

# Revenue Navigator

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# Revenue Recognition Rules

# What is Revenue Recognition Rule?

**A RULE THAT DEFINES HOW REVENUE IS RECOGNIZED FOR ANY SOLD PRODUCT/OFFERING OVER A PERIOD OF TIME.**



# How to use Revenue Recognition Rule?



SELECT THE PRODUCT GROUP/ OFFERING ALONG WITH KPIS(IF ANY)



DEFINE THE DURATION/MONTHS THRU WHICH REVENUE IS RECOGNIZED



ASSIGN THE % DISTRIBUTION OF REVENUE ACROSS THE DURATION/MONTHS DEFINED ABOVE



SAVE THE RULE

# How to use Revenue Recognition Rule? - Example

Mike is a sales Rep who specializes in selling servers for Big IT companies. Every time he sells a server, the revenue from the sold product is recognized over a fixed duration of 4 months. Mike also has the % distribution of the revenue across the duration of 4 months. Every time he creates an opportunity, he is tracking the revenue recognized manually in an excel. He approached ForecastEra Team to help him automate this process.

## Revenue Recognition Rule Defined

### Product/Offering

IBM Server

### Duration

4

Define % Revenue Recognized	M1	M2	M3	M4
	20	30	30	20

**\$ WON**

**\$ 40,000**

## Revenue Recognition

Month	Revenue
M1	\$ 8,000
M2	\$ 12,000
M3	\$ 12,000
M4	\$ 8,000

# Revenue Recognition Rules for Compucom

Revenue Recognition for Compucom has been defined based on combination of Revenue Type and Offering Name

For Revenue Type = Product – Commodity or Product – Enterprise

- 12 Month Fixed Duration
- Select the Revenue Type, Offering Name Combination
- Define the % Revenue recognized for 12 months
- Save

For Revenue Type = Annuity / Project / eXcell

- No User Input required
- Amount available in "Svr Yr1 and Prod amount"(in salesforce.com) would be equally distributed across the duration between "Service Start Date" and "Service End Date"

# How to access?

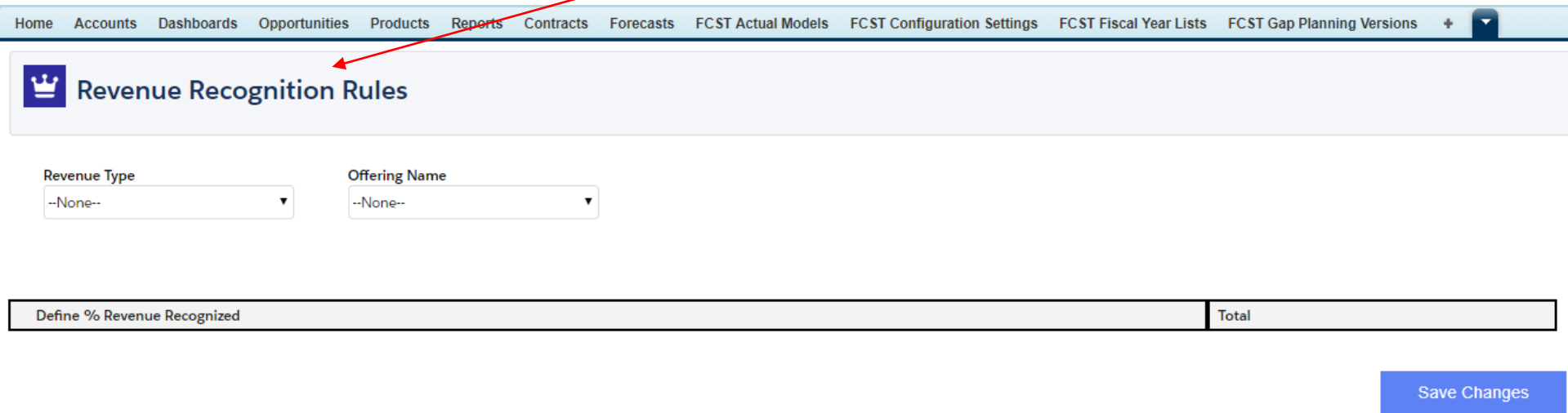
User needs to click on “FCST Rev Recognition Rules” tab to navigate to the “Revenue Recognition Rules”

