



# **Siebel Forecasting Guide**

Siebel 2018

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# Contents

## **Chapter 1: What's New in This Release**

## **Chapter 2: Overview of Forecasting**

About Siebel Forecasting 11

Forecasting Terms 12

Key Features of Siebel Forecasting 12

About Forecasting Screens 14

About Types of Forecasts 15

## **Chapter 3: Getting Started with Siebel Forecasting**

About Forecasting Requirements 17

About Forecasting Process Design 17

Guidelines for Improving Forecasting Performance 20

## **Chapter 4: Forecasting Migration**

About Forecasting Migration 23

    About the Automatic Upgrade Feature 23

    About the Data Migration Utility 24

Upgrading Forecasting Automatically 24

Upgrading Forecasting Using the Data Migration Utility 25

## **Chapter 5: Forecasting Prerequisites**

About Using the Periods Table in Forecasting 29

About Using the Currencies Table in Forecasting 30

About Setting Up Currency Exchange Rates for Forecasting 31

About Using Units of Measurement in Forecasting 31

About Units of Measurement and Product Definitions 32

Setting Up Units of Measurement Conversion for Forecasting 32

About Setting Up Employee Positions and Employee Reporting Structure for Forecasting 33

- About Revenue Classes and Revenue Types 33
- About Forecasting System Preferences 34
  - Forecast: Auto-Forecast System Preference 34
  - Forecast: Use Server System Preference 36

## **Chapter 6: Setting Up Forecasting**

- About Forecast Series 37
- Scenario for Setting Up Forecasting 38
- Creating a Forecast Series 39
  - Creating Search Specifications for Forecast Series 42
  - Defining Forecast Series Dates 43
  - Adding Forecast Series Participants 45
  - Adding Forecast Series Organizations 46
  - Adding Aggregation Levels 46
  - Adding a Custom Field for Aggregation 47
  - Moving Forecast Dates Ahead Automatically 49
  - About Copying a Forecast Series 49
- Types of Forecast Series 49
  - Creating a Personal Forecast Series with Details 50
  - Creating a Personal Forecast Series without Details 51
  - Creating a Standard Personal Forecast Series 54
  - Creating a Global Forecast Series 55
  - Creating a Departmental Forecast Series 56
  - Creating a Hybrid Forecast Series 58
  - Setting Up Customer Adaptive Forecasting 58
  - About Creating a Partner Forecast Series 59
- Deactivating Auto-Forecast 59
- About Configuring Revenue and Forecast Spreadsheets 60
  - Modifying Spreadsheet Applets for Forecasting 61
  - Configuring Spreadsheet Scrolling Buttons for Forecasting 64
  - Adding a Dynamic Column to the Spreadsheet 67

## **Chapter 7: Revenues**

- About Revenues 69
- About Opportunities, Accounts, and Products 70
- Scenario for Using Revenues 70
- About Configuring Revenue SmartScripts 71
- Creating Revenue Plan Templates 72

Adding a New Revenue to an Opportunity (End User)	73
Adding Multiple or Recurring Revenues Using SmartScripts (End User)	74
Adding a Split Revenue (End User)	75
Using a Revenue Plan (End User)	75
Reviewing Revenues (End User)	76
Modifying a Revenue Item (End User)	77
Viewing the Revenue Spreadsheet (End User)	77
Using Revenue Charts for Reporting (End User)	78
About Using Revenue Reports (End User)	78
About Distinguishing Between Revenues (End User)	78

## **Chapter 8: Forecasting (End User)**

Scenario for Forecasting	79
Scenario for Forecasting - Product Quantity Forecasting	80
Setting a Default Unit of Measurement	80
Creating a Forecast	81
Adding Forecast Details	82
Adding Ad-Hoc Revenue Line Items to a Forecast	83
Viewing Forecasts	84
Viewing Forecast Details	85
Viewing the Forecast Summary	85
Viewing a Subordinate's Forecasts	86
Viewing and Creating Subordinate's Forecasts Remotely	86
About Forecast Adjustments	86
Adjusting a Detail Depth Forecast	87
Adjusting a Summary Depth Forecast	88
Adjusting a Standard Depth Forecast	89
Auto-Adjusting a Forecast	89
Unadjusting a Forecast	90
Adjusting a Subordinate's Forecast	90
API Driven Forecasting	91
Submitting a Forecast	91
Rolling Up a Forecast	91
Refreshing a Forecast	92
Rejecting a Subordinate's Forecast	94

Updating Revenues from a Forecast 94  
Updating a Forecast with a Revenue Item 95  
About Analyzing Forecasts 96

## **Chapter 9: Matrix Sales Organization**

About the Matrix Sales Organization 97  
About Changing the Visibility of My Team's Opportunities View 98  
About Using the My Team's Revenues View (End User) 98  
About Using the All and All Across Organization Views (End User) 98  
About Adding Overlay Managers to the Sales Team (End User) 99

## **Chapter 10: Importing and Exporting Forecast Information**

Scenario for Importing and Exporting 101  
Exporting Forecast Data (End User) 101  
Importing Revenue Data (End User) 102  
Exporting Revenue Data (End User) 103  
About Updating Predefined Mapping in the Revenue Import Process 103

## **Chapter 11: Troubleshooting Forecasting and Revenues**

Troubleshooting Forecasting and Revenues 105

## **Appendix A: Common High-Level Forecast Usage Examples**

Product Quantity Forecasting 109  
Opportunity Forecasting 111  
Service Forecasting 113  
Product Level Forecasting 114  
Cost-Margin Forecasting 115  
Worst, Expected, Best (WEB) Forecasting 116  
Partner Forecasting Option I: Partner Portal 117  
Partner Forecasting Option II: Triggered by Partner Manager 118  
Opportunity Product Forecasting 119  
Weighted Average—Expected Revenue Forecasting 120  
Global Account or Product Forecasting 121

Indirect Sales Forecasting	121
Forecast Summary Spreadsheets	123
Last Forecast Adjustment Amounts	124

## **Appendix B: Forecasting User Properties**

About Forecasting User Properties	125
Forecast 2000 - Forecast User Properties	126
Forecast 2000 - Forecast Item User Properties	128
Forecast 2000 - Forecast Item Detail User Properties	131
Forecast 2000 - Forecast Item Detail Flat User Properties	132
Forecast 2000 - Forecast Item DynCol User Properties	134
Forecast 2000 - Forecast Series User Property	136
Forecast 2000 - Forecast Series Aggregation User Property	136
Forecast 2000 - Forecast Series Date User Properties	137

## **Appendix C: API Driven Forecasting**

About API Driven Forecasting	139
Forecast 2000 - Forecast Service	139
Forecast 2000 - Forecast Service Business Service Methods	140
Forecast 2000 - Forecast Service Business Service Method Arguments	140

## **Index**





# 1

## What's New in This Release

### **What's New in Siebel Forecasting Guide, Siebel 2018.**

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

**NOTE:** Siebel 2018 is a continuation of the Siebel CRM version 8.1/8.2 release.

### **What's New in Siebel Forecasting Guide, Siebel Innovation Pack 2017, Rev. A.**

This guide has been updated to correct or remove obsolete product and component terms.

