SIEBEL 7
eBusiness

SIEBEL FORECASTING GUIDE

VERSION 7.5, REV. A

12-EE8WSK

JANUARY 2003

Contents

Chapter 5. Forecasting Setup

Chapter 6. Revenues

Chapter 7. Forecasting

Chapter 8. Matrixed Sales Organization

Chapter 9. Importing and Exporting

Appendix A. Troubleshooting

Appendix B. Forecast Usage Examples

Appendix C. Forecasting User Properties

Index

Contents

Introduction

This guide covers administrative and end-user tasks specific to Siebel Forecasting. Use this guide in combination with *Applications Administration Guide*.

The audience for this guide consists primarily of employees in the following categories:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.
Sales Representatives	Persons responsible for creating, reviewing, and submitting forecasts.
Sales Managers and Executives	Persons responsible for managing revenue and forecasting data.
Sales Operations Managers or Executives	Persons responsible for managing the pipeline and forecast processes across sales channels.

NOTE: Job titles and duties at your company may differ from those listed in this table.

How This Guide Is Organized

This guide covers prerequisite and administrative tasks of Siebel Forecasting. It also covers end-user tasks specific to using Siebel Forecasting. Use this guide in combination with *Applications Administration Guide*.

Applications Administration Guide covers the setup tasks that are common to each Siebel eBusiness Application, such as using license keys, defining employees, and defining your company's structure. It also provides you with the information you need to perform data administration and document administration tasks.

This guide assumes that you have already installed or completed the upgrade of Siebel Forecasting. If you have not, go to the Installation/Upgrade section of the *Siebel Bookshelf* and click the links to the guides that are relevant to your company's implementation.

The Siebel database server installation script creates a Siebel administrator account that can be used to perform the tasks described in this guide. For information about this process, see *Siebel Server Administration Guide* and the Siebel server installation guide for the operating system you are using.

NOTE: Some chapters in this guide are for end users, some are for administrators, and some are for both.

If you are an administrator, it is recommended that you read Chapter 2, "Getting Started," and Chapter 3, "Forecasting Migration," first. These chapters provide information administrators need to know before using Siebel Forecasting.

Revision History

Siebel Forecasting Guide, Version 7.5, Rev. A

January 2003 Bookshelf

Table 1.   Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
"Changing the Visibility of My Team's Opportunities View (Administrator)"	Updated incorrect cross-reference to additional information.
"Setting Up System Preferences for Forecasting (Administrator)"	Added more information about the Forecast Service Manager server component. Moved information from third paragraph to a new fourth paragraph.
"Upgrading Using the Data Migration Utility (Administrator)"	Corrected list of dll files in Step 1.
"Forecasting User Properties"	Added new appendix.

Overview of Forecasting 1

Siebel Forecasting allows customers to manage their revenues across each channel and to take periodic forecast snapshots of those revenues as they mature. The Revenues screen and views allow for straightforward pipeline management. They allow a sales professional, sales manager, or sales executive to retrieve revenue information in real time. The Forecasts screen is used to create new forecasts, snapshots of live revenue records, and then analyze and evaluate those saved forecasts over time.

The total forecast process encompasses a range of activities across many organizations. Also, the business requirements, and the approaches to forecasting can vary dramatically from time-to-time and division-to-division. While forecasting may only involve a simple query in some companies, it can be a planning process in other companies. Forecasting may be very high level in some organizations, and very detailed in other organizations. For some organizations, margin is a critical element of forecasting. For other organizations, it is revenue that matters, or the quantity of a product to be built, the quantity of product to be shipped, the monthly bookings, or the quarterly billings. Siebel Forecasting can address a wide range of forecasting requirements.

NOTE: The relationship between forecast items and revenue items is a many-to-many relationship. Siebel Tools provides a Link representing this relationship: "Forecast 2000 -- Forecast Item Detail Flat/Revenue". This Link can be used to retrieve revenue data from forecast items.

Key Features of Forecasting

Siebel Forecasting allows you to:

■ Report revenues by account, opportunity, product, product line, employee, partner, division, organization, or project

■ Create snapshots of revenue information over time for historical analysis

■ Perform real-time analysis of revenues using charts and reports

■ Access projected margins, cost, best case, and worst case

■ Use multiple currencies and multiple organizations

■ Perform auto-forecasts for absentee employees when appropriate

■ Create recurring revenues by account, project, and opportunity

■ Split credit of sales revenue across multiple positions and products

■ Perform matrixed revenue analysis and forecasting

■ Import and export data from the Revenues screen

Business Functions of Screens in Forecasting

The Forecast Administration screen includes a Forecast Administration view, which allows you to create and define forecasts series, and a Revenue Templates view, which allows you to create and define revenue templates.

The Revenues screen includes every revenue to which you have access. These revenues may be associated with opportunities, accounts, projects, and so on. When you add a revenue to a Revenues view in a screen such as Opportunities, it appears where you add it, and it appears in the Revenues screen. You can analyze your revenues from the Revenues screen without performing a forecast.

The Forecasts screen includes your forecasts of revenues over time. From the Forecasts screen you can create new forecasts, adjust forecasts, submit forecasts, and perform analysis on your forecasts.

NOTE: The exact configuration of Siebel applications screens, views, and fields depends on your company's configuration of the application.

Forecasting Terms

Table 1 describes some terms which will be helpful as you learn about and use Siebel Forecasting.

Table 1.   Forecasting Terms

Term	Definition
Forecast period	The period of a forecast series from start to end date. For example, quarterly.
Summary period	The summary period defines the periodic *buckets* for the Summary view in the Forecasts screen. Some integer number of these exists for each forecast period (for example, monthly).
Summary Revenues	Each summary period has one summary revenue amount.
Interval period	Period between creation of new forecasts; their frequency. For example, weekly.
Total Forecast Revenue	Sum of each summary record. Each summary period is a summary record *bucket*.
Detail Revenues	Can be either of summary type or detail type depending on the type of forecast. For more information about forecast types, see "Forecast Types" on page 17.
Rollup	Sums details and synchronizes totals with summaries.

Forecast Types

You can perform a number of different types of forecasts. Siebel Forecasting allows the administrator to define summary depth or detail depth forecasts based on the level of information that managers and executives want to see about their subordinates' revenues in their forecasts. The type of forecast set up determines whether end users' final adjustments should be completed in the Details view or the Summary view in the Forecasts screen. Administrators also define whether or not a forecast is rollup, snapshot, or hybrid.

Detail and Summary Forecast Types

Every forecast is either detail depth or summary depth.

In a *detail depth* forecast, each revenue line item in the Details view in the Forecasts screen is rolled up through the reporting hierarchy. As a result, senior management has access to every forecast detail revenue item for their review. In this scenario, end users should make sure that adjustments are made in the Details view of the forecast. After adjusting the details, end users must select Rollup to recalculate the modified forecast. To view the forecast details by periodic summary, use the Summary view tab.

In a *summary depth* forecast, each record in the Summary view is rolled up to a user's direct manager. As a result, a manager can see his own detailed line item records and the summary records of his direct subordinates from the Details view in his forecast. Users can adjust detail records and click Rollup to calculate the modified forecast. They can then further adjust those records from the Summary view.

NOTE: If an administrator selects a summary depth forecast, executives will have less granularity of information for analysis, but will have greater performance.

Rollup, Corporate Snapshot, and Hybrid Forecast Types

A *rollup forecast* is one that moves up through a hierarchy. It involves many participants and facilitates sales and forecast management. A personal forecast with details is an example of a rollup forecast. For more information see, "Creating a Personal Forecast Series With Details (Administrator)" on page 57.

A *corporate snapshot* allows you to avoid forecasting altogether. It provides you with an instant way of seeing your revenues over time. It requires no participants. A global forecast is an example of a corporate snapshot. For more information see, "Creating a Global Forecast Series (Administrator)" on page 62.

A *hybrid forecast* allows you to have more than one visibility in one forecast and thus to combine a rollup and snapshot forecast, if appropriate. For example, one manager does not want his team to create individual forecasts, but another does. A hybrid forecast allows both managers to forecast their own way; snapshot and rollup, and still rollup to their VP. For more information see, "Creating a Hybrid Forecast Series (Administrator)" on page 66.

Getting Started 2

This chapter describes concepts useful for defining Siebel Forecasting requirements and design for administrators. You should define your company's forecasting requirements before performing these administration setup tasks. Use this chapter in combination with *Applications Administration Guide*.

Gathering Forecasting Requirements (Administrator)

Siebel Forecasting provides you with many implementation options. With the importance that forecasting plays in most organizations, and the variety of implementation choices available, an administrator must fully understand the choices that are under consideration. A thorough understanding of your company's business requirements can make sure that you have the information needed to improve your organization's technology and business offerings for the entire sales organization.

The ultimate goal is to address the business requirements with less overhead and a higher level of accuracy in a more timely manner. Sometimes, the best way to understand the requirements is to look at your company's existing process to make sure you cover the basics, and then to evaluate possible opportunities for improvement. You can begin gathering requirements with a list of the reports, screens, systems, and processes that are currently in place. From there, you can drill down on the business process to get a better understanding of the overall objectives and process.

Forecasting Process Design (Administrator)

Forecasting process design is a way of evaluating the numerous forecasting options available to you. It consists of questions that assist you with requirements gathering and help you to design a streamlined, reliable, and timely forecasting process.

The questions asked during this process are:

■　Who Forecasts?

To determine who forecasts, compile a list of the major participants in the forecasting process. These participants may include account managers, regional or geographic sales professionals, product specialists, industry specialists, overlay sales representatives, and sales managers. Each group is likely to have a different set of requirements. You may select one forecasting approach for one group, and a different forecasting approach for another group.

In some companies, the district managers create a forecast and roll it up to their managers with a committed monthly total for the sales representative. The product specialists and overlay sales representatives may rely on a less formal process by querying against the All Revenues list view to find the information they are looking for, and then using a report, a chart, or exporting to Microsoft Excel to collaborate or capture the information for later use.

■　Why Do They Forecast?

Understanding the overriding goals, principles, and objectives behind a forecast is critical. These objectives may vary from one group to another. For instance, the sales department might want to identify potential lags in revenue to redeploy resources faster. Manufacturing might want to avoid production bottlenecks by adequately predicting demand. Professional services might need to use their internal resources more efficiently. Product management might want to provide directors with visibility into the sales pipeline to better drive product specific sales.

Once you clarify the goals of the various forecasting constituents, select an approach that works for each group. In general, use the simplest, most straight-forward option that meets the objectives of each group. Sometimes, a single approach works for everyone; often, several approaches are needed.

■ What kind of information is required?

The information requirements in sales are often very different from the information requirements in manufacturing and accounting. While it is useful to have the right level of detail, too much information can be overwhelming. Typically, sales organizations focus on total revenues for each representative, or opportunity, partner, or account specific revenues. Accounting and manufacturing usually want more detail; they need to know how much of product X was booked last quarter, or how much of product Y is being shipped this quarter.

Each organization will have access to the appropriate level of information. You might set up a revenue query for sales which shows only opportunity or account specific information, while setting up a more detailed query for manufacturing that provides users with details on each of the products within a given product line. Apply this same line of logic to the design of your forecast search specifications, so that they pull in the right level of information for the users involved.

■ How often is the information needed?

While a weekly forecast is fine for some organizations, a monthly forecast is better for others. The Revenues screen allows a sales professional, partner manager, sales manager, or executive to retrieve information in real time, while the Forecasts screen provides users with a way of copying a set of revenues and saving it for future use.

Find a balance between a more structured, scheduled forecasting process, and a less structured, less scheduled forecasting process. With the charts and reports available in the Revenues screen, you can perform an analysis without ever creating a forecast. You can reserve the forecasting process for organizations that really need a snapshot of the information at appropriate points in time.

■ Is management intervention and adjustment required in forecasting?

In many organizations, a snapshot of the information in the Revenues screen, with some criteria applied to filter out extraneous records, is a sufficient forecasting method. In other organizations, some level of management intervention and adjustment is required as the forecast rolls up to management and executive levels.

In general, it is best to streamline the forecasting process. With fewer intermediaries and adjustments, the forecasting process becomes more timely and less cumbersome. Where possible, the manager and the sales representative are advised to agree on the revenue amount, the close date, the win probability, and the commit status in the Revenues screen, so that the manager does not need to intervene in the forecasting process. This allows an organization to take one snapshot of the information without intermediate steps as the forecast rolls up the management chain. It also confirms a level of agreement between the sales representative and the manager, so that the queries in the Revenues screen accurately reflect the level of anticipated business.

■ Do sales representatives need to adjust their total dollars forecasted?

Often, the total dollar amount that a sales representative forecasts is equal to the sum total of his or her forecastable revenues, on a monthly or quarterly basis. In these cases, running a query in the revenue list view, or running a snapshot of the revenues for forecasting purposes is enough to produce a corporate forecast. However, there are organizations in which sales professionals are expected to commit to a monthly or quarterly revenue amount that does not equal the sum of their forecasted opportunities.

Perhaps a sales representative wants to include a hundred thousand dollars worth of opportunities in a forecast, even though the representative is only willing to commit to fifty thousand dollars in revenue. The Forecasts screen allows the sales representative to include $100,000 in opportunities, while adjusting the total revenue amount on a monthly or quarterly basis to $50,000. Although this can be useful in some situations, it means that the value of the revenues and the value of what the sales representative is willing to forecast do not agree.

NOTE: Siebel Forecasting allows sales team members to enter negative integers in their forecasts.

Performance Considerations (Administrator)

Forecasting performance can vary from one company to another based on network bandwidth, server capacity, database tuning, and a variety of other variables. Investigate these possible causes whenever performance issues arise.

As a preemptive move, you may want to consider the following performance objectives for forecasting:

- Minimize the number of records that end up in the forecasting table.

- Minimize the number of participants involved in forecasting.

- Minimize the duplication of data as the forecast rolls up from subordinate to manager.

- Minimize the complexity of the forecasting process in general.

These objectives are described in the following sections.

Minimize the Number of Records in Forecasting Table

Use a restrictive Auto Forecast Search Spec. Do not include product or revenue line item details for an opportunity unless they are needed. Only include opportunities that are committed or that meet some minimal criteria.

Consider implementing a process that batches up the revenue records or summarizes the information in the revenues table before the creation of the forecast itself. A customer with hundreds of thousands of detailed revenue line items might want to summarize the related revenue line items into higher level revenue line items before creating the weekly or monthly forecast. This keeps unnecessary detail out of the forecast.

Minimize the Number of Participants

Consider the list of people who really need to forecast in your organization.

If you are creating a global snapshot, you may want only one or two people in the Forecast Series Participants list that do not have a manager-subordinate relationship. Otherwise, the auto-forecasting feature will create a manager's forecast with the revenues in your company that qualify for forecasting, and a subordinate's forecast with the same data.

If you are using the departmental forecast, you may not want to include managers and their subordinates at the same time.

Minimize the Duplication of Data

Consider using global snapshots or departmental forecasts. If you are using personal forecasts, consider the personal forecast without details. The manager can still view the details by drilling down on subordinates, and you reduce the number of copies of revenue information.

Minimize the Complexity of the Forecasting Process

Consider using the Revenues view for many of your day-to-day operations. You can provide overlay sales organizations and product managers with access to the Revenues views, while restricting the use of forecasting to organizations that really need it. In the global forecast scenario, you only need one forecast. Overlay sales organizations still have access to the information they need without having to make copies of the database on a weekly or monthly basis.

Forecasting Migration 3

If you are migrating data from previous versions of Siebel Sales, you need to determine if you will upgrade automatically or if you will use the data migration utility.

The automatic upgrade feature of Siebel Sales migrates opportunities, opportunity product information, and select opportunity sales team information from older versions. The automatic upgrade does not, however, migrate old forecasting information. For many Siebel customers, there is sufficient information in the opportunity and opportunity product tables in Siebel Sales to begin the forecasting process without the old forecasts.

The automatic upgrade feature is sufficient if your organization:

■ Does not use Siebel Forecasting yet.

■ Uses revenue forecasting for simple opportunities with one close date and one revenue amount.

■ Uses the Opportunities list or the Opportunities Products list to enter most forecast information.

■ Uses the New button when forecasting, rather than the Copy button.

Some Siebel customers may need to also run the data migration tool provided with the new Siebel installation. This tool migrates information from old forecasting tables into new revenue tables. You must use the data migration tool if your organization:

■ Uses Siebel Forecasting.

■ Uses revenue forecasting with more complex opportunities that include recurring revenues over many months.

■ Uses the Forecasts screen to enter most forecast information (instead of the Opportunities list or Opportunities Products list).

■ Uses the Copy button when forecasting, rather than the New button.

The following sections describe the Automatic Upgrade feature and the Data Migration tool. Please read both sections carefully before upgrading to Siebel 7.0.

Upgrading Automatically (Administrator)

In previous versions of Siebel applications, the opportunity close date, win probability, commit status, and revenue amount were stored on the intersection table between the opportunity and its sales team members. In newer versions of Siebel applications, each opportunity has only one close date, win probability, commit status, and revenue amount. This information is stored in the Revenue table, on a special primary revenue record for that opportunity. This portion of the upgrade is automatic.

In previous versions of Siebel applications, opportunity products were stored in the opportunity product intersection table. In Siebel 7.0, opportunity products are stored in the Revenue table, along with the primary revenue record. For each opportunity product migrated from a previous version, a revenue record is created. The product name, part number, quantity, price, and extended revenue is copied from the old opportunity product record to the new revenue record. Other attributes, such as the win probability, the primary sales representative's name, and the opportunity name, are copied in from the opportunity record.

Before you upgrade from a previous version of Siebel applications, decide whether the revenues for nonprimary sales team members should be upgraded. You may want to consider upgrading nonprimary sales team members' revenues if your organization:

■ Uses nonprimary forecasting and wants to continue using a similar nonprimary forecasting approach. (Running queries on the Revenue table may not be adequate to meet this need.)

■ Wants each sales team member to have a different opinion on the close date and revenue amount for each opportunity.

■ Wants to assign some portion of each opportunity that is not related to a specific product or some percentage of the overall opportunity value to each sales team member.

For each opportunity migrated from a previous version, the automatic upgrade evaluates the opportunity sales team records for nonprimary sales team members. Each sales team member record is used to create a revenue record in Siebel 7.5, if:

■ The primary flag is not checked.

■ The revenue amount is nonzero.

■ The commit flag is checked.

Before you upgrade, make sure that your opportunity sales team records are appropriately marked as committed (to upgrade them) or not committed (to ignore them during the automatic upgrade process). Most customers do not need to upgrade these uncommitted sales team records.