The screenshot displays the FCST application's 'All Tabs' interface. At the top, a navigation bar contains the following tabs: Home, Chatter, Accounts, Opportunities, FCST Settings, Reports, Dashboards, Products, FCST Summary, **FCST Rev Recognition Rules**, and FCST Revenue Recognition Products. A red arrow points from the text 'FCST Rev Recognition Rules' in the preceding block to this specific tab. Below the navigation bar, the 'All Tabs' section is active, showing a list of available tabs in two columns. The left column includes Accounts, App Launcher, Assets, Campaigns, Cases, Chatter, CLINs, Contacts, Content, Contracts, D&B Companies, and Dashboards. The right column includes FCST Upload Files, Files, Forecasts, Groups, Home, Ideas, Leads, Libraries, List Emails, Macros, Opportunities, and Orders. On the far left, there is a 'Recent Items' sidebar with a list of project links and a 'Recycle Bin' button. The bottom of the interface features a green bar with navigation icons and the page number '8'.



# Revenue Recognition Rules UI

Once user click on “FCST Rev Recognition Rules” then user is navigated to “Revenue Recognition Rules” UI



Home Accounts Dashboards Opportunities Products Reports Contracts Forecasts FCST Actual Models FCST Configuration Settings FCST Fiscal Year Lists FCST Gap Planning Versions +

## Revenue Recognition Rules

Revenue Type: --None--  
Offering Name: --None--

Define % Revenue Recognized	Total
-----------------------------	-------

Save Changes

# Define Revenue Recognition Rules

- User needs to select the Revenue Type from drop down field and offering name from the next drop down list.
- As soon as user select these values, system will ask user to enter percentage values of revenue spread for the selection for 12 months.

Home Accounts Dashboards Opportunities Products Reports Contracts Forecasts FCST Actual Models FCST Configuration Settings FCST Fiscal Year Lists FCST Gap Planning Versions

## Revenue Recognition Rules

Revenue Type: --None--

Offering Name: --None--


Define % Revenue Recognized	Total
-----------------------------	-------


Save Changes

# Define Revenue Recognition Rules

- If the total sum of all percentage values is less than or more than 100 percent then system will display a warning message and will not allow user to save the changes.

Home Accounts Dashboards Opportunities Products Reports Contracts Forecasts FCST Actual Models FCST Configuration Settings FCST Fiscal Year Lists FCST Gap Planning Versions +

 **Warning:**  
Total of periods should be equals to 100%

 **Revenue Recognition Rules**

Revenue Type:

Offering Name:


Define % Revenue Recognized	M+1	M+2	M+3	M+4	M+5	M+6	M+7	M+8	M+9	M+10	M+11	M+12	Total
	10	10	10	10	5	10	10	10	5	5	5	5	95%

Save Changes

# Define Revenue Recognition Rules

- Once Total is 100 percent and click on “Save Changes” then system will save the changes.

Home Accounts Dashboards Opportunities Products Reports Contracts Forecasts FCST Actual Models FCST Configuration Settings FCST Fiscal Year Lists FCST Gap Planning Versions + ▾

 Revenue Recognition Rules

Revenue Type  
Prod - Commodity ▾

Offering Name  
Networking Services Offering ▾

Define % Revenue Recognized	M+1	M+2	M+3	M+4	M+5	M+6	M+7	M+8	M+9	M+10	M+11	M+12	Total
	10	10	10	10	10	10	10	10	5	5	5	5	100%

Save Changes

# Verify the Revenue Recognition Rules

- Now, Once any Product with amount, date and product code is created under the Opportunity in System then FCST system will create the **same no of Product models** for this product as mentioned in “Revenue Recognition in Months” header under “Revenue Recognition Rules” UI.

Products (Standard)

Add Product


Edit All

Choose Price Book

Sort

Products (Standard) Help ?

Action	Product	Quantity	Sales Price	Date	Line Description
<a>Edit</a>   <a>Del</a>	<a>Hardware</a>	200.00	\$1,000.00	12/13/2018	

 FCST Product Models

New FCST Product Model

FCST Product Models Help ?

