



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



Kenny's Org FY 2020 Forecast ▾

FY2020 Q1 (Current) ▾ Grid Trend Flow

User	Quota	Pipeline	Best case
▾ KS Kenny Smith	\$0.00	\$226,217.06	\$396,490.58 (\$386,521.44)
KS Kenny Smith	\$0.00		
▾ DO Dustin Ochs	\$0.00		
DO Dustin Ochs	\$0.00		
▾ SS Samuel Strom	\$0.00		
SS Samuel Strom	\$0.00		
MH Malcolm Homer	\$0.00		
▾ AD Alyce Durham	\$0.00		
AD Alyce Durham	\$0.00		
MF Nicolas Frizzell	\$0.00		
▾ VC Vance Carrico	\$0.00		
VC Vance Carrico	\$0.00		
SH Stan Hadden	\$0.00		
> SS Stuart Silas	\$0.00		

New Opportunity

Opportunity · Opportunity ▾

Opportunity Sales Process < Qualify (< 1 Min)

Active for less than one mi...

Summary Product line items Quotes

Topic * 3D printers

Contact  Alberto Gass

Account  Contoso

Purchase Timeframe Next Quarter

Currency *  US DOLLAR

Budget Amount 25000.00 \$

Purchase Process Committee

Forecast Category Pipeline ▾

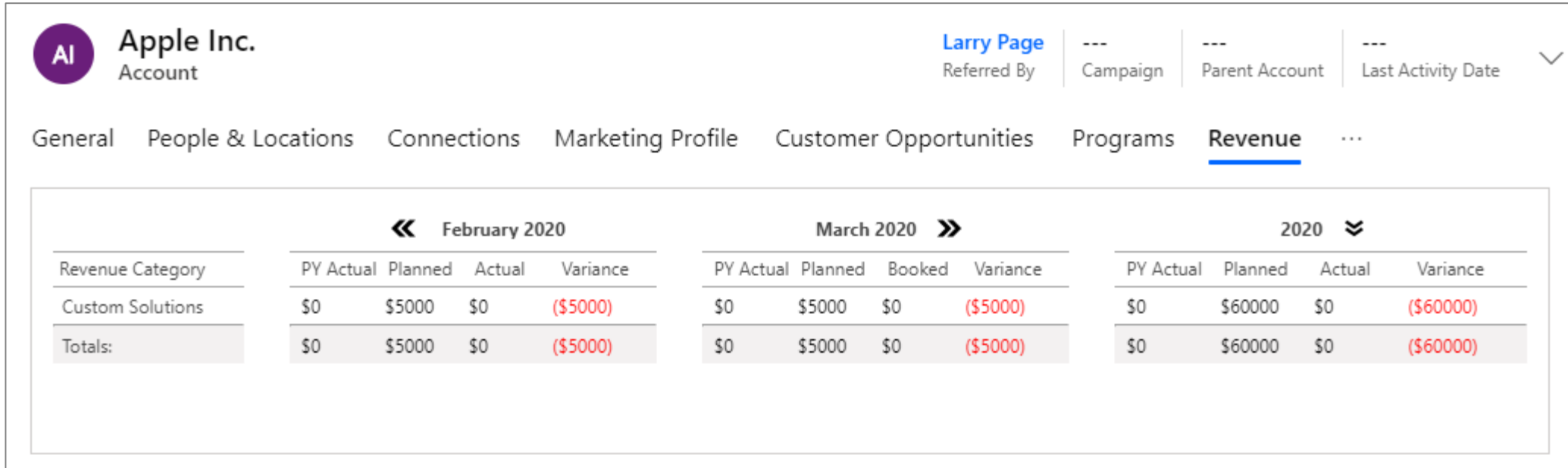
Description

- Select--
- Pipeline
- Best case
- Committed
- Omitted
- Won
- Lost

- 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.
Account

Larry Page
Referred By

Campaign

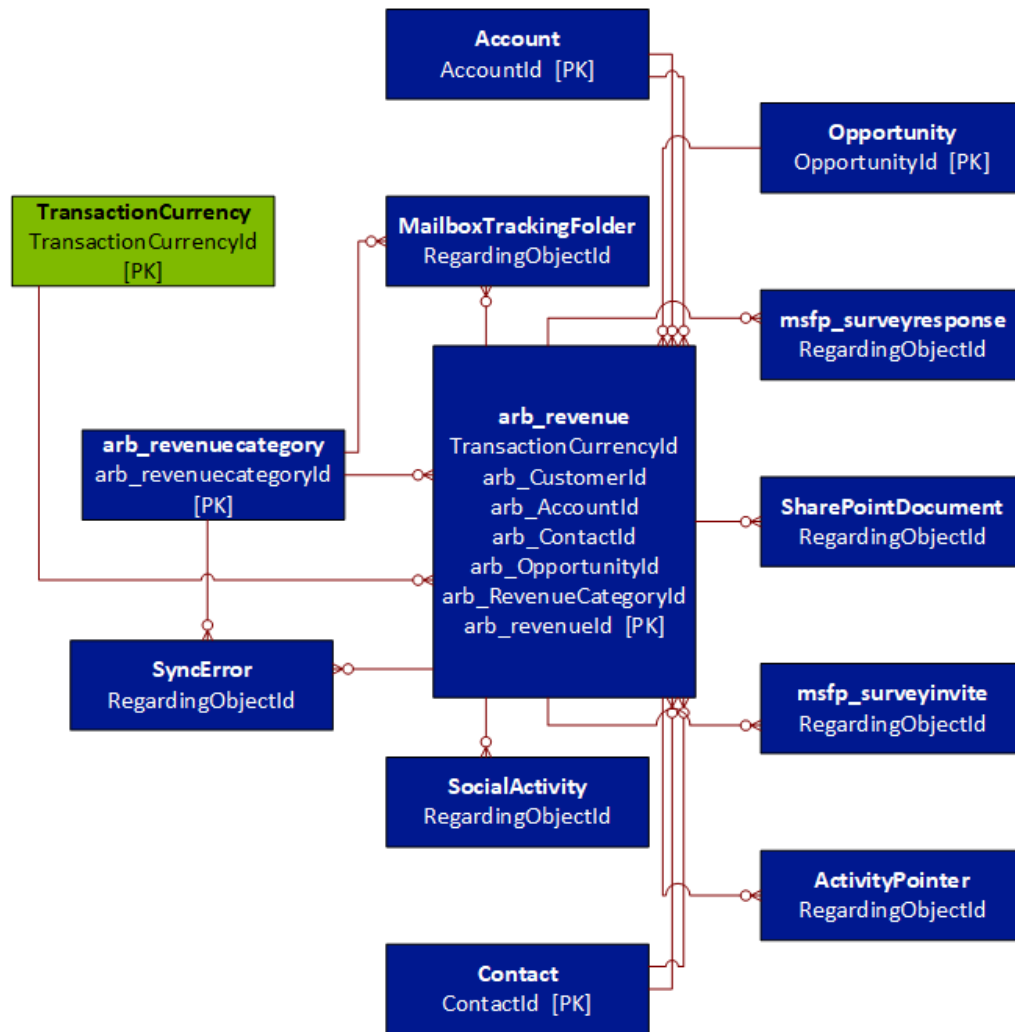
Parent Account

Last Activity Date

General People & Locations Connections Marketing Profile Customer Opportunities Programs **Revenue** ...

	February 2020				March 2020				2020			
Revenue Category	PY Actual	Planned	Actual	Variance	PY Actual	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.

