 Approval**

This approval is required to move opportunity stage from Prospecting to Proposal. There are required fields to be filled to complete Gate1 approval. Required fields are different based on Opportunity record type (Service or Purchase Order or New MSA) and Opportunity Region

For APAC: Below Gate-1 fields should be readable by anyone but only editable for the Regional Admin.

* Qualification Approved?
* Gate 1 Approval Date
* Gate 1 Approvers
* Gate 1 Comments

For APAC Region only below Gate-1 fields should be editable by APAC user and rest of fields should be editable only by Regional Admin.

* Ready for Qualification

Applies to both Service/distribution record types

#### **Components**

* Create a Custom Button (Approve Gate1) – To call below VisualForcePage.
* Create a new VisualForcePage – “Gate1ApprovalPage” which displays below fields depending upon Opportunity record type (Service or Purchase Order or New MSA) and Opportunity Region
* Create Controller Extension Class – “Gate1ApprovalControllerExt” which does the following
  + On Save, check all required fields are filled in and update Stage = Proposal

Fields on VF Page,

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Gate 1 – Required Fields Info |  |  |
|  | Key Stakeholders | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Contract Length (in months) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Expected Business Case Approval Date | * Required * Visible to All Regions * Visible to Service Opportunity record type |
|  | Proposal Due Date | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Total Net Revenue (USD) | * Read-only (Rollup-summary field) Visible to All Regions * Visible to Service, & New MSA Opportunity record type |
|  | Total Gross Profit (USD) | * Read-only (Rollup-summary field)Visible to All Regions * Visible to Service, & New MSA Opportunity record type |
|  | Level of Effort | * Required * Visible to US & C Region * Visible to Service Opportunity record type |
|  | Business\_Owner\_\_c | * Required * Visible to US & C Region * Visible to Service and New MSA Opportunity record type |
| Gate 1 – Qualification fields Info |  |  |
|  | Gate 1 Approval Date | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Gate 1 Approvers | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Gate 1 Comments | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Qualification Approved? | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Ready for Qualification | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |

* Create permission set “Modify Gate Fields Permission for Non-APAC Users” for Non-Apac Sales user to edit Gate-1 field. Modify "Sales" profile to have read only rights on Gate-1 fields.
* Gate-1 Fields:
  + Qualification Approved?
  + Gate 1 Approval Date
  + Gate 1 Approvers
  + Gate 1 Comments
* Modify Opportunity Trigger – “OpportunityTrigger” (Before Update) and trigger handler class -blogic\_opportunity to do the following.
* Update Opportunity Stage from Prospecting to Proposal If all the Gate-1 Fields are entered.

### **Gate2 Approval**

This approval is required to move opportunity stage from Proposal to Negotiation. There are required fields to be filled to complete Gate2 approval. Required fields are different based on Opportunity record type (Service or Purchase Order or New MSA) and Opportunity Region

For APAC: Below Gate-2 fields should be readable by anyone but only editable for the Regional Admin.

* Proposal Sign Off Approved?
* Gate 2 Approval Date
* Gate 2 Approvers
* Gate 2 Comments

For APAC Region only below Gate-2 fields should be editable by APAC user and rest of fields should be editable only by Regional Admin.

* Ready For Proposal Sign Off

Applies to both Service/distribution record types

#### **Components**

* Create a Custom Button (Approve Gate2) – To call below VisualForcePage.
* Create a new VisualForcePage – “Gate2ApprovalPage” which displays below fields depending upon Opportunity record type (Service or Purchase Order or New MSA) and Opportunity Region –
* Create Controller Extension Class – “Gate2ApprovalControllerExt” which does the following,
  + On Save, check all required fields are filled in and update Stage = Negotiation

Fields on VF Page,

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Gate 2 – Required Fields Info |  |  |
|  | Solution Design Approval Date | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Solution Design Approvers | * Required * Visible to All RegionsVisible to Service & New MSA Opportunity record type |
|  | Total Gross Revenue (USD) | * Required * Visible to All Regions * Visible to Service, & New MSA Opportunity record type |
|  | Total EBITDA (USD) | * Read-Only (Rollup-Summary field)Visible to All Regions * Visible to Service, & New MSA Opportunity record type |
|  | Total EBIT (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Total Net Income (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Net Working Capital (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Total Capital Employed (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | CAPEX IT (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | CAPEX Other (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | CAPEX Total (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Implementation IT (USD) | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | ROIC Overall Opportunity | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | ROIC Product | * Required (If ROIC Service is null) * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | ROIC Service | * Required (If ROIC Product is null) * Visible to All Regions * Visible to Service Opportunity record type |
|  | Level of Effort | * Required * Visible to APAC, EMEA, LATAM Regions * Visible to Service Opportunity record type |
| Gate 2 – Proposal fields Info |  |  |
|  | Gate 2 Approval Date | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Gate 2 Approvers | * Visible to All Regions   Visible to Service & New MSA Opportunity record type |
|  | Gate 2 Comments | * Visible to All Regions   Visible to Service & New MSA Opportunity record type |
|  | Proposal Sign Off Approved? | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Ready For Proposal Sign Off | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  |  |  |

* Create permission set “Modify Gate Fields Permission for Non-APAC Users” for Non-Apac Sales user for Gate-2 fields. Modify “Sales" profile to have read only rights on Gate-2 fields.
* Gate-2 Fields: -
  + Proposal Sign Off Approved?
  + Gate 2 Approval Date
  + Gate 2 Approvers
  + Gate 2 Comments
* Modify Opportunity Trigger – “OpportunityTrigger” (Before Update) and trigger handler class -blogic\_opportunity to do the following.
* Update Opportunity Stage from Proposal to Negotiation If all the Gate-2 Fields are entered.

### **Gate3 Approval**

This approval is required to move opportunity stage from Negotiation to Won. There are required fields to be filled to complete Gate3 approval. Required fields are different based on Opportunity record type (Service or New MSA) and Opportunity Region

For APAC: Below Gate-3 fields should be readable by anyone but only editable for the Regional Admin.

* Final Business Sign Off Approved?
* Gate 3 Approval Date
* Gate 3 Approvers
* Gate 3 Comments

For APAC Region only below Gate-3 fields should be editable by APAC user and rest of fields should be editable only by Regional Admin.

* Ready For Final Business Sign Off?

Applies to both Service/distribution record types

#### **Components**

* Create a Custom Button (Approve Gate3) – To call below VisualForcePage.
* Create a new VisualForcePage – “Gate3ApprovalPage” which displays below fields depending upon Opportunity record type (Service or New MSA) and Opportunity Region
* Create Controller Extension Class – “Gate3ApprovalControllerExt” which does the following,
  + On Save, check all required fields are filled in and update Stage = Won



Fields on VF Page,

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Gate 3 – Required Fields Info |  |  |
|  |  |  |
|  | Awarded Date | * Required * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Open Status | * Required * Visible to all Regions and equal to Awarded * Visible to Service & New MSA Opportunity record type |
|  |  |  |
| Gate 3 – Business Case Final Fields Info |  |  |
|  | Final Business Sign Off Approved? | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Gate 3 Approval Date | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Gate 3 Approvers | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Gate 3 Comments | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  | Ready For Final Business Sign Off? | * Visible to All Regions * Visible to Service & New MSA Opportunity record type |
|  |  |  |

* Create permission set “Modify Gate Fields Permission for Non-APAC Users” for Non-Apac Sales user to edit Gate-3 fields. Modify "Sales" profile to have read only right on Gate-3 fields.
* Gate-3 Fields:
  + Final Business Sign Off Approved?
  + Gate 3 Approval Date
  + Gate 3 Approvers
  + Gate 3 Comments
* Modify Opportunity Trigger – “OpportunityTrigger” (Before Update) and trigger handler class -blogic\_opportunity to do the following.
* Update Opportunity Stage from Negotiation to Won If all the Gate-3 Fields are entered.

### **Change Record Type**

System should allow to change the record type from Service to Distribution and vice versa. This change can be done by Regional Admin or CRM Admin only.

#### **Components**

* Custom Button (Change Record Type)
  + If user is not Regional Admin or CRM Admin then show message “You are not authorized to change record type. Please contact Regional Admin
  + If user is Regional Admin or CRM Admin then show message “Are you sure you want to change record type? So if Opportunity record type is service and user is trying to change the record type from "Change Record Type" button then there will be 2 options (Remaining 2 record type) visible to user for change record type. It will same for other record types (MSA, Buy and Sell). This will move the Opportunity Stage back to Prospecting”. If user click “Yes” then Set
    - Stage = Prospecting
    - Qualify for Qualification = False
    - Ready for Proposal Signoff = False
    - Ready for Final Business Signoff = False
* Apex class – This apex class will be called from button (Change Record Type). This will update the opportunity as
  + Stage = Prospecting
  + Qualify for Qualification = False
  + Ready for Proposal Signoff = False
  + Ready for Final Business Signoff = False

### **Calculate Approval Level (Decision Board)**

System should auto calculate value for “Decision Board” field and all approvers for the opportunity. This is based on the hurdle rate defined in custom setting against each parameter. Refer to hurdle rate.

This calculation should not happen for Won, Lost or Cancelled opportunity.

#### **Components**

The existing trigger on opportunity will be modified to update “Decision Board” and “Approvers” as per the new hurdle rates.

* Update Opportunity Trigger’s handler class “blogic\_Opportunity”’s method “populateGateFields” to calculate Decision Board values.
* The Decision Board will have following values as per new the hurdle rates
* CEO
* Corporate
* Region

### **Modify Hurdle Rate**

Hurdle rates are used to calculate “Decision Board” value. Values in hurdle rate is used to identify all approvers for an opportunity.

#### **Components**

Hurdle rates are currently being maintained in custom settings. This custom setting should be changed to include Total CAPEX, CAPEX IT, Total Capital Employed

* The Decision board will get calculate on the base below these fields and the range of these fields are mentioned in custom setting “[Sales Business Threshold](https://brightstar--hcldevpro.cs91.my.salesforce.com/01Io0000001SZhe?setupid=CustomSettings)” as hurdle rates.
* [Annual Average Gross Revenue](https://brightstar--hcldevpro.cs91.my.salesforce.com/00No000000CWS9k?setupid=OpportunityFields) /Life Contract Value (Ordinary

Course of Business & Corp is a party) - Opportunity -> Total\_Gross\_Revenue\_USD\_\_c

* CAPEX () – Opportunity -> CAPEX\_Total\_USD\_\_c
* Opportunity-> Total Capital Employed (USD)
* Risk Adjusted minimum ROIC (exd Corp AllLocated) = For Services – Opportunity-> ROIC Services, for all the country- Opportunity-> ROIC Product
* FS- Opportunity Product->Risk\_Exposure\_\_c
* BBTI- Opportunity Product->Point\_of\_Sales\_\_c
* Total FTE = Opportunity->Level of Effort;

Total IT COST = Opportunity->Implementation IT (USD) + CAPEX IT (USD)

* Opportunity -> Unusual Risk
* Currently there are few other fields which are existing in Custom setting and we are using to calculate the Decision Board, we will no longer use these fields and keep the values blank The fields are …
* [Total Investment/CM](https://brightstar--hcldevpro.cs91.my.salesforce.com/00No000000CWSDH?setupid=OpportunityFields)
* Contribution Margin Ratio
* Net Working Capital (USD)

### **Update Service Line (Bulk Update)**

Service Line is a new field being introduced on opportunity. This field contain abbreviation of all products/services added to opportunity as opportunity product. Abbreviation should be comma separated and have space. Abbreviation should not be duplicated in “Service Line” field and Order them alphabetically (ASC).

