

USER GUIDE

ForecastEra CRM Project

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Prepared by



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Document Control

Revision History

Note: Template of this document is version controlled. Changes are subject to approval and control procedures.

Date	Version Number	Summary of Changes
	0.1	Initial Draft

Approvals

This document requires the following approvals:

Name	Title	Approval Signature	Date
Rahul Shah	CEO		

Consulted

This document created in consultation with:

Name	Title
Leela	Functional Consultant
Havirdhara	Associate Functional Consultant
Rahul Singh	Solution Design
Vikas Reddy	Technical Architect

Distribution

This document has been distributed to:

Name	Title	Version
Rahul Shah	CEO	

Related Documents

The following documents should be read in conjunction with this document:

Document Name	Description	Location	Version Number
NA			

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Introduction

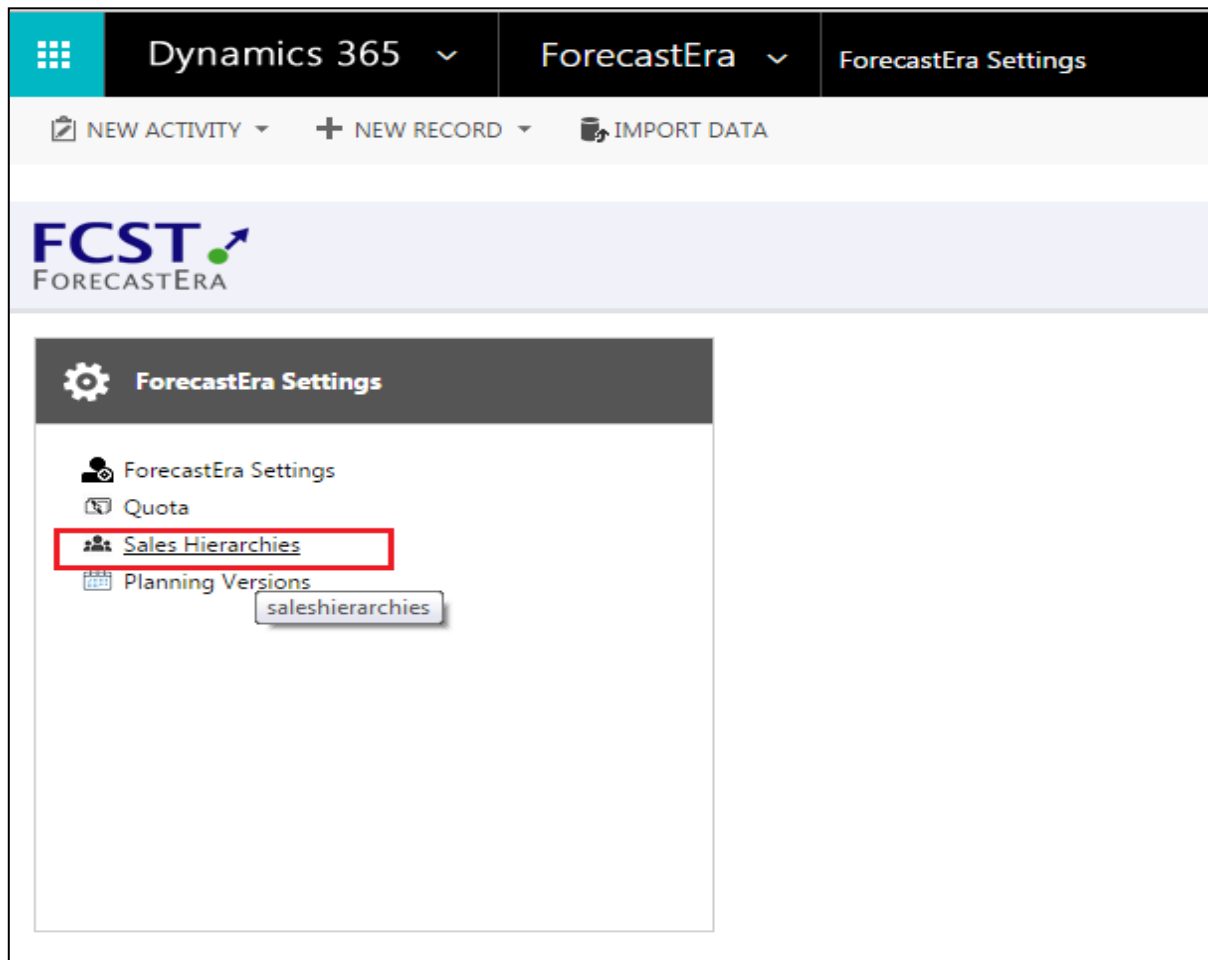
Forecastera allows you to capture various sales and operational inputs which form the basis for your Business Intelligence. Sales drivers are correlated with your operational plans, giving you best analytical insights to power your business. Forecastera allows Companies to spend more time in analyzing the forecast and taking corrective action.