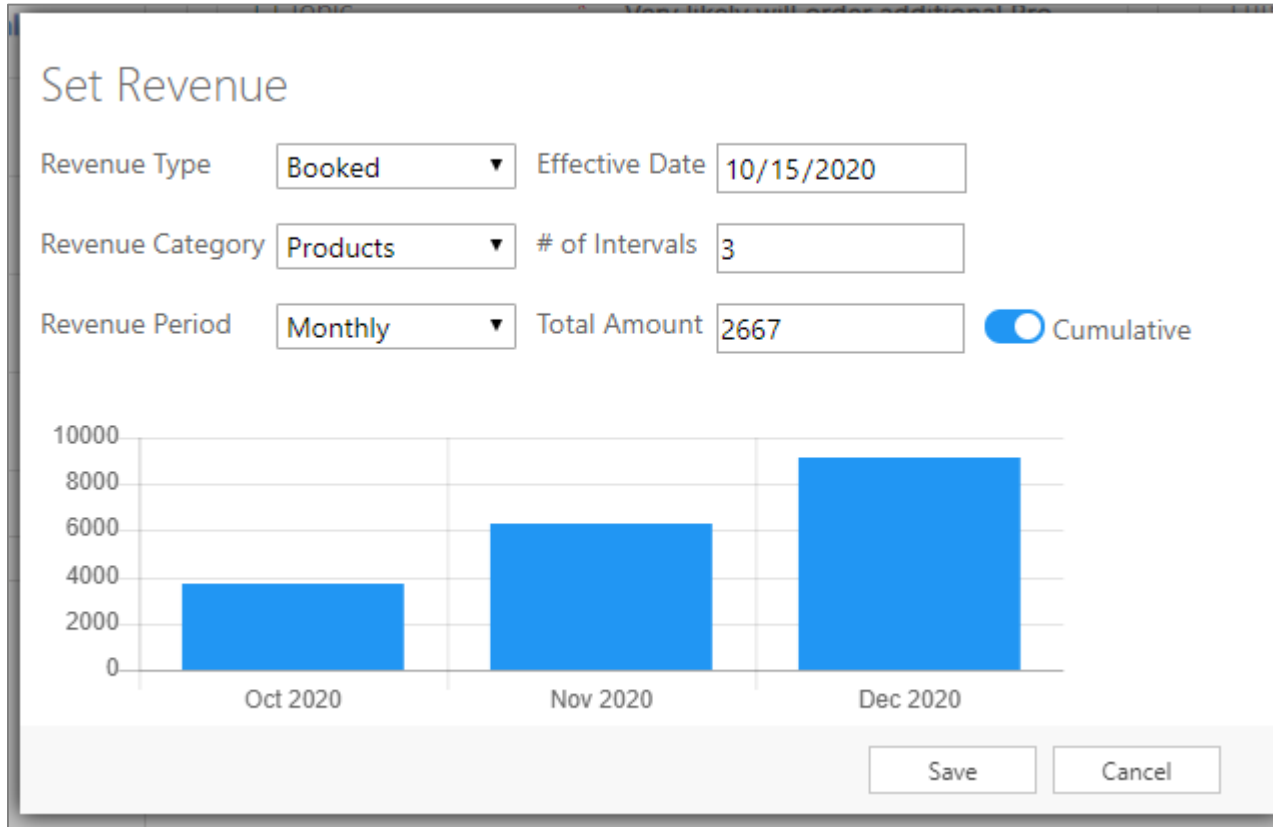
Track planned, booked, and actual revenue

Planned: Forecasted revenue often calculated from historical data.