Action	FCST Product Model Name	Amount	Fiscal Period	Planning Version	Product	Project CLIN
<a>Edit</a>   <a>Del</a>	<a>PRM-163176</a>	\$30,000	<a>FY2018P12</a>	<a>2019-February</a>	<a>Hardware</a>	
<a>Edit</a>   <a>Del</a>	<a>PRM-163177</a>	\$30,000	<a>FY2019P01</a>	<a>2019-February</a>	<a>Hardware</a>	
<a>Edit</a>   <a>Del</a>	<a>PRM-163178</a>	\$30,000	<a>FY2019P02</a>	<a>2019-February</a>	<a>Hardware</a>	
<a>Edit</a>   <a>Del</a>	<a>PRM-163179</a>	\$30,000	<a>FY2019P03</a>	<a>2019-February</a>	<a>Hardware</a>	
<a>Edit</a>   <a>Del</a>	<a>PRM-163180</a>	\$30,000	<a>FY2019P04</a>	<a>2019-February</a>	<a>Hardware</a>	

Show 3 more »

Go to list (8) »

# Verify the Revenue Recognition Rules

- Revenue Spread (“**Amount**” field’s value) on each product model of Product will be spread as per the percentage value (as mentioned for **each of the months** in “Revenue Recognition Rules” UI) of product’s **total price**.

Product Code	Revenue Recognition in Months
HW	8

	M+1	M+2	M+3	M+4	M+5	M+6	M+7	M+8	Total
Terms in Months	15	15	15	15	15	10	10	5	100%

Products (Standard)		Add Product		Edit All	Choose Price Book	Sort	Products (Standard) Help ?	
Action	Product	Quantity	Sales Price		Total Price	Date	Line Description	
Edit   Del	Hardware	200.00	\$1,000.00		\$200,000.00	12/13/2018		

FCST Product Models		New FCST Product Model		FCST Product Models Help ?			
Action	FCST Product Model Name	Amount	Fiscal Period	Planning Version	Product	Project CLIN	
Edit   Del	PRM-163176	\$30,000	FY2018P12	2019-February	Hardware		
Edit   Del	PRM-163177	\$30,000	FY2019P01	2019-February	Hardware		
Edit   Del	PRM-163178	\$30,000	FY2019P02	2019-February	Hardware		
Edit   Del	PRM-163179	\$30,000	FY2019P03	2019-February	Hardware		
Edit   Del	PRM-163180	\$30,000	FY2019P04	2019-February	Hardware		
Edit   Del	PRM-163181	\$20,000	FY2019P05	2019-February	Hardware		
Edit   Del	PRM-163182	\$20,000	FY2019P06	2019-February	Hardware		
Edit   Del	PRM-163183	\$10,000	FY2019P07	2019-February	Hardware		

# Forecast Summary




# Forecast Summary

- Summarized Amounts of Actuals, Closed WON, Baseline along with Risk adjusted amounts are displayed in this screen for the selected user.
- If a CPM user logs in, the user should select the list of PE/PM to view the data.
- For a PE/PM, the Baseline and Closed WON amounts are displayed for the contracts that he/she is associated with.
- The amount under OPEN Opportunities displayed are related to the Accounts that a PE/PM is associated with for a particular CPM Region.



# Forecast Summary (Filters)

Filter	Description
Planning Year	Drop down field. By default current Fiscal Year would be displayed.
Planning Version	Drop down field. By default current month version would be displayed.
Quarter	Fiscal Quarter. User can choose multiple quarters.
CPM Region	CPM region to which the logged in/selected user belong to.
Revenue Type	Revenue Type – Annuity, Project, Prod-Enterprise, Prod-Commodity, eXcell
User Role	CPM/PE/PM
User Name	Displays user names for the role selected

