



Quota & Forecast Add-On

for Saleslogix v8

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sw!ftpage™

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Overview

Put info here about what is the Forecasting & Quotas Accelerator.

Prerequisites

- SalesLogix Web v8
- At least Web Core Update 03
- At least Web Model Update 03

Installation

The package consists of a SQL script, one Architect bundle (*.SXB) and one Web Model. To install the new Forecasting & Quotas Customization

- Unzip the “Quota and Forecast for Saleslogix v8” ZIP file
- From SQL Mgt Studio, run the “RemoveLegacyQuotaSchema.sql” script against the Saleslogix database.
- Log into Workgroup Administrator
- Apply the “Quota and Forecast.sxb” bundle.
- Log out of Workgroup Administrator
- Log into Application Architect
- Apply the “Quota and Forecast v8.zip” bundle
- Rebuild & Redeploy
- Log into the Web Client as Admin
- Assign users to the “Quota and Forecast Mgt” Role. These are usually Sales Managers (or higher)
- Assign the appropriate secured actions to the “Standard User” Role (or other roles) for Viewing & Editing Quota & Forecast records.

Getting Started

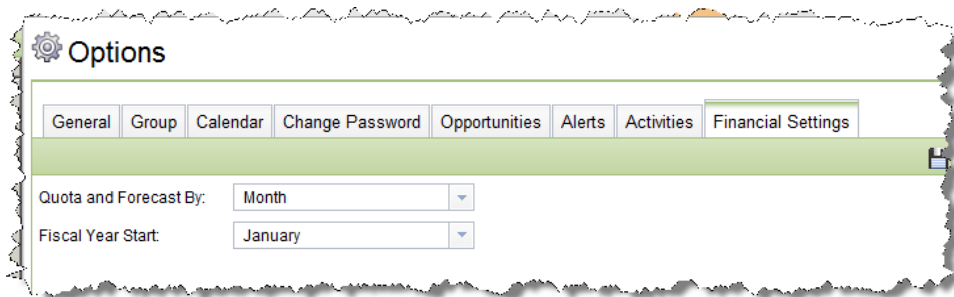
Set up Fiscal Calendar

The time span used for Quotas and Forecasts is based off of new system settings. These settings can be found under Tools -> Options -> Financial Settings when logged on as the administrator.

- “Quota and Forecast By:” – Determine the time span of Quotas and Forecasts when they are created. The four choices are by
 - Month (12 periods)

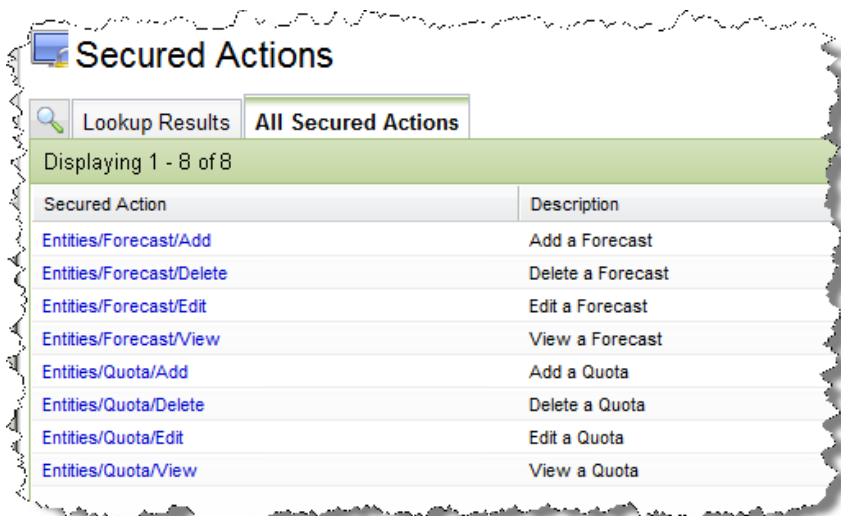
- Quarter (4 periods)
- Semi Annual (2 periods)
- Year (1 period)
- “Fiscal Year Start:” – Sets the beginning month of the fiscal calendar. Based on the previous setting, the choices are modified.

The default settings are “Month” and “January”.



Roles & Secured Actions

The two new entities come with the standard Secured Actions (Add/Edit/Delete/View). There is a new Role called “Forecast and Quota Mgt” which is associated to these actions. These actions are not associated to the “Standard User” role. The actions should be added to the “Standard User” role based on how Quotas and Forecasts will be used with the Saleslogix system.



Opportunities & “Add to Forecast”

For Opportunities to be used in a Forecast, ensure the “Add To Forecast” checkbox is checked!

