Arbela Revenue Planner

Microsoft Partner Gold Cloud Customer Relationship Management Gold Cloud Business Applications Gold Enterprise Resource Planning Gold Application Development Gold Cloud Platform Gold Data Analytics Gold Data Platform Gold DataCenter Gold ISV

## Purpose: Streamline the revenue planning process





### Augment and extend out-of-the-box Sales Forecasting

--Select--

Pipeline Best case Committed Omitted Won Lost

Description

V2020 Q1 (Current)	Trend Flow			
User	Quota	Pipeline	Best case	
🗸 📧 Kenny Smith	\$0.00	\$226,217.06	\$396,490.58 (\$386,521.44)	
Kenny Smith	\$0.00	New Oppor	tunity	
🗸 🙆 Dustin Ochs	\$0.00	Opportunity · Op		
💿 Dustin Ochs	\$0.00	Opportunity Sales Active for less than		Qualify (< 1 M
Samuel Strom	\$0.00			Quality ( < 1 ii
5 Samuel Strom	\$0.00	Summary Pro	oduct line items Quotes	
Malcolm Homer	\$0.00	Topic	3D printers	
🗸 極 Alyce Durham	\$0.00			
💩 Alyce Durham	\$0.00	Contact	🕅 Alberto Gass	
Nicolas Frizzell	\$0.00	Account	🔁 Contoso	
🗸 🥸 Vance Carrico	\$0.00	Purchase Ti	meframe Next Quarter	
🧐 Vance Carrico	\$0.00	Currency	* 🔉 US DOLLAR	
😏 Stan Hadden	\$0.00	Currency	(B) 03 DOLLAR	
> 🚳 Stuart Silas	\$0.00	Budget Am	ount 25000.00 \$	
		Purchase Pr	rocess Committee	
		Forecast Ca	tegory Pipeline	

- Organized around sales managers and sales people, not customers.
- Limited to opportunities.
- Unable to divide estimated revenue over multiple time intervals.

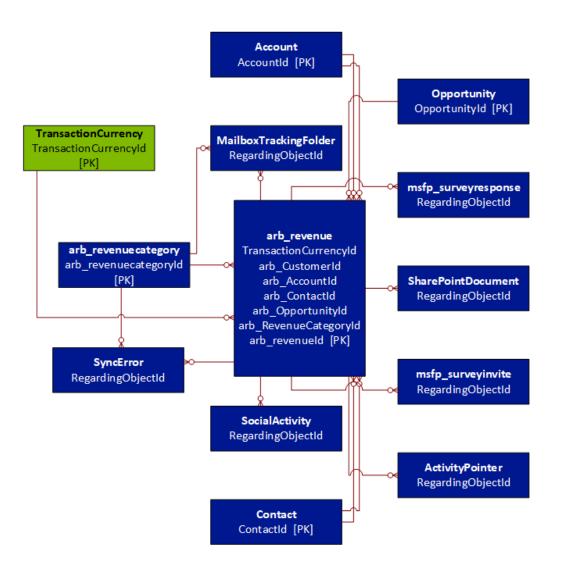
Goal: Provide visibility to data traditionally stored in other applications





Apple Inc.								<b>arry Page</b> eferred By		Parent Accou	unt Las	t Activity Date
eneral People &	Locations	Conne	ctions	Marketing	Profile	Custome	r Oppor	tunities	Programs	Revenue		
		<b>≪</b> Fe	ebruary 20	020		March	2020 🗙	<b>&gt;</b>		20	20 😆	
Revenue Category	PY Actual	Planned	Actual	Variance	PY Actua	al Planned	Booked	Variance	PY Actual	Planned	Actual	Variance
Custom Solutions	\$0	\$5000	\$0	(\$5000)	\$0	\$5000	\$0	(\$5000)	\$0	\$60000	\$0	(\$60000)
Totals:	\$0	\$5000	\$0	(\$5000)	\$0	\$5000	\$0	(\$5000)	\$0	\$60000	\$0	(\$60000)

- Existing web resource requires lots of clicks to visualize the data and does not match the esthetic of the new Unified User Interface.
- Complicated plug-ins and workflow actions aggregate revenue amounts over predefined, inflexible time intervals.



- Revenue can be related to accounts, contacts, and/or opportunities.
- Revenue can be related to configurable categories.
- Customer can be an account or a contact, supporting both B2B and B2C scenarios.

## Track planned, booked, and actual revenue

Planned: Forecasted revenue often calculated from historical data.

Booked: Expected revenue from signed agreements, sometimes referred to as committed or contracted revenue.

Actual: Realized revenue from specific transactions, such as a paid invoice.