 Forecast Summary  

Planning Year  
2019

Planning Version  
2019-June

Quarter - Multi-Select  
2019-Q1  
2019-Q2

FCST CPM\_Region Test  
All

Revenue Type Test  
All

User Role  
Program Executive (PE) - DC Area

User Name  
John Cena

Load Report

# Forecast Summary (Navigation)

Accessed by Clicking “FCST Summary” Tab from the drop down as shown below

The screenshot displays the Salesforce FCST Revenue Navigator interface. The top navigation bar includes the Salesforce logo, a user profile for Dwayne Johnson, and a 'Switch to Lightning Experience' button. The main navigation menu is open, showing various tabs: Home, Accounts, Dashboards, Opportunities, Products, Reports, Contracts, Forecasts, FCST Actual Models, FCST Configuration Settings, and FCST Fiscal Year Lists. The 'FCST Fiscal Year Lists' dropdown menu is expanded, listing various options including 'FCST Gap Planning Versions', 'FCST Planning Fiscal Years', 'FCST Planning Measures', 'FCST Planning Versions', 'FCST Prior Years', 'FCST Product Models', 'FCST Revenue Recognition Products', 'FCST Settings', 'FCST Rev Recognition Rules', 'FCST Contracts', 'FCST Initial Forecasts', 'FCST Opportunity Initial Forecasts', 'FCST Summary' (highlighted), 'FCST Mapping', 'FCST Cost Centers', 'FCST Geo Codes', 'FCST Actual Error Logs', and 'FCST BaseLine Error Logs'. The main content area shows the user's profile 'Dwayne Johnson at Compucom Revenue Navigaor' and a 'Calendar' section for 'Monday April 29, 2019'.

salesforce

Switch to Lightning Experience Dwayne Johnson Setup Help FCST Revenue Navigator

Home Accounts Dashboards Opportunities Products Reports Contracts Forecasts FCST Actual Models FCST Configuration Settings FCST Fiscal Year Lists

Create New...

Search

Search All Go!

Limit to items I own Advanced Search...

Recent Items

- App Support for US Bank
- US Bank
- PRM-001156
- a062E00001OW8oL
- a062E00001OW8oM
- PRM-001157
- 0027
- PRM-001160
- PRM-001159

Dwayne Johnson at Compucom Revenue Navigaor

Monday April 29, 2019

Calendar New Event

Today 4/29/2019

You have no events scheduled for the next 7 days.

My Tasks New

You have no open tasks scheduled for this period.

- FCST Gap Planning Versions
- FCST Planning Fiscal Years
- FCST Planning Measures
- FCST Planning Versions
- FCST Prior Years
- FCST Product Models
- FCST Revenue Recognition Products
- FCST Settings
- FCST Rev Recognition Rules
- FCST Contracts
- FCST Initial Forecasts
- FCST Opportunity Initial Forecasts
- FCST Summary
- FCST Mapping
- FCST Cost Centers
- FCST Geo Codes
- FCST Actual Error Logs
- FCST BaseLine Error Logs

# Forecast Summary (Screen)

HomeAccountsDashboardsOpportunitiesProductsReportsContractsForecastsFCST Actual ModelsFCST Configuration SettingsFCST Fiscal Year ListsFCST Gap Planning VersionsFCST Planning Fiscal Years

Forecast Summary

Planning Year

2019

Planning Version

2019-June

Quarter - Multi-Select

2019-Q12019-Q2

FCST CPM\_Region Test

All

Revenue Type Test

All

User Role

Program Executive (PE) - DC Area

User Name

John Cena

Load Report

Show10entres

Search:

ACCOUNT/REVENUE TYPE	ACTUAL AMOUNT(A)	UNADJUSTED REVENUE FROM BASELINE(B)	RISK ADJUSTED REVENUE FROM BASELINE(C)	UNADJUSTED REVENUE FROM CLOSED WON(D)	RISK ADJUSTED REVENUE FROM CLOSED WON(E)	REVENUE FCST FROM OPEN OPPORTUNITIES(F)	UNADJUSTED BESTCASE FORECAST (A+B+D+F)	RISKADJUSTED BESTCASE FORECAST (A+C+E+F)
Annuity								
US Bank	\$ 6,911	\$ 0	\$ 0	\$ 0	\$ 0	\$ 51,000	\$ 57,911	\$ 57,911
Cigna	\$ 0	\$ 78,570	\$ 78,570	\$ 0	\$ 0	\$ 0	\$ 78,570	\$ 78,570
Project								
US Bank	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 54,000	\$ 54,000	\$ 54,000
Cigna	\$ 0	\$ 5,700	\$ 5,700	\$ 0	\$ 0	\$ 0	\$ 5,700	\$ 5,700
Prod - Enterprise								
US Bank	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 81,000	\$ 81,000	\$ 81,000