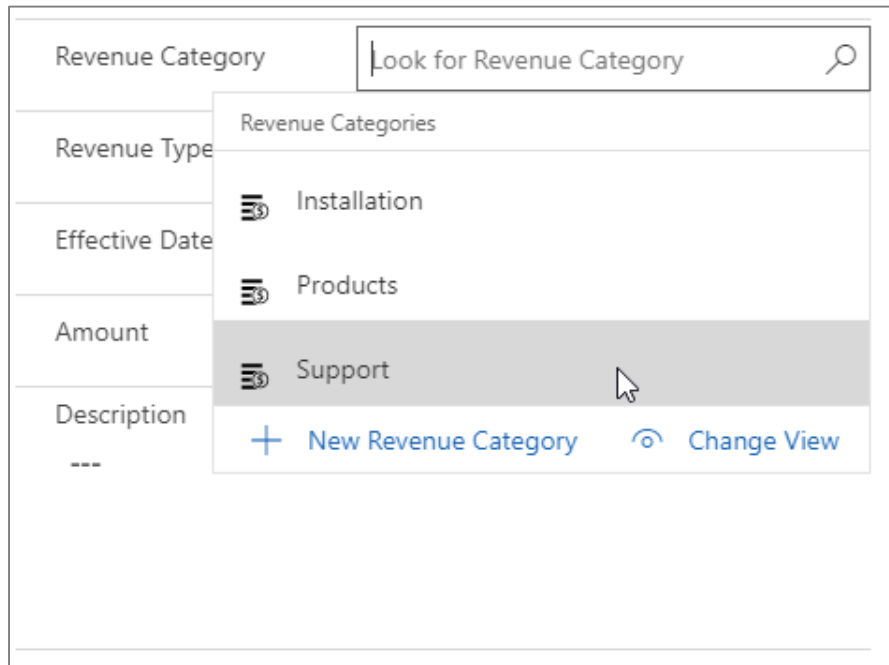
Booked: Expected revenue from signed agreements, sometimes referred to as committed or contracted revenue.

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

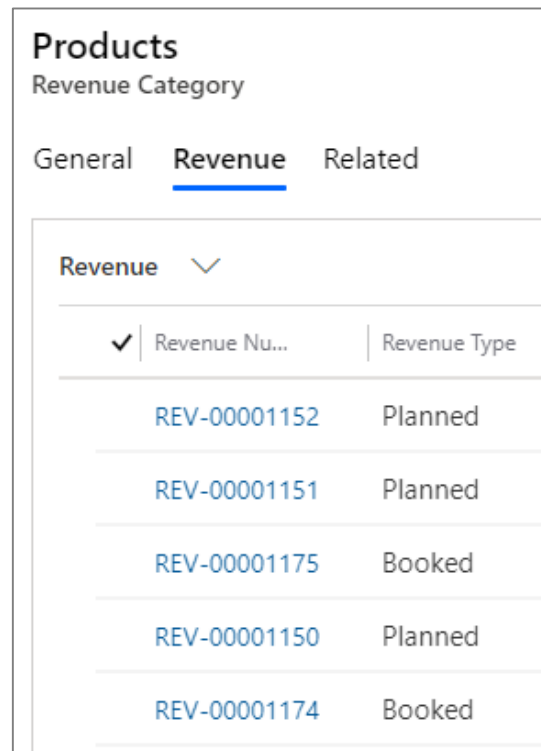




- Create new records for different months, quarters, or years.
- Quickly change the amount for each time interval by interacting with the bar chart.
- Flexible design to support unique customer needs.



The screenshot shows a form with a 'Revenue Category' dropdown menu. The dropdown is open, showing a search bar 'Look for Revenue Category' and a list of categories: 'Installation', 'Products', and 'Support'. The 'Support' category is highlighted. Below the list are two buttons: '+ New Revenue Category' and 'Change View'.



The screenshot shows the 'Products' page with the 'Revenue' tab selected. The page displays a table of revenue records for the 'Support' category.

Revenue	
✓	Revenue Nu...
	Planned
	Planned
	Booked
	Planned
	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.