**NOTE:** Siebel Innovation Pack 2017 is a continuation of the Siebel CRM version 8.1/8.2 release.



# 2

## Overview of Forecasting

This chapter provides an introduction to Oracle's Siebel Forecasting including a summary of its key features and the screens involved in forecasting. It includes the following topics:

- ["About Siebel Forecasting" on page 11](#)
- ["Forecasting Terms" on page 12](#)
- ["Key Features of Siebel Forecasting" on page 12](#)
- ["About Forecasting Screens" on page 14](#)
- ["About Types of Forecasts" on page 15](#)

### About Siebel Forecasting

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, that is, snapshots of live revenue records, and to then analyze and evaluate those saved forecasts over time.

The total forecast process encompasses a range of activities across many organizations. The business requirements, and the approaches to forecasting can vary dramatically from time-to-time and division-to-division. While forecasting can involve only a simple query in some companies, it can be a planning process in other companies. Forecasting can be very high level in some organizations, and very detailed in other organizations. For example, 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](#). You can use this link to retrieve revenue data from forecast items.

## Forecasting Terms

Table 1 defines some terms that can 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 date to end date, for example, quarterly.
Interval period	The period between creation of new forecasts; their frequency, for example, weekly.
Product quantity forecasting	Forecasting in which forecasts are aggregated according to specified fields, where each field is assigned a particular hierarchical level. Also known as <i>multidimensional revenue forecasting</i> .
Roll up	To sum details and synchronize totals with summaries.
Summary period	A length of time into which revenues are aggregated for each forecast in a series. The default summary period is the month.
Summary revenue	The sum of revenues in a forecast period. Each summary period has one summary revenue amount.
Total forecast revenue	The sum of each summary record. Each summary period is a summary record period.

## Key Features of Siebel Forecasting

Siebel Forecasting allows you to:

- **Report revenues by account, opportunity, product, product line, employee, partner, division, organization, or project.** Users can add revenue data in a number of screens. For more information, see [Chapter 7, "Revenues."](#)
- **Aggregate revenues by certain groups or dimensions, such as account, product line, or product.** Siebel Forecasting provides a *product quantity forecasting* feature (also known as *multidimensional forecasting*) that allows the forecasting administrator to specify fields by which forecasts are aggregated. These fields are used to group the revenues into a hierarchy in the Summary view of forecasts. For example forecasts can be grouped by account by product line by product. This allows the creation of granular forecasts that fit business requirements. For more information, see ["Adding Aggregation Levels" on page 46](#) and ["Viewing the Forecast Summary" on page 85](#).
- **Refresh forecasts with updates from subordinate forecasts.** Often, managers must pull revenue data from their subordinates' pipeline to create their forecast. Managers can initiate an update of their aggregate forecast, and automatically retrieve the updates that the subordinates have made since the last revision of the manager's forecast. For more information, see ["Refreshing a Forecast" on page 92](#).

- **Create snapshots of revenue information over time for historical analysis.** Siebel Forecasting provides access to historical information from earlier forecasts. For more information, see [“Defining Forecast Series Dates” on page 43.](#)
- **Perform real-time analysis of revenues using charts and reports.** Users can analyze their forecasts by using a chart view, or by using reports. For more information, see [“About Analyzing Forecasts” on page 96.](#)
- **Access projected margins, cost, best case, and worst case estimates.** Users can create forecasts that include the costs associated with an opportunity, the calculated margin, and best case and worst case estimates of revenues. For more information, see [“Creating a Forecast” on page 81,](#) [“Cost-Margin Forecasting” on page 115](#) and [“Worst, Expected, Best \(WEB\) Forecasting” on page 116.](#)
- **Use multiple currencies and multiple organizations.** Siebel Forecasting supports the use of multiple currencies across different divisions of an organization. For more information, see [“About Using the Currencies Table in Forecasting” on page 30.](#)
- **Define conversions between different units of measurement.** Companies with global business models can use different units of measurement for the same product in different parts of their organization. Forecast participants can define a default unit of measurement for their forecasts and units of measurement are converted to the manager’s preferred unit of measurement when forecasts are rolled up. For more information, see [“About Using Units of Measurement in Forecasting” on page 31](#) and [“Setting Up Units of Measurement Conversion for Forecasting” on page 32.](#)
- **Perform auto-forecasts for absentee employees when appropriate.** Siebel Forecasting supports the automatic creation of subordinate forecasts when a manager creates a forecast. For more information, see [“Forecast: Auto-Forecast System Preference” on page 34.](#)
- **Create recurring revenues by account, project, and opportunity.** Users can define revenue templates recurring revenues by using SmartScripts. For more information, see [“Adding Multiple or Recurring Revenues Using SmartScripts \(End User\)” on page 74.](#)
- **Create revenues using revenue templates.** Administrators can create revenue templates for sales representatives and managers. Multiple revenue items can be generated using the revenue templates for a week, month, year, and so on. For more information, see [“Creating Revenue Plan Templates” on page 72.](#)
- **Update revenues in the Revenue screen.** Users can update live revenue records with the current forecast updates. For more information, see [“Updating Revenues from a Forecast” on page 94.](#)
- **Update revenues with details.** Users can update a forecast with a revenue item to apply the most recent adjustment in the live revenue records. For more information, see [“Updating a Forecast with a Revenue Item” on page 95.](#)
- **Split credit for sales revenue across multiple employee positions.** Siebel Forecasting supports forecasting for revenues that are split between multiple sales representatives. For more information, see [“Adding a Split Revenue \(End User\)” on page 75.](#)
- **Perform matrix revenue analysis and forecasting.** Siebel Forecasting supports analysis and forecasting in sales teams that span organizations, groups, and divisions. For more information, see [Chapter 9, “Matrix Sales Organization.”](#)