Showing 1 to 8 of 8 entres

Previous

1

Next

# Forecast Summary (Column Headers)

Column Header	Description
<b>Account/Revenue Type</b>	Under each revenue type, account names are given. If user click on that account then user is navigated to Summary workbench for that account.
<b>Actual Amount(A)</b>	Actual revenue already collected for the account.
<b>Unadjusted Revenue from Baseline(B)</b>	Revenue collected from Baseline Opportunities for the account.
<b>Risk Adjusted Revenue from Baseline(C)</b>	Baseline amount of opportunities for the account multiplied by Risk Factor (considering the risk factor).
<b>Unadjusted Revenue from Closed Won(D)</b>	Revenue collected from Closed Won Opportunities for the account.
<b>Risk Adjusted Revenue from Closed Won(E)</b>	Closed Won amount of opportunities for the account multiplied by Risk Factor (considering the risk factor).

# Forecast Summary (Column Headers)

Column Header	Description
<b>Revenue FCST from Open Opportunities (F)</b>	Revenue collected from Open Opportunities for the account.
<b>Unadjusted Best Case Forecast(A+B+D+F)</b>	Total revenue collected from all opportunities (Baseline, Closed Won, Open) for the account
<b>Risk Adjusted Best Case Forecast(A+C+E+F)</b>	Total revenue collected from all opportunities (Baseline, Closed Won, Open) for the account considering the risk factor.

# Forecast Workbench - Summary

# Forecast Workbench – Summary

- Month wise forecasts of Baseline Amount, Closed Won Amounts are displayed for the logged in/selected user.
- All the contract amounts under Baseline and Closed Won are summarized and displayed in this page.
- Summary of ALL Open Opportunities of an Account that the selected user/logged in user is associated with are displayed under Open Opportunities grouping.
- To view the detailed summary user has to click the links available under each grouping.

# Forecast Workbench – Summary (Filters)

Filter	Description
Planning Year	Drop down field. By default current Fiscal Year would be displayed.
Planning Version	Drop down field. By default current month version would be displayed.
User Role	The role of logged in user/ the user selected from previous page would be displayed.
User Name	The name of logged in user/ the user selected from previous page would be displayed.
Account Name	The account for which the user has selected from previous page would be displayed.
FCST CPM_Region	The CPM Region for the logged in user/ the user selected in the previous page would be displayed.

Planning Year

2019

Planning Version

2019-July

User Role

CPM-US

User Name

Dwayne Johnson

Account Name

US Bank

FCST CPM\_Region

US-DC Area



# Forecast Workbench – Summary (Details)

For the selected Account, below information is displayed at summary level.

Account	
US Bank	
Actual Amount	Actual Amount for the Contracts – Loaded Monthly
Forecast Without Risk	Contract Amount with out Risk Factor
Forecast with Risk	Contract Amount with Risk Factor included
Adjusted Forecast - OPEN	ONLY for OPEN Opportunities – Probability% Included
Unadjusted Forecast - OPEN	ONLY for OPEN Opportunities – Probability% NOT Included

# Forecast Workbench – Summary (Details)

Forecast of the entire page is grouped into 4 categories as shown below

## Baseline Amount

[\(Click here to view detailed Forecast\)](#)

Displays the summary of Baseline Forecast for the selected Account. To view detailed forecast, user has to click the link given under the label.

## Closed Won

[\(Click here to view detailed Forecast\)](#)

Displays the summary of Closed WON Forecast for the selected Account. To view detailed forecast, user has to click the link given under the label.

## Commit/Bestcase/Pipeline

[\(Click here to view detailed Forecast\)](#)

Displays the summary of OPEN opportunities Forecast for the selected Account. To view detailed forecast, user has to click the link given under the label.

## Above the Funnel

[\(Click here to view detailed Forecast\)](#)

Displays the summary of Above the funnel opportunities Forecast for the selected Account. To view detailed forecast, user has to click the link given under the label.

