c360 Forecast Manager User Guide

Forecast Manager Version 1.2.1 – Microsoft CRM 1.2 Compatible

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c360 Solutions, Inc.
www.c360.com

Products@c360.com

Forecast Manager _____

Overview

c360 Solutions Forecast Manager is designed to improve forecast accuracy by simplifying the process of reviewing and updating sales opportunity forecast information. The key benefits of Forecast Manager are:

- Improved forecast accuracy
- Reduced time spent updating forecasts
- Improved Microsoft CRM user adoption

Forecast Manager presents the sales user with a single, easy to update screen listing all his or her active sales opportunities. Sales personnel can quickly update the opportunity sales stage, estimated revenue, close probability and close date. Sales Managers can view and update opportunities assigned directly to them and/or to their direct reports. Forecast Manager can also retrieve c360 SearchPac Query Manager queries. This allows users to configure complex queries to list opportunities meeting specific criteria.

Screen Resolution

It is recommended to use a screen resolution of no less than 1024 x 768 pixels. 600 x 800 will not display Forecast Manager correctly. For best results, use 1280 x 1024 pixels. Please note that if you are using a resolution of 1024 x 768 pixels you may need to launch Forecast Manager from the c360 Tools menu to see all features.

Accessing Forecast Manager

Forecast Manager, pictured in figure 1.0, can be accessed from two places within the Microsoft CRM web client; the left navigation bar and the c360 Tools menu.
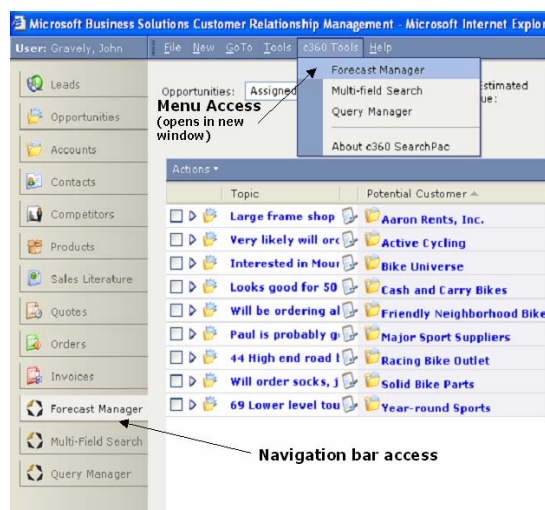

Figure 1.0: Accessing Forecast Manager

Figure 1.0 illustrates the two ways to access Forecast Manager. When Forecast Manager is accessed from the left navigation bar, it is displayed in the same window with Microsoft CRM. If you access Forecast Manager through the c360 Tools menu, it is displayed in a separate window, allowing you to navigate separately in the application without losing your query. You can operate a Query Manager window and close the main Microsoft CRM window.
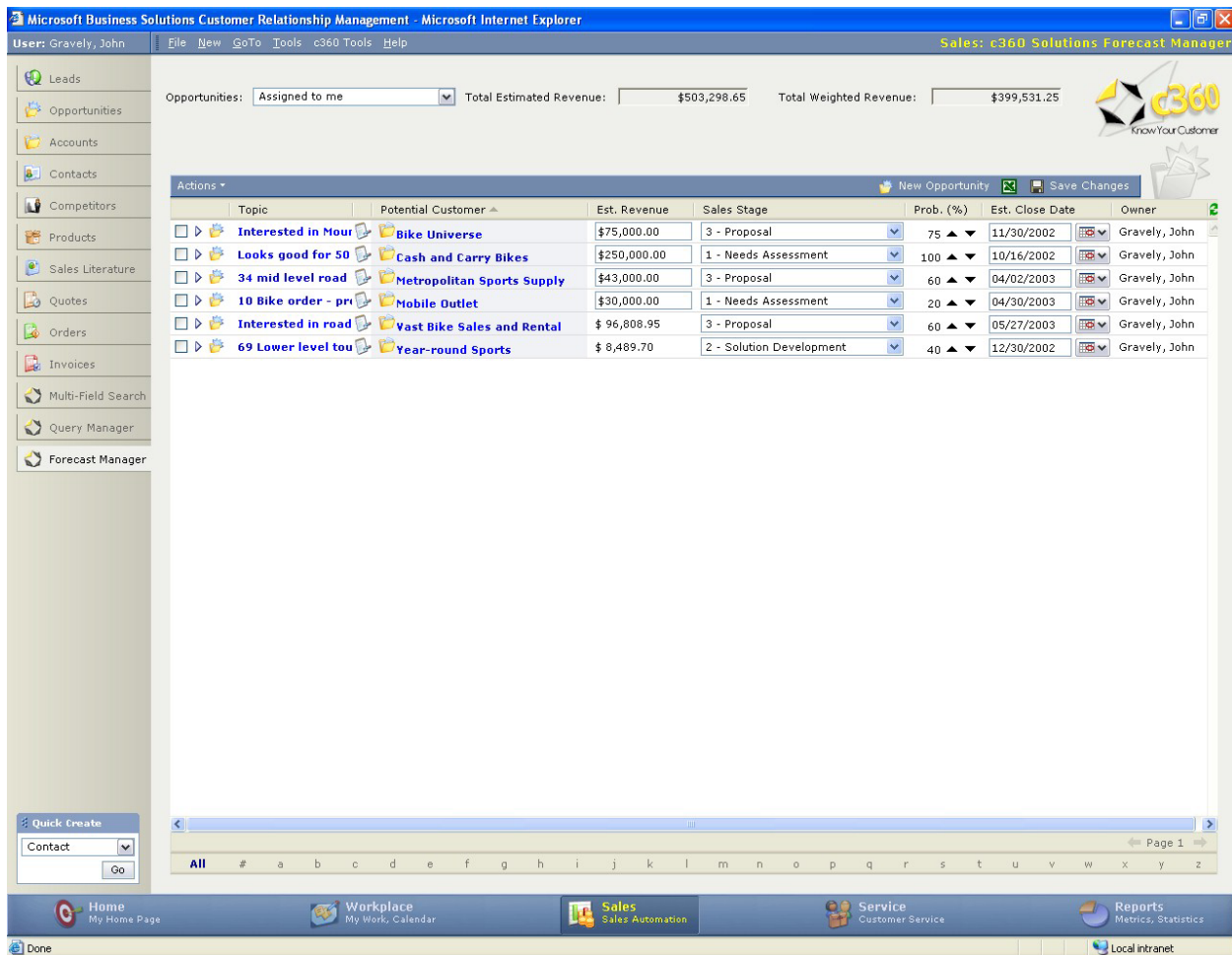