- **Import and export data from the Revenues screen.** Users can import and export revenue data and also export data from the Forecasts screen. For more information, see [Chapter 10, "Importing and Exporting Forecast Information."](#)
- **Add an ad-hoc revenue line item to a forecast.** Managers and sales representatives can add an ad-hoc revenue line item to a forecast, which is reflected both in the pipeline revenue and the forecast rollup. For more information, see ["Adding Ad-Hoc Revenue Line Items to a Forecast" on page 83.](#)
- **Create a forecast-specific hierarchy.** Managers and sales representatives can define a forecast-specific hierarchy where they can roll up and submit forecasts to managers outside of their reporting hierarchy. For more information, see ["Setting Up Customer Adaptive Forecasting" on page 58.](#)
- **API driven forecasting.** Users can generate a forecast through batch mode work flow. For more information, see ["API Driven Forecasting" on page 91.](#)

## About Forecasting Screens

The following screens are used in Siebel Forecasting:

**Administration - Forecast screen.** Includes a Forecast Administration view, which allows you to create and define forecast series, and a Revenue Templates view, which allows you to create and define revenue templates. In the Forecast Administration view there are tabs for:

- **Forecast Series Dates.** Includes the dates on which each forecast of a series occurs.
- **Forecast Series Participants.** Includes the employees who participate in a forecast series.
- **Forecast Series Organizations.** Includes any organizations that participate in a forecast.
- **Aggregation.** Includes the aggregation fields and aggregation levels that are used in the Summary view of a forecast.

**Revenues screen.** Includes every revenue to which you have access. These revenues can 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.

**Forecasts screen.** Includes your forecasts of revenues over time. From the Forecasts screen you can create new forecasts, adjust forecasts, unadjust forecasts, reject forecasts, submit forecasts, and perform analysis on your forecasts. A forecast includes the following views:

- **Summary.** Includes summed totals for the periods specified in the forecast series, grouped according to the aggregation levels defined for the forecast series. You can view the summary as a list, as a tree structure, or as a chart.
- **Details.** Includes revenue items queried into the forecast and in the case of a manager's forecast, summary amounts for subordinates. You can view the details as a list, as a spreadsheet, or as a chart.
- **Subordinates.** Includes a manager's subordinate's forecasts.

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

## About Types of Forecasts

You can perform a number of different types of forecasts. Siebel Forecasting allows you to define summary depth, detail depth, or standard 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 users' final adjustments must be completed in the Details view or the Summary view in the Forecasts screen. It also determines whether all subordinate line item details are visible to the manager or just the aggregate data. You can also define whether a forecast is a rollup, snapshot, or hybrid forecast.

### About Detail, Summary, and Standard Forecast Types

A forecast can be detail depth, summary depth, or standard 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, users need to make sure that adjustments are made in the Details view of the forecast. After adjusting the details, users must select Rollup to recalculate the modified forecast. To view the forecast details by periodic summary, use the Summary tab. Detail depth forecasts have a value of Revenue Detail in the Detail Depth field.

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 the detailed line item records that they own and the summary records of direct subordinates from the Details view in the 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. Summary depth forecasts have a value of Summary Only in the Detail Depth field.

In a *standard depth* forecast, the manager can see a detailed view of all subordinate forecasts, including a roll up of any adjustments made from the Summary view. In this scenario, managers and sales representatives can see all revenue records in the Detail view, and Summary records in the Summary view. However, they can make revenue adjustments in the Summary view only. Standard depth forecasts have a value of Standard in the Detail Depth field.

For all forecast types (detail depth, summary depth, and standard depth), the Total Adjustment By Subordinate field displays a summation of the total revenue adjustments made by all subordinates in the forecast.

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

### About 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" on page 50](#).

A *corporate snapshot* allows you to avoid forecasting altogether. It provides you with an instant way of seeing your revenues over time. A global forecast is an example of a corporate snapshot. For more information, see ["Creating a Global Forecast Series" on page 55](#).

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 the team to create individual forecasts, but another does. A hybrid forecast allows both managers to forecast their own way; snapshot and rollup, and still roll up to their VP. For more information, see [“Creating a Hybrid Forecast Series” on page 58](#).



# 3

## Getting Started with Siebel Forecasting

This chapter discusses the issues in planning your use of Siebel Forecasting based on the forecasting requirements. Use this chapter in combination with *Siebel Applications Administration Guide*.

This chapter includes the following topics:

- [“About Forecasting Requirements” on page 17](#)
- [“About Forecasting Process Design” on page 17](#)
- [“Guidelines for Improving Forecasting Performance” on page 20](#)

### About Forecasting Requirements

Siebel Forecasting provides you with many implementation options. With the importance that forecasting plays in most organizations, and the variety of implementation choices available, you must fully understand these choices. 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.

### About Forecasting Process Design

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 can 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 can 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 can 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 can vary from one group to another. For instance, the sales department wants to identify potential lags in revenue to redeploy resources faster. Manufacturing wants to avoid production bottlenecks by adequately predicting demand. Professional services needs to use their internal resources more efficiently. Product management wants to provide directors with visibility into the sales pipeline to better drive product specific sales.

After 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 has access to the appropriate level of information. You can set up a revenue query for sales that 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 include the right level of information for the users involved.

The product quantity forecasting capability of Siebel Forecasting allows you to create forecasts that display information in a hierarchical fashion. For example, you can break down revenues by product line and by product. The kind of information that you want to display in the forecasts determines the aggregation levels that you use for each field (dimension) when you create a forecast series.

■ **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 must 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 their 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.

For example, a sales representative wants to include \$100,000 worth of opportunities in a forecast, even though the representative is only wants to commit to \$50,000 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 wants to forecast do not agree.

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

# Guidelines for Improving Forecasting Performance

This topic provides guidelines for improving forecasting performance. 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, consider the following performance objectives for forecasting:

- [“Minimize the Number of Records in the Forecasting Table” on page 20](#)
- [“Minimize the Number of Participants” on page 20](#)
- [“Minimize the Duplication of Data” on page 20](#)
- [“Minimize the Complexity of the Forecasting Process” on page 21](#)
- [“Minimize the Number of Aggregation Levels” on page 21](#)

## Minimize the Number of Records in the 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. For example, a customer with hundreds of thousands of detailed revenue line items wants 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 creates 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 subordinate forecasts, 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.