Upgrading Using the Data Migration Utility (Administrator)

The data migration tool is designed for customers with recurring revenues entered directly into the Forecasts screen.

NOTE: Because of the data model changes in forecasting, it is recommended that you print out your old forecasts before upgrading. Those forecasts are no longer visible in this version of the Siebel application. Although the data migration described here moves your data, you may want to double-check the results when the migration is finished.

To use the Data Migration Utility

1 In the default bin directory on the server, there is a file called fcstcnvrt.exe. This is the program that is used to migrate information from old Siebel forecasting tables to the new Siebel Revenue table. Also in this directory is a set of DLL files used by the data migration utility:

```
sslcshar.dll

sslcfom.dll

sscfdm.dll

sscfcmn.dll

sscacmbc.dll

sslcsym.dll

sslcosd.dll
```

Once you have located these files and made sure that they are available for data migration, clean up your existing data.

2 You may need to perform some data cleanup on your old Siebel database. Specifically, check for and remove duplicate periods from the periods table, if they exist.

To check for duplicate periods, manually review the periods view in Siebel, or run the following SQL:

```
select t1.row_id || ' CONFLICTS WITH ' || t2.row_id ||
    ' (' || t1.period_cd || ',' || t1.start_dt || ')'
    from s_period t1, s_period t2
    where t1.period_cd = t2.period_cd
    and t1.start_dt = t2.start_dt
    and t1.row_id <> t2.row_id
```

If you do have duplicate periods, and you find that they have been used in creating old Siebel forecasts, work with Siebel Systems to address this issue before proceeding to the next step.

3 At the command prompt, enable logging using the following commands:

```
set SIEBEL_LOG_EVENTS=errors
set ForecastUpgdEvent=errors
```

To log all events instead of just errors, set each of the preceding variables to "All" instead of "errors."

4 To run the data migration, use fcstcnvrt.exe. The syntax for this command is:

```
fcstcnvrt/u username /p password /d datasource /m
masterForecast /date date [/c cfgFile] [/l language] [/postn
postn] [/login login] [/sspec searchSpec] [/r revision] [/
submitted [/Opportunity [/OpportunityProduct [/OpptyProduct [/
NP] [/Period period] [/UseStartDate] [/Desc description]
```

or

```
fcstcnvrt[/help]
```

The following table describes each of these:

Switch	Description	Comments
/u *username* /p *password*	Required. System Administrator's username and password.	These are the same username and password that you use to log in to the Siebel server database.
/d *datasource*	Required. The name of the datasource.	
/c *cfgFile*	The name of the configuration file.	
/l *language*	The language being used.	
/m *masterForecast* /date *date*	Required. Specify which forecasts to upgrade, using *masterForecast* and *date* as search specs.	1. *masterForecast* must be the name of a valid master forecast. 2. *date* must be a valid date. The format for the date field is: MM/DD/YYYY. For example, 01/05/2001.
/postn *postn*	Specifies a position to upgrade.	To specify more than one position, use /sspec /postn takes priority over /login
/login *login*	Specifies a login to upgrade.	Applied in conjunction with other search specs.
/sspec *searchSpec*	Limits the forecast records by search spec.	*searchSpec* must be a valid search spec for a personal forecast.
/r *revision*	Limits the forecast records by revision.	*revision* can be a valid number, or one of {Earliest|Latest}.
/submitted	Limits the forecast records to those which have been submitted.	

Switch	Description	Comments
/Opportunity /OpportunityProduct /OpptyProduct	Specifies the business component to upgrade.	1. Only the specified business components are upgraded. 2. You can upgrade a child business component without upgrading its parent (for example, Opportunity Product without Opportunity).
/NP	Indicates whether to upgrade the nonprimary counterpart of the specified business component (for example, opportunity personal forecast).	The primary business component must be specified for the nonprimary business component to be upgraded.
/Period *period* /UseStartDate /Desc *Description*	Specify how to create Revenues.	1. *period* must be a valid period type, (for example, Month or Year) 2. If /UseStartDate is specified, the revenues are created using the start date of the period in which they fall. Otherwise, the default is the end date. 3. If /Desc is specified, the revenues are created with *description* as their description.
/help	Lists the parameters described here.	

5 The data migration utility takes a few minutes to run. Some messages may appear while the upgrade is running. You might see something like this:

```
      -> "Upgrading forecast for CCONWAY Revision 1.. Success".
      -> "Upgrading forecast for CCONWAY Revision 2.. Failure".
      -> "*******Upgrade complete**************"
      -> "Errors were encountered. Please see the logfile in
  d:\log\siebel.log for
          more details"
```

Forecasting Prerequisites   4

The forecasting module is dependent on a number of prerequisites, such as periods, currencies, exchange rates, an employee reporting structure, and appropriate lists of values for revenue types and revenue classes. These prerequisites are described in the following section.

Using the Periods Table (Administrator)

The periods table includes buckets of time such as weeks, months, quarters, and years. While some organizations use standard calendar reporting periods, other organizations use fiscal reporting periods. Siebel eBusiness Applications provide flexibility in this area, so organizations can set up periods that make sense for them.

Because forecasting often goes months or years into the future, it is important to establish periods not just for the current month or quarter, but for several quarters or years in advance. Ideally, enough periods should be created to allow at least a few months of forecasting without having to go back into the period's table every time someone needs to forecast.

Generally, periods should be contiguous (one period ends on January 31st and the next period begins on February 1st), and regular (periods are whole calendar months or always go from the 15th of one month to the 14th of the next month).

Typically, the smaller buckets, such as months, fit into the larger buckets, such as quarters. The beginning of a month often coincides with the beginning of a quarter, or the end of a month coincides with the end of a quarter.

Table 2 illustrates how the periods defined for forecasting might look.

Table 2.   Example Forecasting Periods

Period Name	Period Type	Start Date	End Date
Jan 01	Month	1/1/2001	1/31/2001
Feb 01	Month	2/1/2001	2/28/2001
Mar 01	Month	3/1/2001	3/31/2001
Q1 01	Quarter	1/1/2001	3/31/2001
Y 01	Year	1/1/2001	12/31/2001

While there are many other ways to establish periods in Siebel applications, contiguous, regular small periods, which fit nicely into the larger periods, are recommended. For information on how to set up periods, see the chapter that discusses ongoing administrative tasks in *Applications Administration Guide*.

Using the Currencies Table (Administrator)

The currencies table includes each of the currencies that an organization refers to when creating opportunities, quotes, orders, and forecasts in Siebel eBusiness Applications.

Currencies can be assigned to divisions. The employees belonging to those divisions have that currency as their default currency. When those employees create new opportunities, the opportunities use the default (divisional) currency for that employee. The employee can accept the default currency for the majority of their opportunities, and can change the currency for occasional exceptions to the rule.

For example, an employee working in Germany might typically manage opportunities with German companies in Deutsche marks. That same employee might occasionally manage opportunities with French companies in French francs. The employee's divisional currency is Deutsche marks, but the employee can also create opportunities denominated in French francs.

Charts, reports, and forecasts in Siebel Forecasting refer to divisional currencies. When opportunities and products are shown, they are shown in their native currency, that is the currency that was entered by the end user. Native currencies are converted automatically for end users into their divisional currencies when displayed in a chart or report, or when displayed as totals for an employee in a forecast.

Organizations that use multiple currencies must set up exchange rates to convert monetary data from one currency to another. For more information on setting up currencies, see the chapter that discusses ongoing administrative tasks in *Applications Administration Guide*.

Setting Up Currency Exchange Rates (Administrator)

The Siebel application uses Currency Exchange Rates to convert monetary amounts from one currency to another. To calculate exchanges between currencies, you must set up an exchange rate twice—one for each currency. For instance, if you want to calculate the exchange rate between the U.S. dollar and the Japanese yen, you must set up an exchange rate for yen to dollars, and set up another rate for dollars to yen.

Currency exchange rates not found in Siebel applications are assumed to be on a 1:1 basis. If you fail to set up an exchange rate, the amounts will stay the same when converting, but the currency symbol will change. Note that not every exchange rate needs to be entered into Siebel. Euro Triangulation can be used to get from one currency to another through common EMU currency - the Euro. For additional information, see the chapter that discusses ongoing administrative tasks in *Applications Administration Guide*.

Setting Up Employee Positions and Employee Reporting Structure (Administrator)

Siebel Forecasting relies on employee positions and positional hierarchies when creating a forecast. The user must appear in the employee table and have a position to create a forecast. Employee relationships between a manager and an employee are established by way of the parent position field on the employee's position record.

For more information on adding employees and employee relationships, see the chapter that discusses initial setup in *Applications Administration Guide*.

Using Revenue Classes and Revenue Types (Administrator)

An opportunity, account, project, or campaign can be related to many different kinds of revenue at the same time. For instance, an opportunity might have a Booked revenue amount which is realized when the opportunity is closed, and that same opportunity might have Billed revenue amounts as services are provided to a customer over time.

The Revenue Class and Revenue Type fields allow users to categorize their revenues for grouping, sorting, and summarization purposes. By default, the Revenue Class field includes values like 1-Pipeline, 2-Upside, 3-Expected, 4-Committed, and 5-Closed. The Revenue Type field includes values like Booked, Billed, Shipped, Projected, Quota, and Actual.

CAUTION: Inspect the values in the Revenue Type and Revenue Class fields before rolling out Siebel Sales and avoid changing these lists of values after users have begun using Siebel Sales, as data integrity issues may result. If you must change these values after Siebel Sales is deployed, be sure to clean up the revenue records in the database that refer to the obsolete values.

For more information about setting up list of values, see the chapter that discusses ongoing administrative tasks in *Applications Administration Guide*.

Setting Up System Preferences for Forecasting (Administrator)

You can create forecasts on the client or the server. For mobile (local database) users, create forecasts on the client. For connected (zero footprint) users, create forecasts on the server. The system preference "Forecast: Use Server" has no impact on forecasts in these two cases.

When you use the Siebel mobile client in a connected mode, the system preference "Forecast: Use Server" determines whether the forecast is run on the server. By default, it is set to FALSE. If TRUE, you can run forecasts on the server instead of the client when your mobile users are operating in a connected mode.

Before changing this setting, make sure that you provide the correct information in the configuration (.cfg) files on each client machine. In the ServerDataSrc section, make sure that you provide the correct settings for the GatewayAddress, EnterpriseServer, and RequestServer.

You should also make sure that the Forecast Service Manager server component is enabled on enough application servers (at least one) to handle the amount of people who will forecast. The Forecast Service Manager server component is a batch mode server component used to submit forecasts to the server when Forecast: Use Server Task system preference is enabled, when forecasts are not running on a local database, and when the user is either a manager or the view mode is other than My. The Forecast Service Manager server component allows users to create forecasts on the server in the background. In general it is a good idea to enable this server component. One reason not to enable it is if your forecasts are very small and can be done while a user waits. As such, if your organization will be creating corporate snapshots, or forecasts with details, the server component should be enabled.

For more information about setting system preferences, see the chapter that discusses ongoing administrative tasks in *Applications Administration Guide*.

NOTE: If you use Resonate, you do not need to specify the RequestServer parameter.

Forecasting Setup 5

You can accept the default forecast series provided with Siebel Forecasting or create new forecast series.

A forecast series defines the rules for forecasting in Siebel Forecasting. Typically, a forecast series involves a unique group of individuals with some unique set of forecasting requirements. The following example illustrates the concepts involved in the forecast series.

At company XYZ, the sales organization consists of district managers who forecast aggregate revenues once a week. The sales managers and executives have requested that each sales representative list their opportunities and provide a committed total which may or may not equal the sum total of the opportunities that they have listed.

The manufacturing organization at this same company wants a monthly snapshot of what is in the pipeline, at a product line level, without allowing sales representatives or sales management to make adjustments. They want to see how the forecast changes from month to month, and want access to historical information on earlier months' forecasts.

In this situation, the administrator might set up two separate forecast series: one series would be for the sales representatives and the other would be for manufacturing. The sales forecast series would have a weekly frequency, with every sales representative as a participant, and a search specification that finds only opportunity revenue records. The manufacturing forecast series would have a monthly frequency, an administrator or manufacturing manager as the participant, and a search specification that finds just product specific revenue records.

In general, a small number of forecast series is better than a large number of forecast series. It is easier to maintain and explain just two or three forecast series rather than 10 or 12. In the preceding example, the administrator would not want manufacturing product managers and sales managers both creating forecasts in the same series because they would end up double-counting the revenues involved. (The product managers would count an opportunity once as a set of products. The sales representatives would end up counting that opportunity twice.)

NOTE: If you think you may end up double-counting, or if your company has groups with fairly different requirements, or you have overlays, you may want to consider adding additional forecast series.

Business Scenario for Forecasting Setup

This scenario is an example of a process performed by a forecast administrator. Your company may follow a different process according to its business requirements.

The forecast administrator has been told to create a number of different forecast series that the company will use for different sets of business requirements. He needs to create a forecast series and include search specs, forecast dates, and forecast participants or organizations. He creates a number of different forecast series: a personal forecast series with details, a personal forecast series without details, a global forecast series, a departmental forecast series, a hybrid forecast series, and a partner forecast series.

For each of the forecast series the administrator has created, the auto-forecast feature is turned on by default. This means that whenever a manager creates a forecast, any absentee subordinates' forecasts are created automatically. He decides to turn off this feature for the global forecast series.

Spreadsheet views will help end users to better work with revenues and forecasts. Spreadsheet views are set up automatically in the default Siebel application so that end users can view revenue data for revenues and forecasts. In order to for end users to access spreadsheet views with additional or different data such as revenue and best case or quantity or price, the administrator needs to configure these views.

Finally, the administrator sets up the forecast series dates to move ahead automatically, to make it easier for users when they need to create the same forecast month after month. Setting up the dates to move ahead means that end users do not have to manually change the dates each time they create a forecast using this forecast series.

NOTE: This scenario, and the examples used throughout this chapter, illustrates the function of Siebel Forecasting in various customer environments. Each forecast series described addresses a different approach to forecasting and a different set of business requirements. Usually, no single company would create every one of these different forecast series.

Example Process for Forecasting Setup

This is an example of a process an administrator might follow to set up forecasting. Your company may follow a different process according to its business requirements.

1 **Create a forecast series.** For information, see "Creating a Forecast Series (Administrator)" on page 48.

2 **Create search specs for a forecast series.** For information, see "Creating Search Specs for Forecast Series (Administrator)" on page 51.

3 **Define a forecast series date.** For information, see "Defining Forecast Series Dates (Administrator)" on page 53.

4 **Add a forecast series participant.** For information, see "Adding Forecast Series Participants (Administrator)" on page 55.

5 **Add a forecast series organization.** For information, see "Adding Forecast Series Organizations (Administrator)" on page 56.

6 **Create a personal forecast series with details.** For information, see "Creating a Personal Forecast Series With Details (Administrator)" on page 57.

7 **Create a personal forecast series without details.** For information, see "Creating a Personal Forecast Series Without Details (Administrator)" on page 59.

8 **Create a global forecast series.** For information, see "Creating a Global Forecast Series (Administrator)" on page 62.

9 **Create a departmental forecast series.** For information, see "Creating a Departmental Forecast Series (Administrator)" on page 64.

10 **Create a hybrid forecast series.** For information, see "Creating a Hybrid Forecast Series (Administrator)" on page 66.

11 **Create a partner forecast series.** For information, see "Creating a Partner Forecast Series (Administrator)" on page 68.

12 **Inactivate auto-forecast.** For information, see "Inactivating Auto-Forecast (Administrator)" on page 69.

13 **Configure a spreadsheet.** For information, see "Revenue and Forecast Spreadsheet Configuration (Administrator)" on page 70.

14 **Change the configuration of a spreadsheet applet for a new view.** For information, see "Changing the Configuration of Spreadsheet Applets for New Views (Administrator)" on page 72.

15 **Configure spreadsheet scrolling buttons.** For information, see "Configuring Scrolling Buttons on Forecast and Revenue Spreadsheets (Administrator)" on page 76.

16 **Add a dynamic column to a spreadsheet.** For information, see "Adding a Dynamic Column to the Spreadsheet (Administrator)" on page 80.

17 **Move forecast dates ahead automatically.** For information, see "Moving Forecast Dates Ahead Automatically (Administrator)" on page 82.

Creating a Forecast Series (Administrator)

The following procedure explains how to create a forecast series.

To create a forecast series

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 In the More Info form, click New.

3 Fill in the fields, using the following table as a guide.

Field Name	Comments
Name	Typically gives some insight as to how the forecast series is used, what the forecast series includes, or how often it is run.
Auto Forecast Search Spec	Determines which revenue items are automatically included when a forecast is created. If a query is not specified here, then the sales representative's revenue records (within the applicable date range) are included in the forecast. For more information, see "Auto Forecast Search Spec and Associate Search Spec" on page 51.
Associate Search Spec	The filter that is applied to the Add New Records list on the Forecast Details view. This field determines which revenue items the end user can manually add to a forecast. For more information, see "Auto Forecast Search Spec and Associate Search Spec" on page 51.
Rollup Search Spec	Indicates which detail records are included in the forecast summary amounts. The Rollup Search Spec can vary from one forecast series to another, and may be based on revenue type, revenue class, probability, or any other field on the forecast detail record.
	Tip: For Rollup Search Spec to pull in fields, the field needs to come from the Forecast 2000 -- Forecast Item Detail flat business component, not revenue. For example, the committed spec is [Commit] = 'Y'.

Field Name	Comments
Active	Indicates whether the forecast series is available for forecasting purposes to anyone listed in the Forecast Series Participants list on the dates indicated on the Forecast Series Dates list. By default, this box is checked.
Detail Depth	Choices are: Revenue Detail and Summary Only. Determines whether the user's forecast details are copied into the manager's forecast or simply summarized in a set total. The default value for this field, Summary Only, is the recommended setting for most customers.
Visibility	This is the visibility mode applied to the revenue table in the selection of forecast records. Choices are: My Revenues, My Team's Revenues, All, and All Across Organizations. (These views are described in Table 3 on page 50.) The default value for this field is My Revenues.
Public Access	Read-only. When checked, allows each employee within the selected organization to access the forecast and create a forecast. It is only selected when an organization is added.
Interval	When used in conjunction with the Interval Period Type field, this field determines the default amount of time that passes between forecasts of a given series. The default interval is 1, meaning that forecasts in this series have an interval of one unit of time indicated by the Interval Period Type.
Interval Period Type	The type of forecast interval period (includes Day, Week, Month, Year, and Quarter). The default type is Month.
Summary Period Type	Determines the buckets into which revenues are aggregated for each forecast in this series. Choices are based on period types and may include periods from a day to a year. The default type is Month, meaning that the Forecast Summary view shows monthly totals.