Forecastera uses a new approach of sales driven planning whereby your CRM is transformed to capture all the inputs needed for accurate financial and operational planning. Since ForecastEra is a native Salesforce® application, it comes with functionality chatter with social collaboration, security and role access from Salesforce®. Sales and Marketing have a one stop shop to input their plans, Finance gets accurate inputs for forecasting and Operations gets the right insights to manage capacity and plan their costs. With integrated plan we can guarantee removing redundancy and increasing your organizations productivity.

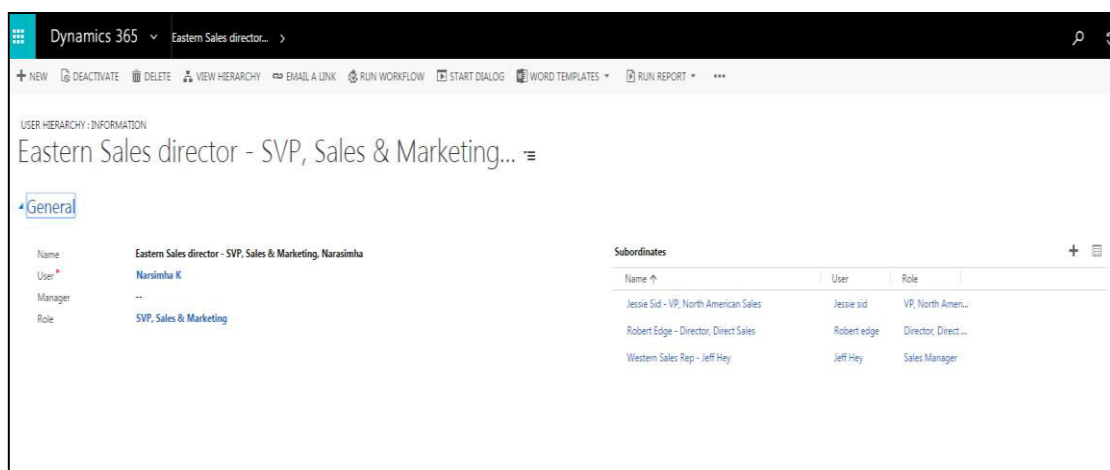
Functionality

Sales Hierarchy:

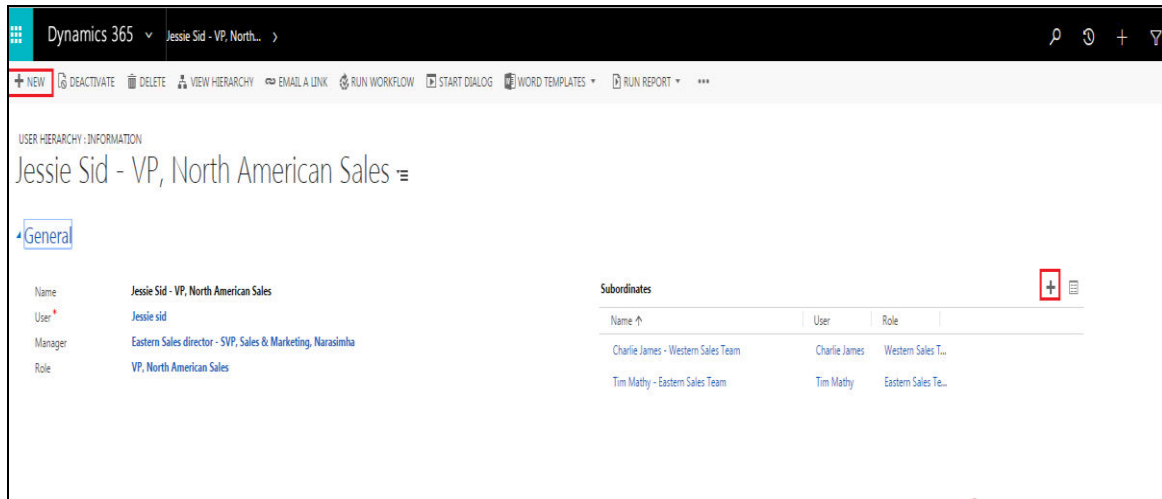
Define the sales hierarchy based on the roles. To create Sales Hierarchy navigate to Dynamics 365 → ForecastEra → ForecastEra settings → click on Sales Hierarchies as shown below.