Opportunity - Abbott Ltd.-Phase I

Lookup Results All Open All Opportunities Closed - Lost

Opportunity: Abbott Ltd.-Phase I

Account: Abbott Ltd. ùñ

Acct. Mgr.: Hogan, Lee

Reseller:

Est. Close: 7/9/2012

Close Probability: 100

Status: Closed - Won

Add To Forecast: ☒

Comments: This is a big order. We need to confirm our d

Quotas

Adding

Inserting a new quota can be done from the Left Nav Bar item (RMC Menu) or from the Toolbar Menu.

- The description field is auto-generated based on the “Assigned To” user in addition to the Begin & End date of the quota.
- The “Assigned To” field defaults to the currently logged in user
- The “Begin Date” field defaults to the current month.
- The “End Date” is calculated based on the Begin Date and the “Quota and Forecast By” settings. It is not editable.

Recently Viewed New Schedule Tools Administrator

SpeedSearch

Insert Quota

Administrator: Aug, 2013

Description: Administrator: Aug, 2013

Assigned To: Administrator

Amount: 0.00

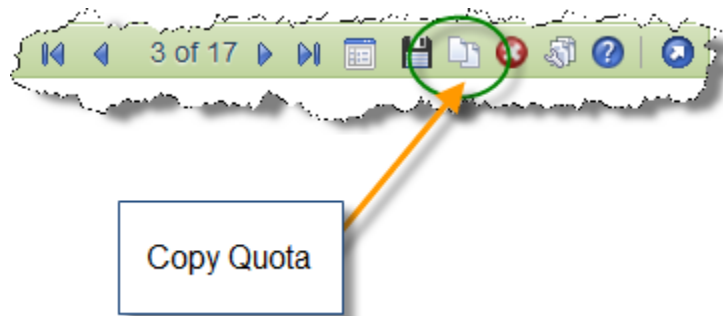
Active: ☒

Begin Date: 8/1/2013

End Date: 8/31/2013

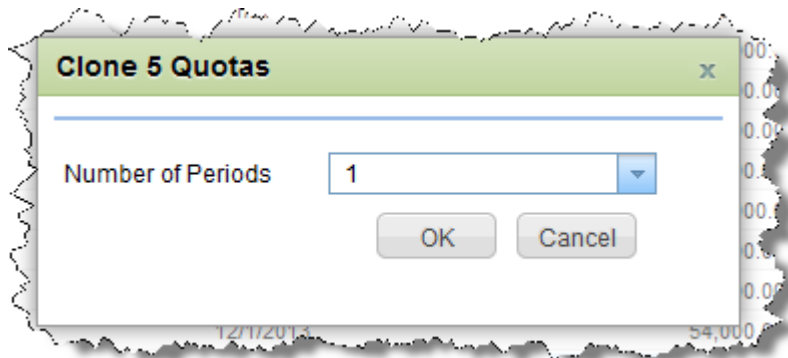
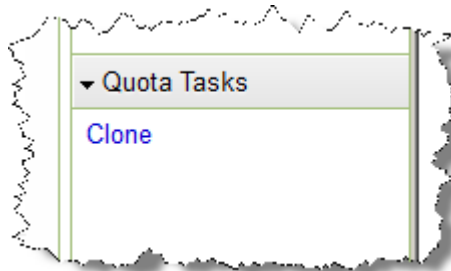
Copying an existing Quota

From the Quota Detail view, the Quota can be copied into a new Quota, for the same user & person, but for the next period.



Cloning Quotas

From the Quota list view, one or more Quotas can be “Cloned” for future periods. Select the Quotas to clone, then click the “Clone” hyperlink from the “Quota Tasks”. In the dialog box, put in the number of periods to clone the Quotas.



Forecasts

Adding

There are multiple steps to setting up a forecast. The first one is to create a new forecast record.

Inserting a new forecast can be done from the Left Nav Bar item (RMC Menu) or from the Toolbar Menu.

- The description field is auto-generated based on the “Assigned To” user in addition to the Begin & End date of the quota.
- The “Assigned To” field defaults to the currently logged in user
- The “Begin Date” field defaults to the current month.
- The “End Date” is calculated based on the Begin Date and the “Quota and Forecast By” settings. It is not editable.

Pulling in Opportunities

When the Forecast is first added, it will automatically associate any Opportunities that are within that time range where the Forecast “Assigned To” is the same as the Account Manager, and the “Add To Forecast” is checked. A “snapshot” of these Opportunities (and pertinent information) are shown in the “Opportunities” Tab of the Forecast.