System should provide a button or an option to launch Service Line field update for all opportunities where Stage <> Closed or (Stage = Closed and Closed Date in last one year).

#### **Components**

* Create a new Custom Home Page Component-"Update Service Line” of type- “Visualforce Area” and associate following VisualForcePage to it.
* Create a new VisualForcePage - “UpdateServiceLinePage” with a button- “Update Service Line”, Create a Controller Class - “UpdateServiceLineController”. Upon clicking on this button the “UpdateServiceLineController” will call “UpdateServiceLineBatch” batch which will process the following and once the process will get completed it will notify user through email. if some records gets fail then it will include info about those records also.
* For below opportunities,

(Opportunity-> Stage = Prospecting or Proposal or Negotiation) or

(Opportunity-> Stage = Won or Lost or Cancelled and Date of Won/Lost in last one year)

* Recalculate Opportunity->Service Line,



Opportunity->Service Line = Related Opportunity Products->Product->Abbreviation

* Abbreviation should be comma separated, have space, should not be duplicated and ordered Alphabetically in ASC.

### **Update Service Line (From Opportunity Product)**

Create a summary of the services (Service Line) included on an opportunity using a list of abbreviations from product. The abbreviations should be separated by a comma and a space.

#### **Components**

* Create a new Trigger on Opportunity Product-” OpportunityProductTrigger”, On After Insert, and after Delete call below trigger handler class method.
* Create trigger handler class – “OpportunityProductTriggerHandler”, create a method- “CalculateServiceLine” which does the following
  + Calculate value for Opportunity 🡪 Service line

Opportunity 🡪 Service line = “Abbreviation” of all Opportunity Products of Opportunity separated by Comma and space

* + Value should be alphabetically sorted
  + Abbreviation should not be duplicated

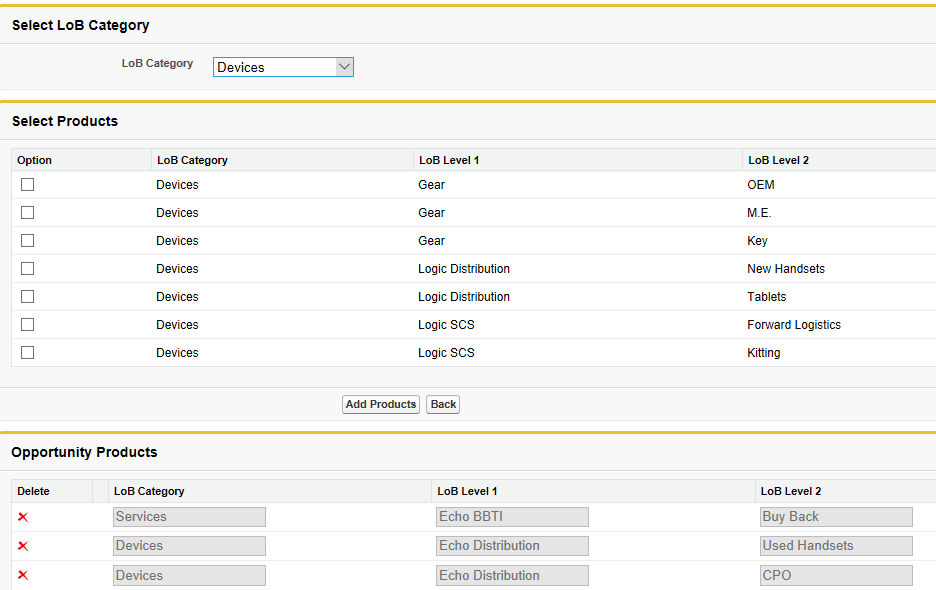
### **“**[**Add/Edit Services**](https://brightstar--hcldevpro.cs91.my.salesforce.com/00b2F000000DvH9?type=OpportunityLineItem&setupid=OpportunityLineItemLinks&retURL=%2Fp%2Fsetup%2Flink%2FActionButtonLinkList%3FpageName%3DOpportunityLineItem%26type%3DOpportunityLineItem%26setupid%3DOpportunityLineItemLinks%26retURL%3D%252Fui%252Fsetup%252FSetup%253Fsetupid%253DOpportunityLineItem)**” process**

The “Add/Edit Service” allow user to select products to be added as opportunity product. The process will open a page layout where user can search for product based on Category – Service, Device and Non-Corp Business. The search will show all products in a category with following fields

* LoB Category (Read Only)
* LoB Level1 (Read Only)
* LoB Level2 (Read Only)
* Volume (Editable)
* Net Revenue (USD) (Editable)
* Gross Profit (USD) (Editable)
* EBITDA (USD) (Editable)

User can enter the value in editable fields and select the products to be added. On click of “Add Product” button, it will create opportunity product records for each product selected.

This layout will also show a section with all the product already selected. And have delete option against each.



#### **Components**

* Upon clicking of “[Add/Edit Services](https://brightstar--hcldevpro.cs91.my.salesforce.com/00b2F000000DvH9?type=OpportunityLineItem&setupid=OpportunityLineItemLinks&retURL=%2Fp%2Fsetup%2Flink%2FActionButtonLinkList%3FpageName%3DOpportunityLineItem%26type%3DOpportunityLineItem%26setupid%3DOpportunityLineItemLinks%26retURL%3D%252Fui%252Fsetup%252FSetup%253Fsetupid%253DOpportunityLineItem)” custom button below visualForcePage opens up,
* Create a new VisualforcePage - “OpportunityProductPage”, create a controller extension class- “OpportunityProductControllerExt”, which does the following
* For Distribution Opportunities (New MSA, Purchase order), user can add products of LoB Categories-> “Devices”, “Services”, “Non-Corp Business”
* For Service Opportunities, user can add products of LoB Categories->” Services”
* PricebookEntryId should be populated for each opportunity product created,

Opportunity Product->PricebookEntryId = selected Product’s PricebookEntryId from Standard PriceBook

### **Update** [**CAPEX Total (USD)**](https://brightstar--devcrm2.cs20.my.salesforce.com/00No000000CWS9w?setupid=OpportunityFields)

#### **Components**

The existing trigger on opportunity will be modified to update **“CapexTotal(USD)”.** This field will contain the sum of [**CAPEX Other (USD)**](https://brightstar--devcrm2.cs20.my.salesforce.com/00No000000CWS9v?setupid=OpportunityFields) **and** [**CAPEX IT (USD)**](https://brightstar--devcrm2.cs20.my.salesforce.com/00No000000CWS9u?setupid=OpportunityFields)

* Update Opportunity Trigger’s handler class “blogic\_Opportunity’s” method “updateCAPEXFields” to calculate CapexTotal(USD) value.

### **Update KeyStakeHolder and Description field on Opportunity whenever Lead converted opportunity is created.**

The existing trigger on opportunity will be modified to update **“KeyStakeHolder” and “Description”** fields values. **KeyStakeHolder** field will contain the name of opportunity Owner as a value and **Description** field will contain the name of the opportunity.

#### **Components**

Update Opportunity Trigger’s handler class “blogic\_Opportunity’s” method “**updateOpportunityFields**” will assign the value in both the fields.

### **Qualification Process**

Qualification process will be initiated from opportunity. From a button “Qualification Process”, a page will open with fields to fill for qualification process. After filling the form, information will be saved in opportunity.

A button “Print Qualification Form” will be provided on Qualification form to print a pdf file.

#### **Components**

* this button opens below visualForcePage.
* Create a VisualForcePage - “QualificationProcessPage” with a button- “Print Qualification Form” and controller extension class- “QualificationProcessControllerExt”, this page consists of “Qualification form” which has following fields,

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Qualification Information | Strategic Fit |  |
|  | Product Fit |  |
|  | Platform Alignment |  |
|  | Profit Potential |  |
|  | Risk Evaluation |  |
|  | Financial Evaluation |  |
|  | Do we want it |  |
|  | Can we win it |  |
|  | Can we deliver |  |
|  | Complexity |  |
|  | Risk |  |
|  | Compelling Event |  |
|  | Key Decision Maker/s |  |
|  | Buying Group / Stakeholders |  |
|  | Formal & Informal Buying Criteria |  |
|  | Identify Threats |  |
|  | Competitive Landscape |  |
|  | How will we win |  |
|  | Resources Required |  |
|  | Approvals |  |
|  | Gaps |  |

* Upon clicking of “Print Qualification form” button generates pdf version of the Qualificaton form.
* Create a VisualForcePage- “PrintQualificationProcessPage” to generate pdf file for Qualification form.

### **Email Notification Custom Setting**

A custom setting - “Email Notification Settings” of type “List” would be created to make few parameters of notification configurable.

#### **Components**

* Custom setting fields

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Name | Name | Text | Standard field, identifies each entry as Unique |
| Object | Object | Text (80) |  |
| Is\_Active | Is\_Active | Checkbox | Notification turn on/off |
| Notify\_Manager | Notify Manager | Checkbox | Notify Manager turn on/off |
| Notifiaction\_Recurrence | Notifiaction Recurrence (In Days) | Number | Notifiaction Recurrence (In Days) |
| Description | Text (255) |  | Description about notification |
| Initial Notification Days | Initial Notification Days | Number | Value for intial notification days |
| ProspectingStage(Days) | ProspectingStage(Days) | Number | To configure Initial notification days for Prospecting Stage |
| ProposalStage(Days) | ProposalStage(Days) | Number | To configure Initial notification days for Proposal Stage |
| NegotiationStage(Days) | NegotiationStage(Days) | Number | To configure Initial notification days for Negotiation Stage |

* Custom setting entries for Opportunity notifications.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Name | Object | Is Active | Notify Manager | Notification Recurrence (In Days) | Initial Notification Days | Description | ProspectingStage(Days) | ProposalStage(Days) | NegosiationStage(Days) |
| Notifiy\_Close\_Date\_21days | Opportunity | True | True | 7 | 21 | Notifications for Close Date within 21 days |  |  |  |
| Notify\_Bus\_Case\_Approval\_21days | Opportunity | True | True | 7 | 21 | Notification for Business Case Approval within 21 days |  |  |  |
| Notify\_Stage\_Unchanged \_90days | Opportunity | True | True | 14 |  | Notification for Opportunity stage unchanged for greater than 90 days | 30 | 90 | 60 |
| Notify\_PL\_Impact\_Date\_Past | Opportunity | True | True | 7 |  | Notification if P&L Impact Date in past |  |  |  |
| Notify\_Proposal\_Due\_Date\_Past | Opportunity | True | True | 7 |  | Notification if Proposal Due Date in past |  |  |  |
| Notify\_Closed\_Date\_Past | Opportunity | True | True | 7 |  | Notification if Closed Date in past |  |  |  |

* These entries will be referred in the code for the below mentioned notifications

### **Notification for “Close Date” within 21 days**

When an opportunity stage is “Prospecting”, “Proposal” or “Negotiation” and Close Date < (Today +21) And Open Status <> OnHold then send a notification to Opportunity Owner and his Manager. And repeat this notification every week.