# Forecast Workbench – Summary (Screen)

January 2019 to 31 December 2019



Load Workbench

Account	Planning Year - 2019												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Total
<b>US Bank</b>													
Actual Amount	\$6,911	\$6,911	\$6,911	\$6,911	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$27,644
Forecast without Rlsk	\$32,888	\$32,888	\$132,888	\$138,888	\$138,888	\$138,888	\$138,888	\$138,888	\$138,888	\$138,888	\$132,888	\$132,888	\$1,436,656
Forecast with Rlsk	\$32,888	\$32,888	\$132,888	\$138,688	\$138,688	\$138,688	\$138,688	\$138,688	\$138,688	\$138,688	\$132,888	\$132,888	\$1,435,256
Adjusted Forecast - OPEN	\$0	\$0	\$0	\$0	\$106,500	\$79,500	\$79,500	\$79,500	\$79,500	\$13,500	\$13,500	\$13,500	\$465,000
Unadjusted Forecast - OPEN	\$0	\$0	\$0	\$0	\$710,000	\$530,000	\$530,000	\$530,000	\$530,000	\$90,000	\$90,000	\$90,000	\$3,100,000
<b>Baseline Amount</b> (Click here to view detailed Forecast)													
Actual Amount	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Forecast without Rlsk	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$311,724
Forecast with Rlsk	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$25,977	\$311,724
<b>Closed Won</b> (Click here to view detailed Forecast)													
Actual Amount	\$6,911	\$6,911	\$6,911	\$6,911	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$27,644
Forecast without Rlsk	\$6,911	\$6,911	\$106,911	\$112,911	\$112,911	\$112,911	\$112,911	\$112,911	\$112,911	\$112,911	\$106,911	\$106,911	\$1,124,932
Forecast with Rlsk	\$6,911	\$6,911	\$106,911	\$112,711	\$112,711	\$112,711	\$112,711	\$112,711	\$112,711	\$112,711	\$106,911	\$106,911	\$1,123,532
<b>Commit/Bestcase/Pipeline</b> (Click here to view detailed Forecast)													
Adjusted Forecast	\$0	\$0	\$0	\$0	\$106,500	\$79,500	\$79,500	\$79,500	\$79,500	\$13,500	\$13,500	\$13,500	\$465,000
Unadjusted Forecast	\$0	\$0	\$0	\$0	\$710,000	\$530,000	\$530,000	\$530,000	\$530,000	\$90,000	\$90,000	\$90,000	\$3,100,000
<b>Above the Funnel</b> (Click here to view detailed Forecast)													
Adjusted Forecast	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0


# Forecast Workbench - Baseline

# Forecast Workbench – Baseline



- Month wise forecasts of Baseline Amounts are displayed for the logged in/selected user.
- All the contract amounts under Baseline are summarized and displayed in this page.
- ONLY one Line Item per Contract is displayed in this page.
- User can select the Line item that he/she would like to edit by choosing the line item from the dropdown list available.
- ONLY one Contract per Account is displayed in the page.
- User can select the contract that he/she would like to edit by choosing the contract from the dropdown list available.

# Forecast Workbench – Baseline (Filters)

Filter	Description
Planning Year	Drop down field. By default current Fiscal Year would be displayed.
Planning Version	Drop down field. By default current month version would be displayed.
Account Name	The account for which the user has selected from previous page would be displayed.
Contract#	Drop down field with list of Contracts associated with the logged in user/selected user from the previous page selection.
Line Item#	Drop down field with list of ALL Line items for the selected Contract# in the page.

 Forecast Workbench - Baseline

Back



Planning Year	Planning Version	Account Name	Contract#	Line Items#
2019 ▼	2019-July ▼	US Bank		All

# Forecast Workbench – Baseline (Details)

For the selected Account, below information is displayed at summary level.

Account	
US Bank	
Actual Amount	Actual Amount for the Contracts – Loaded Monthly
Forecast Without Risk	Contract Amount with out Risk Factor
Forecast with Risk	Contract Amount with Risk Factor included

# Forecast Workbench – Baseline (Screen)

Back



Planning Year

2019

Planning Version

2019-June

Account Name

Cligna

Contract#(Search Field)

K141218-17632

Line Items#(Search Field)