4 Add dates and participants.

For instructions, see "Defining Forecast Series Dates (Administrator)" on page 53 and "Adding Forecast Series Participants (Administrator)" on page 55.

Table 3.   Forecast Visibility

Visibility	Description
My Revenues	This mode allows the forecast access only to records assigned to the sales representative who owns the revenues that are included in the forecast. My Revenues is used for standard forecasts.
My Team's Revenues	This mode allows the forecast access to each revenue record attributed to the end user's subordinates. This mode is recommended for departmental or group forecasts in which a manager wants a snapshot of the revenues attributed to their department or group.
	Use caution when using the My Team's Revenues setting; limit the number of participants to only one level of the forecast tree (that is, only directors or only VPs or only first level managers). If a manager and a subordinate are both listed as participants in a forecast series with this setting, the subordinate's revenue records are counted at least twice: once at the subordinate level and then a second time at the manager's level, and so on up the tree for every level in which there is a participant listed.
All	This mode allows the forecast access to each revenue record within the organization. This mode is recommended for organizational snapshots, in which just one person (typically an administrator) creates one forecast with a snapshot of each forecastable revenue record within that organization.
All Across Organizations	This mode allows the forecast access to each revenue record in the Siebel database, across all organizations. This mode is recommended for global snapshots, in which just one person (typically an administrator) creates one forecast with a snapshot of each forecastable revenue record within the Siebel database.

NOTE: A hybrid forecast uses My Revenues and My Team's Revenues simultaneously by adjusting the Visibility field in the Forecast Series Participants view. For more information about hybrid forecasts, see "Creating a Hybrid Forecast Series (Administrator)" on page 66.

Creating Search Specs for Forecast Series (Administrator)

The following section explains how to build an Auto Forecast Search Spec and an Associate Search Spec.

Auto Forecast Search Spec and Associate Search Spec

The *Auto Forecast Search Spec* determines which revenue line items are automatically copied into the forecast when it is created. The *Associate Search Spec* determines which revenue line items can be manually added to the forecast by the sales representative after the forecast has been created. The Auto Forecast Search Spec and the Associate Search Spec can vary from one forecast series to another, and may be based on revenue type, revenue class, probability, or any other field on the revenue record. The end user sees the results of the Associate Search Spec displayed as a list of records in the Add New Records pop-up on the Forecast Details form.

The Auto Forecast Search Spec uses the same syntax and grammar that the Associated Search Spec uses. However, it is usually more restrictive in scope. For example, you can create a forecast series with the following search specifications:

```
Associate Search Spec: [Revenue Type] = 'Shipped' or [Revenue
Type] = 'Booked'

Auto Forecast Search Spec: ([Revenue Type] = 'Shipped' or [Revenue
Type] = 'Booked') and [Committed] = 'Y'
```

In this example, the end user can manually copy into the forecast any revenue record with a Revenue Class of Shipped or Booked, whether it is committed or not. However, the automatically included forecast details only include revenue records that were actually marked as committed.

As in this example, typically the Associate Search Spec is slightly less restrictive than the Auto Forecast Search Spec, allowing end users to copy into their forecast some revenue records that did not meet the more restrictive Auto Forecast Search Spec criteria.

Table 4 shows some common search specs.

Table 4.   Common Forecast Search Specs

Search Spec	Description
`[Committed] = 'Y'`	Allows the end user to add committed revenue records.
`[Committed] = 'Y' and ([Revenue Type] = 'Shipped' or [Revenue Type] = 'Booked')`	Allows the end user to add committed revenue records with Revenue Types of Shipped or Booked.
`[Calculated Primary Flag] = 'Y'`	Allows the end user to add only primary revenue records into the forecast. Each opportunity has one primary revenue record associated with it. The primary revenue line includes the revenue amount for the opportunity as a whole. The opportunity can have other revenue records, but those line items have [Calculated Primary Flag] set to null or 'N'.
`[Partner] is NULL`	Allows the end user to manually add revenue records in which the partner field is null.
`[Product] is NULL`	Allows the end user to manually add revenue records in which the product field is null.

NOTE: Test the search spec before deploying the forecast. To test the spec, navigate to the Revenues screen and create a new query. Type or paste the exact search spec into the Description field in the query and then run the query to see if it delivers the correct results.

Defining Forecast Series Dates (Administrator)

Forecast series dates determine when each forecast of that series occurs. Create a record in the Forecast Series Dates view for each date a forecast is to be run in that series. Forecasts typically occur according to a set pattern or frequency (for example: weekly, monthly, or quarterly) determined by the Interval and Interval Period Type fields in the Forecast Series form, and include some range of revenue records (for example, January 1 through June 30).

Forecasts can be static, with the end user almost always seeing the same range of dates, or rolling, with the end user seeing the effective date range for the forecast move each week or month. Typically, forecasts within a series involve some set amount of time, covering a range of six months or one year.

The forecast Start Date, End Date, History View Date, and History Edit Date are established using entries in the Siebel Periods table (see "Using the Periods Table (Administrator)" on page 36). While the Start Date and End Date provide the range of dates for active (future) forecasting, the History View Date and History Edit Date provide the range of dates for historical forecasting. The historical information allows the end user to spot trends in opportunity-, account-, or product-related revenues when creating a forecast.

To define dates for a forecast series

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 In the Forecast Series list, select the forecast series for which you want to define dates.

3 Click the Forecast Series Dates view tab.

4 In the Forecast Series Dates list, click New.

5 Fill in the fields, using the following table as a guide.

Field Name	Comments
Archive Date	The Archive Date should be used only to freeze a forecast snapshot completely so that it can be pulled into the Siebel Analytics data warehouse. Once the forecast has passed the archive date, the forecast is not editable or usable and the archive date is not editable as well.
Description	This field can be used for comments related to the forecast.
End Date	The end of the date range for a selected forecast. The last date for which revenues should be pulled into the forecast.
Forecast Date	The date for which the forecast is being created. Typically, this is the beginning or end of some logical period. Some organizations forecast on the first of every month. Other organizations forecast at the end of each week.
History Edit Date	The first date for which forecast information is editable. Typically, the History Edit Date occurs a period or two before the Forecast Start Date. This allows a user to fill in actuals from the earlier period during the current forecast.
History View Date	The first date for which forecast information appears in the forecast. The periods between this date and the History Edit Date are read-only. This allows users to view their earlier month's performance when creating a new forecast.
Start Date	The beginning of the date range for a selected forecast. This is the first date for which Siebel Forecasting pulls revenue records into the forecast.

NOTE: When you change the value in the Start Date field, the value in the End Date field is updated automatically. However, when you change the value in the End Date field, the value in the Start Date field remains the same.

TIP: To produce multiple forecast start dates, you can copy the first record and it automatically moves the forecast date forward according to the defined interval.

Adding Forecast Series Participants (Administrator)

The Forecast Series Participants view lists the employees who will participate in the forecast series. The participant determines:

■ Whether an employee can create a forecast within a given series.

■ The list of individuals for whom an auto-forecast is created when a manager creates a forecast.

Although the Forecast Series Participants view appears person-based, it is actually position-based. As employees move from one job to another, Siebel Forecasting maintains the correct participant links.

To add participants to a forecast series

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 In the Forecast Series list, select a series.

3 Click the Forecast Series Participants view tab.

4 In the Forecast Series Participants list, click the menu button, and then click New Record.

5 In the Add Participants dialog box, select participants, and then click OK.

The new participants are added to the Forecast Series Participants list.

Adding Forecast Series Organizations (Administrator)

The Forecast Series Organizations view lists the organizations who will participate in the forecast series. It is useful when you are creating a forecast for a large set of participants. Like the Forecast Series Participants view, the organization determines:

■ Whether an employee can create a forecast within a given series.

To add an organization to a series

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 In the Forecast Series list, select a forecast series.

3 Click the Forecast Series Organizations tab.

4 In the Forecast Series Organizations list, click the menu button, and then click New Record.

5 In the Add Organization dialog box, select the organization, and then click OK.

   The new organization is added to the Forecast Series Organizations list. Note that the Public Access checkbox is now selected.

NOTE: Organization-defined forecasts do not use auto-forecast as this could cause confusion in very large organizations. Because auto-forecast is not enabled for organization-defined forecasts, make sure that your forecast series process allows that end users create their own forecasts or that managers create and add absentee forecasts when appropriate.

Creating a Personal Forecast Series With Details (Administrator)

The personal forecast with details assumes that sales representatives and their managers want to participate in the forecasting process. After a personal forecast is created, other managers are allowed to adjust the forecast. The personal forecast with details is an example of a rollup forecast.

The personal forecast with details:

■ Is hierarchical and structured, allowing visibility to an entire organization's forecast efforts.

■ Rolls up from the bottom to the top of an organization.

■ Allows sales representatives, sales managers, and their subordinates to create their own forecasts.

Use the personal forecast with details if:

■ Your company has a small number of opportunities with high revenue potential.

■ Managers are involved with every aspect of the opportunities and want the ability to change a forecast's line items.

■ You want to be able to view several forecasting perspectives.

Do not use the personal forecast with details if:

■ Management is not interested in an opportunity's specific details.

■ The amount of work involved with creating the forecast has no real advantage.

Example: A sales representative creates a forecast for an opportunity that is predicted to be worth $1 million dollars and will close in January. The sales representative's manager can review the forecast, and change the value of the opportunity and the closing date. The manager's manager can review the forecast and make additional changes. See Figure 1 for an illustrated example of this process.
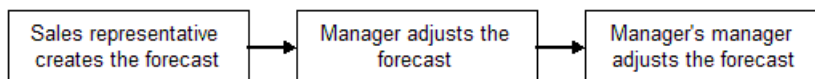
Figure 1.   Example of a Forecast Process

To create a personal forecast series with details

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 Create a forecast series.

For information, see "Creating a Forecast Series (Administrator)" on page 48.

3 In the Forecast Series list, select the newly created forecast series.

4 From the Detail Depth drop-down list, select Revenue Details.

This causes the end user's forecast detail records to be copied into his or her manager's forecast without being summarized.

5 From the Visibility field, select My Revenues.

This limits the end user's forecast to his or her own revenue records.

6 Click the Forecast Series Dates view tab and add forecast dates.

For information about adding dates, see "Defining Forecast Series Dates (Administrator)" on page 53.

7 Click the Forecast Series Participants view tab and add the appropriate end users.

For information about adding participants, see "Adding Forecast Series Participants (Administrator)" on page 55.

Creating a Personal Forecast Series Without Details (Administrator)

The personal forecast without details allows sales representatives and managers to participate in the forecasting process. The personal forecast without details is an example of a rollup forecast.

The personal forecast without details offers a compromise between the global forecast and the personal forecast with details. It is faster than the personal forecast with details, while allowing less intervention and adjustment.

The personal forecast without details:

■ Rolls up from the bottom to the top of an organization, one level at a time.

■ Automatically creates missing subordinate forecasts when the manager forecasts.

■ Summarizes subordinates' forecast information for the manager.

■ Allows a manager to prorate an end user's contribution to the manager's forecast totals.

■ Provides the manager with forecast details for subordinates only when they drill down into the subordinate's forecast record.

The sales managers may not be especially concerned about the details; they are primarily interested in the revenue potential of each subordinate.

Like the personal forecast *with* details, the personal forecast *without* details has many participants, each of whom must create a forecast or have one created for them. In large organizations, this approach to forecasting can take a long time, as each level of the reporting structure needs some time to create, review, and adjust their forecasts.

NOTE: Personal forecasts tend to have fairly high maintenance requirements. Although the participant lists are position-based, they still require updating as positions are added or removed from the Siebel application.

Use the personal forecast without details if:

■ Managers will only adjust the total revenues, and not the sales representative's forecast details.

■ There are many opportunities, with fairly low revenue amounts.

■ Managers want the forecast summaries rolled up on a monthly basis.

Do not use the personal forecast without details if:

■ Managers need to be more involved with opportunities.

■ Managers need to adjust the details without the end user's knowledge.

Because the managers do not have access to the details, they cannot change the details. Managers can only add a subordinate's contribution to their forecast. Forecast details are revenue line items, and there is a forecast summary that is rolled up monthly.

Example: Company XYZ closes a large number of opportunities each quarter. Each opportunity has a small dollar value. The managers are rarely involved in these opportunities, and would prefer summary level information to seeing every detail. The manager and the sales representative review the Revenues list view on a regular basis and make their changes directly in that view. The managers want to see, for each of their subordinates, a monthly commit number which is somewhat arbitrary and not always based on the end user's forecastable revenues for that forecast period.

To create a personal forecast series without details

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 Create a forecast series.

For information, see "Creating a Forecast Series (Administrator)" on page 48.

3 In the Forecast Series list, select the newly created forecast series.

4 From the Detail Depth drop-down list, select Summary Only.

This causes the end user's forecast detail records to be summarized in the manager's forecast.

5 From the Visibility drop-down list, select My Revenues.

This restricts the end user's forecast to his or her own revenue records.

6 Click the Forecast Series Dates view tab and add forecast dates.

For information about adding dates, see "Defining Forecast Series Dates (Administrator)" on page 53.

7 Click the Forecast Series Participants view tab and add the appropriate end users.

For information about adding participants, see "Adding Forecast Series Participants (Administrator)" on page 55.

Creating a Global Forecast Series (Administrator)

The global forecast allows a user to take a snapshot of the corporate revenues that qualify for forecasting. Organizations using the global forecasting approach place a high level of emphasis on the Revenues screen, and a low level of emphasis on the Forecasting views. The global forecast is an example of a corporate snapshot type of forecast.

The global forecast:

- Allows an individual user to take a snapshot of corporate revenues.

- Does not require user or management intervention.

- Captures the revenue that meets the forecast series criteria, including partner and third-party related revenues.

- Avoids a lengthy and involved adjustment process as forecasts are rolled from manager to manager to executive.

Sales managers and executives review revenues in real time using queries in the My Team's Revenues view. Using this view, sales managers conduct their weekly or monthly one-on-one meetings with their account managers or sales representatives, before the global forecast.

The sales manager, along with the sales representative, adjusts the revenues, close dates, win probabilities, and commit statuses in the Revenues view so that the sales representative and the manager have a single consensus opinion on the revenue items that end up in the forecast. They finish this process before the deadline of the corporate forecast.

As administrator, you create the forecast and make it available to high-level managers and executives from the All Forecasts view.

Use global forecasts if:

- Your sales representative is likely to have the most accurate perspective on the value of an opportunity, account, partner, project, or product line over time.

- The manager is unlikely to adjust the sales representative's forecast, or if the manager is able to adjust the sales representative's projected revenues before the creation of the corporate forecast.

■ You want to reduce the amount of overhead and time spent in forecasting.

Do not use global forecasts if:

■ The manager wants the opportunity to adjust revenues without the sales representative's knowledge.

■ It is very important for sales representatives to actually visit the forecast form and submit their forecasts to a manager.

■ Sales representatives must make a revenue commitment that is different from the sum of the revenue line items they are tracking in Siebel.

To create a global forecast series

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 In the Forecast Series list, select the forecast that is to become global.

If you need to create a new forecast series, see "Creating a Forecast Series (Administrator)" on page 48.

3 From the Visibility drop-down list, select All or All Across Organizations.

This causes the manager's view to include each of the subordinates' revenue records.

4 Click the Forecast Series Dates view tab and add forecast dates.

For information about adding dates, see "Defining Forecast Series Dates (Administrator)" on page 53.

5 Click the Forecast Series Participants view tab and add one or more forecast series participants, such as yourself or another administrator who will run the forecast for the company.

For information about adding participants, see "Adding Forecast Series Participants (Administrator)" on page 55.

Creating a Departmental Forecast Series (Administrator)

The departmental forecast can be used as a supplement to other forecasting methods mentioned in this chapter. In many companies, the global forecast may only be available to a few individuals. The departmental forecast provides divisional or departmental managers with a way of taking a snapshot of their revenues for historical or analytical purposes. The departmental forecast is an example of a corporate snapshot type of forecast.

The departmental forecast:

■ Allows an individual user to take a snapshot of each departmental revenue at once.

■ Requires no end user or management intervention.

■ Captures each revenue that meets the forecast series criteria, including partner and third-party related revenues.

■ Avoids a lengthy and involved adjustment process as forecasts are rolled from manager to manager to executive.

Compared to the personal forecasts, the departmental forecast requires a very low amount of overhead and almost no administration. It gives timely information with no requirement for intervention and adjustment.

Example: At company DEFG, there is an overlay sales group for every product line. The managers of these sales groups need periodic snapshots of their product specific revenues. Although each manager runs a small business, no individual manager is allowed to see how the other product lines are doing. When the managers do not think a revenue item is realistic, they ask the end user to change it. The end user's committed forecast total is equal to the sum of each of their revenues that meet the company's forecasting rules.

Use the departmental forecast if:

■ One manager wants to forecast for an entire team.

■ Periodic snapshots of data are necessary.

Do not use the departmental forecast if:

■ Data needs to be rolled up, or different levels of management need access to the snapshot.

■ You do not need a midmanagement view of forecasting.

To create a departmental forecast series

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 Create a forecast series.

For information, see "Creating a Forecast Series (Administrator)" on page 48.

3 In the Forecast Series list, select the newly created forecast series.

4 From the Visibility drop-down list, select My Team's Revenues.

This causes the manager's view to include each of the subordinates' revenue records.

5 Click the Forecast Series Dates view tab and add forecast dates.

For information about adding dates, see "Defining Forecast Series Dates (Administrator)" on page 53.

6 Click the Forecast Series Participants view tab and add a few forecast series participants, including *only one* level of the hierarchy.

For information about adding participants, see "Adding Forecast Series Participants (Administrator)" on page 55.

Creating a Hybrid Forecast Series (Administrator)

A hybrid forecast allows you to have My Revenues and My Team's Revenues visibility in the same Forecast series, thus combining a rollup and departmental snapshot forecast.

The hybrid forecast:

■ Allows for a forecast process to include both a rollup forecast and a departmental forecast in the same forecast series.

Use the hybrid forecast if:

■ One manager does not want or cannot have his subordinates create a formal forecast each period, yet another manager wants to have his subordinates run a formal forecast rollup.

Do not use the hybrid forecast if:

■ Both managers want either just a rollup or departmental forecast.

To create a hybrid forecast series

1 From the application-level menu, choose View > Site Map > Forecast Administration > Forecast Administration.

2 Create a forecast series.

For information, see "Creating a Forecast Series (Administrator)" on page 48.

3 In the Forecast Series list, select the newly created forecast series.

4 Click the Forecast Series Participants view tab and add the appropriate end users.

For information about adding participants, see "Adding Forecast Series Participants (Administrator)" on page 55.