Figure 2.0: The Forecast Manager Screen

Forecast Manager features

This section outlines the features of Forecast Manager. Forecast Manager is pictured in figure 2.0. The three fields at the top of the screen are:

- **Opportunities**; This drop-down list provides up to four options for selecting which Opportunity records will be displayed in the Forecast Manager grid. They are:

  o *Assigned to me*; This is the default view and will show Opportunities assigned to the currently active user.

- o *Assigned to my direct reports*; This view will only be available if the currently active user has at least one direct report. This view will list all Opportunity records assigned to the users in the active user's reporting chain. Manager/Direct Report relationships are set up on the User screen.

- o *Assigned to my direct reports and me*; This view will only be available if the currently active user has at least one direct report. This view will list all Opportunities assigned to the active user and all Opportunities assigned to the users in the active user's reporting chain.

- o *Query Manager Query*; This option will only be available if c360 SearchPac is installed. This option allows the user to retrieve Opportunities that meet the criteria of any saved Query Manager query. Figure 3.0 shows the dialog a user sees when selecting a Query Manager query. Once you have selected a Query Manager query, that query is appended to the Opportunities drop-down list until you move off of the Forecast Manager screen.
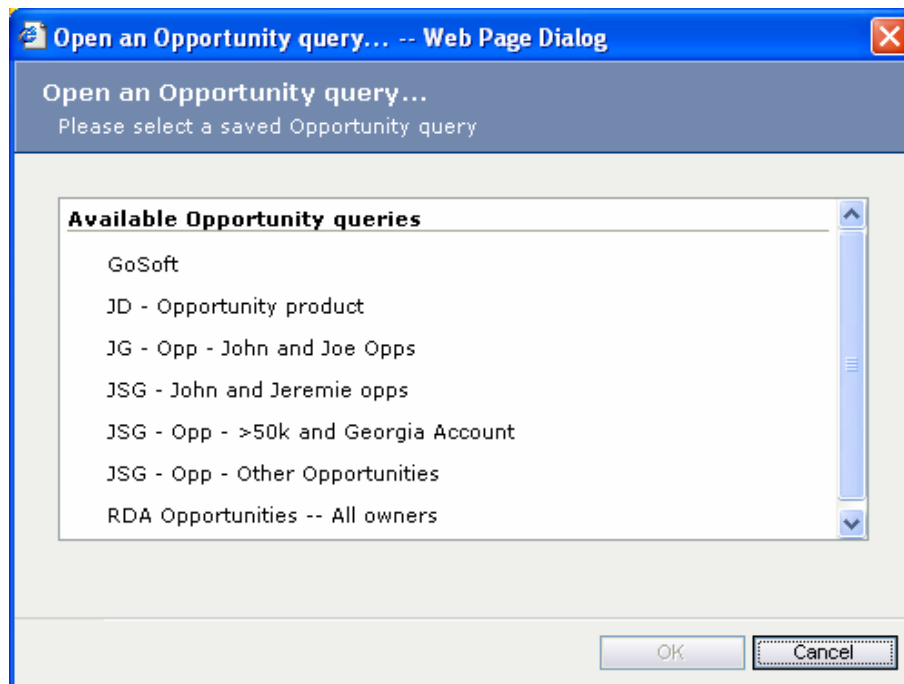