### **Minimize the Number of Aggregation Levels**

Consider whether you can decrease the number of aggregation levels. The more aggregation levels that you define when creating a forecast series, the greater the impact on performance.



# 4

## Forecasting Migration

This chapter discusses how to migrate from Siebel Sales 6.x to Siebel Forecasting 8.1. It includes the following topics:

- [“About Forecasting Migration” on page 23](#)
- [“Upgrading Forecasting Automatically” on page 24](#)
- [“Upgrading Forecasting Using the Data Migration Utility” on page 25](#)

### About Forecasting Migration

If you are migrating data from a 6.x version of Siebel Sales, you need to determine whether:

- To use the automatic upgrade feature, or,
- To use the data migration utility.

**NOTE:** Forecasting migration only applies when you are upgrading your Siebel application from 6.x versions to 7.x or later versions.

The following topics describe the Automatic Upgrade feature and the data migration utility. Read both sections carefully before upgrading to Siebel 8.1.

### About the Automatic Upgrade Feature

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

## About the Data Migration Utility

Some Siebel customers need to also run the data migration utility provided with the Siebel installation. This utility migrates information from old forecasting tables into new revenue tables. You must use the data migration utility 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

## Upgrading Forecasting Automatically

In previous versions of Siebel Business 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 Business 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 older versions of Siebel Business Applications, opportunity products were stored in the opportunity product intersection table. Since 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 Business Applications, decide whether the revenues for nonprimary sales team members must be upgraded. 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 is not always 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 8.1, 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 Forecasting Using the Data Migration Utility

The data migration utility 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, 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:

```
ssl cshar.dll
ssl cfom.dll
sscfdm.dll
sscfcmn.dll
sscacmbc.dll
ssl csym.dll
ssl cosd.dll
```

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

- 2 If necessary, 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 your Siebel application, or run the following SQL statement:

```
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 Oracle 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 [/hel p]
```

The following table describes each of these:

Switch	Description	Notes
<i>/u username</i> <i>/p password</i>	Required. System Administrator's username and password.	These are the same username and password that you use to log on to the Siebel server database.
<i>/d datasource</i>	Required. The name of the datasource.	
<i>/c cfgFile</i>	The name of the configuration file.	
<i>/l language</i>	The language being used.	
<i>/m masterForecast</i> <i>/date date</i>	Required. Specify which forecasts to upgrade, using <i>masterForecast</i> and <i>date</i> as search specifications.	1. <i>masterForecast</i> must be the name of a valid master forecast. 2. <i>date</i> must be a valid date. The format for the date field is: MM/DD/YYYY. For example, 01/05/2007.
<i>/postn postn</i>	Specifies a position to upgrade.	To specify more than one position, use <i>/sspec</i>  <i>/postn</i> takes priority over <i>/login</i>
<i>/login login</i>	Specifies a login to upgrade.	Applied in conjunction with other search specifications.
<i>/sspec searchSpec</i>	Limits the forecast records by search specification.	<i>searchSpec</i> must be a valid search specification for a personal forecast.
<i>/r revision</i>	Limits the forecast records by revision.	<i>revision</i> can be a valid number, or one of {Earliest Latest}.
<i>/submitted</i>	Limits the forecast records to those that have been submitted.	

Switch	Description	Notes
/Opportunity /OpportunityProduct /OpptyProduct	Specifies the business component to upgrade.	<p>1. Only the specified business components are upgraded.</p> <p>2. You can upgrade a child business component without upgrading its parent. For example, Opportunity Product without Opportunity.</p>
/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 <i>period</i> /UseStartDate /Desc <i>Description</i>	Specify how to create Revenues.	<p>1. <i>period</i> must be a valid period type, for example, Month or Year.</p> <p>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.</p> <p>3. If /Desc is specified, the revenues are created with <i>description</i> as their description.</p>
/help	Lists the parameters described here.	

- 5 The data migration utility takes a few minutes to run. Some messages can appear while the upgrade is running. For example, sometimes messages similar to the following appear:
- > "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"



# 5

## Forecasting Prerequisites

This chapter describes the prerequisites that must be satisfied before you set up Siebel Forecasting. It includes the following topics:

- [“About Using the Periods Table in Forecasting” on page 29](#)
- [“About Using the Currencies Table in Forecasting” on page 30](#)
- [“About Setting Up Currency Exchange Rates for Forecasting” on page 31](#)
- [“About Using Units of Measurement in Forecasting” on page 31](#)
- [“About Units of Measurement and Product Definitions” on page 32](#)
- [“Setting Up Units of Measurement Conversion for Forecasting” on page 32](#)
- [“About Setting Up Employee Positions and Employee Reporting Structure for Forecasting” on page 33](#)
- [“About Revenue Classes and Revenue Types” on page 33](#)
- [“About Forecasting System Preferences” on page 34](#)

### About Using the Periods Table in Forecasting

The Periods table includes lengths of time such as weeks, months, quarters, and years. While some organizations use standard calendar reporting periods, other organizations use fiscal reporting periods. Siebel Business 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, create enough periods to allow at least a few months of forecasting without having to go back into the Periods table every time someone needs to forecast.

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

Typically, the smaller lengths of time, such as months, fit into the larger lengths of time, 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 can look.

Table 2. Example Forecasting Periods

Period Name	Period Type	Start Date	End Date
Jan 04	Month	1/1/2004	1/31/2004
Feb 04	Month	2/1/2004	2/28/2004
Mar 04	Month	3/1/2004	3/31/2004
Q1 04	Quarter	1/1/2004	3/31/2004
Y 04	Year	1/1/2004	12/31/2004

While there are many other ways to establish periods in Siebel Business 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 *Siebel Applications Administration Guide*.

## About Using the Currencies Table in Forecasting

The currencies table includes each of the currencies that an organization refers to when creating opportunities, quotes, orders, and forecasts in Siebel Business 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 can typically manage opportunities with German companies in the euro currency. That same employee can occasionally manage opportunities with British companies in British pounds. The employee's divisional currency is the euro, but the employee can also create opportunities denominated in British pounds.

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 entered by the user. Native currencies are converted automatically for 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 *Siebel Applications Administration Guide*.

## About Setting Up Currency Exchange Rates for Forecasting

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 Business Applications are assumed to be on a 1:1 basis. For additional information about setting up exchange rates, see the chapter that discusses ongoing administrative tasks in *Siebel Applications Administration Guide*.