5 Once you have added a participant, choose their visibility from the Visibility drop-down list by selecting either My Revenues or My Team's Revenues.

CAUTION: Do not select My Team's Revenues for a manager that has included a participant as this results in double-counting.

NOTE: If you cannot see the Visibility field in the Forecast Series Participants list, check to see which columns are being displayed.

Creating a Partner Forecast Series (Administrator)

Siebel Forecasting supports numerous partner forecasting scenarios. These scenarios include rollup forecasts, forecasts run by the partner only, forecasts of each partner, and forecasts of individual partner organizations. For details on setting up forecast series to support each of these scenarios, see *Siebel Partner Relationship Management Administration Guide*.

Inactivating Auto-Forecast (Administrator)

By default, the system preference "Forecast: Auto-Forecast" is set to true. This means that if you are a manager, when you forecast, the application automatically creates forecasts for subordinate's who are listed as participants of that series that have not already forecasted. You can disable this feature if you want.

To inactivate auto-forecast

1 From the application-level menu, choose View > Site Map > Application Administration > System Preferences.

2 In the System Preferences list, select the Forecast: Auto-Forecast record.

3 Change the System Preference Value to FALSE.

4 Restart the server.

Revenue and Forecast Spreadsheet Configuration (Administrator)

Spreadsheets in Siebel applications allow the end user to view a list of values consolidated into a more concise format. For example, instead of seeing a long list of services delivered over a period of many months, the end user sees just one row of information with the revenues listed out over time, with a series of dates as column headers.

The revenue spreadsheets are combined with revenue lists and revenue charts in Revenues views. You can move between the different displays by selecting the desired display from the Show drop-down list in a Revenues view. This ability to view information in a variety of formats (list, chart, or spreadsheet) is useful when dealing with recurring revenues over time. This is especially true in cases where multiple products, employees, or revenue classes are involved in one user view.

Revenue and forecasting forms, lists, and charts are configured in Siebel Tools, using the standard properties and configuration techniques typically used for forms, charts, and lists. You can add columns, remove columns, change column headings, and apply calculations in Siebel Tools, using the same approach that you would use for almost any other Siebel applet.

Some revenue and forecast data displays in a spreadsheet-like applet. Spreadsheet applets are configured differently from forms, lists, and charts. This section explains how to make changes to Revenue and Forecasting spreadsheet applets.

Spreadsheet Column Types

Revenue and forecasting spreadsheets contain a set of static, or nonrepeating, columns on the left, followed by a set of dynamic, or repeating, columns on the right. In the default Siebel application configuration, the Opportunity Revenues spreadsheet view consists of static columns including the Product Name and the Revenue Class on the left, followed by a repeating Revenue field on the right. The Revenue field is a dynamic column that repeats once for each date in the Opportunity Revenues list.

You can configure both the static columns and the dynamic columns in the spreadsheet using Siebel Tools. You can add, hide, or change the order of columns in the spreadsheet. While the default configuration has just one repeating column, it is possible to have several repeating columns such as quantity, price, and revenue, or to have just margin and revenue, for example.

The Add Column button in the spreadsheet view allows users to dynamically add a new date column. The new column must be a valid date, such as 1/1/01. After the creation of the new date column, a new revenue record in the List view is automatically created with the appropriate default values consistent with the parent record, for instance Opportunity Name or Account Name.

Spreadsheet Groups

In the Opportunity and Account Revenue screens, when users click the Revenues view tab, the items in the spreadsheet are automatically grouped together using a field called Dynamic Group Number. Items entered in the spreadsheet on the same row automatically receive the same Dynamic Group Number. Although these items are really individual records in the Revenue list and the Revenue table, they are grouped together in the spreadsheet using the Group Number. In the Forecasting views, it is the Forecast Item ID that ties the items in a row together.

When a user enters a value into a repeating cell in a Revenue and Forecasting spreadsheet view, a revenue record is automatically created with the appropriate default values. Typically, the default values include the static information in the spreadsheet, plus a few additional attributes. Changing the static values in the list can cause a revenue item to look different from other members of its group. In the default configuration of Siebel Sales, such records are automatically moved into their own groups. Changes to static values in the spreadsheet are automatically propagated to each of the corresponding revenue records. While the general behavior of the spreadsheet and list applets has already been defined, you can configure the content of these applets to meet end-user requirements.

Changing the Configuration of Spreadsheet Applets for New Views (Administrator)

The following procedure explains how to change the configuration of a spreadsheet applet so that end users can use spreadsheets in views other than Revenues, Forecasts, or Time Sheets.

To change the configuration of a spreadsheet applet

1 Identify the business component that includes the static information of the spreadsheet. This is the primary business component.

2 Identify the business component that includes the dynamic information of the spreadsheet. This is the data business component.

> **NOTE:** In some cases, the primary business component already exists in Siebel Sales, while the data business component has to be created or modified so that it includes the columns that you want displayed in a repeating fashion.

3 The primary and data business components may sit on the same table. If they do, the property DC Data SameAsPrimary must be set to Y. The primary business component must include the subclass CSSBCDynCol. The Data Business component must include a subclass CSSBusiness component.

4 Configure the display applet to include the static columns and a required control called eDynamicColumns. This control acts as a placeholder for the data business component columns. Make sure that the primary business component is based on a subclass of CSSBCDynCol.

5 For the primary business component, configure a Web applet based on CSSSWEFrameDynCol (or subclass of CSSSWEFrameDynCol). Include controls for the static fields, followed by the eDynamicColumns control.

6 Configure the business components.

The following table gives instructions for configuring the user properties on the primary business component.

User Property	Value	Description
Dynamic Columns Enabled	Dynamic Columns Enabled	Required. Indicates that the applet uses the dynamic columns feature.
DC Pri RowKey	A field on the primary business component	Required. The primary key for grouping the items together on the same row in the spreadsheet.
		For example, in the Opportunity Revenues spreadsheet view, this property is Dynamic Group Number.
DC 1 Data BCName	The name of the data business component	Required. This business component must be in the same BusObj as the primary business component.
DC 1 Data DynColRowKey	Row name	Required. Indicates in which spreadsheet row a data record appears, by matching Data.[DynColRowKey] with Primary.[DynColRowKey].
		For example, in the Opportunity Revenues view, the DynColRowKey is the same as the DC Pri RowKey (Dynamic Group Number). However, in the Forecast Details view, these values are different.
DC 1 Data DynColHdrKey	Field name	Required. Indicates the data to be displayed as headers on recurring columns of the spreadsheet.
		For example, in the Opportunity Revenues view, the field name is Date, so each date in the group causes a new column to be displayed.

User Property	Value	Description
DC 1 Data DynColCellValue	Field, Model	Required. *Field* identifies the data to be displayed as the cell value in the spreadsheet. *Model* identifies the field on the primary business component that provides cell formatting information.
DC 1 Data SubCol *N* (*N* ≥ 1)	Field, Model	Use this property if you want to display more than one repeating column. *Field* identifies another column to be displayed after the column indicated by DynColHdrKey. *Model* identifies the field on the primary business component that provides formatting information for this field.
DC 1 DataLink	Link	Specifies the link to be used for driving records to be displayed in the spreadsheet. Typically, this is the link between the parent of the List applet and the data business component. For example, on the Opportunity or Account Revenues spreadsheet, this field is blank and the Siebel application uses the default parent link.
DC 1 Data SameAsPrimary	Y or N	If specified and set to Y, the Data 1 business component maps to the same table as the primary and uses the same fields for DynColRowKey, DynColHdrKey, DynColCellValue, and DynColCellValueId. This setting is necessary in a spreadsheet because every row displayed has at least one nonempty cell. This implies existence of a record in both the primary and data business components that includes that row key (master record). When the table is the same, only one record is needed.

User Property	Value	Description
DC 1 Data SearchSpec	Valid search specification	If specified, only records in the data business component that match the search specification are visible.
DC 1 Data SortSpec	Valid sort specification	The sort specification affecting the order of the dynamic columns in the spreadsheet, from left to right.
		For example, in the Opportunity Revenues spreadsheet, this property is Date, causing the columns to be sorted in ascending order by date. To sort in descending order by date, use "Date (DESC)."
DC TotalsOnRight	TRUE	If specified and set to TRUE, the total for each row appears in an additional column to the right of the dynamic columns.
DC DeleteDataRecords	Y or N	Affects the behavior of the spreadsheet when the user deletes a record. It is recommended that you set this property to Y.
		If set to Y, records corresponding to nonempty cells in the row are deleted.
		If set to N (default), only the primary record for the row is deleted. The row no longer appears in the spreadsheet.

NOTE: To configure static columns in the spreadsheet so that they make universal changes to each record in Group ID, modify the user properties in business component Revenue DynCol using Siebel Tools. Find user properties like DC 1 Data Field Default #, [FieldName], Primary.[FieldName]. Remove fields you do not want and add other fields as desired. For example, the request for Revenue Type is added as DC 1 Data Field Default 9, Revenue Type, Primary.Revenue Type. Also, you need to modify the same user properties in the business component Revenue Plan Item DynCol to maintain the same Dynamic Column grouping behavior.

Configuring Scrolling Buttons on Forecast and Revenue Spreadsheets (Administrator)

Scrolling buttons appear in the upper right corner of spreadsheets in both the Forecasts and Revenues screens. These buttons allow users to view records containing multiple columns. Table 5 describes the buttons:

Table 5.   Spreadsheet Scrolling Buttons

Button	Name	Description
	Previous column set	Click to view a set number of the previous columns to the left.
	Previous column	Click to view the previous column to the left.
	Next column	Click to view the next column to the right.
	Next column set	Click to view a set number of the next columns to the right.

The static columns found on the spreadsheet view such as, Opportunity, Product, Currency, and so on, are fixed and do not move when the date columns are scrolled. Similarly, persistent columns such as the Total column and any new columns that are added using the Add Column button are retained as the user scrolls. Newly added date columns are persistent until the next time the spreadsheet is refreshed at which time it becomes dynamic like the other date columns.

Administrators can enable or disable spreadsheet scrolling buttons and set the Set Size, which controls the number of dynamic columns to scroll at any one time, and the Window Size, which controls the number of dynamic columns which can be displayed on one screen. Window Size, as defined, does not include static or persistent columns.

To configure spreadsheet scrolling buttons

1 From Siebel Tools set the following values in Applet > User Properties:

■ DC Scrolling: Enabled

■ DC Scrolling: Set Size (Default = 6)

■ DC Scrolling: Window Size (Default = 6)

NOTE: Set Size and Window Size should be equal so that the functionality is predictable to end users. If the Set Size is greater than the Window Size, some records that the end user might expect to see are not displayed by default. For example, if the SetSize = 8 and the WindowSize = 6, clicking the next column set button would cause the window not to display the first two columns in the SetSize. The user would have to click the previous column button to see those columns. Likewise, if the Set Size is less than the Window Size, the window will display more records than the user might expect. For example, if SetSize = 4, WindowSize = 6, using the next column set button would display the next four records to be returned as well as the last two columns of the existing window.

To configure scrolling buttons to jump to the end or the beginning of the spreadsheet

■ Set the SetSize to a large number. For example, if SetSize = 1000, the scrolling button will jump to the end of the spreadsheet, assuming there are fewer than 1000 columns. The end user can then use the previous column button to see columns to the left.

To inactivate scrolling spreadsheet buttons

1 Locate the following applets:

■ Forecast 2000 -- Forecast Summary List Applet DC

■ Forecast 2000 -- Forecast Item List Applet DC (ExecWS)

■ Account Revenue Schedule List Applet DC

■ Opportunity Revenue Schedule List Applet DC

2 For each applet, inactivate the following Applet > User Properties:

■ DC Scrolling: Enabled

■ DC Scrolling: Set Size

- DC Scrolling: Window Size

3 For each applet, inactivate the following Applet > Controls:

- GotoNextHorColumn

- GotoNextHorSet

- GotoPrevHorColumn

- GotoPrevHorSet

4 For each applet, inactivate the corresponding Applet > Web Template > Web Template items:

- Opportunity Revenue Schedule List Applet DC:

    - GotoNextHorColumn (item identifier 150)

    - GotoNextSet (item identifier 151)

    - GotoPrevHorColumn (item identifier 164)

    - GotoPrevSet (item identifier 163)

- Account Revenue Schedule List Applet DC:

    - GotoNextHorColumn (item identifier 150)

    - GotoNextSet (item identifier 151)

    - GotoPrevHorColumn (item identifier 164)

    - GotoPrevSet (item identifier 163)

- Forecast 2000 -- Forecast Summary List Applet DC:

    - GotoNextHorColumn (item identifier 150)

    - GotoNextSet (item identifier 151)

    - GotoPrevHorColumn (item identifier 164)

    - GotoPrevSet (item identifier 163)

- Forecast 2000 -- Forecast Item List Applet DC (ExecWS)

❑ GotoNextHorColumn (item identifier 150)

❑ GotoNextSet (item identifier 151)

❑ GotoPrevHorColumn (item identifier 164)

❑ GotoPrevSet (item identifier 163)

Adding a Dynamic Column to the Spreadsheet (Administrator)

The following procedure explains how to add or change a dynamic column on a spreadsheet view. For example, end users may want to add Price and Quantity or Cost in addition to Revenue, which is the one dynamic column on the Revenue spreadsheet that is preconfigured. The following procedure uses the Quantity field as its example and is based on a standard configuration environment.

To add a dynamic column to a spreadsheet

1 Change the business component Revenue DynCol as follows:

   a Rename the User Property: DC 1 Data SubCol 1 to DC 1 Data SubCol 1x

      This is the dynamic column with the Value: Price, Price. Make sure it is set to inactive.

   b Rename the User Property: DC 1 Data SubCol 2 to DC 1 Data SubCol 1

      This is the dynamic column with the Value: Quantity, Quantity. Make this active (the inactive property should be FALSE).

2 Verify that the Quantity field is active on the data business component, Revenue. The Inactive property for this field should be FALSE.

3 Verify the following for the applet: Opportunity Revenue Schedule List Applet DC. The properties for the List Column, Quantity should be:

Available: TRUE

Inactive: FALSE

Show In List: TRUE

4 Verify the following for the applet: Opportunity Revenue Schedule List Applet DC:

   a Edit the Web Layout.

   b Verify that the Quantity column is mapped into the Edit List Web template. (The location does not matter.)

5 Compile the changes.

The Quantity field is visible as a dynamic column in the Revenues Spreadsheet view.

Moving Forecast Dates Ahead Automatically (Administrator)

In the Forecast Administration screen, when you create a new forecast series, the start and end dates, as well as history and edit dates, can be set up to move ahead automatically.

Modify the value of the user property, Auto-Set Start/End Dates in the business component, Forecast 2000 - Forecast Series Date. The values of the Auto-Set Start/End Dates user property are shown in Table 6.

Table 6.   Values of the User Property Auto-Set Start/End Dates

Value	Description
Y	Copying the forecast sets the start and end dates so that the first period within the interval will encompass the forecast date and the interval will be the same length.
N	Copying the forecast does not preset the start and end dates. They remain the same as the original that was copied.

NOTE: This user property is set to N by default.

For a list of the user properties associated with forecasting, see "Forecasting User Properties" on page 160

Revenues 6

The Revenues screen provides users with a convenient place to perform updates for important information. It offers managers and sales professionals a useful, cumulative view of the business across a range of revenue records.

Forecasts are simply snapshots in time of revenue data. It is recommended that revenue information be updated on a regular basis during the course of normal business activities. This provides the application with the information that managers and executives need when they are ready to review revenues or create forecasts.

End users can add and analyze revenue data from the Revenues view in a number of screens including, Opportunities, Accounts, Projects, Partners, Products, Contacts, Agreements, and Campaigns.

TIP: To guarantee forecast consistency, make modifications to revenue records rather than adjusting a forecast. Forecasts are based on current revenue data. Adjustments to forecast records are not replicated in subsequent forecasts, resulting in extra work as the same items are adjusted week after week. Choose Update Revenue Item from the menu button in the Forecasts screen to make sure key adjustments in forecasts are updated in the live revenues.

Business Scenario for Revenues

This scenario provides you with an example of a process performed by forecast administrators and sales representatives. Your company may follow a different process according to its business requirements.

The forecast administrator for a large company needs to make sure users can use the Revenues screen to analyze their revenues. If necessary, he configures revenue SmartScripts so that users can add recurring revenues to the application, and he creates revenue plan templates. SmartScripts configuration is optional and is already set up in the default Siebel application. He also creates a revenue template so that the sales representatives in his district can create sets of recurring revenues that include a product bundle as well as scheduled services and maintenance activities.

The company's district manager manages multiple recurring revenues for each of his opportunities. From the Revenues view in the Opportunities screen he adds multiple product revenues to an opportunity using SmartScripts. He also has two sales representatives working on the same opportunity revenue item. As such, he goes into the opportunity and splits this revenue.

The vice president of sales has a number of choices for monitoring the business. The Revenues screen offers up-to-the-minute data on revenue opportunities across divisions, partners, products, and service offerings. With the aid of several predefined queries, the vice president can view revenues by product line or sales representative, margins by partner, and upside by account or opportunity. She can also view revenue spreadsheets and use revenue charts to gain further information about each revenue. When she examines the revenues, she may find that she needs to make modifications to some of them. She does this directly in the Revenues view, as she feels that making changes to revenue records rather than adjusting a forecast allows for more consistent forecasting.

Example Process for Revenues

This is an example of a process for revenues. Your company may follow a different process according to its business requirements.

Administrator Procedures

1 **Configure a revenue SmartScript.** For information, see "Configuring Revenue SmartScripts (Administrator)" on page 86.

2 **Create a revenue plan template.** For information, see "Creating Revenue Plan Templates (Administrator)" on page 87.

End-User Procedures

3 **Add a new revenue to an opportunity.** For information, see "Adding a New Revenue to an Opportunity" on page 89.

4 **Add multiple and recurring revenues using SmartScripts.** For information, see "Adding Multiple or Recurring Revenues Using SmartScripts" on page 91.

5 **Add a split revenue.** For information, see "Adding a Split Revenue" on page 93.

6 **Use a revenue plan.** For information, see "Using a Revenue Plan" on page 94.

7 **Review revenues.** For information, see "Reviewing Revenues" on page 95.

8 **Modify a revenue item.** For information, see "Modifying a Revenue Item" on page 96.

9 **View the revenue spreadsheet.** For information, see "Viewing the Revenue Spreadsheet" on page 97.

10 **Use revenue charts to report.** For information, see "Using Revenue Charts for Reporting" on page 98.

11 **Using revenue reports.** For information, see "Using Revenue Reports" on page 99.

12 **Distinguish between revenues.** For information, see "Distinguishing Between Revenues" on page 100.