Figure 3.0: Selecting a SearchPac Query Manager query in Forecast Manager

- - **Total Estimated Revenue**: This field displays the total of all Estimated Revenue values on all listed Opportunities. Each time a new set of Opportunities is displayed, this value is refreshed to show the total estimated revenue of all Opportunities.

- - **Total Weighted Revenue**: This field displays the total of all Weighted Revenue values on all listed Opportunities. Weighted Revenue is equal to the Opportunity's Close Probability percentage times the Estimated Revenue amount. To see an individual Opportunity's Weighted Revenue amount, click the record preview triangle next to the Opportunity's selection checkbox.

The columns on the Forecast Manager screen are:

- **Topic**; The Opportunity record's topic field is an overview description of the Opportunity. Clicking the topic text will open the Opportunity record in a new window.

  > **Tip**: It is advisable to put the client/prospect's short name at the beginning of the Opportunity topic field (ex: 'GE – Big consulting opportunity'). Doing so will make it much easier to search for the Opportunity in Microsoft CRM search screens.

- **Potential Customer**; The Account or Contact to which the Opportunity record is attached. Clicking this field will open the Account/Contact record in a new window.

- **Activity Summary**; The Activity Summary column is represented by a small Activity icon. Clicking this icon presents the user with a chronological listing of all Activities and Notes attached to the Opportunity record. The Activity Summary screen will only be accessible if the c360 Activity Summary product is installed. Figure 4.0 shows the Activity Summary screen
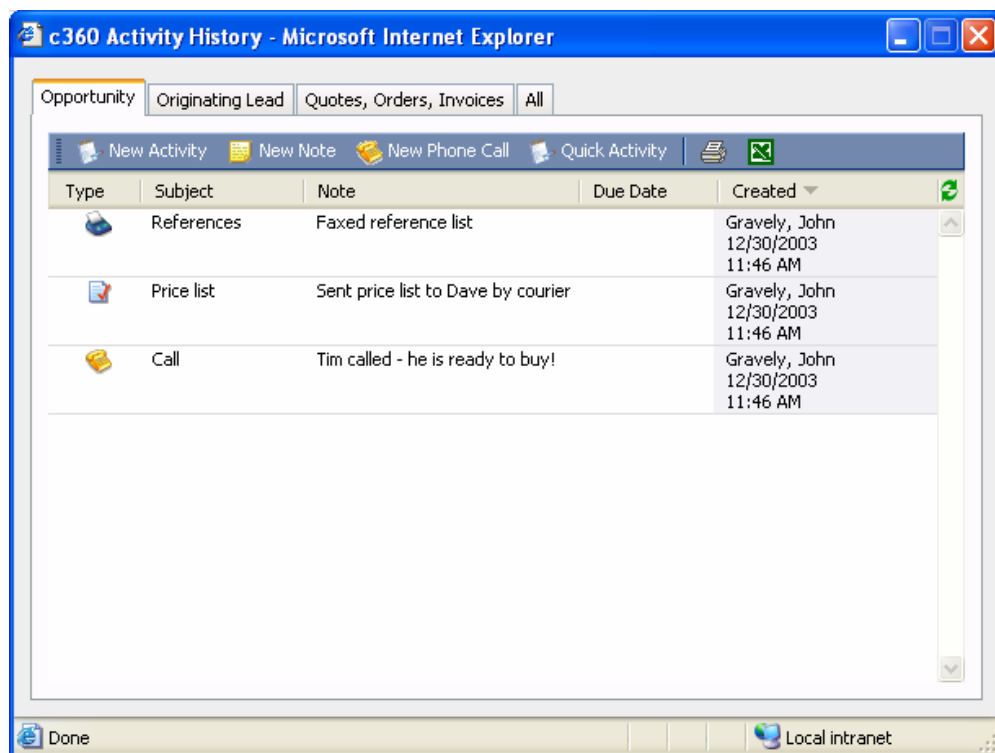

Figure 4.0: The Activity Summary screen

- **Est. Revenue**; The estimated revenue either as entered by the user or as generated by the system. If this value has been entered by the user, it will appear as an editable field on the Forecast Manager screen. If the value is system generated, the

field will not be editable from either the Forecast Manager screen or the standard Opportunity screen.