#### **Components**

* From Batch Job “SendNotificationsBatch”, Call method 🡪 notificationsForOppCloseDate. Method will do the following
  + If Custom Setting 🡪 Notifications for Close Date = True Then
    - Get all Opportunities with “Next Notification Date for Close Date <= Today and Stage = “Prospecting” or “Proposal” or “Negotiation” and

Open Status <> OnHold.

* + - For each opportunity,
      * Send notification to Opportunity Owner based on email template “Opportunity:Notification For Close Date”
      * Send Notification to Opportunity Owner’s Manager if Custom setting->Send Notification to Manager for Close Date =true
    - Update “Next Notification Date for Close Date” = Today + Custom Setting 🡪 Notification Recurrence (In Days) for Close Date
* Create Opportunity Trigger’s handler class “blogic\_Opportunity” method “settingNotificationsForOppCloseDate”, which will perform below actions on trigger’s before insert and before update events
  + For new Opportunity, “Next Notification Date for Close Date” = (Close Date – Custom Setting-> Initial Notification Days)
  + For existing Opportunity, if Close Date changes then “Next Notification Date for Close Date” = (Close Date – Custom Setting-> Initial Notification Days)
* Email Template Name: Opportunity:Notification For Close Date
* Email Body:

EMAIL TEXT:

**To:**

[Opportunity Owner]

**Subject:**

Opportunity: [Opportunity Name] - [Field trigger] is within the next 21 days

**Body:**

Dear [Opportunity Owner]

Your opportunity [Opportunity name] has a [field trigger] that falls in the next 21 days. Please update your opportunity to reflect all recent activity / progress and revise the date if needed.

Link of Opportunity Record

If you need any assistance, please contact your Regional Deal Desk.

CRM system administration

### **Notification for “Business Case Approval” within 21 days**

When an Opportunity 🡪 New Gate2 Approved = “No” and Expected Business Case Approval Date < (Today +21) And Open Status <> OnHold then send a notification to Opportunity Owner and his Manager. And repeat this notification every week.

#### **Components**

* From Batch Job “SendNotificationsBatch”, Call method 🡪 notificationsForOppBusinessCaseApproval. Method will do the following
  + If Custom Setting 🡪 Notifications for Business Case Approval = True Then
    - Get all Opportunities with “Next Notification Date for Business Case Approval <= Today and New Gate2 Approved =” No” and

Open Status <> OnHold.

* + - For each Opportunity,
      * Send notification to Opportunity Owner based on email template “Opportunity:Notification For Business Case Approval”
      * Send Notification to Opportunity Owner’s Manager if Custom setting-> Send Notification to Manager for Business Case Approval = true
    - Update “Next Notification Date for Business Case Approval” = Today + Custom Setting 🡪 Notification Recurrence (In Days) for Business Case Approval
  + Create Opportunity Trigger’s handler class “blogic\_Opportunity” method “settingNotificationsForOppBusinessCaseApproval”, which will perform below actions on trigger’s before insert and before update eventsFor new Opportunity, “Next Notification Date for Business Case Approval” = (Expected Business Case Approval Date – Custom Setting-> Initial Notification Days)
  + For existing Opportunity, if Expected Business Case Approval Date changes then “Next Notification Date for Business Case Approval” = (Expected Business Case Approval Date – Custom Setting-> Initial Notification Days)
* Email Template Name: Opportunity:Notification For Business Case Approval
* Email Body:

EMAIL TEXT:

**To:**

[Opportunity Owner]

**Subject:**

Opportunity: [Opportunity Name] - [Field trigger] is within the next 21 days

**Body:**

Dear [Opportunity Owner]

Your opportunity [Opportunity name] has a [field trigger] that falls in the next 21 days. Please update your opportunity to reflect all recent activity / progress and revise the date if needed.

Link of Opportunity Record

If you need any assistance, please contact your Regional Deal Desk.

CRM system administration

### **Notification for Opportunity stage unchanged for long**

When an opportunity Stage is unchanged for X days (Depends on Stage value) And Open Status <> OnHold then send a notification to Opportunity Owner and his Manager. And repeat this notification every two week.

#### **Components**

* From Batch Job “SendNotificationsBatch”, Call method 🡪 notificationsForOppStageUnchanged. Method will do the following
  + If Custom Setting 🡪 Notifications for Opportunity Stage Unchanged = True Then
    - Get all Opportunities with “Next Notification Date for Opportunity Stage Unchanged <= Today and

Open Status <> OnHold.

* + - For each Opportunity,
      * Send notification to Opportunity Owner based on email template “Opportunity:Notification For Opportunity Stage Unchanged”
      * Send Notification to Opportunity Owner’s Manager if Custom setting-> Send Notification to Manager for Opportunity Stage Unchanged =true
    - Update “Next Notification Date for Opportunity Stage Unchanged” = Today + Custom Setting 🡪 Notification Recurrence (In Days) for Opportunity Stage Unchanged
  + Create Opportunity Trigger’s handler class “blogic\_Opportunity” method “settingNotificationsForOppStageUnchanged”, which will perform below actions on trigger’s before insert and before update events.
    - For new Opportunity, if Opportunity->Stage=” Prospecting” and Probability > 0% then “Next Notification Date for Opportunity Stage Unchanged” = (Today + Custom Setting->ProspectingStage(Days))
    - For existing Opportunity, if Stage changes and Opportunity->Stage=” Prospecting” and Probability > 0% then “Next Notification Date for Opportunity Stage Unchanged” = (Today + Custom Setting->ProspectingStage(Days))
    - For existing Opportunity, if Stage changes and Opportunity->Stage=” Proposal” then “Next Notification Date for Opportunity Stage Unchanged” = (Today + Custom Setting->ProposalStage(Days)
    - For existing Opportunity, if Stage changes and Opportunity->Stage=” Negotiation” then “Next Notification Date for Opportunity Stage Unchanged” = (Today + Custom Setting-> NegotiationStage(Days)
* Email Template Name: Opportunity:Notification For Opportunity Stage Unchanged
* Email Body:
* Notification template

EMAIL TEXT:

**To:**

[Opportunity Owner]

**Subject:**

Opportunity: [Opportunity Name] - [Stage] has [Time in stage]

**Body:**

Dear [Opportunity Owner]

Your opportunity [Opportunity name] has spent [Time in stage] days in the stage of [stage]. Please review if there is any update needed.

Link of Opportunity Record

If you need any assistance, please contact your Regional Deal Desk.

CRM system administration

### **Notification if P&L Impact Date in past.**

When Opportunity P&L Impact Date in past And Open Status <> OnHold then send a notification to Opportunity Owner and his Manager. And repeat this notification every week.

#### **Components**

* From Batch Job “SendNotificationsBatch”, Call method 🡪 notificationsForOppPLImpactPastDate. Method will do the following
  + If Custom Setting 🡪 Notifications for Opportunity PLImpact PastDate = True Then
    - Get all Opportunities with “Next Notification Date for Opportunity PLImpact PastDate <= Today and

Open Status <> OnHold.

* + - For each Opportunity,
      * Send notification to Opportunity Owner based on email template “Opportunity:Notification For Opportunity PLImpact PastDate”
      * Send Notification to Opportunity Owner’s Manager if Custom setting-> Send Notification to Manager for Opportunity PLImpact PastDate =true
    - Update “Next Notification Date for Opportunity PLImpact PastDate” = Today + Custom Setting 🡪 Notification Recurrence (In Days) for Opportunity PLImpact PastDate
* Modify Process Builder <<Name of process builder>>
  + For new Opportunity, “Next Notification Date for Opportunity PLImpact PastDate” = (P&L Impact Date + 1)
  + For existing Opportunity, if PL Impact Date changes then “Next Notification Date for Opportunity PLImpact PastDate” = (P&L Impact Date + 1)
* Email Template Name: Opportunity:Notification For Opportunity PLImpact PastDate
* Email Body:
* Notification template

EMAIL TEXT:

**To:**

[Opportunity Owner]

**Subject:**

Opportunity: [Opportunity Name] - [field trigger] need update

**Body:**

Dear [Opportunity Owner]

Your opportunity [Opportunity name] has [field trigger] that is in the past. Please update your opportunity to reflect all recent activity / progress and revise any dates as necessary.

Link of Opportunity Record

If you need any assistance, please contact your Regional Deal Desk.

CRM system administration

### **Notification if Proposal Due Date in past.**

When Opportunity Proposal Due Date in past And Open Status <> OnHold then send a notification to Opportunity Owner and his Manager. And repeat this notification every week.

#### **Components**

* From Batch Job “SendNotificationsBatch”, Call method 🡪 notificationsForOppProposalDuePastDate. Method will do the following
  + If Custom Setting 🡪 Notifications for Opportunity ProposalDue PastDate = True Then
    - Get all Opportunities with “Next Notification Date for Opportunity ProposalDue PastDate <= Today and

Open Status <> OnHold.

* + - For each Opportunity,
      * Send notification to Opportunity Owner based on email template “Opportunity:Notification For Opportunity ProposalDue PastDate”
      * Send Notification to Opportunity Owner’s Manager if Custom setting-> Send Notification to Manager for Opportunity ProposalDue PastDate = true
    - Update “Next Notification Date for Opportunity ProposalDue PastDate” = Today + Custom Setting 🡪 Notification Recurrence (In Days) for Opportunity ProposalDue PastDate
* Modify Process Builder <<Name of process builder>>
  + For new Opportunity, “Next Notification Date for Opportunity ProposalDue PastDate” = (Proposal Due Date + 1)
  + For existing Opportunity, if PL Impact Date changes then “Next Notification Date for Opportunity ProposalDue PastDate” = (Proposal Due Date + 1)
* Email Template Name: Opportunity:Notification For Opportunity ProposalDue PastDate
* Email Body:
* Notification template

EMAIL TEXT:

**To:**

[Opportunity Owner]

**Subject:**

Opportunity: [Opportunity Name] - [field trigger] need update

**Body:**

Dear [Opportunity Owner]

Your opportunity [Opportunity name] has [field trigger] that is in the past. Please update your opportunity to reflect all recent activity / progress and revise any dates as necessary.