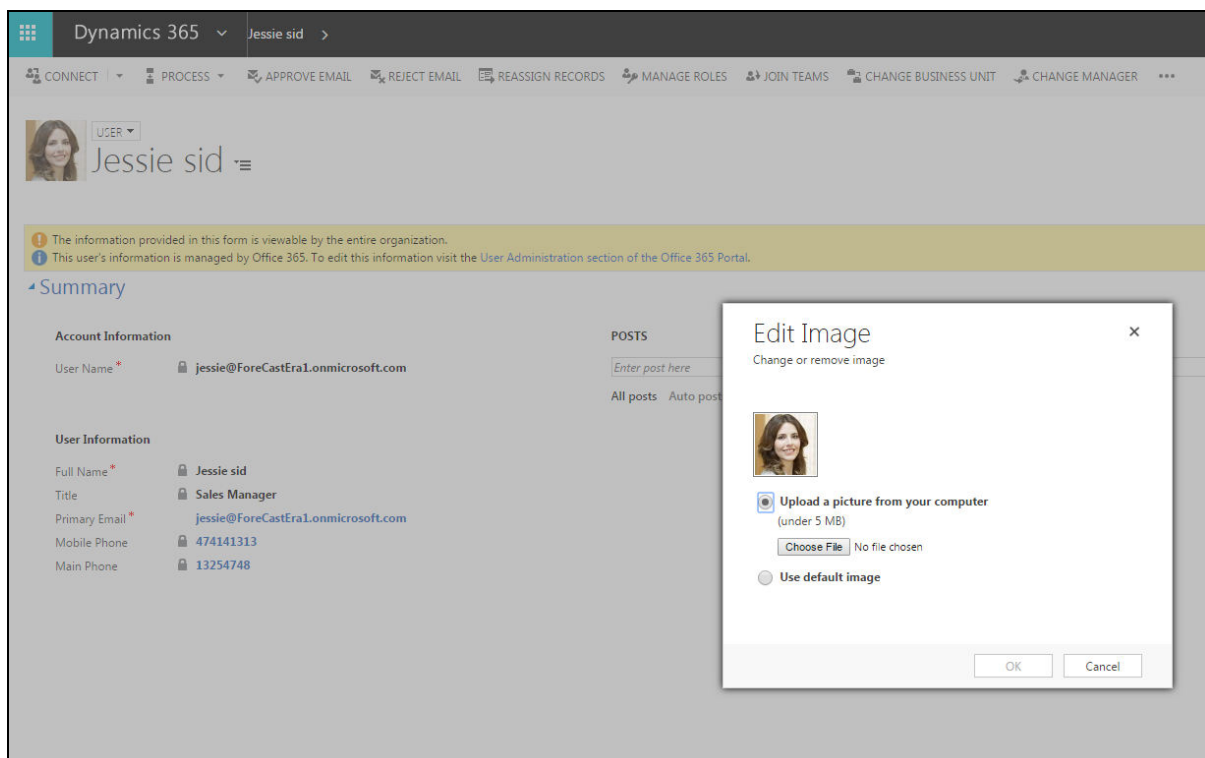
- To create new user hierarchy click on new
- In the user look up select the user
- In the Role look up select the security role which the user has assigned for his role.
- If the user is sub ordinate and he has manager then in the manager look up select the manager for this user.



To add the subordinates, click on the + icon as shown above in the subordinates sub grid.