All

January 2019 to 31 December 2019



Load Workbench

Account/Contract		Planning Year - 2019												
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Cigna														
Actual Amount		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Forecast without Risk		\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$314,280
Forecast with Risk		\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$314,280
Baseline Amount														
K141218-17632	DSS OPT Staf - Char													
Actual Amount		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Forecast wlnout Risk		\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$314,280
Forecast wlnh Risk		\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$314,280
CLI-0187	Help Desk - Blllable COGS													
Actual Amount		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Forecast wlnhout Risk		\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$314,280
Forecast wlnh Risk		\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$26,190	\$314,280
Risk		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Risk Factor		0%												

<< <Previous Next> >>



## Forecast Workbench – Closed WON

# Forecast Workbench – Closed Won

- Month wise forecasts of Closed Won Amounts are displayed for the logged in/selected user.
- All the contract amounts under Closed Won are summarized and displayed in this page.
- ONLY one Line Item per Contract is displayed in this page.
- User can select the Line item that he/she would like to edit by choosing the line item from the dropdown list available.
- ONLY one Contract per Account is displayed in the page.
- User can select the contract that he/she would like to edit by choosing the contract from the dropdown list available.

# Forecast Workbench – Closed Won (Filters)

Filter	Description
Planning Year	Drop down field. By default current Fiscal Year would be displayed.
Planning Version	Drop down field. By default current month version would be displayed.
Account Name	The account for which the user has selected from previous page would be displayed.
Contract#	Drop down field with list of Contracts associated with the logged in user/selected user from the previous page selection.
Line Item#	Drop down field with list of ALL Line items for the selected Contract# in the page.
Opportunity Name	Displays the name of Opportunity to which the selected Contract# is associated with.

Planning Year

2019

Planning Version

2019-July

Account Name

US Bank

Contract#

Line Items#

All

Opportunity Name

# Forecast Workbench – Closed WON (Details)

For the selected Account, below information is displayed at summary level.

Account	
US Bank	
Actual Amount	Actual Amount for the Contracts – Loaded Monthly
Forecast Without Risk	Contract Amount with out Risk Factor
Forecast with Risk	Contract Amount with Risk Factor included

# Forecast Workbench – Closed WON (Screens)



Forecast Workbench - Closed Won

Back



Planning Year  
2019

Planning Version  
2019-June

Account Name  
US Bank

Contract#(Search field)  
Q-0077#K150529-18043#0027

Line Items#(Search field)  
All

Opportunity Name  
App Support for US Bank

January 2019 to 31 December 2019



Load Workbench

Account/Contract	Planning Year - 2019												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
US Bank													
Actual Amount	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Forecast without Risk	\$0	\$0	\$0	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$0	\$0	\$7,000
Forecast with Risk	\$0	\$0	\$0	\$800	\$800	\$800	\$800	\$800	\$800	\$800	\$0	\$0	\$5,600
Closed Won Amount													
Q-0077 App Support for US Bank													
Initial Forecast	\$0	\$0	\$0	\$120,000	\$60,000	\$60,000	\$60,000	\$60,000	\$30,000	\$30,000	\$30,000	\$30,000	\$480,000
K150529-18043#Contract for APP Support													
Actual Amount	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Forecast without Risk	\$0	\$0	\$0	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$0	\$0	\$7,000
Forecast with Risk	\$0	\$0	\$0	\$800	\$800	\$800	\$800	\$800	\$800	\$800	\$0	\$0	\$5,600
CL1-0138#Application Support													
Actual Amount	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Forecast without Risk	\$0	\$0	\$0	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$0	\$0	\$7,000
Forecast with Risk	\$0	\$0	\$0	\$800	\$800	\$800	\$800	\$800	\$800	\$800	\$0	\$0	\$5,600
Risk	\$0	\$0	\$0	\$ (200)	\$ (200)	\$ (200)	\$ (200)	\$ (200)	\$ (200)	\$ (200)	\$0	\$0	\$ (1,400)
Risk Factor	20%												

# Forecast Workbench - Open

# Forecast Workbench – Open

- Month wise forecasts of Open Opportunities are displayed.
- For a PE/PM ALL the Open opportunities associated with the PE/PM's CPM Region are displayed in the screen.

# Forecast Workbench – Open (Filters)

Filter	Description
Planning Year	Drop down field. By default current Fiscal Year would be displayed.
Planning Version	Drop down field. By default current month version would be displayed.
Account Name	The account for which the user has selected from previous page would be displayed.
Opportunity Name	Displays list of Opportunities for the selected Account.
Line Item#	Drop down field with list of ALL Line items for the selected Contract# in the page.