Link of Opportunity Record

If you need any assistance, please contact your Regional Deal Desk.

CRM system administration

### **Notification if Closed Date in past.**

When Opportunity Close Date in past And Open Status <> OnHold then send a notification to Opportunity Owner and his Manager. And repeat this notification every week.

#### **Components**

* From Batch Job “SendNotificationsBatch”, Call method 🡪 notificationsForOppClosePastDate. Method will do the following
  + If Custom Setting 🡪 Notifications for Opportunity Close PastDate = True Then
    - Get all Opportunities with “Next Notification Date for Opportunity Close PastDate <= Today and

Open Status <> OnHold.

* + - For each Opportunity,
      * Send notification to Opportunity Owner based on email template “Opportunity:Notification For Opportunity Close PastDate”
      * Send Notification to Opportunity Owner’s Manager if Custom setting-> Send Notification to Manager for Opportunity Close PastDate = true
    - Update “Next Notification Date for Opportunity Close PastDate” = Today + Custom Setting 🡪 Notification Recurrence (In Days) for Opportunity Close PastDate
* Modify Process Builder <<Name of process builder>>
  + For new Opportunity, “Next Notification Date for Opportunity Close PastDate” = (Close Date + 1)
  + For existing Opportunity, if PL Impact Date changes then “Next Notification Date for Opportunity Close PastDate” = (Close Date + 1)
* Email Template Name: Opportunity:Notification For Opportunity Close PastDate
* Email Body:
* Notification template

EMAIL TEXT:

**To:**

[Opportunity Owner]

**Subject:**

Opportunity: [Opportunity Name] - [field trigger] need update

**Body:**

Dear [Opportunity Owner]

Your opportunity [Opportunity name] has [field trigger] that is in the past. Please update your opportunity to reflect all recent activity / progress and revise any dates as necessary.

Link of Opportunity Record



If you need any assistance, please contact your Regional Deal Desk.



CRM system administration

## **Data Management**

* Update Partner Account for all exiting Opportunities.
* Export records from OpportunityPartner object of Salesforce through data loader in CSV file.
* Export Existing Opportunity Records in CSV file through data loader.
* Match Opportunity record id with OpportunityId field of OpportunityPartner and get the AccountToId field value in CSV file.
* Update Opportunity->Partner Account= OpportunityPartner ->AccountToId in CSV file
* Import updated Opportunity’s CSV file through data loader

And update Opportunity records.

* Update Service Line field for all opportunities.
  + This will be covered in section - 8.5.9 Update Service Line (Bulk Update).
* Update ultimate parent on all opportunities.
  + This will be covered under Section-6.6 Account Data Management
* Update “Open Status” field for all opportunities
  + Step1: Export all opportunities as csv file using data loader.
  + Step2: Modify csv to map Open Status field as below,

If Opportunity->Awarded = Yes then Open Status = Awarded

If Opportunity->Onhold = Yes then Open Status = Onhold

If Opportunity->Suspect = Yes then Open Status = Suspect

Else Open Status = Pursuit

* + Step3: Import csv to update these Opportunity records.
* Create a batch class “Updat Notification Date Field” on Opportunity, which will run once and perform following actions:
  + Update “Next Notification date for close date” field on Opportunity for “Notification for Close Date” functionality
  + Update “Next\_Notification\_Date\_for\_Business\_Case\_\_c” field on Opportunity for “Notification for business case” functionality
  + Update “Notification\_Opportunity\_stage\_unchanged\_\_c” field on Opportunity for “Notification for Opportunity stage Unchaged” functionality
  + Update “Next\_Notification\_for\_P\_l\_Impact\_\_c” field on Opportunity for “Notification for P&L impact” functionality
  + Update “Notification\_For\_Oppty\_Close\_Past\_Date\_\_c” field on Opportunity for “Notification for Close Past Date” functionality
  + Update “Notification\_For\_Proposal\_Due\_Date\_Past\_\_c” field on Opportunity for “Notification for Proposal due Date past” functionality
* If Probability = 0% then Set Open Status = Suspect. If Probability > 0% and Open Status = Suspect then Set Open Status = “In Pursuit”
* Update Record Type (Earlier record type were managed through workflow rule but now we have deactivated workflow rules related to record type)
* Update Opportunity stage based on Gate1, Gate2, Gate3 conditions
* For Business Case Financial Section, below is the details for fields and data management. Data management would be done for all existing opportunities (including closed Opportunities).

|  |  |  |
| --- | --- | --- |
| New Field | Old Field | Data Management Details |
| Total Gross Revenue USD  (Currency) | Gross Revenue (USD)  (Formula) | Copy old field value to new |
| Total Net Revenue (USD)  Roll-Up-Summary: Opportunity Product->Net Revenue (USD) | Net Revenue (USD) (Formula) | No data management required |
| Total Gross Profit (USD)  Roll-Up-Summary: Opportunity Product->Gross Profit (USD) | Gross Profit (USD) (Formula) | No data management required |
| Total EBITDA (USD) Roll-Up-Summary: Opportunity Product->EBITDA (USD) | EBITDA (USD) (Formula) | No data management required |
| Total EBIT (USD) (Currency) | EBIT (USD) (Formula) | Copy old field value to new |
| Total Net Income USD  (Currency) | Net Income (USD) (Formula) | Copy old field value to new |
| Average CCC (days) | CCC Total | Same field will be used, Field is renamed as “Average CCC (days)” |
| Net Working Capital (USD) | Net Working Capital (USD) | Same field will be used |
| CAPEX Total (USD) | CAPEX Total (USD) | Same field will be used |
| Total Capital Employed (USD)  (Formula) | Total Capital Employed (USD)  (Currency) | No data management required |
| ROIC Overall Opportunity | - | New Field created, Old field is not available |
| - | FCF (USD) | Old field no longer required |
| Leverage Ratio (TCE / EBITDA)  (Formula) | Leverage Ratio (TCE / EBITDA)  (Number) | Not Data management required |

## **Other considerations**

* Include all new fields on the Custom Report type “Opportunities with or without Products”
* Review and modify the validation rules based on new fields introduced and fields removed from layout.
  + Modify all validation rule that involve Target Close date and exchange it by Close Date
  + Remove Type from all existing validation rules
* Global Region, Sub Region and Country field and their dependency should be fixed as per the details provided in Appendix A
* For all fields planned to be removed from page layout, check its dependency on all components (including validation rules. Workflow rules, approvals, custom code) and do the relevant changes.
* Rename opportunity record type “Purchase Order” to “Buy and Sell”
* Remove Change Originator field validation to allow inactive users to be originators – Inactive Users are not allowed to be selected in User lookup in Salesforce.
* All Gates approvals will be done manually. So, there will not be any change in existing approval process components.
* Template of business case upload will change. This will have fields corresponding to summary information. There will not be any yearly informationChange the validation rule so that
  + Stage of Won opportunity cannot be changed back.
  + Lost or Cancelled opportunity can be changed back to “Prospecting” only. And following fields should be changed
    - Qualify for Qualification = False
    - Ready for Proposal Signoff = False
    - Ready for Final Business Signoff = False
* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.
* If Gross Revenue = 0 and Net Revenue <> 0 then the system should update Gross Revenue = Net Revenue. Gross Revenue is Editable.
* A close opportunity could be reopen by the Regional Admin or CRM Admin
* Use the same Utility class of Change Record Type functionality. This will update the opportunity as :-

Stage = Prospecting

Qualify for Qualification = False

Ready for Proposal Signoff = False

Ready for Final Business Signoff = False

# ***Opportunity Product Management***

## **Overview**

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Quantity | Quantity | Number | Rename to “Volume” |
| Point\_of\_Sales\_\_c | Point of Sales | Number (No Decimal) | Collection Point for BBTI - |
| Risk\_Exposure\_\_c | Risk Exposure | Currency (16,0) | Risk exposure for FS |
| LoB\_Category\_\_c | LoB Category | Formula (Text) | Product Id 🡪 LoB Category |
| LoB\_Level\_1\_\_c | LoB Level1 | Formula (Text) | Product Id 🡪 LoB Level1 |
| LoB\_Level\_2\_\_c | LoB Level2 | Formula (Text) | Product Id 🡪 LoB Level2 |
| [EBITDA\_USD](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields)\_New\_\_c | [EBITDA (USD)](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields) | Currency (16,0) |  |
| [Gross\_Profit\_USD](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields)\_New\_\_c | Gross Profit (USD) | Currency (16,0) |  |
| [Net\_Revenue\_USD](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields)\_New\_\_c | Net Revenue (USD) | Currency (16,0) |  |
| Opportunity\_Record\_Type\_Category | Opportunity Record Type Category | Picklist | Rename as Opportunity Record Type Category-OBSOLETE |
| Level\_1 | Line of Business Category | Picklist | Rename as Line of Business Category-OBSOLETE |
| Level\_2 | Line of Business Level 1 | Picklist | Rename as Line of Business Level 1-OBSOLETE |
| Level\_3 | Line of Business Level 2 | Picklist | Rename as Line of Business Level 2-OBSOLETE |
| Products | Products | Picklist (Multi-Select) | Rename as Products-OBSOLETE |
| Risk\_Assessment\_\_c | Risk Assessment | Currency (16,0) |  |
| Net\_Revenue\_USD\_\_c | Net Revenue (USD) | Formula (Currency) | Rename as [Net Revenue (USD)- OBSOLETE](https://brightstar--devcrm2.cs20.my.salesforce.com/00No000000CWSDh?setupid=OpportunityLineItemFields) |
| Net\_Revenue\_YR1\_USD\_\_c | Net Revenue YR1 (USD) | Currency(16, 0) | Rename as [Net Revenue YR1 (USD)-](https://brightstar--devcrm2.cs20.my.salesforce.com/00No000000CWSDi?setupid=OpportunityLineItemFields) OBSOLETE |
| Net\_Revenue\_YR2\_USD\_\_c | Net Revenue YR2 (USD) | Currency(16, 0) | Rename as Net Revenue YR2 (USD) - OBSOLETE |
| Net\_Revenue\_YR3\_USD\_\_c | Net Revenue YR3 (USD) | Currency(16, 0) | Rename as Net Revenue YR3 (USD) - OBSOLETE |
| Net\_Revenue\_YR4\_USD\_\_c | Net Revenue YR4 (USD) | Currency(16, 0) | Rename as Net Revenue YR4 (USD) - OBSOLETE |
| Net\_Revenue\_YR5\_USD\_\_c | Net Revenue YR5 (USD) | Currency(16, 0) | Rename as Net Revenue YR5 (USD) - OBSOLETE |
| Net\_Revenue\_YR6\_USD\_\_c | Net Revenue YR6 (USD) | Currency(16, 0) | Rename as Net Revenue YR6 (USD) - OBSOLETE |
| Gross\_Profit\_USD\_\_c | Gross Profit (USD) | Formula (Currency) | Rename as Gross Profit (USD)- OBSOLETE |
| Gross\_Profit\_YR1\_USD\_\_c | Gross Profit YR1 (USD) | Currency(16, 0) | Rename as Gross Profit YR1 (USD) - OBSOLETE |
| Gross\_Profit\_YR2\_USD\_\_c | Gross Profit YR2 (USD) | Currency(16, 0) | Rename as Gross Profit YR2 (USD) - OBSOLETE |
| Gross\_Profit\_YR3\_USD\_\_c | Gross Profit YR3 (USD) | Currency(16, 0) | Rename as Gross Profit YR3 (USD) - OBSOLETE |
| Gross\_Profit\_YR4\_USD\_\_c | Gross Profit YR4 (USD) | Currency(16, 0) | Rename as Gross Profit YR4 (USD) - OBSOLETE |
| Gross\_Profit\_YR5\_USD\_\_c | Gross Profit YR5 (USD) | Currency(16, 0) | Rename as Gross Profit YR5 (USD) - OBSOLETE |
| Gross\_Profit\_YR6\_USD\_\_c | Gross Profit YR6 (USD) | Currency(16, 0) | Rename as Gross Profit YR6 (USD) - OBSOLETE |
| EBITA\_USD\_\_c | EBITA (USD) | Formula (Currency) | Rename as [EBITA (USD)- OBSOLETE](https://brightstar--devcrm2.cs20.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields) |
| EBITA\_YR1\_USD\_\_c | EBITA YR1 (USD) | Currency(16, 0) | Rename as EBITA YR1 (USD) - OBSOLETE |
| EBITA\_YR2\_USD\_\_c | EBITA YR2 (USD) | Currency(16, 0) | Rename as EBITA YR2 (USD) - OBSOLETE |
| EBITA\_YR3\_USD\_\_c | EBITA YR3 (USD) | Currency(16, 0) | Rename as EBITA YR3 (USD) - OBSOLETE |
| EBITA\_YR4\_USD\_\_c | EBITA YR4 (USD) | Currency(16, 0) | Rename as EBITA YR4 (USD) - OBSOLETE |
| EBITA\_YR5\_USD\_\_c | EBITA YR5 (USD) | Currency(16, 0) | Rename as EBITA YR5 (USD) - OBSOLETE |
| EBITA\_YR6\_USD\_\_c | EBITA YR6 (USD) | Currency(16, 0) | Rename as EBITA YR6 (USD) - OBSOLETE |
|  |  |  |  |