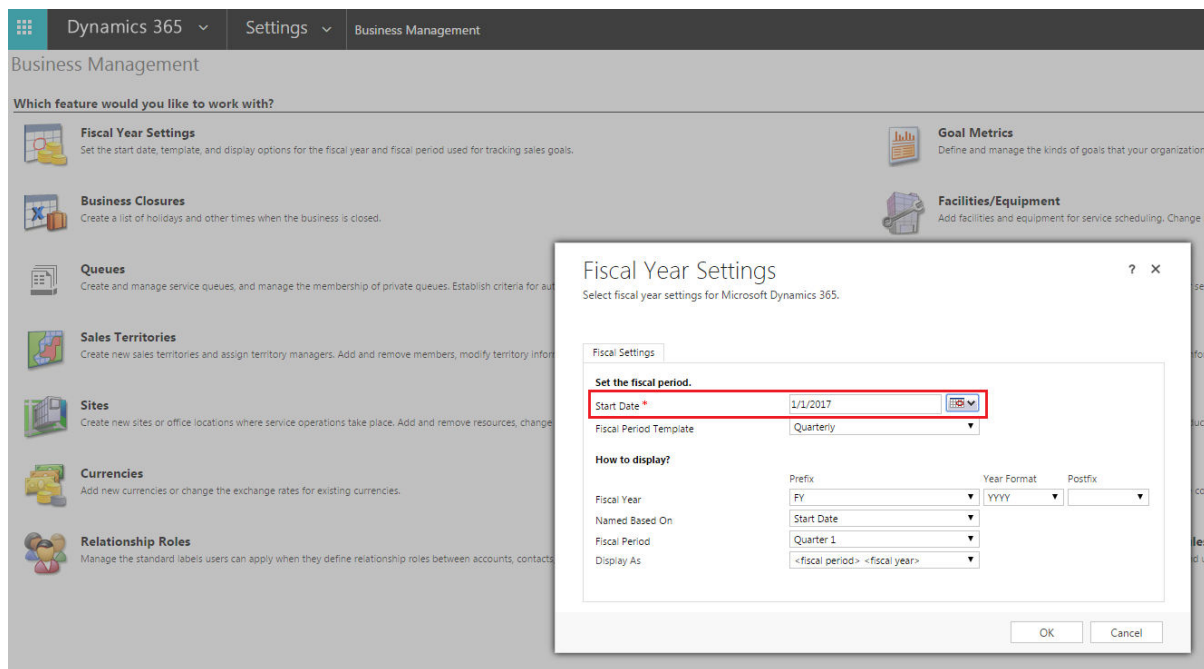


- To add the image the user navigate to settings → security → user → click on the image icon.
- Then you will get option to select the image.
- Browse the image and click on OK.