Set Revenue	e			
Revenue Type	Booked <b>*</b>	Effective Date	10/15/2020	
Revenue Category	Products •	# of Intervals	3	
Revenue Period	Monthly •	Total Amount	2667	Cumulative
10000 8000 6000 4000 2000 0				
00	t 2020	Nov 2020	Dec 2020	
			Sav	e Cancel

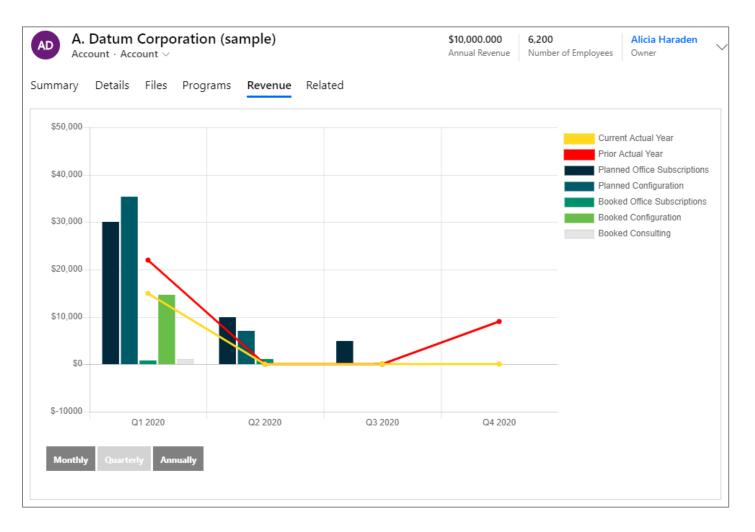
- Create new records for different months, quarters, or years.
- Quickly change the amount for each time interval by interacting with the bar chart.
- Flexible design to support unique customer needs.

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🗊 Instal	llation			
	in an			
p Produ	ucts			
supp	ort			
+ New	Revenue Category	<u>м</u>	Change View	,
	ຍ ງ Supp	Connect	support	support

Products Revenue Category							
Genera	Revenue	Related					
Rever	nue 🗸						
	Revenue Nu	Revenue Type					
	REV-00001152	Planned					
	REV-00001151	Planned					
	REV-00001175	Booked					
	REV-00001150	Planned					
	REV-00001174	Booked					

- Many revenue records can be related to a single category.
- Categories can be created by administrators under Advanced Settings.
- View related revenue from the category.

#### Compare revenue by date, type, and category



- Aggregate revenue by month, quarter, or year.
- Compare prior year actuals to current year actuals.
- Compare different categories and types.

### Other benefits

- Spread opportunity estimates over one to many time intervals.
- Help present a 360 degree view of a customer in CE.
- Reduce the risk associated with spreadsheets and manual processes.





Set Re	evenue			
Ту	pe Booked	Frequency Mont	hly 🔻	
Catego	Configuration	▼ Start Date 02/22	2/2020	# of Intervals 3
Produ	act AS4 GP 12k	Amount 10000	)	Cumulative
	AS4 GP 12k			
10000	AS4D/12K			
8000 6000	AS4-GP/6K(5000)	2		
4000	IM8 12K			
2000				
0	Feb 2020	Mar 2020	Apr 2020	
			Sav	e Cancel

- Revenue categories are connected to the out-of-thebox products.
- Revenue records can be related to products or product families.
- Create Revenue web resource shows a filtered list of products.

#### Customer Scenario #2



#### Forecast Revenue

If Opportunity:Generate Revenue? equals [Yes], then:

If Generate Revenue equals Yes, then:

If Opportunity:Opportunity Type equals [Sales], then:

- If Opportunity Type equals Sales, then generate Sales Revenue
  Start child workflow: Opportunity Sales Revenue
- Check Manager Adjusted

If Opportunity: Manager Adjusted contains data, then:

- If Manager Adjusted contains data, then generate Adjusted Revenue Start child workflow: Opportunity Adjusted Revenue
- End Workflow

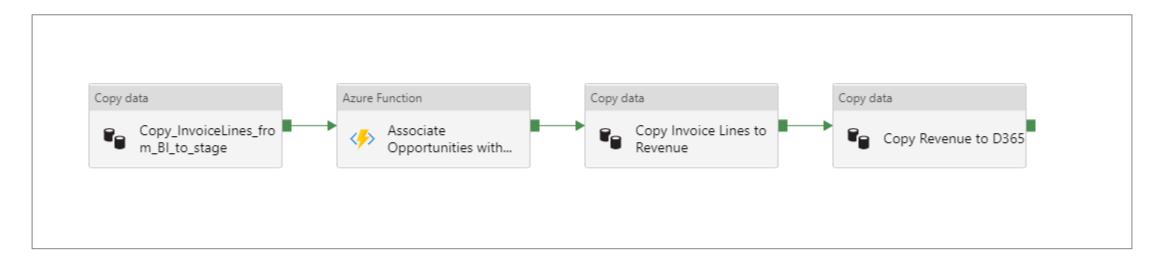
Stop workflow with status of: Succeeded View properties

Otherwise, if Opportunity:Opportunity Type equals [Negative Sales], then:

- If Opportunity Type equals Negative Sales, then generate Negative Revenue
  Start child workflow: Opportunity Negative Revenue
- End Workflow

Stop workflow with status of: Succeeded View properties

- Revenue records are automatically created when an opportunity enters a particular stage in the business process flow.
- Revenue amounts ramp up at different rates depending on the ordering pattern selected on the opportunity.



- Actual revenue is imported from invoice line data stored in the customer's ERP.
- Imported revenue are aggregated by month and automatically related to won opportunities based on certain criteria.

# THANK YOU

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