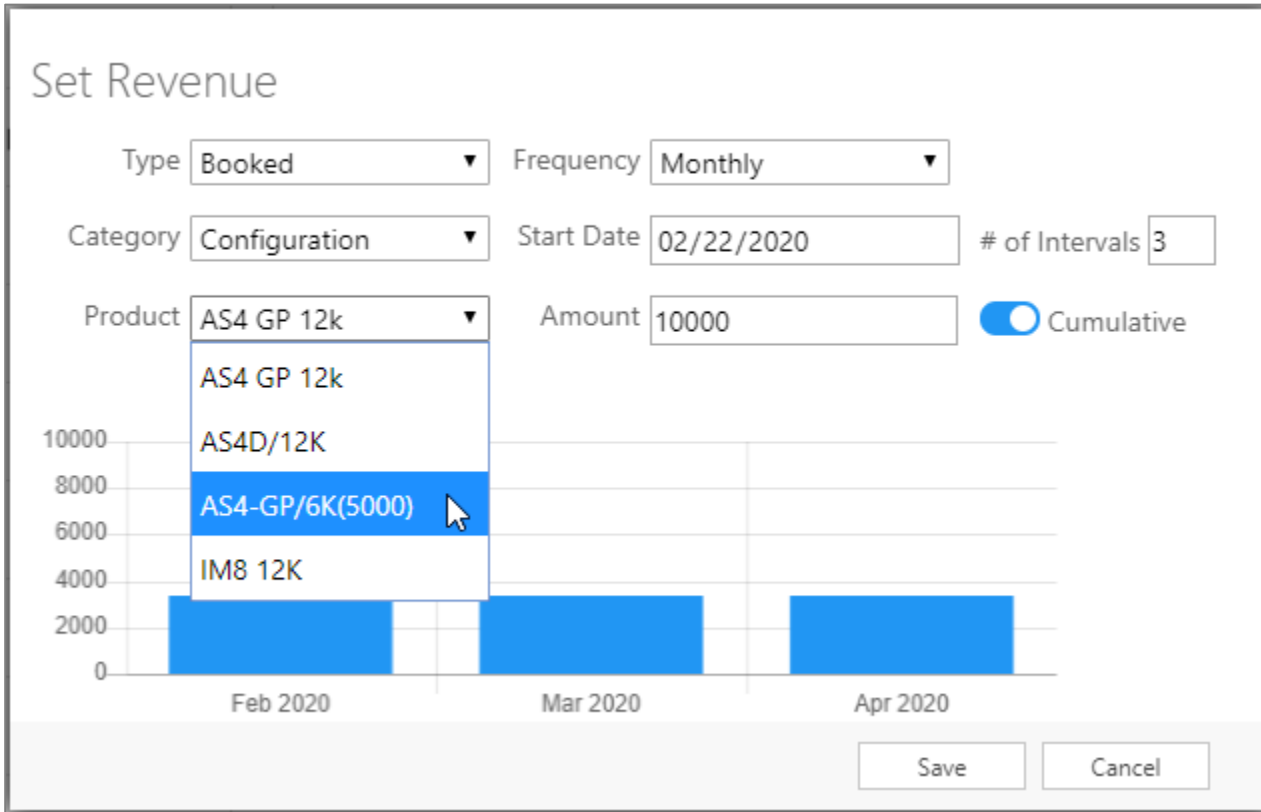


- Aggregate revenue by month, quarter, or year.
- Compare prior year actuals to current year actuals.
- Compare different categories and types.