## About Using Units of Measurement in Forecasting

Companies with global business models often sell the same product in different geographies using different units of measurement. For example, cable can be sold by the yard in the U.S and the same cable can be sold by the meter in Germany.

As another example, chemical and oil and gas companies would require forecasting volumes for production planning purposes. Sales representatives can forecast product revenues with appropriate units of measurement for their customers. For volumes, the most common volume units are gallons, quarts, and liters, but Siebel Forecasting allows you to define other units of measurement.

Because, for example, the volume or length for a single product can be forecast in different units of measurement, it is necessary to convert quantities to the same unit of measurement before they can be rolled up. The Administration - Data, then Unit of Measurement Conversion view allows you to define how the units of measurement in a particular category are converted to the other units of measurement in that category, based on the conversion factor set for the category. For more information, see [“Setting Up Units of Measurement Conversion for Forecasting” on page 32](#).

Each participant in a forecast series must set up their preferred units of measurement in each category, as described in [“Setting a Default Unit of Measurement” on page 80](#). When forecasts are rolled up, the values are converted to the unit of measurement specified by the manager to which the forecasts are rolled up. For example, if a manager has two subordinates whose preferred units of measurement are gallons and quarts respectively, the forecasts are converted to use the manager’s preferred unit of measurement, say gallons, when rolling up occurs.

If you need to define new units of measurement or new categories of UoM, you must define them in the Administration - Data, then, then List of Values view. You create units of measurement and categories with Type UOM\_CD. For new units of measurement, select the appropriate category from the Parent LIC field. For new categories, the Parent LIC field must be blank.

## About Units of Measurement and Product Definitions

For products that use a unit of measurement, you must select the appropriate value in the Unit of Measure field in the Administration - Product, then Product Definitions view.

However, Siebel Forecasting can use units of measurement such as kilometer, meter, and mile that are not available in the Product Definitions view. For such units of measurement, the values must be defined for both the LOV Type UNIT\_OF\_MEASURE, and the LOV Type UOM\_CD. For example, to define values for kilometer, meter, and mile, navigate to the Administration - Data, then List of Values view, and create the following records for Type UNIT\_OF\_MEASURE:

Table 3. LOV type UNIT\_OF\_MEASURE

Type	Display Value	Language-Independent Code	Language Name	Parent LIC
UNIT_OF_MEASURE	Meter	Meter	English-American	One-Time
UNIT_OF_MEASURE	Miles	Miles	English-American	One-Time
UNIT_OF_MEASURE	Kilometer	Kilometer	English-American	One-Time

## Setting Up Units of Measurement Conversion for Forecasting

To convert between different units of measurement you must set up the appropriate conversion data in the Administration - Data, then Unit of Measurement Conversion view. A number of conversions in the categories Length, Volume, and Weight are supplied:

- **Length.** Conversions between the Mile and Kilometer and Meter.
- **Weight.** Conversions between the Pound and Kilogram and Gram.
- **Volume.** Conversions between the Gallon and Quart and Liter.

You must define the other conversions that you require. To define a unit of measurement conversion, complete the steps in the following procedure.

### *To create a unit of measurement conversion*

- 1 Navigate to the Administration - Data screen, Unit of Measurement Administration, and then Unit of Measurement view.
- 2 Create a new record and complete the required fields

Some fields are described in the following table.



Field Name	Description
Category	Defines the category of unit of measurement used. Select from Length, Volume, and Weight.  The category selected determines the units of measurement available in the From UoM and To UoM fields.
From UoM	The unit of measurement from which to convert.
To UoM	The unit of measurement to which to convert.
Conversion Factor	The factor used in the conversion of units of measurement.

**NOTE:** The Preview field in the Unit of Measurement form displays values according to the values selected in the From UoM, To UoM and Conversion Factor fields.

## About Setting Up Employee Positions and Employee Reporting Structure for Forecasting

Siebel Forecasting relies on employee positions and positional hierarchies when creating a forecast. The forecast participants 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 and on the organization to which they belong.

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

Alternatively, for a forecast of type My Revenues - Indirect Sales, you can define a forecast-specific hierarchy in the Forecast Series Participants view. For more information about defining a forecast-specific hierarchy, see ["Setting Up Customer Adaptive Forecasting"](#) on page 58.

## About Revenue Classes and Revenue Types

An opportunity, account, project, or campaign can be related to many different kinds of revenue at the same time. For instance, an opportunity can have a Booked revenue amount that is realized when the opportunity is closed, and that same opportunity can 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 this can result in data integrity issues. 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 lists of values, see the chapter that discusses working with lists of values in *Siebel Applications Administration Guide*.

## About Forecasting System Preferences

The following system preferences are relevant to forecasting:

- **Forecast: Auto-Forecast.** Creates subordinate forecasts to be used in a rollup forecast, if the subordinates have not created forecasts themselves.
- **Forecast: Use Server Task.** Sends forecast processing requests to the Siebel Server for batch processing. If the value is False, requests are processed in real time.

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

### Forecast: Auto-Forecast System Preference

The value of the Forecast: Auto-Forecast system preference determines whether subordinates' forecasts are created, and whether they are rolled up into a manager's forecast when the manager creates the forecast, as shown in [Table 4](#). The default value is TRUE.

When the Forecast: Auto-Forecast system preference has the value TRUE, a confirmation dialog is displayed to the manager upon forecast creation, only if one or more of the manager's subordinates have not generated their forecast yet. When the manager clicks OK, forecasts are created for the subordinates. If all the subordinates have already generated their own forecast, the confirmation dialog is not displayed.

However, if the Enforce Forecast Creation user property of the Forecast 2000 - Forecast business component is defined and the user property has the value TRUE, the confirmation dialog is not displayed before the forecasts are created for the subordinates. The Enforce Forecast Creation user property is not defined by default.