Configuring Revenue SmartScripts (Administrator)

Using the SmartScripts Administration screen, you can edit the behavior of the Script command in the Revenues list.

You can make changes to:

■ The order in which questions are asked.

■ The appearance of the questions: font style, color, and grouping of questions on the pages.

■ Which business object, business component, and field answers are set.

■ What questions are asked. You can only create questions that directly set revenue fields based on the answers. No special logic can be built on answers to questions you create.

You cannot make changes to:

■ The default values for questions.

■ The special logic that handles the revenue creation. (For example, questions like "How many revenues do you want to create?" and "Remove existing revenues?" and processes such as the one used to divide total revenue into periodic revenues.)

NOTE: If more complicated logic is desired, you can build a VB script that will be invoked during the execution of the SmartScript.

For information about:

■ Using the Script command, see *Siebel Sales User Guide*

■ Using the SmartScripts Administration screen, see *Siebel SmartScript Administration Guide*

■ Writing VB routines, see *Siebel Tools Online Help*

Creating Revenue Plan Templates (Administrator)

Revenue plans allow sales managers to create predefined revenue templates that can be used by sales representatives to create a series of recurring revenues or a particular group of revenues. A predefined product or service package that consists of recurring revenues could be a revenue plan. The Revenue Plans view is available in each screen that has a Revenues view, such as Opportunities, Accounts, and Projects. Use revenue plans only for simple grouped revenues.

To create a revenue plan template

1 From the application-level menu, choose View > Site Map > Forecast Administration > Revenue Templates.

2 In the Revenue Templates list, click New.

3 Fill in the appropriate fields. Some fields are described in the following table.

Field Name	Comments
Units	Choose from Hours, Days, Weeks, Months, Quarters, and Years.
Public	Check the box if you want this revenue plan to be accessible to each user.

4 Click the Revenue Template Details view tab to associate the revenue line items with the parent template.

5 Fill in the appropriate fields. Some fields are described in the following table.

Field Name	Comments
From	Enter number at which specified unit begins.
To	Enter number at which specified unit ends.
Price Multiplier	The rate at which the price changes from the original price.
Qty Multiplier	The rate at which the quantity changes from the original quantity.
Revenue Multiplier	The rate at which revenue changes from the original revenue.
Product	Enter the name of the product associated with this revenue item.
Sales Rep	Enter the name of the sales representative associated with this revenue item.

NOTE: The multiplier is the amount by which the revenue plan revenue, price, or quantity is to be multiplied by. This number is defined by the end user. For example, if the Revenue Multiplier = 1, and the end user enters $1,000 for the revenue plan's revenue, then each revenue is $1,000. If the Price or Qty have a multiplier, then both of these fields are changed and the revenue for that line item is the result of the new Price and Qty calculation. This is true even if the revenue multiplier is equal to one or is blank. If the revenue has a multiplier on it, it overrides Price and Qty changes regardless of their multipliers.

Adding a New Revenue to an Opportunity

Revenues associated with opportunities, accounts, projects, and so on appear in forecasts.

To add new revenue to an opportunity

1 From the application-level menu choose View > Site Map > Opportunities > My Opportunities.

2 In the Opportunities list, select the opportunity to which the revenue is being added.

3 Click the Revenues view tab.

4 In the Revenues list, click the menu button, and then click New Record.

5 In the new record, complete the necessary fields, using the following table as a guide.

Field Name	Comments
Commit	Checking this box indicates that there is a high probability the deal will close and that it should be included in forecasts.
Product	Use the selection dialog box to associate this revenue with a product.
Product Line	Use the selection dialog box to associate this revenue with a product line.
Qty	Enter the amount of product or service being purchased.
Price	Enter the unit price of the product or service being purchased.
Revenue	Enter the total revenue this will produce.
Probability	Enter the percentage likelihood of winning this revenue for this opportunity.
Best Case	Enter a best case estimate of what revenue will be produced.
Worst Case	Enter a worst case estimate of what revenue will be produced.
Expected Revenue	Number based on the value in the Probability field.
Revenue Class	Choose from 1-Pipeline, 2-Upside, 3-Expected, 4-Committed, and 5-Closed.
Revenue Type	Choose from Actual, Shipped, Billed, Booked, Projected, and Quota.
Quote	If this is checked, product revenue is included in the auto-quote function in the Quotes module.

NOTE: End users can also add revenues from screens other than Opportunities. These include Accounts, Projects, Contacts, Products, Partners, Campaigns, and Agreements.

Adding Multiple or Recurring Revenues Using SmartScripts

End users can add multiple or recurring revenues from any screen where the Revenues view is found, for example Opportunities, Accounts, Projects, Contacts, Products, Partners, and Agreements. Multiple or recurring revenues can be added using SmartScripts. SmartScripts are accessed by choosing Script from the menu button in the Revenues view. Revenues created using SmartScripts reside in the same spreadsheet record.

NOTE: End users can add recurring revenues from any screen that has a Revenues view. The Opportunities screen is used in the following procedure as an example.

To add multiple or recurring revenues using SmartScripts

1 From the application-level menu choose View > Site Map > Opportunities > My Opportunities.

2 Click the Revenues view tab, and click the menu button, and then click Script.

3 In the SmartScripts screen in the Revenue Schedule - Date Range form, complete the necessary fields, and then click Next.

4 In the Revenue Schedule - Default Values form, complete the necessary fields, and then click Next.

5 In the Revenue Schedule - Default Values form, complete the necessary fields, and then click Next.

6 In the Revenue Schedule - Amounts form, complete the necessary fields, and then click Finish.

The appropriate revenue records are calculated and added to the Revenues list.

A set of revenues created using SmartScripts includes the same Group ID and thus are each included in the same spreadsheet record when the end user navigates to the spreadsheet view.

NOTE: A substantial number of the Script's fields may not be necessary for the end user's specific needs and are not required if not marked. In addition, the script has a built-in calculation function. The application calculates the correct end date, frequency, or period. If the Replace Existing Revenues check box in the Revenue Schedule Default Values screen has been checked, the script function replaces only the items added or owned by the user. It does not replace account revenues associated with other positions.

Adding a Split Revenue

A revenue split allows an end user to forecast an opportunity revenue that is split between multiple sales representatives. Split revenues can only be added from the Opportunities screen.

To set up a revenue split

1 From the application-level menu, choose View > Site Map > Opportunities > My Opportunities.

2 Click the Revenues view tab.

3 From the Show drop-down list in the Revenues view, choose Splits.

4 Click New.

5 Complete the appropriate fields. For information on the fields, see "Adding a New Revenue to an Opportunity" on page 89.

NOTE: Once a revenue split record is created, a read-only split flag is checked in both the parent opportunity and the revenue line item. To include or exclude these records from a forecast, craft the forecast's search specs accordingly. For information about creating search specs, see "Creating Search Specs for Forecast Series (Administrator)" on page 51.

Using a Revenue Plan

A revenue plan allows sales managers to create predefined revenue templates that can be used by sales representatives to create a series of recurring revenues or a particular group of revenues. Revenue plan templates are created and activated by the Siebel administrator. Access revenue plans from any screen where Revenues views are found, for example Opportunities, Accounts, Projects, Contacts, Products, Partners, and Agreements. Revenue plans are created by the forecast administrator. Data updated at the parent level of the plan updates each of the child revenues automatically, unless locked.

■ Values entered by end users at the Revenue Plan level for quantity, price, and revenue are multiplied by the value in the Multiplier field defined by the administrator in the revenue template, and the results populate the detail records.

■ Use the Lock field to prevent selected revenue details from being updated.

■ Use Update All to update each record with the parent-level changes, even if the detail records are locked.

To use a revenue plan

1 From the application-level menu choose View > Site Map > Opportunities > My Opportunities.

2 Select the opportunity you want to associate with a revenue plan, and then click the Revenue Plans view tab.

3 Click New in the Revenue Plans list.

4 In the new record, select a revenue plan template from the Template drop-down list.

The applicable revenue items and proposed period appear in the Revenues subview beneath the Revenue Plans list.

NOTE: End users can override the revenue plan detail data as needed.

Reviewing Revenues

The Revenues screen offers a useful management tool for monitoring the health of the business. With the appropriate predefined queries, this screen offers real-time insight to the revenue attainment status of the sales organization. End users need to define the search spec or define appropriate criteria for a query to select the correct revenue records for forecasting. For details on defining the search spec, see Table 4 on page 52.

End users must define the appropriate criteria for a query or search spec to identify the following:

■ To view only Opportunity Revenues use:

    [Calculated Primary Flag] = 'Y'

■ To view each of the Revenue line items that are not opportunities use:

    [Calculated Primary Flag] = 'N'

■ To view just product, partner, or project revenues use, for example:

    [Product] is not NULL

NOTE: Once the appropriate query criteria is defined and the appropriate revenue records have been found, use the Charts view to further analyze the revenues.

To review My Team's Revenues

1 From the application-level menu choose View > Site Map > Revenues > My Team's Revenues.

2 Select a predefined query from the Queries drop-down list to view specific sets of revenue, or create your own query.

For more information on how to create basic queries, see *Fundamentals*.

Modifying a Revenue Item

Making changes to revenue records rather than adjusting a forecast allows for more consistent forecasting. Forecasts are based on current revenue data. Adjustments to forecast records are not replicated in subsequent forecasts, resulting in extra work as the end user adjusts the same item week after week.

To modify a revenue item

1 From the application-level menu choose View > Site Map > Revenues > My Team's Revenues.

2 In the Revenues list, select the revenue item you want to modify.

3 In the More Info form, change the necessary fields.

Viewing the Revenue Spreadsheet

End users may want to display revenue information using the spreadsheet view for easy data entry and visibility of recurring items. Revenue spreadsheets are available in the following screens: Opportunities, Accounts, and Projects.

To view the revenue spreadsheet

1 From the application-level menu choose View > Site Map > Opportunities > My Opportunities.

2 From the Show drop-down list, select My Opportunities.

3 In the Opportunities list, select the opportunity for which the information will be displayed.

4 Click the Revenues view tab.

5 In the Revenues list, from the Show drop-down list, select Spreadsheet.

The information is grouped by certain product types and displayed accordingly.

NOTE: To make sure revenues are grouped in rows as intended in the spreadsheet, revenue data should be entered either into the spreadsheet directly, by using the script feature available from the menu button, or by using revenue plans.

Using Revenue Charts for Reporting

The Charts view provides end users with a graphical representation which allows them to analyze revenue data. For example, it is possible, using the chart, to show opportunity revenues by month or opportunity margin by partner.

TIP: In queries, include all Calculated Primary Flag records = Y to view only opportunity-level revenue records. Include all Calculated Primary Flag records = N to view all revenue records that are not opportunities.

To view revenue in a chart

1 From the application-level menu choose View > Site Map > Opportunities > My Opportunities.

2 In the Opportunities list, select the opportunity with which the information will be displayed.

3 Click the Revenues view tab.

4 In the Revenues list, from the Show drop-down list, select Chart.

Data is displayed in graphical format. Summary values for each chart element are displayed when using the mouse-over feature.

Use the By and Then drop-down lists in the Chart view to summarize data by a variety of segments.

Using Revenue Reports

End users can create revenue reports from the Revenues screen and from the Revenues view tab in any screen. For more information about reports, see *Fundamentals*.

Distinguishing Between Revenues

Use Revenue Type list of values (LOVs) or Channel LOVs to distinguish between indirect, direct, and other specially-noted revenues.

Sales representatives can select values from the Channel and Revenue Type fields for each opportunity or product revenue. In this way, when users run their forecast or a predefined query, they can view charts or reports which allow them to divide the data by Revenue Type or Channel.

NOTE: The Siebel administrator must add correct LOVs if there is specific terminology. For information about adding LOVs, see the chapter which discusses working with LOVs in *Applications Administration Guide*.

Forecasting 7

This chapter describes end-user procedures for creating, adjusting, and working with forecasts.

Business Scenario for Forecasting

The following scenario provides an example of a process performed by a sales representative and a sales manager. Your company may follow a different process according to its business requirements.

A sales representative at a large company is responsible for forecasting. She creates a periodic forecast by selecting a predefined forecast series. The application automatically creates her forecast by applying the forecast search rules, or a query to the account, opportunity, and partner-related revenue that she is managing. The sales representative analyzes the forecast data, viewing the anticipated revenues by product line and then by account. She then adds a revenue item and modifies an existing revenue item before submitting the forecast to her manager.

After the sales team members have submitted their forecasts, the sales manager runs the same forecast series, which aggregates the teams' submissions. In this way, the sales organization can poll its members for their projected results for the period. The manager modifies the results of the forecast by adjusting one of the individual forecasts submitted. This change to a forecast will not carry over to any corresponding revenue records. To keep his data accurate, the sales manager updates the corresponding live revenue records with the changes he made to the forecast.

The sales manager then remembers that the last time he created this same forecast, he made changes to it as well. He selects Auto-adjust to automatically apply the changes made in the most recent forecast to this forecast. This makes sure that any adjustments that were made in the last forecast (the most recent forecast date available) are automatically added to the current forecast. Finally, he analyzes the forecast using charts and reports, and when he is satisfied with it, he submits the forecast to his manager.

Example Process for Forecasting

This is an example of a process an end user might follow to use forecasting. Your company may follow a different process according to its business requirements.

1 **Create a forecast.** For information, see "Creating a Forecast" on page 105.

2 **View forecast details.** For information, see "Viewing Forecast Details" on page 108.

3 **Add forecast details.** For information, see "Adding Forecast Details" on page 109.

4 **View a forecast summary.** For information, see "Viewing Forecast Summary" on page 110.

5 **View a subordinate's forecast.** For information, see "Viewing Subordinate's Forecasts" on page 111.

6 **Working with subordinate's forecasts from Siebel Remote Web Client.** For information, see "Viewing and Creating Subordinate's Forecasts Remotely" on page 112.

7 **Creating a partner forecast.** For information, see "Creating a Partner Forecast" on page 113.

8 **Rolling up a forecast.** For information, see "Rolling Up Forecasts" on page 114.

9 **Adjust a detail depth forecast.** For information, see "Adjusting a Detail Depth Forecast" on page 116.

10 **Adjust a summary depth forecast.** For information, see "Adjusting a Summary Depth Forecast" on page 118.

11 **Auto-adjust a forecast.** For information, see "Auto-Adjusting a Forecast" on page 119.

12 **Unadjust a forecast.** For information, see "Unadjusting a Forecast" on page 120.

13 **Adjust a subordinate's forecast.** For information, see "Adjusting a Subordinate's Forecast" on page 121.

14 **Update a revenue from a forecast.** For information, see "Updating Revenues from a Forecast" on page 123.

15 **Update a forecast with a revenue item.** For information, see "Updating a Forecast with a Revenue Item" on page 124.

16 **Analyze a forecast.** For information, see "Analyzing Forecasts" on page 125.

17 **Submit a forecast.** For information, see "Submitting a Forecast" on page 126.

Creating a Forecast

A forecast is a snapshot of revenues over time. The following procedure explains how to create a forecast.

To create a forecast

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecasts list, click the menu button, and then click New Record.

3 Click the Forecast Series select button.

4 In the Pick Forecast Series dialog box, select the forecast series you are basing this forecast on, and then click OK.

5 Click the Forecast Date select button.

NOTE: By default, when a forecast is issued for the first time, the Siebel application uses the system date as well as the date for the master forecast and bases the forecast on the nearest future date. For instance, the end user creates a master forecast, named Revenue, and enters three master forecast dates: 05/01/2001, 06/01/2001, and 07/01/2001. If the end user forecasts on 5/22/01, then the forecast is for the period 06/01/2001. If the end user forecasts on 06/01/2001, then the forecast is for the period 06/01/2001. Forecasting always uses a future date. End users can override the forecast date by changing it. End users can even change one that is for a date that has already passed, and then generate the forecast.

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6 In the Pick Forecast Date dialog box, select the forecast date you want to apply to this forecast, and then click OK.

Step off the forecast or save the record to generate the forecast.

The forecast record's revenue fields (revenue, cost, margin, and expected revenue) are calculated. See the following table for more information about what information is contained in each field:

Field Name	Comments
Forecast Date	Indicates the start range of the forecast.
Forecast Series	Indicates the forecast series this forecast is based on.
Owner	Indicates the person who owns or is responsible for this forecast.
Position	Read-only. Indicates the position of the owner of this forecast.
Organization	Read-only. Indicates what organization the owner of this forecast belongs to.
Total Forecast Revenue	Read-only. The sum the revenues included in this forecast.
Cost	Read-only. Expense associated with an opportunity.
Margin	Read-only. A calculated field that displays the revenue figure minus the cost.
Best Case	Read-only. A best case estimate of what revenue will be produced by an opportunity.
Worst Case	Read-only. A worst case estimate of what revenue will be produced by an opportunity.
Status	Choose from Pending, Active, and Submitted.
Created By	Read-only. Indicates the name of the person who created the forecast. In some cases the owner of a forecast is not the creator of the forecast.

Field Name	Comments
Submitted By	Read-only. Indicates the name of the person who submitted the forecast.
Updated	Read-only. Indicates the date and time the forecast was last changed.

NOTE: When a manager forecasts, the application automatically creates forecasts for subordinates who are listed as participants of that series that have not already been forecasted. To disable this feature, see "Inactivating Auto-Forecast (Administrator)" on page 69.

Viewing Forecast Details

Forecast details define the elements that sum to the total forecast amount. At the sales representative level, the details include each of the revenue items queried into the forecast. The manager's forecast details can include summary amounts for immediate subordinates, if it is a summary type forecast, and direct revenue from the manager's own deals. The manager's forecast can include subordinates' forecast details, for a detail type forecast, instead of summaries depending on how the forecast series is set up.

Details can be adjusted. To view the adjustment history click the Date hyperlink. Also, from the menu button end users can unadjust, update from revenue, update to revenue, auto-adjust an item from the last forecast, and see net revenue change from the last forecast.

NOTE: The forecast owner can modify the revenue values displayed in the Details view. However, these changes are not automatically aggregated into the forecast total. The end user must click the menu button, and then click Rollup Parent Forecast to recalculate total forecast revenue.

Three options are available for viewing the details of a forecast.

■ List

■ Spreadsheet

■ Chart

To view forecast details

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecasts list, select the forecast for which you want to view the details.

3 Click the Details view tab.

4 From the Show drop-down list, select List, Spreadsheet, or Chart.

The information is displayed based on your selection.

Adding Forecast Details

Occasionally, the forecast that has been created does not include each of the revenue items that it should. Additional revenue records can be added manually.

To add forecast details

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecast list, select the forecast to which details will be added.