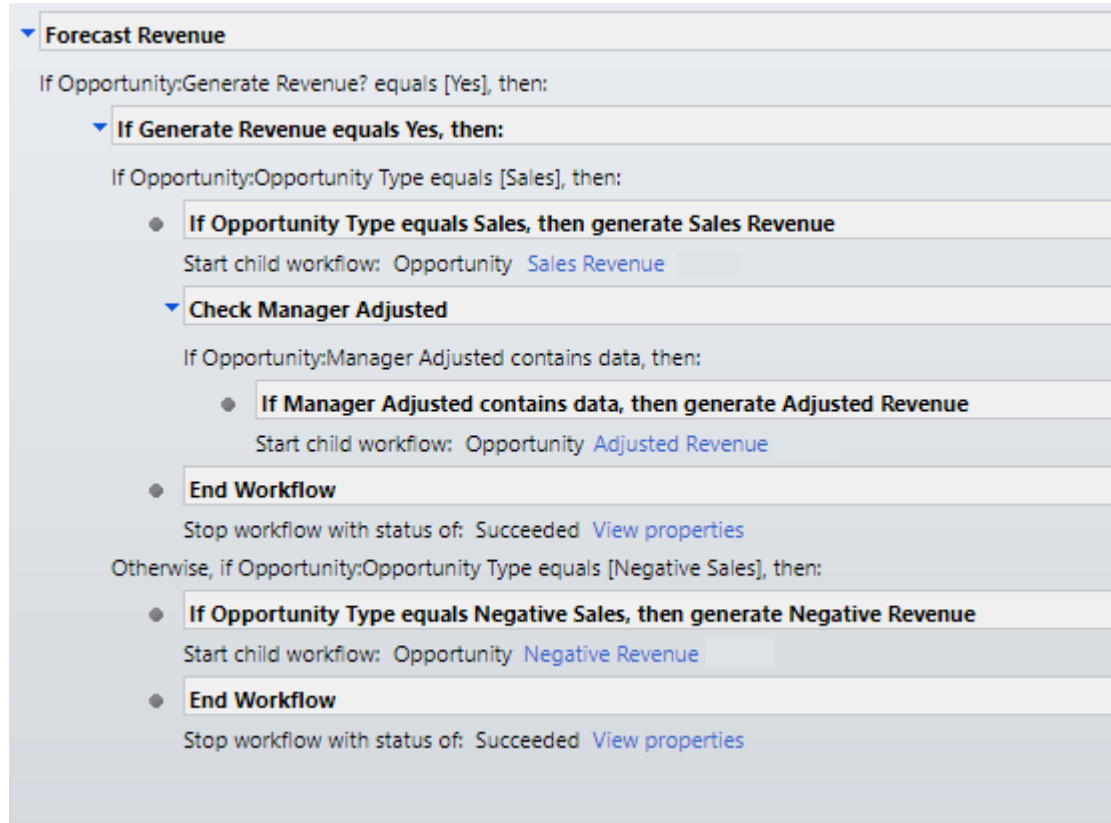
Other benefits

- 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.

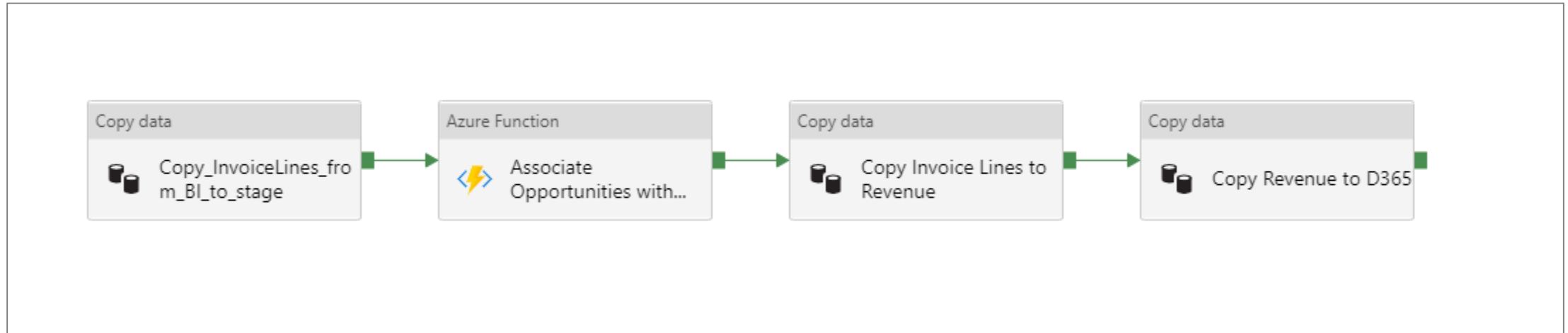




- Revenue categories are connected to the out-of-the-box products.
- Revenue records can be related to products or product families.
- Create Revenue web resource shows a filtered list of products.



- 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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