Table 4. Forecast: Auto-Forecast System Preference and Forecast Generation

Value of System Preference	Status of Subordinates' Forecasts	Behavior		Description
		Confirmation Dialog When Manager Creates Forecast	Forecast Generation	
TRUE	Already created	No confirmation dialog displayed	Manager creates forecast and subordinates' revenues are pulled into manager's forecast	Everything works as expected
TRUE	Not created	Confirmation dialog displayed to manager	<p>If manager clicks Yes in confirmation dialog, forecasts for subordinates are automatically created and their revenues are pulled into the manager's forecast.</p> <p>If manager clicks No, the forecast for subordinates is not created and their revenues are not pulled into the manager's forecast</p>	If the manager clicks No in the confirmation dialog, the forecast status is Incomplete because subordinates' revenue items are not pulled in to the manager's forecast
FALSE	Already created	No confirmation dialog displayed	Manager creates forecast and subordinates' revenues are pulled into manager's forecast	Everything works as expected
FALSE	Not created	No confirmation dialog displayed	Manager creates forecast but subordinates' revenues are not pulled into manager's forecast	The forecast status is Incomplete because subordinates' revenue items are not pulled in to the manager's forecast

## Forecast: Use Server System Preference

The value of the Forecast: Use Server system preference determines whether forecasts are generated on a separate Siebel component in the background as a batch job, or whether they are generated locally. This allows the client to work while the forecast is generated. The effect of this system preference varies for the different types of Siebel client as follows:

- **Mobile clients connected to a local database.** The system preference is not applicable.
- **Mobile clients connected to the server.** For these clients, the system preference determines whether the forecast is run on the Siebel Server. By default, it is set to FALSE. If set to TRUE, you can run forecasts on the server instead of the client when your mobile users are operating in a connected mode.
- **Web Clients.** For these clients, the forecast is always generated on the Siebel Server, but the system preference determines whether the forecast is executed on the connected component, that is, the Callcenter OM, or on the Forecast OM:
  - If you set the system preference to False, the forecast is calculated on the Callcenter OM, and therefore the client has to wait until the OM is finished.
  - If you set the preference to True, the forecast is calculated on the Forecast OM and therefore the client can continue working as the job runs in the background as a batch job.

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

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 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 Forecast. 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 is creating corporate snapshots, or forecasts with details, the server component must be enabled.

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

# 6

## Setting Up Forecasting

This chapter contains information about setting up Siebel Forecasting. It includes the procedures that an administrator must perform to create a forecast series, and it discusses the different types of forecast series.

This chapter includes the following topics:

- [“About Forecast Series” on page 37](#)
- [“Scenario for Setting Up Forecasting” on page 38](#)
- [“Creating a Forecast Series” on page 39](#)
- [“Types of Forecast Series” on page 49](#)
- [“Deactivating Auto-Forecast” on page 59](#)
- [“About Configuring Revenue and Forecast Spreadsheets” on page 60](#)

### About 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 that can equal, or 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 can set up two separate forecast series: one series for the sales representatives and the other for manufacturing. The sales forecast series has a weekly frequency, with every sales representative as a participant, and a search specification that finds only opportunity revenue records. The manufacturing forecast series has 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 will end up double-counting, if your company has groups with fairly different requirements, or if you have overlays, consider adding additional forecast series.

## Scenario for Setting Up Forecasting

This scenario gives one example of how to set up forecasting. You can set up forecasting differently, depending on your business model.

The forecast administrator is told to create a number of different forecast series that the company will use for different sets of business requirements. The forecast administrator needs to create a forecast series and include search specifications, forecast dates, forecast participants or organizations, and the required aggregation levels. The aggregation levels specify the fields by which forecasts are aggregated and the hierarchy of aggregation.

The forecast administrator 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.

Spreadsheet views help users to better work with revenues and forecasts. Spreadsheet views are set up automatically in the default Siebel application so that users can view revenue data for revenues and forecasts. To allow 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 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 the different forecast series described herein.

## Creating a Forecast Series

The following procedure describes how to create a forecast series.

### *To create a forecast series*

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 In the More Info form, create a new record and complete the necessary fields. Some fields are described in the following table.

Field Name	Description
Series Name	Typically gives some insight as to how the forecast series is used, what the forecast series includes, or how often it is run.
Detail Depth	Determines whether the user's forecast details are included in the manager's forecast (Revenue Detail, or Standard) or summarized in a set total (Summary Only).  The default value for this field, Summary Only, is the recommended setting for most customers.
Visibility	The visibility mode applied to the Revenue table in the selection of forecast records. Choices are: <ul style="list-style-type: none"> <li>■ My Revenues</li> <li>■ My Team's Revenues</li> <li>■ All Revenues</li> <li>■ All Revenues Across Organizations</li> <li>■ My Revenues - Indirect Sales</li> </ul> These views are described in <a href="#">Table 5 on page 41</a> . The default value for this field is My Revenues.
Interval Period Type	The type of forecast interval period. Choices are: Day, Week, Month, Quarter, and Year. The default type is Month.
Interval	Determines the time between creation of new forecasts of a given series. The value is a number of units of the Interval Period Type.  For example, for the default interval value 1, and the default interval period type, forecasts are created monthly.
Summary Period Type	Determines the summary periods into which revenues are aggregated for each forecast in this series. The choices are based on the period types defined and can include periods from a day to a year. The default type is Month, meaning that the Forecast Summary view shows monthly totals.  For more information about summary periods, see <a href="#">"Viewing the Forecast Summary" on page 85</a> .

Field Name	Description
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 selected.
Public Access	Read-only. When selected, allows each employee within the selected organization to access the forecast series and create a forecast. It is only selected when an organization is added.  For more information about adding an organization, see <a href="#">“Adding Forecast Series Organizations” on page 46.</a>
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 <a href="#">“Creating Search Specifications for Forecast Series” on page 42.</a>
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 user can manually add to a forecast. For more information, see <a href="#">“Creating Search Specifications for Forecast Series” on page 42.</a>
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 can be based on revenue type, revenue class, probability, or any other field on the forecast detail record.  <b>TIP:</b> The Rollup Search Spec is based on fields from the Forecast 2000 -- Forecast Item Detail Flat business component, not Revenue.

**3** Add dates.

You must define the dates required for the forecast.

For instructions, see [“Defining Forecast Series Dates” on page 43.](#)

**4** Add participants or organizations.

You must either define participants or organizations, which provide a useful means of creating forecast series for a large group of participants.

For more information, see [“Adding Forecast Series Participants” on page 45,](#) and [“Adding Forecast Series Organizations” on page 46.](#)

**5** Add the required aggregation levels.

You can set aggregation fields and aggregation levels for Accounts, Products, and Product Line fields. You can also use custom fields if you require fields specific to your business requirements.



For instructions, see [“Adding Aggregation Levels” on page 46](#).