 Forecast Workbench - Open

Back



Planning Year

2019

Planning Version

2019-June

Account Name

US Bank

Opportunity Name(Search field)

All



# Forecast Workbench – Open (Details)

For the selected Account, below information is displayed at summary level.

Account/Opportunity
US Bank
Adjusted Forecast
Unadjusted Forecast

Product Models Amount multiplied by Probability%

Product Models Amount without Probability%

# Forecast Workbench – Open (Screens)

Forecast Workbench - Open

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Planning Year  
2019

Planning Version  
2019-June

Account Name  
US Bank

Opportunity Name(Search field)  
All

1 January 2019 to 31 December 2019

Load Workbench

Account/Opportunity	Planning Year - 2019												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
US Bank													
Adjusted Forecast	\$0	\$0	\$0	\$0	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	\$0	\$0	\$0	\$45,000
Unadjusted Forecast	\$0	\$0	\$0	\$0	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$0	\$0	\$0	\$300,000
Commit/Bestcase/Pipeline													
Remote Network Opportunity													
Adjusted Forecast	\$0	\$0	\$0	\$0	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	\$0	\$0	\$0	\$45,000
Unadjusted Forecast	\$0	\$0	\$0	\$0	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$0	\$0	\$0	\$300,000
SLA: Gold													
Adjusted Forecast	\$0	\$0	\$0	\$0	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	\$0	\$0	\$0	\$45,000
Unadjusted Forecast	\$0	\$0	\$0	\$0	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000	\$0	\$0	\$0	\$300,000

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# Add/Update Contract

On Opportunity Page

# Add/Update Contract

- ✓ Button available in the Opportunity screen to Add a New Contract or Update Existing Contract
- ✓ Button is enabled ONLY when an Opportunity is turned to “CLOSED WON”

## Add/Update Contract

## The screen has 2 sections

“Opportunity Detail”  
section displays  
Opportunity related  
information

“Contract Edit”  
section displays  
Contract & Line Item  
Related Information  
where user Input is  
required.

Opportunity Detail

Opportunity Name

ClosedWon Opportunity2

Account Name

US Bank

Geo #

Geo Name

Contract Edit

Enter Contract #

Enter Contract Description

Choose Fiscal Year

2019

Q#

Show

10

entries

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
INITIAL FORECAST	200	200	200	200	200	200	200	200
ACTION	LINE#	DESCRIPTION	REVENUE TYPE	COST CENTER	BU LEVEL 1	BSLA #		
No data available in table								
+								
TOTAL								

Showing 0 to 0 of 0 entries

Save

Back

# Contract Edit Section – Contract Information

Field	Description
Enter Contract#	Non-mandatory field. User has to input whenever Contract#/k# is available.
Enter Contract Description	User to need to input description about Contract#. Non-mandatory field.
Choose Fiscal Year	User has to choose for Which FY the forecast has to be saved.
Q#	The default Q# assigned to Opportunity would be displayed here. This is a non-editable field.

# Contract Edit Section – Line Item Information

Field	Description
Description	Mandatory Field. User has to input Line Item Description.
Revenue Type	Mandatory Field. User will have option to choose from the drop down.
Cost Center	Mandatory Field. User will have option to choose from the drop down.
BU Level1	Based on Cost center chosen by user, BU Level1 would be auto populated
BSLA#	Mandatory Field. User will have option to choose from the drop down.

# Contract Edit Section – Screens

User Input field

Auto Populated

Dropdown List

Line Item Amount should be less than Initial Forecast.  
Else User can not save the data

**Contract Edit**

Enter Contract #



Choose Fiscal Year

Enter Contract Description

Q#

Show  entries

Search:

							Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
INITIAL FORECAST							0	0	200000	200000	200000	200000	200000	200000	200000	200000	200000	200000	\$2,000,000
ACTION	LINE#	DESCRIPTION	REVENUE TYPE	COST CENTER	BU LEVEL 1	BSLA #													
 	CLI-0140	DC relocation	Annuity	5312	SEM	203563	\$0	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$1,000,000
+																			
TOTAL																			\$1,000,000

Showing 1 to 1 of 1 entries

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# Thank You