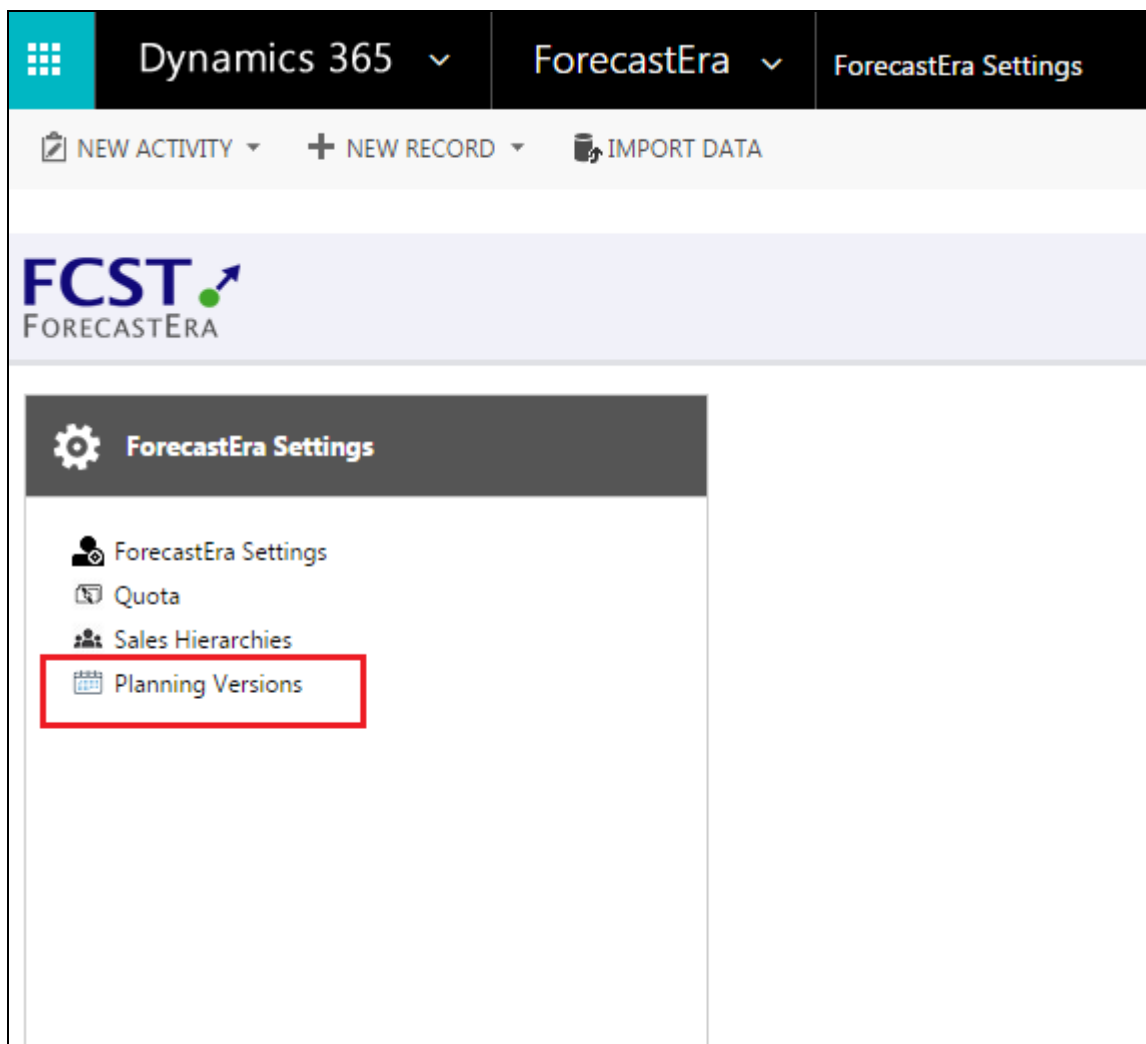
To know the start date for quarter1

- Start date will be considered from the fiscal calendar date from CRM.
- To know the start date navigate to settings → Business management → Fiscal year settings →
- Start Date.
- From this date to next 3 months will be considered as Quarter1.
- From the below date to next 6 months will be considered as quarter2.



Planning version:

To create planning version navigate to Dynamics 365 → ForecastEra → Forecast settings → click on planning versions as shown below.



- From the Planning version type select the option set type as Revenue Planning Version (As of now only one option is available, will add more in the next phase as per client requirement).
- Select the version name
- Choose fiscal year
- Choose fiscal period.
- Enter quarter 2 start date and end date.
- Give the planning version status from the option set.
- **Note:** only open (user) planning version is available for input for Sales booking.

The screenshot shows the Dynamics 365 interface for the 'Quarter 2' planning version. The top navigation bar includes 'Dynamics 365' and 'Quarter 2'. Below the navigation bar, there is a toolbar with options like 'NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', and 'WORD TEMPLATES'. The main content area displays 'PLANNING VERSION : INFORMATION' and 'Quarter 2'. Under the 'Information' tab, there is a table with the following data:

Planning Version Type*	Revenue Planning Version	Data Entry Start Date	4/1/2017
Version Name	Quarter 2	Data Entry End date	6/30/2017
Choose Fiscal Year	2017	Sequence Number	11
Choose Fiscal Period	Quarter 2	Version Status	Open(User)

Quota:

To create Quota navigate to Dynamics 365 → ForecastEra → Forecast settings → click on Quota as shown below.