Opportunities in the list can be removed one at a time. There is also a “refresh” button that can be used to add/remove/update the entire list of opportunities, based on the original criteria of the forecast (All Opportunities that have the “Add To Forecast” checkbox checked, and the Forecast “Assigned To” user is the Opportunity “Account Manager” and the Opportunity’s Closed Date or Estimated Closed data falls within the range of the Forecast Begin & End Date.

Note: Opportunities with a Status of “Open” and “Closed – Won” are pulled in, but not “Closed – Lost” Opportunities.

Opportunity	Close Date	Probability	Status	Min Potential	Max Potential
Columbus America-Phase1	5/4/2013	25%	Open	224,850	899,400
Clayco Manufacturing-Phase I	4/30/2013	25%	Open	49,875	199,500

Export Forecast Opportunities

The grid data can be exported to a CSV file. Use the “Export” button to save & download a CSV file.



Using the Worksheet Tab

The worksheet tab is useful to determine what the value of the Forecast should be set at. It pulls in Quota information as well as the opportunities listed on the forecast's "Opportunities" tab.

At the top, it shows the total amount of all Quotas for the date range compared to opportunities that have closed, and the "Percent to Quota" ratio.

At the bottom left, it calculates 3 pipeline levels

- The sum of each opportunity (from the list in the Tab) against their close probability
- The sum of each opportunity at their highest sales potential (100% close probability)
- The average of the minimum and maximum potential (average).

At the bottom right, it sums the different pipelines with what has already closed.

The "Up Arrow" buttons are used to copy the amount chosen into the Forecast's Amount.

The Forecast Amount field can be edited manually as well.

Opportunities Worksheet Audit

05/01/13 - 05/31/13

Sum of all Quotas for the date range

Quota: 800,000.00

Sum of all Closed - Won Opps from Tab

Closed - Won: 119,350.00

Closed - Won / Quota

% of Quota: 14.92%

Pipeline (Potential)

Pipeline (Potential)	Amount (Min)	Amount (Avg)	Amount (Max)
Weighted (Min): 274,725.00	394,075.00	806,162.50	1,218,250.00
Average: 686,812.50			
Potential (Max): 1,098,900.00			

Use these buttons to copy the value into the Forecast Amount (to set the Amount of the Forecast)

Forecast - Hogan, Lee: May 2013

Lookup Results | **All Active Forecasts** | All Forecasts | My Forecasts

Hogan, Lee: May 2013 1 of 3

Description: Hogan, Lee: May 2013 ☒ Active

Assigned To: Hogan, Lee Begin Date: 5/1/2013

Forecast Amount: 400,000.00 End Date: 5/31/2013

drag a tab here to show it in this area

Opportunities | Audit | **Worksheet** | Snapshots

05/01/13 - 05/31/13

Quota: 800,000.00

Closed - Won: 119,350.00

% of Quota: 14.92%

Pipeline (Potential)

		Total Potential
Weighted (Min):	274,725.00	Amount (Min): 394,075.00 ↑
Average:	686,812.50	Amount (Avg): 806,162.50 ↑
Potential (Max):	1,098,900.00	Amount (Max): 1,218,250.00 ↑

Snapshots & Snapshot Tab

Use the snapshot button (the camera) to save the current forecast information to a snapshot record. The snapshot record holds the following information

- Date the Snapshot was taken
- Forecast Amount
- Closed – Won Amount
- Quota Amount

Forecast - Hogan, Lee: May 2013

Lookup Results **All Active Forecasts** All Forecasts My Forecasts

Hogan, Lee: May 2013 1 of 3

Description: Hogan, Lee: May 2013 ☒ Active

Assigned To: Hogan, Lee Begin Date: 5/1/2013

Forecast Amount: 806,162.50 End Date: 5/31/2013

Snapshot Forecast

drag a tab here to show it in this area

Use these snapshots to see how the forecast changes over time, using the Snapshots Tab

Opportunities Audit Worksheet **Snapshots**

Description	Date	Forecast Amt	Closed-Won Amt	Quota Amt
10/1/2013 - Hogan, Lee: May 2013	10/1/2013	806,163	119,350	800,000
9/30/2013 - Hogan, Lee: May 2013	9/30/2013	400,000	119,350	800,000
9/30/2013 - Hogan, Lee: May 2013	9/30/2013	394,075	119,350	800,000

Audit Tab

The Audit Tab displays the changes made to the Forecast's status and Forecast Amount fields. It will show the Old Value, New Value, the date the change was performed as well as who made the change.



About Swiftpage

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