## **Page Layouts**



|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Product Information |  |  |
|  | LoB Category |  |
|  | LoB Level1 |  |
|  | LoB Level2 |  |
|  |  |  |
| Product/Service Financial Information |  |  |
|  | [EBITDA (USD)](https://brightstar--linkedint.cs79.my.salesforce.com/00No000000ESb3d?setupid=OpportunityLineItemFields) | New Field |
|  | Gross Profit (USD) | New Field |
|  | Net Revenue (USD) | New Field |
|  | Volume | Move from Product Information section |
|  | Point of Sales |  |
|  | Risk Exposure |  |
|  | OpportunityProductFieldEdit | Remove this VF page |
|  | Opportunity Record Type Category | Remove |
|  | Line of Business Category | Remove |
|  | Line of Business Level1 | Remove |
|  | Line of Business Level2 | Remove |
|  | Products | Remove |
|  | Product Code | Remove |
|  | Total Price | Remove |

## **Configuration Functionalities**

No Change

## **Data management**

* For all existing opportunity products (including closed Opportunities), copy values in new fields from existing formula fields as follows
  + Step:1 Use Data Loader to export all the Opportunity products as csv file.
  + Step:2 Modify the csv file and copy below fields from existing formula fields as follows

EBITDA (USD) = EBITDA (USD) – Formula Field

Gross Profit (USD) = Gross Profit (USD) – Formula Field

Net Revenue (USD) = Net Revenue (USD) – Formula Field

* + Step:3 Import csv file from Step:2 to update Opportunity products.
* For all existing opportunity products, PriceBook Entry Id, Product Id should be updated based on Product records so that LoB Category, LoB Level1 and LoB Level2 fields auto populate correctly on opportunity product.
  + Step:1 Use Data Loader to Export all the Opportunity Products as csv file
  + Step:2 Use Data Loader to Export PriceBook Entries of Standard PriceBook for all the products as csv file
  + Step:3 Modify csv file from Step:1 and add PriceBook Entry Id by matching the below fields from Step:1 & Step:2 csv files

Opportunity Product->Line Of Business Level 2 = PriceBook Entry->Product->Name

* + Step:4 Import the csv file from Step3 to update Opportunity Products.

## **Other considerations**

* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Account Plan Management***

## **Overview**

The Account plan module allows the Sales user to create and control account development plans. There will be only one “Open” Account Plan associated with an account at a time. We will add product information on Account Plan in the same way as we are adding on Opportunity module.

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Status\_\_c | Status | Picklist | Options :-   * Open * Closed * Default Open |
| Brightstar\_Strengths\_\_c | Brightstar Strengths | Rich Text | Rename as Strengths |
| Weaknesses\_\_c | Weaknesses | Rich Text |  |
| Customer\_Opportunities\_\_c | |  |  | | --- | --- | |  | Customer Opportunities | | Rich Text | Rename as Opportunities |
| Threats\_\_c | Threats | Rich Text |  |
| |  |  | | --- | --- | |  | Product\_s\_\_c | | Product(s) | |  |  | | --- | --- | |  | Picklist  (Multi-  Select) | | Rename as Product(s)-OBSOLETE |
| Service\_Line\_\_c | LoB Summary | Text (100) | Label Change from Service Line to LoB Summary |

Objective Object

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Name | Objective Name | Text(80) | * This is on Objective Object * Change type as Auto number |
| Objective\_c | Objective | Text(255) |  |

Account Plan Product Object (Detail Object of Account Plan)

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Total\_Annual\_Addressable\_  Revenue\_\_c | Total Annual Addressable Revenue | currency |  |
| Brightstar\_Annual\_current\_share\_  (Revenue)\_\_c | Brightstar Annual current share (Revenue) | currency |  |
| **Brightstar\_Annual\_addressable\_share\_Rev\_\_c** | [**Brightstar Annual addressable share(Rev)**](https://brightstar--devcrm2.cs20.my.salesforce.com/00Nm0000001XK8o?setupid=CustomObjects) | currency |  |
| YTD\_Brightstar\_Revenue\_\_c | YTD Brightstar Revenue | currency |  |
| YTD\_Brightstar\_Gross\_Profit\_\_c | YTD Brightstar Gross Profit | currency |  |
| Goal\_Annual\_Revenue\_\_c | Goal Annual Revenue | currency |  |
| Goal\_Annual\_Gross\_Profit\_\_c | Goal Annual Gross Profit | currency |  |
|  |  |  |  |
| AccountPlanId\_\_c | Account Plan Id | Lookup (Account Plan) |  |
| ProductId\_\_c | Product Id | Lookup(Product) |  |
| Quantity | Quantity\_\_c | Number (18, 0) |  |

## **Page Layouts**

Account Plan Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| SWOT analysis | Strengths |  |
|  | Weaknesses |  |
|  | Opportunities |  |
|  | Threats |  |
|  |  |  |
| Account Plan Detail | Product(s) | Remove |
|  | Status | Default Open |
|  | Service Line | Read Only |
|  |  |  |
| Account Plan Product Related List |  | Add |

Account Plan Product Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Account Plan Product Detail | Total Annual Addressable Revenue |  |
|  | Brightstar Annual current share (Revenue) |  |
|  | Brightstar Annual addressable share (Revenue) |  |
|  | YTD Brightstar Revenue |  |
|  | YTD Brightstar Gross Profit |  |
|  | Goal Annual Revenue |  |
|  | Goal Annual Gross Profit |  |
|  | AccountPlanId | Read only |
|  | ProductId | Read only |
|  | Quantity |  |

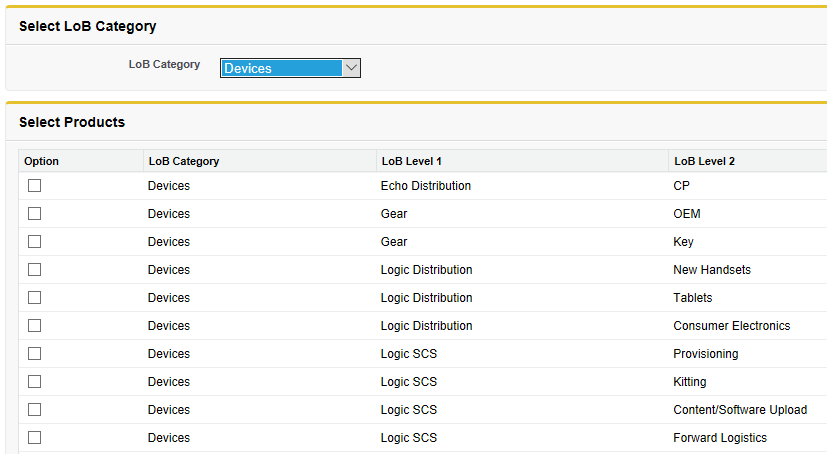
## **Configuration Functionalities**

None

## **Customizations**

### **“**[**Add/Edit Services**](https://brightstar--hcldevpro.cs91.my.salesforce.com/00b2F000000DvH9?type=OpportunityLineItem&setupid=OpportunityLineItemLinks&retURL=%2Fp%2Fsetup%2Flink%2FActionButtonLinkList%3FpageName%3DOpportunityLineItem%26type%3DOpportunityLineItem%26setupid%3DOpportunityLineItemLinks%26retURL%3D%252Fui%252Fsetup%252FSetup%253Fsetupid%253DOpportunityLineItem)**” process**

The “Add Product” process will be same as it is on Opportunity module. This process will allow user to select products/services for Account planning



#### **Components**

* Create custom button “[Add/Edit Services](https://brightstar--hcldevpro.cs91.my.salesforce.com/00b2F000000DvH9?type=OpportunityLineItem&setupid=OpportunityLineItemLinks&retURL=%2Fp%2Fsetup%2Flink%2FActionButtonLinkList%3FpageName%3DOpportunityLineItem%26type%3DOpportunityLineItem%26setupid%3DOpportunityLineItemLinks%26retURL%3D%252Fui%252Fsetup%252FSetup%253Fsetupid%253DOpportunityLineItem)”.
* Create a VF page “Add&EditAccountPlanProductPage”
  + which will be open on click of “[Add/Edit Services](https://brightstar--hcldevpro.cs91.my.salesforce.com/00b2F000000DvH9?type=OpportunityLineItem&setupid=OpportunityLineItemLinks&retURL=%2Fp%2Fsetup%2Flink%2FActionButtonLinkList%3FpageName%3DOpportunityLineItem%26type%3DOpportunityLineItem%26setupid%3DOpportunityLineItemLinks%26retURL%3D%252Fui%252Fsetup%252FSetup%253Fsetupid%253DOpportunityLineItem)” button and will give option to add product as it does in Opportunity module.
* Create an extension apex class “Add&EditAccountPlanProductExt”
  + which will provide the option of product selection on base of product category chosen by the user

### **Update Service Line**

Create a summary of the services included on an Account Plan using a list of abbreviations on the field called “Service Line”. The abbreviations should be separated by a comma and a space.