Table 5. Forecast Visibility

Visibility	Description
My Revenues	<p>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.</p>
My Team’s Revenues	<p>This mode allows the forecast access to each revenue record attributed to the 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.</p> <p>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.</p> <p>For more information about creating a departmental forecast series, see <a href="#">“Creating a Departmental Forecast Series” on page 56</a>.</p>
All Revenues	<p>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.</p>
All Revenues Across Organizations	<p>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.</p> <p>For more information about creating global snapshots, see <a href="#">“Creating a Global Forecast Series” on page 55</a>.</p>
My Revenues - Indirect Sales	<p>This mode allows the administrator to define a forecast-specific hierarchy; that is, define which participants will submit their forecasts to which manager. The forecast-specific hierarchy may or may not match the Siebel Position Based Reporting Hierarchy.</p> <p>Use this mode only if the reporting hierarchy for a forecast series is different from the position based reporting hierarchy.</p> <p>For more information about defining a forecast-specific hierarchy, see <a href="#">“Setting Up Customer Adaptive Forecasting” on page 58</a>.</p>

**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" on page 58.

## Creating Search Specifications for Forecast Series

The *Auto Forecast Search Spec* determines which revenue line items are automatically included in 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 is created.

The Auto Forecast Search Spec and the Associate Search Spec can vary from one forecast series to another, and can be based on revenue type, revenue class, probability, or any other field on the revenue record. The 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 user can manually copy into the forecast any revenue record with a Revenue Type 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 users to copy into their forecast some revenue records that did not meet the more restrictive Auto Forecast Search Spec criteria.

The *Rollup Search Spec* determines which detail records are included in the forecast summary.

The Rollup Search Spec can vary from one forecast series to another, and can be based on revenue type, revenue class, probability, or any other field on the forecast detail record.

Rollup Search Spec is used in scenarios where the History View Date and History Edit Date fields are specified in the dates for the forecast series. If when rolling up the forecasted revenue, the user wants to include only those revenues having a close date between the specified Start Date and End Date of the forecast series, the administrator must define the following Rollup Search Spec:

[Detail Date] >= "&FCST\_START\_DATE" and [Detail Date] <= "&FCST\_END\_DATE")

Table 6 shows some common search specifications.

Table 6. Common Forecast Search Specifications

Search Specification	Description
[Committed] = 'Y'	Allows the user to add committed revenue records.
[Committed] = 'Y' and ([Revenue Type] = 'Shipped' or [Revenue Type] = 'Booked')	Allows the user to add committed revenue records with Revenue Types of Shipped or Booked.
[Calculated Primary Flag] = 'Y'	Allows the 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 user to manually add revenue records in which the Partner field is null.
[Product] is NULL	Allows the user to manually add revenue records in which the Product field is null.

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

## Defining Forecast Series Dates

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 user almost always seeing the same range of dates, or rolling, with the 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 [“About Using the Periods Table in Forecasting” on page 29](#)). 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 user to spot trends in opportunity, account, or product-related revenues when creating a forecast.

The Archive Date is the date on which a forecast is deemed to be completed and ready for archival in the data warehouse.

To define dates for a forecast series, complete the steps in the following procedure.

**To define dates for a forecast series**

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 In the Forecast Series list, select the forecast series for which you want to define dates.
- 3 Click the Forecast Series Dates tab.
- 4 In the Forecast Series Dates list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field Name	Description
Forecast Date	The date for which the forecast is 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.
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.
End Date	The end of the date range for a selected forecast. The last date for which revenues are pulled into the 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.
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 actual revenue from the earlier period during the current forecast.
Archive Date	The date on which to freeze a forecast snapshot completely so that the forecast: <ul style="list-style-type: none"> <li>■ Cannot be changed at all after this date</li> <li>■ Can be pulled into the Oracle Business Intelligence data warehouse</li> </ul> In this way, data warehouse reports remain consistent over time. Once a forecast passes its archive date, the forecast is not editable or usable, and the archive date is not editable either.

**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 or click Add Next Date and it automatically moves the forecast date forward according to the defined interval. This only applies if it is set up as such by the Siebel administrator. For information on setting this up, see [“Deactivating Auto-Forecast” on page 59](#).

## Adding Forecast Series Participants

The Forecast Series Participants view lists the employees who will participate in the forecast series. Where the visibility of a forecast series is set to My Revenues - Indirect Sales, the Forecast Series Participants view gives you the option of defining a forecast-specific hierarchy for each participant in the forecast. 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.

## Adding Participants to a Forecast Series

To add participants to a forecast series, complete the steps in the following procedure.

### *To add participants to a forecast series*

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 In the Forecast Series list, select a forecast series.
- 3 Go to the Forecast Series Participants tab.
- 4 Click Add to a new record, as follows:
  - a In the Add Participants dialog box that opens, select the required participants.
  - b Click OK to add the new participants to the Forecast Series Participants list.

**NOTE:** By default, according to the position hierarchy, all participants in a forecast series report their forecasts to their manager; that is, unless a forecast-specific hierarchy is defined for participants in the forecast, as described in the following procedure.

## Defining a Forecast-Specific Hierarchy For Participants in a Forecast Series

To define a forecast-specific hierarchy for participants in a forecast series, complete the steps in the following procedure.

### *To define a forecast-specific hierarchy for participants in a forecast series*

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 In the Forecast Series list, select a forecast series.
- 3 Go to the Forecast Series Participants tab, and define a forecast-specific hierarchy for participants in the forecast series, as follows:

- For each participant in the forecast series, specify a different Submit To position.

**NOTE:** A forecast-specific hierarchy can only be defined for participants in a forecast series when the visibility for that forecast series is set to My Revenues - Indirect Sales.

For more information about defining a forecast-specific hierarchy for a forecast series, see [“Setting Up Customer Adaptive Forecasting”](#) on page 58.

## Adding Forecast Series Organizations

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 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 In the Forecast Series list, select a forecast series.
- 3 Click the Forecast Series Organizations tab and add a new record.
- 4 In the Add Organization dialog box, select the organization you want to add, and then click OK.

The new organization is added to the Forecast Series Organizations list. Note that the forecast series' Public Access check box is now selected.

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

## Adding Aggregation Levels

The Aggregation view lists the revenue fields and aggregation levels that are used in the Summary view of a forecast. These aggregation levels are used to break down a forecast according to business requirements. For example, you can break down revenue figures by Account by Product Line by Product.