- **Sales Stage**; The Opportunity's current sales process stage. If no sales process has been applied to the Opportunity, this field will be empty. Changing the Sales Stage here has the same effect as changing it using the 'Change Stage…' option on the Opportunity's Actions menu.

- **Prob**. **(%)**; The Opportunity's close probability value. Using the up and down arrow keys allows the user to increase or decrease the value by a set increment. The increment can be configured by the Microsoft CRM system administrator in the web.config file.

- **Est**. **Close Date**; Estimated Close Date. The date the user feels the Opportunity will be won.

- **Owner**; The Microsoft CRM user to whom the Opportunity is assigned.
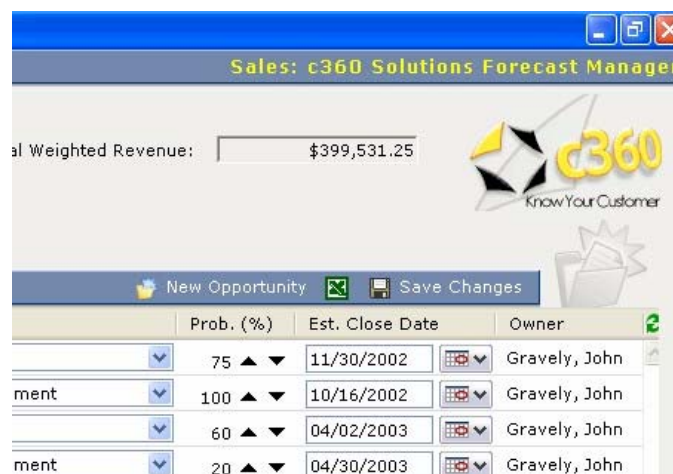

Figure 5.0: Additional features on the Forecast Manager grid header.

The Forecast Manager grid header, pictured in Figure 5.0, gives the user the ability to create a new Opportunity record, export the data on screen to Microsoft Excel and save changes. In addition, anytime changes have been made to Opportunity records and the Forecast Manager grid needs to be refreshed (due to column sorting of manual page refresh) the Save Changes dialog, pictured in figure 6.0 will appear so the use can confirm that he/she wants to save the changes.
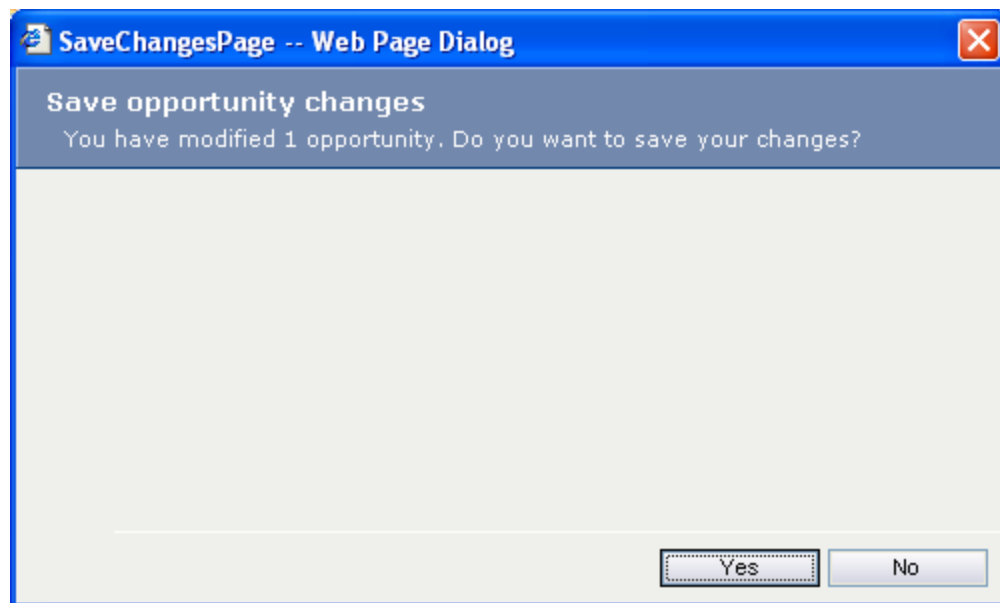
Figure 6.0: The Save Changes dialog in Forecast Manager