#### **Components**

* Create a Trigger on Account Plan Product object – “AccountPlanProductTrigger”, on after Insert, After Delete, below method will be called from trigger handler class.
  + AccountPlanProductTriggerHandler->populateAccountPlanServiceLine
* Create a Trigger Handler class- AccountPlanProductTriggerHandler with a method – populateAccountPlanServiceLine, which does the following
  + Calculate value for Account Plan 🡪 Service line

Account Plan🡪 Service line = “Abbreviation” of all Account Plan Products of Account Plan separated by Comma and space

* + Value should be alphabetically sorted
  + Abbreviation should not be duplicated

## **Data management**

* Adding new field “Status” on Account Plan, so we need to update all existing records with “Open” status.
* Exports all records of Account plan in CSV
* Update Status column with “Open” value
* Update Account plan by importing updated CSV file using data loader
* We are removing Product(s) field from the page layout so we need to update Service Line field and need to create Account Plan product records for the product ids which are mentioned in Product(s) fields on old Account Plan records.
* Create a Batch Apex class “CreateAccountPlanBatch” to create Account Plan Products based on existing AccountPlan->Product(s).
* We are changing data type for Objective name field from text to auto number, so we need to copy objective name field value in Objective field for old records.
* Export Objective object records through data loader
* Update objective field value with Objective name field values
* Import file and update records

## **Other considerations**

* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Product Management***

## **Overview**

Product module is used to maintain Products and Services at LoB level. Currently Products and Services available for selection at opportunity level is not directly linked to records of Product module. Due to this, introducing a new product or change in definition of product is complex process and require configuration change.

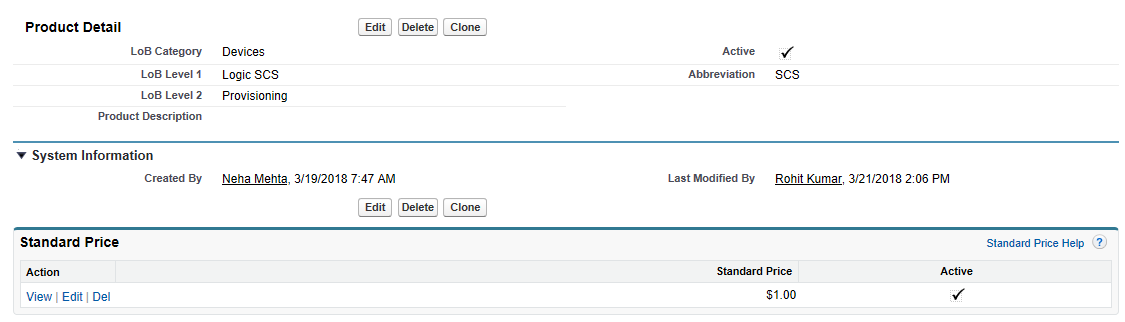
The current CRM implementation is for a group that does not have set prices for their products. In accordance with the Brightstar business model, each product will be assigned a base price of 0$ and the Sales User will be required to enter in the price for the Product or Service line manually.

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| LoB\_Category\_\_c | LoB Category | Picklist | Required  Options   * Services * Devices * Non-Corp Business |
| LoB\_Level\_1\_\_c | LoB Level 1 | Text (100) | Required |
| Product\_Name | LoB Level 2 |  | Rename “Model” to “LoB Level 2”  Required |
| Abbreviation\_\_c | Abbreviation | Text (50) | Required |
| Manufacturer\_Custom | Manufacturer | Text (50) | Rename as Manufacturer -OBSOLETE |
| Part\_Number | Part Number | Text (50) (External ID) | Rename as Part Number -OBSOLETE |
| Class\_Description | Class Description | Text (50) | Rename as Class Description -OBSOLETE |
| Service\_Line\_1 | Service Line 1 | Picklist | Rename as Service Line 1-OBSOLETE |
| Service\_Line\_2 | Service Line 2 | Picklist | Rename as Service Line 2-OBSOLETE |
| Services | Non-Transactional (Services) | Checkbox | Rename as Non-Transactional (Services)-OBSOLETE |
| Transactional | Distribution | Checkbox | Rename as Distribution-OBSOLETE |

## **Page Layouts**

Product Layout



|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Product Details | LoB Category | Required |
| ‘ | LoB Level 1 | Required |
|  | LoB Level 2 | Required |
|  | Abbreviation | Required |
|  | Active |  |
|  | Product Description | Remove |
|  | Manufacturer | Remove |
|  | Part Number | Remove |
|  | Class Description | Remove |
|  | Service Line 1 | Remove |
|  | Service Line 2 | Remove |
|  | Non-Transactional (Services) | Remove |
|  | Distribution | Remove |
| Inventory |  | Remove |

## **Configuration Functionalities**

No Change

## **Customizations**

No Change

## **Data management**

* Add and modify products manually as per details provided in
* Modify existing Opportunity Products to link with correct Product record.
* Refer section 9.5 Opportunity Product Data Management for more details.

## **Other considerations**

* All products should be added to Standard Price book. Only then it will be available for selection at Opportunity Product level.
* Product record can be created or modified by CRM Admin only.
* For other users, Product Tab will not be visible and they cannot create or modify product records.
* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Opportunity Plan***

## **Overview**

The Opportunity plan module allows the Sales user to create and control opportunity plan based on the Account Plan and Opportunity plan framework.

The Opportunity plan module would allow the vulnerability analysis to compare with 3 competitors instead of one.

In Vulnerability analysis section, user could select value between 1 to 8 against criteria.

Products field would be modified so that it populates value from Service Line field of the selected opportunity.

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Competitor\_1\_\_c | Competitor 1 | Text (80) |  |
| Competitor\_2\_\_c | Competitor 2 | Text (80) |  |
| Competitor\_3\_\_c | Competitor 3 | Text (80) |  |
| Competitors\_2\_Criteria\_1\_Ranking\_\_c | Competitor 2 Criteria 1 Ranking | Picklist | Options: From 1 t0 8 |
| Competitors\_2\_Criteria\_2\_Ranking\_\_c | Competitor 2 Criteria 2 Ranking | Picklist | Options: From 1 to 8 |
| Competitors\_2\_Criteria\_3\_Ranking\_\_c | Competitor 2 Criteria 3 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_2\_Criteria\_4\_Ranking\_\_c | Competitor 2 Criteria 4 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_2\_Criteria\_5\_Ranking\_\_c | Competitor 2 Criteria 5 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_2\_Criteria\_6\_Ranking\_\_c | Competitor 2 Criteria 6 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_2\_Criteria\_7\_Ranking\_\_c | Competitor 2 Criteria 7 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_2\_Criteria\_8\_Ranking\_\_c | Competitor 2 Criteria 8 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_1\_Ranking\_\_c | Competitor 3 Criteria 1 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_2\_Ranking\_\_c | Competitor 3 Criteria 2 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_3\_Ranking\_\_c | Competitor 3 Criteria 3 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_4\_Ranking\_\_c | Competitor 3 Criteria 4 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_5\_Ranking\_\_c | Competitor 3 Criteria 5 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_6\_Ranking\_\_c | Competitor 3 Criteria 6 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_7\_Ranking\_\_c | Competitor 3 Criteria 7 Ranking | Picklist | Options From 1 to 8 |
| Competitors\_3\_Criteria\_8\_Ranking\_\_c | Competitor 3 Criteria 8 Ranking | Picklist | Options From 1 to 8 |
| C\_1\_Vulnerability\_Analysis\_Score\_\_c | Competitor 1 Vulnerability Analysis Score | Formula (Number) | Contains formula based on the attached excel sheet given at the end of this table |
| C\_2\_Vulnerability\_Analysis\_Score\_\_c | Competitor 2 Vulnerability Analysis Score | Formula (Number) | Contains formula based on the attached excel sheet given at the end of this table |
| C\_3\_Vulnerability\_Analysis\_Score\_\_c | Competitor 3 Vulnerability Analysis Score | Formula (Number) | Contains formula based on the attached excel sheet given at the end of this table |
| Vulnerability\_Analysis\_Score\_\_c | [Vulnerability Analysis Score](https://brightstar--devcrm2.cs20.my.salesforce.com/00No000000CzyPI?setupid=CustomObjects) | Formula (Number) | Contains formula based on the attached excel sheet given at the end of this table |
| ServiceLine\_\_c | LoB Summary | Formula (Text) | Opportunity --> ServiceLine  Label Change from Service Line to LoB Summary |
| |  |  | | --- | --- | |  | Product\_s\_\_c | | Product(s) | Picklist (Multi-Select) | Rename as Product(s)-OBSOLETEE |
| Criteria\_1\_difference\_\_c | [Criteria 1 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 1 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| Criteria\_2\_difference\_\_c | [Criteria 2 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 2 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| Criteria\_3\_difference\_\_c | [Criteria 3 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 3 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| Criteria\_4\_difference\_\_c | [Criteria 4 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 4 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| Criteria\_5\_difference\_\_c | [Criteria 5 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 5 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| Criteria\_6\_difference\_\_c | [Criteria 6 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 6 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| Criteria\_7\_difference\_\_c | [Criteria 7 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 7 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| Criteria\_8\_difference\_\_c | [Criteria 8 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0) | |  |  | | --- | --- | |  | Formula (Number) | | Rename as [Criteria 8 difference](https://apac01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fbrightstar--hcldevpro.cs91.my.salesforce.com%2F00No000000CzyOp%3Fsetupid%3DCustomObjects&data=02%7C01%7Csagar.p2%40hcl.com%7C64d49712edeb4a3d147408d59ae64ef1%7C189de737c93a4f5a8b686f4ca9941912%7C0%7C0%7C636585237153214897&sdata=dlVobJE7t3FtnDwiwxawmuuKGwTFivDNa3Def2j5KuE%3D&reserved=0)-OBSOLETE |
| OpportunityPlanError | OpportunityPlanError | Custom Label | Value: Please remove duplicate values on Criteria. |





## **Page Layouts**

Opportunity Plan Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Opportunity Plan Detail |  |  |
|  | ServiceLine |  |
|  | Product(s) | Remove |

## **Configuration Functionalities**

None.

## **Customizations**

### **Vulnerability Analysis Changes**

The Opportunity plan module would allow the vulnerability analysis to compare with 3 competitors instead of one. In Vulnerability analysis section, user could select value between 1 to 8 against criteria.