The screenshot shows the Dynamics 365 interface for the 'ForecastEra' settings. The top navigation bar includes 'Dynamics 365', 'ForecastEra', and 'ForecastEra Settings'. Below the navigation bar, there is a toolbar with options like 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main content area displays the 'ForecastEra Settings' page. Under the 'ForecastEra Settings' section, there is a list of settings: 'ForecastEra Settings', 'Quota', 'Sales Hierarchies', and 'Planning Versions'. The 'Quota' option is highlighted with a red box.

Create quota as shown below.

Dynamics 365 Charlie Quota

QUOTA : INFORMATION

Charlie Quota

General

Name *	Charlie Quota	Start Date	2/1/2017
Sales Person	Charlie James	End Date	12/31/2017
		Total	\$90,000.00

Quota lines will be created automatically. Please see the navigation for quota lines as shown below.

Dynamics 365 Charlie Quota

Common Process Sessions

- Audit History
- Background Processes
- Quota Lines**
- Real-time Processes

General

Name *	Charlie Quota	Start Date	2/1/2017
Sales Person	Charlie James	End Date	12/31/2017
		Total	\$90,000.00

Based on the total, start date and end date quota line items will be created.

QUOTA : INFORMATION

Charlie Quota

Quota Lines Associated View

[+ ADD NEW QUOTA LINES](#)
[+ ADD EXISTING QUOTA LIN...](#)
[BULK DELETE](#)
[CHART PANE](#)
[RUN REPORT](#)
[EXCEL TEMPLATES](#)


✓ Name ↑	Start Date	End Date	Amount	Created On
	2/1/2017	2/28/2017	\$7,297.30	3/28/2017 3:48 PM
	3/1/2017	3/31/2017	\$8,108.11	3/28/2017 3:48 PM
	4/1/2017	4/30/2017	\$7,837.84	3/28/2017 3:48 PM
	5/1/2017	5/31/2017	\$8,108.11	3/28/2017 3:48 PM
	6/1/2017	6/30/2017	\$7,837.84	3/28/2017 3:48 PM
	7/1/2017	7/31/2017	\$8,108.11	3/28/2017 3:48 PM
	8/1/2017	8/31/2017	\$8,108.11	3/28/2017 3:48 PM
	9/1/2017	9/30/2017	\$7,837.84	3/28/2017 3:48 PM
	10/1/2017	10/31/2017	\$8,108.11	3/28/2017 3:48 PM
	11/1/2017	11/30/2017	\$7,837.84	3/28/2017 3:48 PM
	12/1/2017	12/31/2017	\$7,837.84	3/28/2017 3:48 PM

ForecastEra Settings:

Navigate for ForecastEra settings → Dynamics 365 → ForecastEra → ForecastEra settings → click on the ForecastEra settings as shown below in red color.