3 Click the Details view tab.

4 In the Details list, click the menu button, and then click New Record.

5 In the Add Revenue Items dialog box, select the item and click OK.

NOTE: End users can add many revenue items at the same time by holding down CTRL or SHIFT and selecting the appropriate items. End users can also run a query and select each of the returned records.

Viewing Forecast Summary

The Forecast Summary view displays the total forecast's revenue aggregated into the periods specified by the forecast series. These summary periods are indicated by their respective start dates. For example, the calendar month of November 2001 is displayed as 11/01/2001 in the Summary view. The owner can modify the summary revenue values of the forecast. Changes to these values are immediately visible in the forecast record's Total Forecast Revenue field.

NOTE: The Details view does not reflect changes made in the Summary view. If modifications have been made to the summary values, those values are overwritten when Rollup is selected.

Viewing Subordinate's Forecasts

From the Subordinates view, end users can add or delete forecast participants who report to them, and they can drill into a subordinate's forecasts by using the Owner Position hyperlink. For summary forecasts, managers can make broad percentage adjustments. For more information, see "Adjusting a Subordinate's Forecast" on page 121.

NOTE: To create and add a subordinate's forecast, create the forecast from the My Team's forecast, and then add the subordinate from the Subordinates view.

Viewing and Creating Subordinate's Forecasts Remotely

Managers can create a forecast and see their subordinates' forecasts that have already been created and synchronized over to the local database when the manager was docked.

A manager cannot create a subordinate's forecast using auto-forecast on the Siebel Remote Web Client as the manager can when using the connected client. Therefore, there can be no duplication of effort between the manager and the subordinate, and synchronization confusion is avoided.

If a sales representative's forecast has not already been created, then the manager, after creating the representative's forecast remotely and then docking, will need to associate the subordinate's forecast using the Subordinates view in the Forecasts screen.

NOTE: Preconfigured Siebel Remote Web Client users have local access to Revenues and Revenue Plans in the Opportunities screen, and to the My Revenues view. However, they do not have access to Revenues from accounts, products, or contacts remotely as they do when they are connected. These views can be added to Siebel Remote Web Client with the assistance of Siebel Expert Services.

Creating a Partner Forecast

Siebel Forecasting supports numerous partner forecasting scenarios. These scenarios include rollup forecasts, forecasts run by the partner only, forecasts of each partner, and forecasts of individual partner organizations. For details on setting up forecast series to support each of these scenarios, see *Siebel Partner Relationship Management Administration Guide*.

Rolling Up Forecasts

When end users click Rollup in the Forecasts screen, the forecast detail item records in the Details view (that match the Rollup Search Spec) are summed up in the Summary view. As the summary records are updated by the forecast details, the total forecasted revenue is also updated. Changes that had been made to the detail records, such as revenue or quantity adjustments are then part of the summary record totals and the total forecasted revenue. Additionally, when Rollup is selected, any adjustments made earlier to summary records are lost when new values are brought in from the detail records. For information about setting the Rollup Search Spec, see "Creating a Forecast Series (Administrator)" on page 48.

Forecast Adjustments

Managers can adjust subordinate forecasts in one of the following three ways:

■ At the detail level from the Forecast > Details view tab for a detail type forecast.

■ By summary period from the Forecast > Summary view tab for a summary type forecast.

■ By subordinate for percentage adjustments for summary type forecasts.

When a sales representative clicks Rollup for a specific forecast while in the forecast's Details view, the forecast is summed into the corresponding periodic summary records, which is displayed from the Summary view tab. When summary records are updated by the rollup process or manually, the Total Forecast Revenue field automatically calculates the values of the summary records. When a sales representative clicks Rollup, any prior adjustments to the summary records are overwritten with the new values brought in from the detail records.

Adjusting a Detail Depth Forecast

In a detail depth forecast, each revenue line item in the Details view is rolled up through the reporting hierarchy. As a result, senior management has access to every forecast detail revenue item for its review. In this scenario, users should make sure that every adjustment is made in the Details view. After adjusting the details, end users must click Rollup to recalculate the modified forecast. To see forecast details by periodic summary, end users can view the forecast from the Summary view tab.

Once a manager adjusts a subordinate's detail record, the Siebel application maintains an adjustment history. Levels of management above can view the adjustment history, however, the subordinate, whose forecast record was adjusted cannot view the adjustment.

NOTE: If end users are unclear about the forecast type their company uses, they should see their Siebel administrator or a member of their sales operations team.

To adjust a detail depth forecast

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 Select the forecast you want to adjust in the Forecast list.

3 Click the Details tab.

4 Select the revenue line item detail you want to adjust.

5 Adjust the revenue, quantity, price, or other value you want to modify.

6 Repeat Step 4 through Step 5 for each line item you want to adjust.

7 Click the menu button, and then click Rollup Parent Forecast to recalculate the forecast.

The adjusted forecast amount is posted by period to the Summary list on the Summary view tab.

8 (Optional) From the Summary view tab, view the summary list by period. Adjustments made here are not displayed in the manager's forecast.

NOTE: Any adjustments to the summary records are not rolled up in a detail depth forecast. Managers can view the summary record adjustments by drilling into their subordinates' forecasts.

Adjusting a Summary Depth Forecast

In a summary depth forecast, each record in the Summary view is rolled up to your direct manager. As a result, a manager can see his own detailed line item records and the summary records of his direct subordinates from his forecast Details view. Users can adjust detail records and click Rollup to calculate the modified forecast. They can then further adjust those records from the Summary view.

A manager can make an additional adjustment to a subordinate's forecast from the Subordinates view in the Forecasts screen. In this view, a manager can see the total forecast revenue amount for his direct subordinates. A manager can also make a broad percentage adjustment. This percentage adjustment is calculated into the rollup for each subordinate when the Rollup button is clicked. For more information, see "Adjusting a Subordinate's Forecast" on page 121.

NOTE: A subordinate's forecast cannot be adjusted from the Subordinates view in a detail type forecast.

To adjust a summary depth forecast

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 Select the forecast you want to adjust in the Forecast list.

3 Click the Summary tab.

4 Select the summary record you want to adjust.

5 Adjust the Revenue, Best Case, Worst Case, or other value you want to modify.

6 Repeat Step 4 through Step 5 for each line item you want to adjust.

The total adjusted forecast amount appears in the Total Forecast Revenue field, but no adjustments appear in the detail forecast for the subordinate.

NOTE: Any adjustments made to the detail records are not captured in the summary records until you click Rollup.

Auto-Adjusting a Forecast

Auto-adjust applies to forecasts with details only. Use auto-adjust to apply any changes made in the most recent forecast to the current forecast. Once auto-adjust is selected, any adjustments that were made in the last forecast (the most recent forecast date available) are automatically added to the current forecast. Fields such as Probability, Qty (quantity), Revenue, Expected Revenue, Price, Commit, Close Date, Best Case, Worst Case, Margin, and Cost that may have been changed are updated in the current record.

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecast list, select the forecast to be updated.

3 Click the Details view tab.

4 Select the revenue line item or items you want to apply adjustments to.

5 Click the menu button, and then click Auto-Adjust Selected Details.

NOTE: Auto-adjust is only visible as an option if there is a past forecast to be compared to.

Unadjusting a Forecast

After using auto-adjust or making an adjustment to another user's record, end users can use unadjust. Unadjusting a forecast only applies to forecasts with details.

To unadjust a forecast

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecast list, select the forecast to be updated.

3 Click the Details view tab.

4 Select the record or records you want to unadjust.

5 Click the menu button, and then click Un-Adjust Selected Details.

Adjusting a Subordinate's Forecast

When the sales manager creates a forecast, the Subordinates view is populated with the total value of each of the manager's subordinates' forecasts.

This view offers the manager the ability to adjust the aggregate value of each subordinate's forecasts by a percentage based on the individual's historical forecasting accuracy. The percentage adjustment is entered manually into the Adjust % field. The Revenue field is factored by this percentage and the result is displayed in the Adjusted Revenue field.

NOTE: Managers can only adjust a subordinate's forecast from the Subordinates view if the forecast is a summary type forecast.

To see the details of a subordinate's forecast, drill down on the Owner Position hyperlink.

TIP: The Siebel administrator or sales manager can change the status of a submitted forecast to allow an end user to revise a forecast and submit it again. This simplifies the process of revising a forecast.

To adjust a subordinate's forecast

1 From the application-level menu choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecast list, select the summary forecast that includes subordinate forecasts.

3 Click the Subordinates view tab.

4 In the Subordinates list, locate the record that requires adjustment and select the Adjust % field.

5 In the Adjust % field, enter the appropriate percentage in whole numbers.

The Adjusted Revenue field displays the value of the revenue field factored by the percentage adjusted. (The Adjusted Revenue field is a calculated field. No data entry is allowed.)

NOTE: In Siebel 2000, managers used a Revise Forecast button to adjust forecasts after they had been submitted. In Siebel 7.0, the Revise button is no longer needed to revise subordinate forecasts because end users can delete their active forecasts. Also, managers can submit or unsubmit a subordinate's forecast by changing the Status field in the forecast from Active to Submitted or vice versa.

Updating Revenues from a Forecast

Updating revenues from a forecast allows an end user to update live revenue records with the current forecast updates. This eliminates a number of steps. Updating revenues from a forecast only applies to forecasts with details.

To update revenue items from a forecast

1 From the application-level menu choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecast list, select the forecast to be updated.

3 Click the Details tab.

4 Select the revenue item to be updated.

5 Click the menu button, and then click Update Revenue Item.

   This updates the revenue item with the most recent adjustment from the Forecasts screen.

Updating a Forecast with a Revenue Item

Updating a forecast with a revenue item updates the selected forecast with the most recent adjustment in the live revenue records. Updating a forecast with a revenue item only applies to forecasts with details.

To update a forecast with a revenue item

1 From the application-level menu choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecast list, select the forecast to be updated.

3 Click the Details tab.

4 Select the revenue line item or items you want to update.

5 Click the menu button, and then click Update Detail with Revenue Item.

Analyzing Forecasts

Forecasts can be analyzed a number of ways.

Using Charts to Analyze Forecasts

End users can view forecasts using the chart view in either the Details view or the Summary view in the Forecasts screen. It is possible to view forecasts by month, quarter, or year from the chart view. Also, depending on access privileges, end users can compare individual forecasts from the My Forecast Analysis view, the My Team's Forecast Analysis view, and the All Forecast Analysis view. In the Forecast Analysis view, end users can select or highlight the forecasts they want to compare and the summary data is automatically aggregated. Then they can use the charts to see, for example, revenue by forecast by month.

Using Reports to Analyze Forecasts

For information about running reports, see *Fundamentals*.

Using Analytics to Analyze Forecasting

For information about analytics, see *Siebel Analytics User Guide*.

Submitting a Forecast

The last step in creating a forecast is to submit it to the manager for review.

To submit a forecast

1 From the application-level menu choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecast list, select the forecast to be submitted.

3 In the More Info form, from the Status drop-down list, select Submitted.

Matrixed Sales Organization   8

A *sales team* may consist of individuals from many organizations, groups, and divisions. The team typically includes an account manager or field sales professional, a telesales professional, a sales consultant, a product specialist, and an industry specialist. These individuals may report to different managers, each of whom need visibility into the business pipeline.

By default, a *manager* has visibility, through the My Team's views, into every opportunity, account, and contact a subordinate can access. For example, with the My Team's Opportunities view, a manager can see every opportunity on which one of their subordinates is primary.

Therefore, the primary sales representative's manager has visibility into the subordinates' opportunities through the My Team's view. The other managers (overlay managers such as the telesales professional's manager or the product specialist's manager) need another way to see these opportunities and revenues.

In this instance, you can use one of the following methods to provide visibility:

■ Change the visibility of the My Team's Opportunities view.

■ Use the My Team's Revenues view.

■ Use the All and All Across Organizations views.

■ Add overlay managers to the sales team.

These options are discussed further in the following sections.

Changing the Visibility of My Team's Opportunities View (Administrator)

You can change the visibility of the My Team's Opportunities view using Siebel Tools so that it shows every opportunity in which a subordinate is listed in the sales team (instead of the opportunities where a subordinate is primary).

This approach allows overlay sales managers to see what is going on in the opportunity pipeline, at the expense of system performance and synchronization times. You avoid the additional administration involved in adding overlay sales managers to the sales team, but managers may experience slower connected response times using this view and slower synchronization times in the Siebel Mobile Web Client.

For information on changing visibility, see the Manager List Mode user property information in *Siebel Tools Online Help*.

Using the My Team's Revenues View

The My Team's Revenues view allows a manager to see the revenue items for which a subordinate is listed as the sales representative. A revenue item is a portion of an opportunity. Using the Opportunities screen's Revenues view, the members of the sales team can allocate specific portions of the overall opportunity to individual sales team members. This allows each of their managers to see their portion of the overall opportunity by using the My Team's Revenues view.

The primary sales representative is already listed as the owner of the overall opportunity. The telesales representative might also take credit for some portion of the opportunity, while each product specialist takes credit for their product-related revenues. Their respective managers would see, in the My Team's Revenues view, each of their subordinate's level of involvement in that opportunity. For more information about using the My Team's Revenues view, see "Reviewing Revenues" on page 95.

Using the All and All Across Organization Views

This approach allows sales managers, directors, and executives to find the opportunities or revenues that they are looking for by using a predefined query on the All or All Across Organizations views. The query includes some unique criteria that designates the type of opportunity or revenue the overlay sales manager can use to find the appropriate set of records.

For example, a product manager for a given product line might use a product-specific query on the All Revenues or All Revenues Across Organizations view to find each revenue related to their product line. A country manager for Germany might run a query on the All Opportunities view for every opportunity with the country code for Germany.

For more information about the All and All Across Organization views and forecast visibility, see .

Adding Overlay Managers to the Sales Team

This option guarantees that overlay sales managers can see their subordinates' opportunities, but it means that a large number of people will end up on the sales team, a large number of opportunities will be synchronized, and you will have to do a lot of territory administration work when reporting relationships change.

Mobile sales organizations may want to consider the impact on synchronization times. You may end up providing the overlay sales managers with more information than they really want on a mobile client.

Importing and Exporting 9

This chapter explains how end users can import and export forecast and revenue information. It also discusses administrative maintenance of import and export functionality.

Business Scenario for Importing and Exporting

This scenario provides an example of a process performed by a sales manager and a sales representative. Your company may follow a different process according to its business requirements.

A sales manager at a large company is working on a presentation. She plans to export data from both the Revenues screen and the Forecasts screen into Microsoft Excel so that she can use current revenues and forecasts in her presentation. Later that week, she is given new revenues in the form of a Microsoft Excel spreadsheet which she imports into Siebel Forecasting.

The company's forecast administrator has learned that the display name of a field in the Revenues screen has been changed and that a new field has been added. As a result of this change, the administrator now needs to update the mapping in the Revenue Import process.

Example Process for Importing and Exporting

Figure 2 is an example of a process an end user and an administrator might follow for importing and exporting in Siebel Forecasting. Your company may follow a different process according to its business requirements.

End-User Procedure   **Administrator Procedure**

```
┌─────────────────────┐        ┌─────────────────────┐
│                     │        │  Update Predefined  │
│ Export Forecast Data│        │ Mapping in Revenue  │
│                     │        │   Import Process    │
└─────────────────────┘        └─────────────────────┘
           │
           ▼
┌─────────────────────┐
│                     │
│  Import Revenue Data│
│                     │
└─────────────────────┘
           │
           ▼
┌─────────────────────┐
│                     │
│  Export Revenue Data│
│                     │
└─────────────────────┘
```
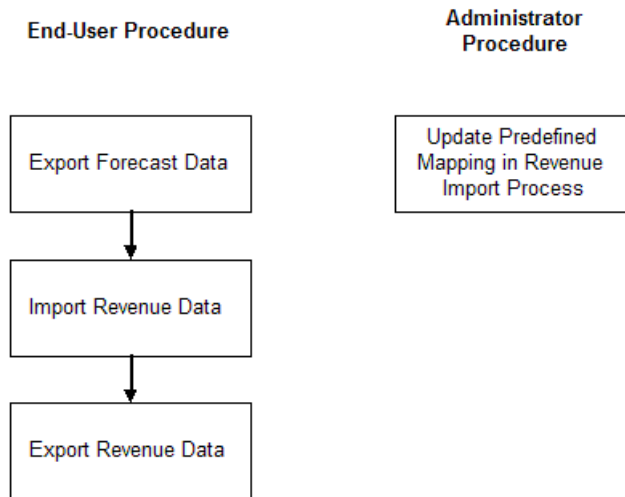
Figure 2.   Example Process for Importing and Exporting

Exporting Forecast Data

You can export forecast data from the Forecasts screen.

To export forecast data

1 From the application-level menu, choose View > Site Map > Forecasts > My Forecasts.

2 In the Forecasts list, select the forecast information you want to export.

3 Click the menu button, and then click Export.

4 In the Export dialog box, set up the export rules and click Next.

5 In the File Download dialog box, click Open this file from its current location or click Save this file to disk, and then click OK.

The file is opened or you have to save it to a location on your machine depending on your instructions.

6 Close the Export dialog box by clicking Close.

Importing Revenue Data

Modified revenue files can be imported back into the application.

To import revenue data

1 From the application-level menu, choose View > Site Map > Revenues > My Revenues.

2 In the Revenues list, click the menu button, and then click Import.

3 In the Import dialog box, click Browse next to the Input File field to select the file you are importing.

4 In the Choose File dialog box, select the file you want to import and click Open.

5 In the Import dialog box, from the Input Format field, select the format you prefer: Comma Separated Text File or Tab Delimited Text File.

CAUTION: Be sure that the file you are importing has been saved in the same format you select from the Input Format field.

6 From the Input Source field, select Predefined Mapping.

7 From the drop-down list beneath the Input Source field, select Opportunity Revenue or Default.

NOTE: If you originally exported the revenues from the Revenues view in the Opportunities screen, select Opportunity Revenue. If you originally exported the revenues from the Revenues screen, select Default.

8 From the Conflict Resolution Method field, select the method you prefer to use should the import encounter a conflict between records: Reject Import Record, Overwrite Existing Record, or Create Additional Record.

9 Click Next.

- If the import was successful, click OK.

- If the import was unsuccessful, click View Log.

NOTE: Any blank data fields you import into revenues are left unchanged in an import. If you want the blank records to be imported as 0 values then you need to replace each blank with a 0.

Exporting Revenue Data

Data can be queried on an ad hoc basis in the Revenues screen. The resulting records can be exported in a variety of formats.

NOTE: If you are exporting files into more than one file format type, you must perform separate exports for each file type.