#### **Components**

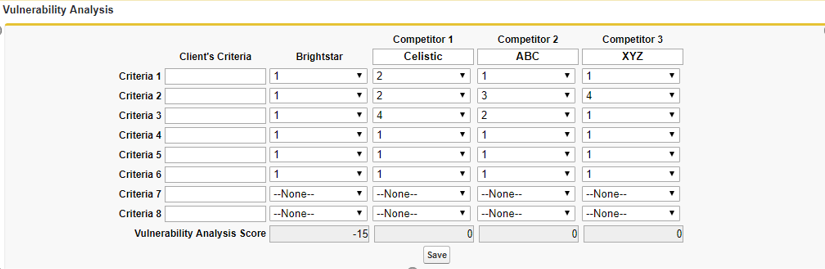
* Vulnerability analysis information is displayed as a section under the Opportunity Plan detail page, which is implemented as inline Visualforce-Page.
* Visualforce Page: OpportunityPlanFieldEditPage and Controller extension - OpportunityPlanFieldEditCtrl would be Modified to accommodate below changes.
* Change the Competition Ranking label as “Competitor 1”
* Add two new competitors and their ranking against Brightstar.



* Duplicate check would be done for Brightstar,Competitor 1,Competitor2 and Competitor3 criterias.A method name validations() has been added to check the duplicate value on all criterias,if any duplicate value found then there will be an error thrown as “Please remove duplicate values on Criteria.”

List of New Fields added on VF page,

|  |  |
| --- | --- |
| Field Label | Details |
| Competitor 1 |  |
| Competitor 2 |  |
| Competitor 3 |  |
| Competitor 2 Criteria 1 Ranking |  |
| Competitor 2 Criteria 2 Ranking |  |
| Competitor 2 Criteria 3 Ranking |  |
| Competitor 2 Criteria 4 Ranking |  |
| Competitor 2 Criteria 5 Ranking |  |
| Competitor 2 Criteria 6 Ranking |  |
| Competitor 2 Criteria 7 Ranking |  |
| Competitor 2 Criteria 8 Ranking |  |
| Competitor 3 Criteria 1 Ranking |  |
| Competitor 3 Criteria 2 Ranking |  |
| Competitor 3 Criteria 3 Ranking |  |
| Competitor 3 Criteria 4 Ranking |  |
| Competitor 3 Criteria 5 Ranking |  |
| Competitor 3 Criteria 6 Ranking |  |
| Competitor 3 Criteria 7 Ranking |  |
| Competitor 3 Criteria 8 Ranking |  |
| Competitor 1 Vulnerability Analysis Score |  |
| Competitor 2 Vulnerability Analysis Score |  |
| Competitor 3 Vulnerability Analysis Score |  |



* Vulnerability Analysis scores for Competitors would be calculated as formula fields -Competitor 1 Vulnerability, Competitor 2 Vulnerability, Competitor 3 Vulnerability.

## **Data management**

* No updates would be done for the Existing records for the new fields.

## **Other considerations**

* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Project Management***

## **Overview**

Project Management Object is used to track internal and external projects.

Internal Projects are created manually by user. External projects are created by system when an opportunity is in Negotiation Stage and its status is awarded.

The changes mentioned in BRD is primarily for Internal Project. Only one change on External Projects.

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Status\_\_c | Status | Picklist | Rename as – “Stage”  External Project  Options:   * Negotiation * Implementation * Management   Internal Project Options:   * BRD * Design * Development * Testing |
| Project\_Type\_\_c | Project Type | Picklist | External Project  Options:   * Sales   Internal Project  Options:   * Foundational * Global |
| Project\_Description\_\_c | Project Description | Long Text Area (32768) | Rename as – “Project Description / Strategic Overview” |
| Service\_Owner\_Business\_Owner\_\_c | Service Owner / Business Owner | Lookup(User) |  |
| Platform\_Overview\_Scope\_Summary\_\_c | Platform Overview / Scope Summary | Text (255) |  |
| Funding\_Required\_\_c | Funding Required | Picklist | Rename as - "Budget" |
| Budget\_Year\_\_c | Budget Year | Picklist | Options   * 2016 * 2017 * 2018 * 2019 * 2020 * 2021 * 2022 |
| Opex\_Total\_\_c | Opex Total | Currency (18, 0) |  |
| Gate\_1\_Approval\_Date\_\_c | Gate 1 Approval Date | Date |  |
| Gate\_1\_Approvers\_\_c | Gate 1 Approvers | Long Text Area (500) |  |
| Gate\_1\_Comments\_\_c | Gate 1 Comments | Long Text Area (2000) |  |
| Gate\_3\_Approval\_Date\_\_c | Gate 3 Approval Date | Date |  |
| Gate\_3\_Approvers\_\_c | Gate 3 Approvers | Long Text Area (500) |  |
| Gate\_3\_Comments\_\_c | Gate 3 Comments | Long Text Area (2000) |  |
| Global\_Region\_project\_\_c | Global Region | Picklist | Remove Picklist Value – “Japan” |
| |  |  | | --- | --- | |  | Record Type | | Record Type | |  |  | | --- | --- | |  | Record Type | |  |
| Local\_Project\_Number\_\_c | Local Project Number | Text (50) | Rename as Local Project Number-OBSOLETE |
| Business\_Cost\_Centre\_\_c | Business Cost Centre | Text (50) | Rename as Business Cost Centre-OBSOLETE |
| Gate\_Implementation\_Approved\_By\_\_c | |  |  | | --- | --- | | Gate 5 Approved By |  | | |  |  | | --- | --- | |  | Long Text Area (2000) | | Rename as   |  |  | | --- | --- | | Gate 5 Approved By |  |   -OBSOLETE |
| Requirements\_and\_Project\_Plan\_Ready\_\_c | Requirements and Project Plan Ready? | Picklist | Rename as Requirements and Project Plan Ready? -OBS |
| Gate\_Implementation\_Comments\_\_c | Gate 5 Comments | |  |  | | --- | --- | |  | Long Text Area (2000) | | Rename as Gate 5 Comments-OBSOLETE |
| Gate\_Implementation\_Approval\_Date\_\_c | Gate 5 Approval Date | Date | Rename as Gate 5 Approval Date-OBSOLETE |
| |  |  | | --- | --- | |  | Gate\_Management\_Approval\_Date\_\_c | | Gate 6 Approval Date | Date | Gate 6 Approval Date-OBSOLETE |
| Gate\_Management\_Approved\_By\_\_c | |  |  | | --- | --- | | Gate 6 Approved By |  | | |  |  | | --- | --- | |  | Long Text Area (2000) | | |  |  | | --- | --- | | Gate 6 Approved By |  |   -OBSOLETE |
| Lessons\_Learned\_Completed\_\_c | Lessons Learned Completed? | |  |  | | --- | --- | |  | Picklist | | Lessons Learned Completed? -OBSOLETE |
| |  |  | | --- | --- | |  | BAU\_Lead\_\_c | | BAU Lead | |  |  | | --- | --- | |  | Lookup(User) | | BAU Lead-OBSOLETE |
| Project\_Implementation\_Review\_Completed\_\_c | Project Implementation Review Completed | Picklist | Project Impl Review Completed-OBSOLETE |
|  |  |  |  |

## **Page Layouts**

Internal Page layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Project Detail |  |  |
|  | Project Type |  |
|  | Service Owner / Business Owner | Add below “Project Sponsor” field |
|  | Platform Overview / Scope Summary | Add below "Project Description and Strategic Overview" |
|  |  |  |
|  |  |  |
| Financial Figures for Budget |  |  |
|  | Budget  Budget Status | Move Budget and Budget Status field in "Financial Figures for Budget" section |
|  | Budget Year | Add below “Budget” field |
|  | Opex Total | Add above “Capex Total” field |
|  |  |  |
| Notes and Files |  | Add Related List – “Notes and Files” |
|  |  |  |
| Gate 1 Qualification |  | Add a new section - “Gate 1 Qualification” |
|  | Gate 1 Approval Date |  |
|  | Gate 1 Approvers |  |
|  | Gate 1 Comments |  |
|  |  |  |
| Gate 3 BEC/Gate 3 |  | Add a new section - “Gate 3 BEC/Gate 3” |
|  | Gate 3 Approval Date |  |
|  | Gate 3 Approvers |  |
|  | Gate 3 Comments |  |
|  |  |  |
| BEC meeting minute |  | Add a new section - “BEC meeting minute” (Based on BEC\_Projs\_Association” object) |
|  | BEC Meeting |  |
|  |  |  |

Project Layout (used for External Project record type)

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Project Details |  |  |
|  | Project Type | Read-only on Layout |
|  |  |  |
| Notes and Files |  | Add Related List - Notes and Files |
|  |  |  |

Remove following fields & Sections from Internal Page layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Project Detail |  |  |
|  | Record Type |  |
|  | Local Project Number |  |
|  | Business Cost Centre |  |
|  |  |  |
| Gate 5 - Implementation |  | Remove Section and fields---This to be removed from internal |
|  |  |  |
| Gate 6 - Go Live |  | Remove Section and fields- This to be removed from internal |
|  |  |  |

Remove following fields from Project layout (i.e. External Project)

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Project Detail |  |  |
|  | Record Type |  |
|  |  |  |

## **Configuration Functionalities**

### **Activate Chatter on Project Object**

#### **Components**

### **Set Project Type for External Projects**

* External projects are created by system when an opportunity is in Negotiation Stage and its status is awarded, when an external project is created then system should set Project Type field to “Sales”. Changes would be made in existing Process builder.

#### **Components**

* Process Builder – “Create Project and Contract Record” - Modify this Process Builder to set Project Type = Sales.

## **Customizations**

No Change

## **Data management**

* Status (renamed as Stage) field options are changed for Internal Projects and there would be no data updates required for this field for existing Internal Project records.
* Update Project Type field as Sales for existing External Project records.
* Export all external project records in CSV file
* Update Project type field as Sales
* Update existing project records with updated CSV file with the use of data loader

## **Other considerations**

* No modifications to existing validation rules, since they are specific to External Projects (status field options for external projects unchanged).
* Append “OBSOLETE” in “Field Label” for all fields to be removed from layout.

# ***Contract Management***

## **Overview**

Contract is a Salesforce standard object that is intended to use to leverage Contract Management for the Sales Business Process. The contract records will be created when the Business Case has been approved, and the Opportunity is “Awarded”. The Contract team will receive an email alert via a group email address that will contain the specified details from the Opportunity.

A new field is to be introduced to track “Service Line”. There is no other change required in the current setup of Contract object.

## **Object and Field definition**

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Service\_Line\_\_c | LoB Summary | Formula (Text) | Opportunity 🡪 Service Line  Label Change from Service Line to LoB Summary |

## **Page Layouts**

Contract layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| Contract Details | Service Line | Add formula field |
|  | Service Line | Remove picklist field |

## **Configuration Functionalities**

No Change.

## **Customizations**

No Change.

## **Data Management**

No Change.

## **Other considerations**

No Change.