Dynamics 365 **ForecastEra** **ForecastEra Settings**

NEW ACTIVITY + NEW RECORD IMPORT DATA

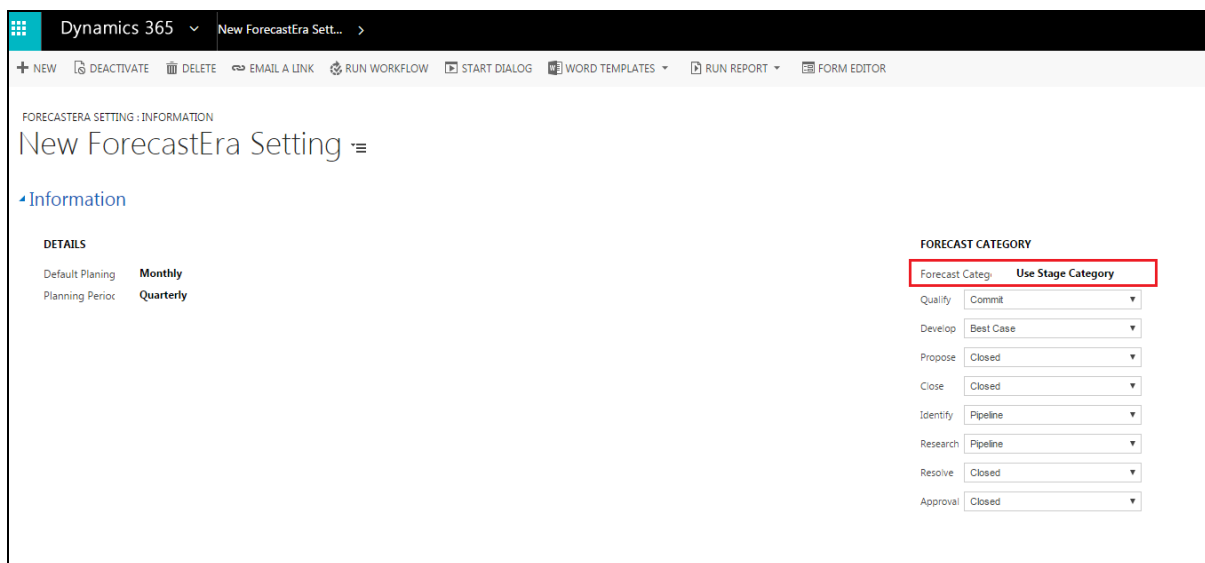
FCST 
FORECASTERA

ForecastEra Settings

- ForecastEra Settings**
- Quota
- Sales Hierarchies
- Planning Versions

- In this Settings, you can define the default settings for planning periods.
- Forecast Category has two options.

- Use Stage Category
 - Forecast Category
- If the Forecast Category option set field selected option is use stage category, then entire flow will be based on the business process flow.
 - The business process flow stages are defined as shown below (Qualify, Develop, propose, close, identify, Research, Resolve, approval).
 - Based on the input given for the respective stages in the settings those will reflected when you are moving from stage to stage in business process flow (opportunity).



The screenshot shows the 'New ForecastEra Setting' page in Dynamics 365. The page has a top navigation bar with 'Dynamics 365' and 'New ForecastEra Sett...'. Below the navigation bar is a toolbar with icons for '+ NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', 'WORD TEMPLATES', 'RUN REPORT', and 'FORM EDITOR'. The main content area is titled 'FORECASTERA SETTING : INFORMATION' and 'New ForecastEra Setting'. Under the 'Information' tab, there are two sections: 'DETAILS' and 'FORECAST CATEGORY'. The 'DETAILS' section has two tabs: 'Default Planning' and 'Monthly'. The 'Monthly' tab is selected, showing 'Planning Period' and 'Quarterly'. The 'FORECAST CATEGORY' section has two tabs: 'Forecast Categ' and 'Use Stage Category'. The 'Forecast Categ' tab is selected, showing a list of stages with their corresponding forecast categories: Qualify (Commit), Develop (Best Case), Propose (Closed), Close (Closed), Identify (Pipeline), Research (Pipeline), Resolve (Closed), and Approval (Closed).

- If the forecast category option set has value of Forecast Category field (this will be on opportunity form).
- Then you have to give input to the option set field as shown below.

Opportunity: Use Stage Category

- Use Stage Category: Based on the stages Forecast Category will be defined from the settings page.
- If you click on Next stage it will navigate to other stage.

Dynamics 365 Sales Opportunities > 2800 S Seacrest Blvd ...

NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUNITY CONVERT TO WORK ORDER FORM PROCESS ASSIGN EMAIL A LINK

OPPORTUNITY

2800 S Seacrest Blvd Boynton Beach, FL

Est. Close Date: 1/7/2013 Est. Revenue: \$37,500.00 Probability: 0 Owner: Jeff Hey

Quality Develop (Active for 1 minute) **Propose** Close

Customer Lead click to enter Identify Competitors mark complete

Proposed Solution click to enter

Identify Stakeholders mark complete

Opportunity Sales Process (Active for 28 days) **Next Stage**

Summary

Topic: 2800 S Seacrest Blvd Boynton Beach, FL

Account: A. Datum

Currency: US Dollar

Forecast: --

Add to Forecast: --

Description: Common area cleaning of 3 story building with X

Probability: 0

Potential Customer: A. Datum

POSTS ACTIVITIES NOTES ONENOTE

All Add Phone Call Add Task

We didn't find any activity records.

STAKEHOLDERS

Name Role

No stakeholders found.

Opportunity: Forecast Category

- In the ForecastEra settings if the option is selected as Forecast Category, then you need to give the input for this field.

Dynamics 365 New ForecastEra Sett...

NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPORT FORM EDITOR

FORECASTERA SETTING: INFORMATION

New ForecastEra Setting

Information

DETAILS

Default Planing: Monthly

Planning Period: Quarterly

FORECAST CATEGORY

Forecast Categ: **Forecast Category**

- In the opportunity, Forecast category field will be enabled if settings page has selected option as forecast category other wiles this field will be in hide.

Dynamics 365 ▾ **Sales** ▾ **Opportunities** > 2800 S Seacrest Blvd ... >

+ NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUN... CONVERT TO WORK ORDER FORM PROCESS ▾ ASSIGN

OPPORTUNITY ▾

2800 S Seacrest Blvd Boynton Beach, FL

✓ **Qualify** **Develop (Active for 3 minutes)**

Customer Need [click to enter](#) | Identify Competitors [mark complete](#)

Proposed Solution [click to enter](#)

Identify Stakeholders [mark complete](#)

Summary

Topic* **2800 S Seacrest Blvd Boynton Beach, FL**

Account **A. Datum**

Currency* **US Dollar**

Forecast **--**

Add to Forecast ☐

Description **Common area cleaning of 3 story building with X restrooms**

Probability **0**

Forecast Category **Best Case**

Potential Customer* **Closed**

POSTS **ACTIVITIES** **NOTES** **ONENOTE**

All ▾ | [Add Phone Call](#) [Add Task](#) ...

We didn't find any activity records.

To open Sales Booking FCST Navigate to Dynamics 365 → ForecastEra → Sales Booking FCST as shown below in red colour.

Dynamics 365 ▾ **ForecastEra** ▾ **SalesBooking FCST**

Sales **Service** **Marketing** **Field Service** **Project Service** **Resource Scheduling** **Settings** **ForecastEra**

FCST

ForecastEra Settings

SalesBooking FCST

Sales Booking FCST:

- Sales Booking will show sum of the opportunities estimated Revenue based on the forecast.
- **Quota** – will show the amount of selected quarter in the planning version.
- **Closed** - sum of all opportunities estimated revenue of forecast category Type is closed
- **Commit** - sum of all opportunities estimated revenue of forecast category Type which is commit and closed
- **Best** - sum of all opportunities estimated revenue of forecast category Type is best case, closed and commit
- **% Achieved:** This can be obtained by $(\text{Commit} / \text{Quota}) * 100$
- **Judge:**

Expand\Collapse functionality for the main and subordinates.

Note:

Dynamics 365

ForecastEra

SalesBooking FCST

NEW ACTIVITY

NEW RECORD

IMPORT DATA

Save

Expand All

Collapse

Role/User	Judge	Quota	Closed	Commit	Best	% Achieved
- SVP, Sales & Marketing		\$218,040.69	\$37,154.00	\$48,979.00	\$71,779.00	22.5%
<div><div></div><div>Narsimha K</div></div>		\$24,175.58	\$1,200.00	\$2,700.00	\$3,950.00	11.2%
+ VP, North American Sales		\$95,353.67	\$14,750.00	\$16,000.00	\$25,200.00	16.8%
+ Director, Direct Sales		\$54,868.07	\$14,575.00	\$14,575.00	\$20,725.00	26.6%
+ Sales Manager		\$43,643.37	\$6,629.00	\$15,704.00	\$21,904.00	36.0%

Opportunities

Action	Opportunity Name	Account Name	Amount	Closed Date	Stage	Probability	Forecast Category	Predicted Closed By	Business Unit
EDIT	150,000 sf building in Lak...	A. Datum Corporation (sa...	\$1,250.00	05-17-2017	Develop	75	Best Case	05-17-2017	forecastera1
EDIT	Boca Credit Union buildin...		\$1,250.00	06-29-2017	Propose	50	Commit	06-29-2017	forecastera1
EDIT	Day Cleaning 5x per week	A. Datum	\$1,200.00	05-01-2017	Qualify	45	Closed	05-01-2017	forecastera1
EDIT	In Depth Cleaning of 185...		\$179.00	05-31-2017	Propose	25	Commit	05-31-2017	forecastera1
EDIT	In-depth cleaning of 1860...		\$1,178.00	06-09-2017	Resolve	35	Commit	06-09-2017	forecastera1