To export revenue data

1 From the application-level menu, choose View > Site Map > Revenues > My Revenues.

2 In the Revenues list, locate the revenue information you want to export.

NOTE: You may want to perform a query or use your predefined query to locate the revenue information.

3 In the Revenues list, click the menu button, and then click Export.

4 In the Export dialog box, set up the export rules, and then click Next.

5 In the File Download dialog box, click Open this file from its current location or click Save this file to disk, and then click OK.

The file is opened or you have to save it to a location on your machine depending on your instructions.

6 Close the Export dialog box by clicking Close.

CAUTION: Do not select Visible Columns when you export revenue data or you will be unable to import that same data back into revenues. Instead, export All Columns and import those same All Columns when you return data, as these map to the Default Predefined Mapping.

Updating Predefined Mapping in Revenue Import Process (Administrator)

Whenever a display name of a field in the Revenues screen is changed or a new field is added, you must update the mapping in the Revenue Import process.

Updating a Display Name

When an end user changes the display name of a list column of the applet, you must also update this new name for the Import Field Column. For example, if an end user changes the Revenue Analysis List Applet List Column *Upside* display name to *Best Case*, then you have to make the following changes in Siebel Tools:

Import Object > Revenue > Import Source (In Revenue's case is Default) > Import Field Map > find the corresponding field (Upside) > Import Field Column > change column to Best Case.

Updating a New Field

When an end user adds a new field to the Revenue Analysis List Applet, you must also add that field as an Import Field column.

After adding the field to the Revenue Analysis List Applet, add the new field to Import Field Map under the corresponding Import Source. You must also specify the Import Field Column of this field (this is the display name of the list column in the list applet).

NOTE: Make sure the Import Field Column of the import field is same as the Display Name of this field in the List Column defined in the List Applet, if you want to first export and then import it.

After making changes in Siebel Tools, you must recompile the SRF file.

Troubleshooting A

This appendix describes some solutions to problems you may encounter as you use Siebel Forecasting.

Forecast Troubleshooting

The following issues may be encountered when you are working with forecasts.

Error Creating a Forecast

When creating a forecast, a user may experience the following error:

> [1] An error occurred while creating your forecast. Forecast may not include all revenues or subordinate details. Please check the log file or contact your system administrator for details.

To find the source of this problem, administrators should check the forecast log file on their server. These files are typically located as follows:

If the instance is a Siebel Mobile Client (siebel.exe) installation:

- xxx: $install/log directory

- yyy: siebel.log, or siebel_N.log, if the client has been run N times since the crash occurred. (The names of the logfiles are incremented by one each run, for example, siebel.log is renamed siebel_01.log, siebel01.log is renamed siebel02.log.)

If the instance is a Microsoft Windows server:

- xxx:$install/siebsrvr/log

- yyy: SrvrComponent_ProcessId.log, for example, SSEObjMgr_50231.log

If the instance is a UNIX server:

- xxx: $install/siebsrvr/enterprises/$enterprise_name/$srvr_name/log

- yyy: SrvrComponent_TaskId.log, e.g. SSEObjMgr_50231.log

A component can have many tasks running and generating logs. See *Siebel Server Administration Guide* for information about the location of log files.

In the log file, you will find records like this:

```
FCSTLOG_EVENT Error 1 2001-10-30 16:16:02 <WW Sales, 10/01/2001,
Product Line Manager-00004456, BGROVES>   Error occurred when
setting field 'Revenue Class" to value "Backlog"
```

The error in the previous example occurred on October 30th, 2001, when running a WW Sales forecast for a regional sales manager with the user ID of MSTERN. The error occurred because a revenue record that was to be included in the forecast included an invalid value for the Revenue Class picklist. In this example, the error can be corrected by adjusting the Revenue Class LOV to include a value called BackLog, or by changing the Revenue Class on the offending record to a choice that is still valid.

NOTE: It is most likely in this example that the valid values for the Revenue Class field were changed and the old data was never cleaned up.

Once this issue is corrected, the forecast can be deleted and rerun, or the missing revenue record can be added manually.

Queries on the Forecast Detail View Affect Summary Views
Queries run in the Details view in the Forecasts screen affect the information shown in the Summary view in the Forecasts screen. End users may have to requery to see each of the forecast summary records after running a query on the forecast details.

Forecast Details View Shows Product Line Items That Were Deleted Before Creating the Forecast
While it is unlikely that any best practice would include the deletion of an opportunity that included revenue estimates, you do have the ability to delete an opportunity. If you delete an opportunity, but do not delete the associated revenues, then those revenues are maintained, and will be included in your next forecast. You should delete each revenue associated with the opportunity before deleting the opportunity if those revenues are not meant to be forecasted.

Forecasting a Global Account or Product
A global account or product can be forecasted three ways.

Global Account Forecast Snapshot

Perform a global forecast that pulls in only data from the key accounts or one account. Set the forecast's visibility to All Revenues and the Auto Forecast Search Spec to Account = 'CompanyName*'.

NOTE: This can also be done for a Product Line or Division.

Ad Hoc Global Account Revenues Screen

Predefined query is saved in the Revenues screen and used for EIS reporting, analytics, and exporting.

Define and save a predefined query in the Revenues screen as follows: Account = CompanyName and [Calculated Primary Flag] = 'Y' (for opportunity level revenue management).

NOTE: This can also be done for a Product Line or Division.

Account Revenues Management

Manage and evaluate revenues associated with an account from the Revenues view in the Accounts screen.

NOTE: This can also be done by Product, Contact, Partner, or Project.

Adding a New Opportunity to a Forecast

When you add a new opportunity to a particular forecast (in the Person Opportunity Forecast Applet), this record will be updated to the S_OPTY_FCSTWD table. Specifically, each revenue detail is being stored in the specific DATAxx (DATA01, DATA02, and so on) columns in the table. Depending on which monthly bucket the revenue is falling in, the corresponding column (DATA01, DATA02, and so on) will be updated accordingly. The logic of deciding which column to be updated is hard-coded within the specialized class that the Forecast module is based on and is not configurable. The same logic is applied when you click the Rollup option to update the revenue in the forecast (in Person Forecast Stagger Chart Applet) except that the data is being stored in the S_PER_FCSTWD table instead.

Relationship Between Opportunities and Expected Delivery Date

The expected delivery date in the Opportunities screen Products view determines the column (month) into which that product falls in the forecasting views. For example, several opportunity products can be combined into one product forecast record. The value that is seen for January for product x might be an aggregation of several opportunity product records. If the date on one of those records is changed, thereby knocking it out of the forecast, other records might still remain with slightly lower quantities or a slightly different average price.

Revenues Troubleshooting

The following issues may be encountered when you are working with revenues.

Revenues in the Opportunities Screen Revenues View Do Not Show Up in the Parent Account

End users will find that if they create an opportunity and assign revenues to it before they define the parent account, then those revenues will not be associated with the parent account. If end users set the parent account in the opportunity first and then create the revenues, the revenues will be correctly associated with the parent account.

Forecast Usage Examples   B

This appendix provides you with examples of the ways in which forecasts can be used. Using a number of scenarios, it offers a glimpse into the requirements of different situations. It also describes how administrators and end users can create and use these different forecasts. Use this appendix after learning the details of how to create forecasts using the Siebel application. This appendix is designed to familiarize you with how forecasts are used. Use the rest of this guide to learn how to forecast.

Common High-Level Forecast Usage Scenarios

The following scenarios are examples of situations in which you may want to forecast. Each specific situation discusses in general terms what steps an administrator and end user would perform to forecast a certain way. Each scenario is not detailed enough to allow you to perform each task. You should use this section to gain an understanding of how forecasts work with regard to the data you want to analyze.

Opportunity Forecasting

Users often need a sales pipeline and actuals to proactively manage key deals, allocate sales resources, manage sales costs, and respond to competitive or industry trends.

Forecast Requirements

■ Opportunity management

■ Use of sales methodology

Administrator Usage Scenario

The administrator defines a WW Sales forecast series. The Auto Forecast Search Spec is set as follows: [Calculated Primary Flag] = 'Y'. This search pulls opportunity level revenue items into the forecast.

End User Revenue Scenario

■ Add a new opportunity.

■ Maintain relevant opportunity data consistent with your company's sales methodology, for example, sales stage, revenue class, and probability.

■ (Optional) Use revenue type attributes in each revenue item to add booked, billed, and actual status as revenue data is actualized over time. End users can use revenue class attributes to add service/hardware/software attributes for each revenue item.

End User Forecast Scenario

■ Create a new WW Sales forecast.

■ In the Details view, end users can see opportunities they are working on being automatically pulled into their forecast.

■ Make adjustments and view adjustment history.

■ Submit the forecast.

Service Forecasting

Often end users need a service pipeline, backlog, and actuals for capacity planning, resource allocation, and service product planning.

Forecast Requirements

The forecast needs to include revenue scheduling, spreadsheets, services as products, easy to add recurring revenues, as well as forecasts that pull scheduled revenue into the correct time buckets.

Administrator Usage Scenario

The administrator defines a service forecast series. The Auto Forecast Search Spec is set as follows: [Product] IS NOT NULL and [Calculated Primary Flag] = 'N'. This search pulls revenue line items that have a product indicated into the forecast.

End User Revenue Scenario

■ Create a new opportunity or project.

■ Associate and create revenues using revenue scripts or revenue plans to establish a revenue group ID.

■ Use the revenue spreadsheet to view and maintain revenues over the scheduled time. As revenues become backlog or actuals they should be updated by the practice manager.

■ Use revenue charts and reports to graphically display data and to perform ad hoc analysis.

End User Forecast Scenario

■ Create a service forecast.

■ In the Details view, use the spreadsheet and chart views to evaluate and adjust scheduled revenues.

■ Use predefined queries to see details by service.

■ Submit the forecast.

Product Level Forecast

Often end users need product level forecasts for demand planning (product and quantities), revenue management (price and revenue), margin management (cost and margin analysis), operations planning (inventory and demand) and product marketing decisions (product mix, discount analysis, and pricing strategies).

Forecast Requirements

Need to associate multiple products to one opportunity or account; need the ability to auto-quote from opportunity revenues; need spreadsheet-like functionality to manage recurring revenue products or milestone-based product deliveries; need the ability to add product price, quantity, cost and margin; and need to see product hierarchy.

Administrator Usage Scenario

The administrator defines a product forecast series. The Auto Forecast Search Spec is set as follows: [Product] IS NOT NULL and [Calculated Primary Flag] = 'N'. This search pulls product revenue line items that have a product indicated into the forecast.

End User Revenue Scenario

- Create a new opportunity or account.

- Associate and create product revenue line items using the New Record command, revenue scripts, or revenue plans.

- Use the revenue list or spreadsheet views to edit and maintain product revenues. Add values in the following fields: Qty, Cost, Margin, Price, and Product Line.

- Use revenue charts and reports to graphically display data and to perform ad hoc analysis. For example, create charts and reports with parameters of:

  - Quantity by product line by month

    OR

  - Margin by product by quarter

End User Forecast Scenario

- Create a product forecast.

- In the Details view, use the spreadsheet and chart views to evaluate and adjust product revenues.

■ Uses forecast detail filters to see details by product.

■ Use charts and reports to perform analysis.

■ Submit the forecast.

NOTE: To rollup total quantity, the administrator needs to expose the quantity rollup in the total forecast. This is a simple configuration procedure.

Cost-Margin Forecast

The company emphasizes cost and margin analysis in product planning and sales strategy. The company wants to use cost and margin analysis to drive lifetime value.

Forecast Requirements

End users want to evaluate costs and margins on each opportunity or product revenue to determine the value of a deal. There is a need to evaluate these costs and margins over a series of scheduled revenues, as some opportunities may lose money initially, but over the long term are highly profitable.

Administrator Usage Scenario

The administrator defines a product cost/margin forecast series. The Auto Forecast Search Spec is set as follows: [Product] IS NOT NULL and [Calculated Primary Flag] = 'N'. This search pulls product revenue line items that have a product indicated into the forecast.

End User Revenue Scenario

■ Create a new opportunity or account.

■ Associate and create product revenue line items using the New Record command, Revenue Scripts, or Revenue Plans.

■ Instead of adding just revenue information, end users should add cost data for every product added.

■ Using the revenue spreadsheet view, end users can view each product and its cost and margin expectations by month or week. These cost and margins can be modified accordingly and can be graphically viewed using the Charts view.

NOTE: The spreadsheet needs to be configured so that Cost and Margin are exposed for each date.

End User Forecast Scenario

■ Create a new product cost/margin forecast.

■ In Forecast Details they see the revenues they are working on automatically pulled into their forecast.

■ End users can view the total revenue expected from each of these revenues from the Forecast Details list view or they can see the cost and margin expectations over time for each product using the spreadsheet view.

■ View a graphical presentation of this data using the Charts view or by creating reports.

■ They can adjust and submit the forecast.

NOTE: This scenario requires minor configuration to the revenue spreadsheet view to see the Cost and Margin by each date. For more information about configuring the revenue spreadsheet view, see "Revenue and Forecast Spreadsheet Configuration (Administrator)" on page 70.

Worst, Expected, Best (WEB) Forecasts

Sometimes there is a need for WEB analysis to evaluate the current state of business and to better allocate sales resources. WEB analysis examines the values in the following fields: Worst Case, Expected Revenues, and Best Case.

Forecast Requirements

Company wants to evaluate each opportunity, product revenue, or service revenue using WEB analysis.

Administrator Usage Scenario

The administrator defines a WEB forecast series. The Worst Case, Expected Revenue, and Best Case data is preconfigured to be pulled into the forecast.

End User Revenue Scenario

■ Create a new opportunity or account and associate the Worst Case, Expected Revenue, and Best Case values to the opportunity revenue or the associated product revenue.

End User Forecast Scenario

■ Create a new WEB forecast which automatically pulls in the correct revenues with their WEB data and rolls up that data into a WEB.

■ Adjust and submit forecast.

Partner Forecast Option I: Partner Portal

A partner's revenues are a large part of a company's overall revenues, and they want to be more proactive in managing such revenues, measuring the partners, and allocating resources to the channel partners.

Forecast Requirements

The company needs to incorporate partner opportunities and revenues into forecasts automatically.

Administrator Usage Scenario

The administrator defines the WW Sales forecast series. The Auto Forecast Search Spec is set up as follows to include partner revenues: [Partner] IS NOT NULL and [Committed] = 'Y'. The administrator makes sure the correct participant's name or organization is associated with the forecast series. For more information, see *Siebel Partner Relationship Management Administration Guide*.

End User Revenue Scenario

■ Partner enters revenues using the Partner Portal and creates appropriate opportunities and product revenues.

■ Partner can create scheduled revenues and use the charts view to see data graphically.

End User Forecast Scenario

■ Partner creates a standard forecast as if he or she were part of the sales force, WW Sales.

■ Partner makes adjustments and submits the forecasts to his or her appropriate internal partner manager.

■ Partner manager creates his or her own forecast.

■ Partner manager reviews, and adjusts the partner's forecast (which is automatically pulled into the partner manager's forecast), and submits it.

For more information, see *Siebel Partner Relationship Management Administration Guide*.

Partner Forecast Option II: Triggered by Partner Manager

In some instances, a partner's revenues are a large part of a company's revenues and the company needs to be more proactive in managing these revenues, measuring the partners, and allocating resources to the channels partners.

Forecast Requirements

Company needs to incorporate partner opportunities and revenues into forecasts using an internal source, such as a partner manager, to minimize partner's responsibilities.

Administrator Usage Scenario

The administrator defines the partner forecast series. The Auto Forecast Search Spec is set up as follows: [Partner] IS NOT NULL OR [Opportunity Primary Organization Partner Flag] = 'Y'. For more information, see *Siebel Partner Relationship Management Administration Guide*. Then, the administrator makes sure the partner manager is associated with the forecast and that the partner manager's positional hierarchy rolls up correctly for the forecast process.

End User Revenue Scenario

■ Partner revenues are entered by the partner manager or imported into the Siebel application.

■ Partner manager then maintains and manage the partner specific revenues in the Partner > Revenues view or the Account or Opportunity > Revenues view.

End User Forecast Scenario

■ Partner manager can create his or her partner forecast or sales forecast and the partner revenues are automatically pulled into the forecast.

■ Partner manager can review, adjust, and submit the forecast to his or her manager.

For more information, see *Siebel Partner Relationship Management Administration Guide*.

Opportunity Product Forecasting

A company needs to forecast both opportunity and product revenues related to opportunities, but only wants to see forecast details by opportunity.

Administrator Usage Scenario

The administrator defines an opportunity product forecast series. The Auto Forecast Search Spec is set as follows: [Product] IS NOT NULL and [Calculated Primary Flag] = 'N'. This search pulls product revenue line items that have a product indicated into the forecast.

End User Revenue Scenario

■ Create a new opportunity.

■ Associate and create product revenue line items using either the New Record command, revenue scripts, or revenue plans.

■ Use the Revenues list or spreadsheet views to edit and maintain product revenues (add quantity, cost, margin, price, and product line).

■ Use revenue charts and reports to graphically display data and to perform ad hoc analysis. For example, create charts and reports with the parameters revenue by opportunity or quantity by opportunity.

End User Forecast Scenario

■ Create an opportunity product forecast.

■ In the Details view, use the spreadsheet and chart views to evaluate and adjust product revenues.

■ Use charts and reports to view product revenues by opportunity and to see aggregates of product quantity and revenue by opportunity.

- Use queries to view live forecast details by opportunity. Preconfigured, these queries are set up to query by product.

- Adjust and submit forecasts.

NOTE: To rollup total quantity, the administrator needs to expose the quantity rollup in the total forecast. This is a simple configuration procedure. Also to use the forecast queries to filter opportunities, the administrator needs to configure this.

Weighted Average—Expected Revenue Forecast

End users often have a large set of opportunities or products and want to manage total forecast by evaluating the probability of each deal.

Forecast Requirements

The company wants to perform expected value forecasting using revenue, probabilities (driven by sales stages), and expected revenue.

Administrator Usage Scenario

The administrator defines an expected revenue forecast series. The forecast series search definition depends on the specific data need. Critical to the success of this method is the need for the sales operations team to clearly define the following:

- Proper sales stages.

- The criteria necessary to move with the next sales stage.

- The probabilities that should be associated with each sales stage. Sales operations need to modify the probabilities as the process and market environment change.

- A method for managers and sales representatives to keep these sales stages accurate.

End User Revenue Scenario

- Create a new opportunity or revenue items.

- Associate the proper sales stage with each opportunity or revenue item. The probabilities should be automatically created and the expected revenue is automatically calculated.

End User Forecast Scenario

■ End user creates a new expected revenue forecast which automatically pulls in the correct revenues with his or her probabilities, sales stages, and expected revenues.