# ***Approval Meeting Management***

## **Overview**

BEC meeting module is already in use. This object includes information related to regional & BEC approval meetings. This also includes meeting details and pending actions.

This module requires change to meeting new requirements.

## **Object and Field definition**

Rename Object “BEC Meeting” to “Approval Meeting”

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Meeting\_Type\_\_c | Meeting type | Picklist | * Existing Field * Add Options * BEC Meeting * BEC Email * Platform |
| Gate\_\_c | Gate | Picklist | * Existing Field * Change option 3 to 2 * Change option 4 to 3 |

A new object to track Project on “Approval Meeting” layout

Object Name: BEC\_Projs\_Association

Singular Name: BEC Project Minutes

|  |  |  |  |
| --- | --- | --- | --- |
| Field Name | Field Label | Data Type | Details |
| Project\_\_c | Project | Lookup (Project) |  |
| BEC\_Meeting\_\_c | Approval Meeting | Lookup (BEC Meeting) |  |

## **Page Layouts**

BEC Meeting Layout

|  |  |  |
| --- | --- | --- |
| Section | Field Label | Details |
| BEC Project Minutes |  | A new related list based on “BEC\_Projs\_Association” object |
|  | Project | Required |

## **Configuration Functionalities**

No change

## **Customizations**

### **Update BEC Approval date**

Approval Meeting where “Meeting Type contains “BEC” are used to discuss opportunities pending Gate2 approvals. All opportunities discussed are tracked in related list. When an opportunity is approved then “BEC Approval Date” of opportunity should be updated with “Meeting Date”

#### **Components**

* Create ApprovalMeetingTrigger’s handler class “ApprovalMeetingTriggerHandler” method “updateMeetingRelatedOpportunity”, which will perform below actions on trigger’s after update event

For existing Approval Meeting the condition will be checked If Meeting Type contains “BEC” then

Get all opportunity linked to BEC meeting record having Status = Approved or Approved with comments

Update Opportunity ->BEC Approval Date = BEC Meeting -> Meeting Date.

* Create BECMinutesTrigger's handler class “ApprovalMeetingTriggerHandler” method “updateMeetingRelatedOpportunity”, which will perform below actions on trigger’s after insert and after update events

For existing Approval Meeting->BEC Opportunity Minute ,the condition will be checked If Meeting Type of Approval Meeting contains “BEC” then

Get all opportunity linked to Approval meeting->BEC Opportunity Minute record having Status = Approved or Approved with comments

Update Opportunity -> BEC Approval Date = BEC Meeting -> Meeting Date.

## **Data Management**

* BEC Approval Date should be updated for all opportunities if approved in BEC Meeting with Meeting Type = “BEC”

## **Other considerations**

None

# ***Activity Management***

Activity is a Standard Salesforce object used to track Tasks, Events, and emails. Activities are also leveraged in the Salesforce for Outlook tool.

In Brightstar Salesforce environment, Activities are enabled with all key modules Campaign, Lead, Account, Contact, Opportunity. Standard out of box feature will be used.

There is no change required in the current activity management setup in Brightstar Salesforce environment.

# ***Outlook Management***

Salesforce provides a tool to sync between Microsoft Outlook and Salesforce. The tool is called “Salesforce for Outlook”.

The records that users can sync between Outlook to Salesforce and Vice Versa are: Contact, Events, Emails and Tasks. Users will also have the ability to work directly with Salesforce records from within Outlook.

Brighstar’s Service team will be responsible for managing the installation of the “Salesforce for Outlook” tool onto the computers of the Users in addition to configuring the system requirements to allow the application to be installed on their hardware and within their network.

HCL will provide instructions document for the initial setup of the Application and demo how Salesforce for Outlook works. Ultimate decision and responsibility of the choice for Automation vs Manual synchronization lies with Brightstar.

# ***Reports and Dashboards***

## **Standard Reports and Dashboards**

Brightstar uses the standard Salesforce reports and dashboard quite extensively. The different regional teams, Global team etc have already created many salesforce reports and managing them.

There is no requirement of new standard reports and dashboards.

In this implementation data model will change. S0, new fields are being introduced on many objects (Such as Account, Opportunity, Opportunity Products). Also, some of the fields are planned to be removed.

It will be the responsibility of different teams of Brightstar to look at their existing reports and fix them as per changes in data model.

Details about the changes in data model, along with fields will be provided by HCL before UAT phase.

## **Custom Reports**

* Account Plan – This is an existing report. There is a button on “Account Plan” layout to generate PDF using this report. There are some changes required on this report. Opportunity Plan – This is an existing report. There is a button on “Opportunity Plan” layout to generate PDF using this report. There are some changes required on this report.
* Qualification form – Opportunity Qualification information will be entered at opportunity level. And a pdf will be generated with qualification information. This is a new custom report.

# BEC Meeting Report ***Collaboration***

Chatter is a tool for Users to collaborate with other people, profiles, groups, files, and directly on object records. In current Salesforce environment chatter is already being used.

Chatter is used from Salesforce and from BrightSpot (Employee community). The chatter feed from BrightSpot is synced in Salesforce so that all chatter feed for a topic, group etc can be viewed from Salesforce force.

There is no change required in the current chatter setup.

# ***Salesforce 1***

Currently SSO setup of Brightstar is not supporting use of Salesforce 1. So, users are not able to log into salesforce from mobile using Salesforce 1 app.

Once SSO setup is fixed by the Brightstar internal IT team, Use of Salesforce one will start.

As part of this implementation, following functionalities should work from Salesforce 1.

* Create and modify Lead
* Create and modify Account
* Create and modify Contact
* Create and modify Opportunity

Some functionalities will be done from Salesforce browser only

* Lead - Convert lead functionality
* Opportunity – Gate1 Approval, Gate2 Approval, Gate3 Approval, Qualification Form, Change Record Type.

# ***Lightning***

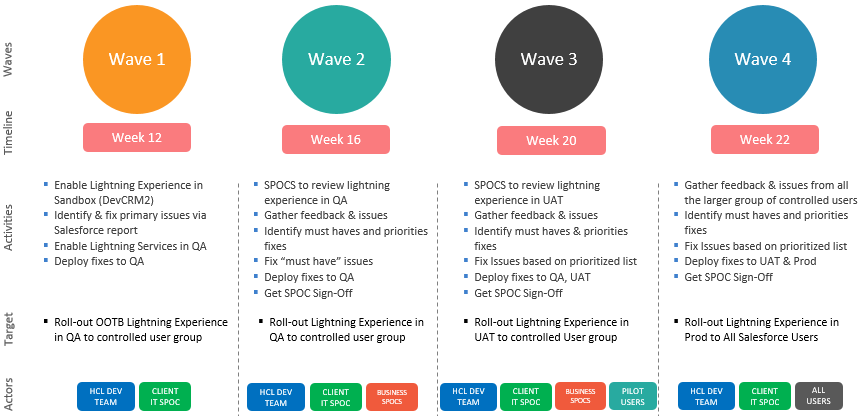
Lightning is a completely re-imagined Salesforce platform designed to take sales productivity to the next level. Delivers a modern, smart experience across every device.

Currently Salesforce classic is used in Brightstar environment. As part of this project it is being planned to enable lightning. Salesforce classic and lightning both should be working in Brightstar environment.

## **Implementation Approach**

* HCL will ensure all changes being done as part of this project will support Salesforce classic and Lightning.
* **To make existing components lightning ready** - Generate Lightning readiness report from production. Make all necessary changes in existing components so that it will support lightning.
* Identify the group of users who should be using the lighting and involve them in testing in different waves.
* Reported issues will be documented and prioritized by Brightstar and HCL. HCL will implement the same process for the remaining project duration prior to UAT. All outstanding issues will be managed by the Change control process

## **Lightning - Onboarding Approach**



## **Limitation and Workaround**

|  |  |
| --- | --- |
| Limitation | Workaround |
| Account Partner related list on Account is not supported in lightning. It means users can’t see them in Lightning Experience. | In Brightstar business, at a time, there will be only one Partner for an account. So, a new field “Partner” will be introduced on Account to keep information of partner. |
| Opportunity Partner related list on Opportunity is not supported in lightning. It means users can’t see them in Lightning Experience. | In Brightstar business, at a time, there will be only one Partner for an opportunity. So, a new field “Partner” will be introduced on opportunity to keep information of partner. |
| Recalculate Approval Gate and Update Special Service Line are home page components. Home page components are not supported in lightning. | Lightning App Builder and create utility bars features will be used to develop the replacement for the home page components. |
| Salesforce Knowledge is used in BrightSpot (Employee Community), which is available in Lightning Experience with some limitations. | To create knowledge article, switch to classic. Only 1 or 2 team members are creating/ modifying articles.  On impact on BrightSpot, as it will not be migrated to lightning. |
| Custom buttons are not supported in lightning | Convert all custom button to global action or quick action |
| Some of the features of VF Pages are not support. | Fix all the VF pages as per the recommendations from Salesforce lightning report. |
| Sharing buttons are not supported in lightning | Need to recreate sharing buttons using the AppExchange component  Lightning Sharing from Salesforce Labs. |
| Notes and Attachments are not support in lightning | Need to transfer notes and attachments in Salesforce Files |

## **Out of Scope**

* No change in BrightSpot. It will continue in classic.

## **Components and Action**

|  |  |
| --- | --- |
| Name | Action |
| Attachments & Notes | Move to salesforce Files, Use "Magic Mover for Notes And Attachments to Lightning Experience" app exchane pkg to move this data in lightning interface . (https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EHAmyUAH ) |
| Account Partners Related List | Account ->RelatedList->Partner (Not visible in lightning). Solution -> introduce a new field as "Partner" on Account |
| Opportunity  Partners related lists | Opportunity ->RelatedList->Partner (Not visible in lightning). Solution -> introduce a new field "Partner" on Opportunity? |
| Recalculate Approval Gate (Home Page Component) | create lightning component |
| Update Special Service Line(Home Page Component) | create lightning component |
| Lead c (Sharing Button) | recreate sharing buttons using the AppExchange component  Lightning Sharing from Salesforce Labs. |
|  |  |
| Lookup Filters | train users about lightning lookup finctioanlity(https://admin.salesforce.com/pro-tip-master-lookup-search-lightning-experience) |
| Visualforce Page | replace hard-coded references to original URL with  references to domain |
| Visualforce Component | replace hard-coded references to original URL with  references to domain |
| Hurdle rtOpportunityPlanFieldEditPage | make Compatible with Lightning Platform, alignment is not correct and buttons are not visible |
| Update Service Line (Bulk Update) | We need to create lightning component for this functionality as well because in classic we will create a home component to run this functionality. |

# ***General Setup***

From security point of view, there is no change in existing

* Role Hierarchy
* Public Group Setup
* Permission Set

Change in Sharing Rule

* Lead record should be visible to everyone. There is no other change in sharing rule for any objects.

Changes in profiles are mentioned in separate excel sheet by name “Security Excel Sheet”