■ User adjusts and submits forecast.

Common High-Level Forecast Usage Scenarios

Forecasting User Properties $\quad$ C

The appendix lists the user properties available for Siebel Forecasting.

Forecasting User Properties

Forecasting user properties are found in Siebel Tools. For more information about user properties, see *Siebel Tools Reference*.

CAUTION: Some Siebel Forecasting user properties are for internal use only. Adjusting user properties marked for internal use can affect the behavior of adjustments. Internal use only user properties should not be modified. They are included in this appendix for informational purposes only.

Table 7 describes the user properties associated with the business component: Forecast 2000 - Forecast.

Table 7.   Forecast 2000 - Forecast

User Property	Value	Comments
Associate: Completion Timeout (Client)	120 (default)	Maximum amount of time (in seconds) to wait on the client for a subordinate's forecast to finish before skipping the association and returning an error.
Associate: Completion Timeout (Server)	1200 (default)	Maximum amount of time to wait (in seconds) on the server for a subordinate's forecast to finish before skipping the association and returning an error.
Associate: Sleep Time Between Attempts	5 (default)	Amount of time to wait (in seconds) between checks for completion of subordinate's forecast.
Forecast Analysis BC	Forecast 2000 - Forecast Item Detail Flat	The business component whose records are displayed in the child applet in the Analysis view, when parent records are selected for comparison.

Table 7.   Forecast 2000 - Forecast

User Property	Value	Comments
Forecast Rollup	[Link Type] = LookupValue ('FCST_FCSTITEM_LIN K_TYPE', 'Own Item') or [Link Type] = LookupValue ('FCST_FCSTITEM_LIN K_TYPE', 'Item')	If active, this search spec is applied on the Forecast Detail BusComp during rollup.
Named Search: Forecast Series Date Range	[Date] > = '&FCST_DATE_LOWER _BOUND' and [Date] < = '&FCST_END_DATE'	If active, this search spec is applied to the Revenue BusComp during forecast creation. This is usually active to make sure that the revenues are within the Forecast Date range.
		If not active, administrators need to modify the Auto and Assoc search specs of the Forecast Series to include similar criteria if they want the revenues that enter the forecast to be limited by date. This search spec (as well as the Auto and Assoc search specs) can use special variables as defined in the Forecast Series and Forecast Series Date BusComps.
Revenue Aggregation Field (N)	Field names on the Forecast 2000 - Forecast Item Detail Flat BusComp	The fields which are aggregated during forecast rollup. Rollup aggregates the forecast details by forecast period, and sums up the fields configured here when creating each summary record.
Skip Existing Forecast Series Date	Y	If enabled, will not show dates for which forecasts of the currently selected series already exist.

Forecasting User Properties

Table 8 describes the user properties associated with the business component: Forecast 2000 - Forecast Item.

Table 8.   Forecast 2000 - Forecast Item

User Property	Value	Comments
Adjustment: Adjustable	Y	Indicates that adjustments are enabled on Forecast Item BusComp.
		An adjustable business component supports the concept of hierarchical information sharing. When a manager modifies a subordinate's record, the changes are made to a copy of the record, not the actual subordinate record. Therefore, changes are not visible to the subordinate.
		Also, the manager's record is visible to the positions above him, for example his change shadows the original record. The record created by the manager is called an *adjustment* of the original.
		If adjustments are disabled, changes are made on the same record and are visible throughout the hierarchy.
Adjustment: Adjustable Field (N)	Field names on the Forecast 2000 - Forecast Item BusComp	Fields which managers can adjust.
		If a field is not configured here, it will appear to be uneditable to managers when they view forecast details included from subordinate forecasts.
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	Used internally.
		Should not be disabled.

Table 8.   Forecast 2000 - Forecast Item

User Property	Value	Comments
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally. Value is the business component which includes information indicating the ownership/level of an adjustment record. This is used to support copy-on-write implementation of adjustments. In Forecasting, the same record is visible in both manager and subordinate forecasts before adjustments and its context is the forecast it is being viewed under. When an adjustment is made, the adjusted record then takes its ownership from its context (the manager's forecast).
Adjustment: Adjustment Context Id Field Name	Owner Forecast Id	Used internally. Field on Context BusComp which indicates position of owner.
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally. Indicates if a record has been adjusted and is used in other methods. For example, it is used for determining if the user can invoke the Unadjust Record method.
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally. Field which stores base record identifier (usually, but not necessarily the value of row_id) that this record is an adjustment for.
Adjustment: Adjustment for Id Matching Field Name	Forecast Item Number	Used internally. Field which, when matched against [Adjustment For Id], determines if a record has been adjusted. This is part of the criteria used in calculating the value of the Adjustment Flag.

Forecasting User Properties

Table 8.   Forecast 2000 - Forecast Item

User Property	Value	Comments
Adjustment: Context BC Position Id Field Name	Owner Position Id	Used internally. Field on the Context BusComp which stores the position of the owner. Because Siebel Forecasting is position-based, this links the user to the forecast record created. The position is used when calculating whether a record is visible.
Adjustment: InterTable	Y	Used internally (default N). Indicates whether this adjustable business component's visibility is determined by an intertable. The code would potentially need to modify the intertable when creating adjustments.
Adjustment: InterTable BC	Forecast 2000 - Forecast/Forecast Item	Used internally. Indicates the business component that sits on the intertable.
Adjustment: InterTable Child Field Name	Forecast Item Id	Used internally. Indicates the field on the intertable that stores the pointer id to this business component.
Adjustment: InterTable Parent Field Name	Forecast Id	Used internally. Indicates the field on the intertable that stores the pointer to the parent (context) business component.
Adjustment: InterTable Update	Y	Used internally. Indicates whether or not the intertable should be updated during adjustments.
Adjustment: Owner Position Id Field Name	Owner Position Id.	Used internally. Field on this business component which stores the owner's Position Id.

Table 8.   Forecast 2000 - Forecast Item

User Property	Value	Comments
Revenue Associate List	Y	When active, the associate applet will show the revenue, and not a standard child business component. It also applies the Associate Search Spec and the Forecast Date Range search when querying the Revenue BusComp.
		When inactive, the behavior defaults to standard association and the business component will be as defined in the associate applet.
Revenue Field Map: < Forecast Item Field >	< Revenue Field >	Maps fields from the Revenue BusComp to the Forecast Item BusComp, which are copied when creating the forecast.
		This is most commonly configured by administrators who have added fields to the Revenue BusComp and want the fields to be carried over in the forecast.

Table 9 describes the user properties associated with the business component: Forecast 2000 - Forecast Item Detail.

Table 9.   Forecast 2000 - Forecast Item Detail

User Property	Value	Comments
Adjustment: Adjustable	Y	Used internally.
Adjustment: Adjustable Field (N)	< Forecast Item Detail field >	See Forecast Item: Adjustable Field (N) in Table 8.
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	Used internally. See Forecast Item: Adjustment Allowed Field Name in Table 8.
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally. See Forecast Item: Adjustment Context BC Name in Table 8.

Forecasting User Properties

Table 9.   Forecast 2000 - Forecast Item Detail

User Property	Value	Comments
Adjustment: Adjustment Context Id Field Name	Owner Forecast Id	Used internally. See Forecast Item: Adjustment Context Id Field Name in Table 8.
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally. See Forecast Item:Adjustment Flag Field Name in Table 8.
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally. See Forecast Item: Adjustment For Id Field Name in Table 8.
Adjustment: Context BC Position Id Field Name	Owner Position Id	Used internally. See Forecast Item: Context BC Position Id Field Name in Table 8.
Revenue Field Map: < Forecast Item Detail Field >	< Revenue Field >	See Forecast Item: Revenue Field Map in Table 8.

Table 10 describes the user properties associated with the business component: Forecast 2000 - Forecast Item Detail Flat.

Table 10.   Forecast 2000 - Forecast Item Detail Flat

User Property	Value	Comments
Adjustment: Adjustable	Y	Used internally. See Forecast Item: Adjustable in Table 8.
Adjustment: Adjustable Field (N)	< Forecast Item Detail Flat field >	See Forecast Item: Adjustable Field (N) in Table 8.
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	Used internally. See Forecast Item: Adjustment Allowed Field Name in Table 8.

Table 10. Forecast 2000 - Forecast Item Detail Flat

User Property	Value	Comments
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally. See Forecast Item: Adjustment Context BC Name in Table 8.
Adjustment: Adjustment Context Id Field Name	Owner Forecast Id	Used internally. See Forecast Item: Adjustment Context Id Field Name in Table 8.
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally. See Forecast Item: Adjustment Flag Field Name in Table 8.
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally. See Forecast Item: Adjustment For Id Field Name in Table 8.
Adjustment: Context BC Position Id Field Name	Owner Position Id	Used internally. See Forecast Item: Context BC Position Id Field Name in Table 8.
Adjustment: Owner Position Id Field Name	Owner Position Id	Used internally. See Forecast Item: Owner Position Id in Table 8.
Adjustment: Force Unadjust Parent BC	Forecast 2000 - Forecast Item	Used internally. When unadjusting this buscomp, the parent buscomp may also need to be unadjusted, e.g. if it drives the visibility of this buscomp.
Adjustment: Force Unadjust Parent BC Id Field Name	Forecast Item Id	Used internally. When unadjusting this buscomp, the field on this buscomp which links to the parent buscomp that it should unadjust.

Forecasting User Properties

Table 10.   Forecast 2000 - Forecast Item Detail Flat

User Property	Value	Comments
Revenue Associate List	Y	See Forecast Item: Revenue Associate List in Table 8.
Revenue Field Map: < Forecast Item Detail Field >	< Revenue Field >	See Forecast Item: Revenue Field Map in Table 8.

Table 11 describes the user properties associated with the business component: Forecast 2000 - Forecast Item DynCol.

Table 11.   Forecast 2000 - Forecast Item DynCol

User Property	Value	Comments
Adjustment: Adjustable	Y	Used internally. See Forecast Item: Adjustable in Table 8.
Adjustment: Adjustable Field (N)	Field names on the Forecast 2000 - Forecast Item buscomp	See Forecast Item: Adjustable Field (N in Table 8).
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	Used internally. See Forecast Item: Adjustment Allowed Field Name in Table 8.
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally. See Forecast Item: Adjustment Context BC Name in Table 8.
Adjustment: Adjustment Context Id Field Name	Owner Forecast Id	Used internally. See Forecast Item: Adjustment Context Id Field Name in Table 8.
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally. See Forecast Item: Adjustment Flag Field Name in Table 8.

Table 11.   Forecast 2000 - Forecast Item DynCol

User Property	Value	Comments
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally. See Forecast Item: Adjustment For Id Field Name in Table 8.
Adjustment: Adjustment for Id Matching Field Name	Forecast Item Number	Used internally. See Forecast Item: Adjustment For Id Matching Field Name in Table 8.
Adjustment: Context BC Position Id Field Name.	Owner Position Id	Used internally. See Forecast Item: Context BC Position Id Field Name in Table 8.
Adjustment: InterTable	Y	Used internally. See Forecast Item: Adjustment InterTable in Table 8.
Adjustment: InterTable BC	Forecast 2000 - Forecast/Forecast Item	Used internally. See Forecast Item: Adjustment InterTable BC in Table 8.
Adjustment: InterTable Child Field Name	Forecast Item Id	Used internally. See Forecast Item:Adjustment InterTable Child Field in Table 8.
Adjustment: InterTable Parent Field Name	Forecast Id	Used internally. See Forecast Item: Adjustment InterTable Parent Field in Table 8.
Adjustment: InterTable Update	Y	Used internally. See Forecast Item: Adjustment InterTable Update in Table 8.
Revenue Associate List		Used internally. See Forecast Item: Revenue Associate List in Table 8.
Revenue Field Map: < Forecast Item Field >	< Revenue Field >	See Forecast Item: Revenue Field Map in Table 8.

Table 12 describes the user properties associated with the business component:
Forecast 2000 - Forecast Series.

Table 12.   Forecast 2000 - Forecast Series

User Property	Value	Comments
Series Subst Var: SERIES_NAME	Name	Special variable available for use in Auto, Assoc, and Date Range search specs. Using this variable, administrators can access the Forecast Series Name.

Table 13 describes the user properties associated with the business component:
Forecast 2000 - Forecast Series Date.

Table 13.   Forecast 2000 - Forecast Series Date

User Property	Value	Comments
Auto-Set Start/ End Dates	N	If enabled, when the user creates a new record and sets the Forecast Date field, Start Date will automatically default to the period that the Forecast Date falls in. Also, if the user is copying a record, the End date will default so that the difference (number of periods) between the source record's start date and end date will be maintained.
Series Subst Var: FCST_DATE_LOW ER_BOUND	Date - Lower Bound	Special variable available for use in Auto, Assoc, and Date Range search specs. Using this variable, administrators can access the lower bound of the Forecast Series Date record, for example the earliest of {History View Date, History Edit Date, Start Date}, some of which can be null.
Series Subst Var: FCST_EFFECTIVE _DATE	Forecast Date	Special variable available for use in Auto, Assoc, and Date Range search specs. Using this variable, administrators can access the Forecast Date.

Table 13.   Forecast 2000 - Forecast Series Date

User Property	Value	Comments
Series Subst Var: FCST_END_DATE	End Date	Special variable available for use in Auto, Assoc, Date Range search specs. Through this variable, administrators can access the End Date.
Series Subst Var: FCST_HISTE_START_DATE	History Edit Date	Special variable available for use in Auto, Assoc, and Date Range search specs. Using this variable, administrators can access the History Edit Date, which can be null. The History Edit Date defaults to History View if defined, otherwise it defaults to Start Date.
Series Subst Var: FCST_HISTV_START_DATE	History View Date	Special variable available for use in Auto, Assoc, and Date Range search specs. Using this variable, administrators can access the History View Date, which can be null. The History View Date defaults to the earlier of {History Edit, Start}.
Series Subst Var: FCST_START_DATE	Start Date	Special variable available for use in Auto, Assoc, and Date Range search specs. Using this variable, administrators can access the Start Date, which cannot be null.

■ When entering user properties or search specs for forecast administration, make sure that the quote symbols (') are not formatted to be directional. The beginning and ending quotations should appear identical. Formatting is automatically done by some editors, for example Microsoft Word, but such formatted quotes are not recognized by the Siebel parser.

■ The "Forecast 2000 - Forecast Item Detail" business component is used internally by the forecast engine, while the "Forecast 2000 - Forecast Item Detail Flat" business component joins both the Forecast Item and Forecast Item Detail business components to form a *flat* view (the Forecast Item BusComp usually stores the non-numeric properties which can be shared by child details). In general, this means that new fields, and user properties referencing that field, should be added to both business components.

Forecasting User Properties

■ The "Forecast 2000 - Forecast Item" business component is used internally by the forecast engine, while the "Forecast 2000 - Forecast Item DynCol" business component is used to display the Forecast Details spreadsheet. Each record in the Forecast Item DynCol business component corresponds to a row in the spreadsheet, with the child forecast details forming the dynamic columns (dates). For information on the dynamic columns user properties, see "Changing the Configuration of Spreadsheet Applets for New Views (Administrator)" on page 72.

Index

Symbols

.cfg file, about changing for mobile
      client   41

A

All and All Across Organization view,
      using   130
analytics, about using to analyze
      forecasts   125
applet
   spreadsheet applet, changing
         configuration of   72
   spreadsheet applet, configuring static
         columns   75
Associate Search Spec, about   51
audience of guide   9
Auto Forecast Search Spec
   about   51
auto-adjust, using   119
auto-forecast, inactivating   69
automatic upgrade feature, about using
      for   27

C

.cfg file, about changing for mobile
      client   41
charts
   forecasts, about using to analyze   125
   revenues, viewing in   98
   tip, for using correct revenues   98
corporate snapshot forecast type, about   18
currencies
   currencies table, about   37

currency exchange rates, about   38
currencies table, using   37
Currency Exchange Rates, setting up   38

D

data migration
   about   27
   data migration utility, about using   27
   data migration utility, using   31
data, minimizing duplication and improving
      performance   26
dates
   moving start and end date
         automatically   82
   overriding in forecasts   105
departmental forecast series
   creating   65
   creating, about   64
detail depth forecast
   adjusting   116
   type, about   17
detail revenues, defined   16

E

employee positions, setting up   39
employee reporting structure
   setting up   39
error message when creating a
      forecast   142
exporting
   business scenario   134
   process example, diagram   135
   revenue data, exporting   139

prerequisites
  See also setup
  currencies table, using   37
  Currency Exchange Rates, setting up   38
  employee positions and reporting
    structure, setting up   39
  Periods table, using   36
  revenue classes and revenue type,
    using   40
  system preferences, setting up   41

Q
queries, affecting Summary view   143

R
recurring revenue, adding   91
reports
  forecasts, about using to analyze   125
  revenue reports, about creating   99
Resonate, about specifying the
    RequestServer parameter   41
revenue spreadsheet
  revenues grouped in rows,
    guaranteeing   97
  viewing   97
revenues
  business scenario   84
  charts, tip for using correct revenues   98
  charts, viewing revenues in   98
  classes, using   40
  data, exporting   139
  importing revenue data   137
  multiple or recurring revenue, adding   91
  My Team's Revenues, reviewing   95
  new revenue, adding to opportunity   89
  reports. about creating   99
  revenue data, automatic update of   29
  revenue item, modifying   96
  revenue items, viewing   129
  revenue plan templates, creating   87
  revenue plan, using   94
  revenue SmartScripts, configuring   86

revenue spreadsheet, viewing   97
reviewing   95
split revenue, setting up   93
spreadsheet, about column types   70
spreadsheet, about configuring   70
spreadsheet, about groups   71
spreadsheet, activating scrolling
  buttons   77
spreadsheet, configuring buttons on   76
spreadsheet, inactivating scrolling
  buttons   77
troubleshooting, not showing up in
  parent account   146
types, using   40
workflow process, example
  (diagram)   85
Revenues screen, about   15
Revise button, about in Siebel 7.0   122
rollup forecast type, about   17
rollups
  about and the Forecasts screen   114
  defined   16

S
sales organization
  All and All Across Organization views,
    using   130
  matrixed sales organization
    overview   127
  My Team's Opportunities view, changing
    visibility   128
  My Team's Revenues view, using   129
  overlay sales managers. adding to sales
    team   131
search
  specification testing   52
  specifications, common search specs
    (table)   52
  specifications, list of   51
setup
  See also prerequisites
  Associate Search Spec, about   51
  Auto Forecast Search Spec, about   51

V
visibility

modes, table of   50
opportunity visibility, changing   128