For each field, you specify a level of aggregation in the hierarchy. Level 1 represents the highest level of aggregation, level 2 the next highest level, and so on. For example, to aggregate revenues by Account by Product Line by Product you define aggregation levels as shown in [Table 7](#):

Table 7. Example of Aggregation Levels

Field	Level
Account	1

Table 7. Example of Aggregation Levels

Field	Level
Product Line	2
Product	3

In the Forecast Summary view, the fields are displayed from left to right according to the defined aggregation level. The Date field is considered to be at level 0 and is always the left-most column. So for the example shown in the table, the columns from left to right would be Date, Account, Product Line, and Product, corresponding to levels 0, 1, 2, and 3 respectively.

There is no limit on the number of aggregation levels that you can define. However, only six levels are available for the preconfigured applications. For help with adding more levels, create a service request (SR) on My Oracle Support. Alternatively, you can phone Oracle Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support.

**CAUTION:** The higher the number of aggregation levels, the greater the impact on performance.

You can add new revenue fields as required, as described in [“Adding a Custom Field for Aggregation” on page 47](#).

**To add aggregation levels to a forecast series**

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 In the Forecast Series list, select a forecast series.
- 3 Click the Aggregation tab and add a new record. The fields are described in the following table.

Field	Description
Field	The aggregation field.
Level	The aggregation level for the field.
Field Description	A description of the field and aggregation level.
Mapped Field	The field of the Forecast Item Detail business component to which the value in the Field column is mapped.

- 4 Click OK. The new aggregation levels are added.

## Adding a Custom Field for Aggregation

You can add a custom field, such as Global Business Unit or Fulfillment, for use in the Aggregation view. To do so, you must first add the custom fields as a column in the S\_REVN table, add the field to the Revenue business component, and add appropriate columns to the appropriate applets. You must then add the field to the appropriate LOV (Type FCST\_AGGR\_FLD) so that it is available in the Administration - Forecast Aggregation view.

For more information about the relevant business components and adding custom fields to the forecasting process, see [Appendix B, "Forecasting User Properties."](#)

**To add a custom revenue field**

- 1 Start Siebel Tools.
- 2 Select the S\_REVN Table.
- 3 Create a column for the custom field - for example, for the Global Business Unit field.

Field	Value
Name	X_GLOBAL_BUSINESS_UNIT
User Name	Global Business Unit Ext
Physical Type	Varchar
Length	15

- 4 Click Apply/DDL to save the changes to the S\_REVN table.
- 5 Lock the Project Symbolic Strings.

Click on Symbolic Strings and create a Symbolic String with the same names as used in the column in the S\_REVN table. For example, for the Global Business Unit field.

Field	Value
Name	X_GLOBAL_BUSINESS_UNIT
User Name	Global Business Unit Ext
Physical Type	Varchar
Length	15

- 6 Select the Revenue business component.
- 7 Click Fields and create a new field, for example, Global Business Unit.
- 8 Select Applets and query on the appropriate applet, for example, Opportunity Revenue Schedule List applet.
- 9 Click Lists and create a new list column, for example, Global Business Unit.
- 10 Select the applet to which you added the field, for example, Opportunity Revenue Schedule List applet.
- 11 Right-click the applet and select Edit Web Layout.
- 12 Select Mode: 2: Edit List.
- 13 Select the custom field, for example, Global Business Unit, in the Columns/Controls template; drag it and drop it into Applets Web Template (Edit) - Layout.
- 14 Save the changes and submit the changes to the Siebel runtime repository.



To add a field to an LOV, complete the steps in the following procedure.

**To add a custom field to the aggregation LOV**

- 1 Navigate to Administration - Data screen, then List of Values view.
- 2 Click New to create a new record, and then enter the list-of-values type FCST\_AGGR\_FLD in the Type field.
- 3 Enter the name of the custom field in the Display Value field.
- 4 Save the record.

## Moving Forecast Dates Ahead Automatically

In the Administration, then the Forecast 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 8](#).

Table 8. 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 encompasses the forecast date and the interval is 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. This is the default setting for this user property.

For a list of the user properties associated with forecasting, see [Appendix B, "Forecasting User Properties."](#)

## About Copying a Forecast Series

You can copy a forecast series, including the forecast dates and forecast participants defined for the forecast series, by selecting Menu, then Copy Record from the Administration - Forecast screen.

## Types of Forecast Series

You can create different types of forecast series, including the following:

- [Creating a Personal Forecast Series with Details on page 50](#)
- [Creating a Personal Forecast Series without Details on page 51](#)

- [Creating a Standard Personal Forecast Series on page 54](#)
- [Creating a Global Forecast Series on page 55](#)
- [Creating a Departmental Forecast Series on page 56](#)
- [Creating a Hybrid Forecast Series on page 58](#)
- A forecast-specific forecast series where the forecast visibility is My Revenues - Indirect Sales. For more information, see [Setting Up Customer Adaptive Forecasting on page 58](#)
- A partner forecast series. For more information, see [About Creating a Partner Forecast Series on page 59](#)

## Creating a Personal Forecast Series with Details

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.

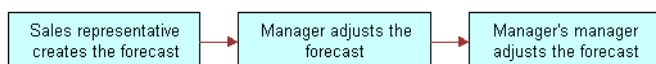


Figure 1. Example of a Forecast Process

***To create a personal forecast series with details***

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 Create a forecast series as described in [“Creating a Forecast Series” on page 39](#).
- 3 In the new forecast series, from the Detail Depth drop-down list, select Revenue Detail.  
This causes the user’s forecast detail records to be copied into their manager’s forecast without being summarized.
- 4 From the Visibility field, select My Revenues.  
This limits the user’s forecast to their own revenue records.
- 5 Click the Forecast Series Dates tab and add forecast dates.  
For information about adding dates, see [“Defining Forecast Series Dates” on page 43](#).
- 6 Click the Forecast Series Participants tab and add the appropriate users.  
Alternatively, click the Forecast Series Organizations tab and add the appropriate organization.  
For information about adding participants, see [“Adding Forecast Series Participants” on page 45](#).  
For information about adding organizations, see [“Adding Forecast Series Organizations” on page 46](#).
- 7 Click the Aggregation tab and add the required aggregation levels.  
For information about adding aggregation levels, see [“Adding Aggregation Levels” on page 46](#).

**Creating a Personal Forecast Series without Details**

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 a 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

Sales managers are not always 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 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 that is somewhat arbitrary and not always based on the user's forecastable revenues for that forecast period.

### ***To create a personal forecast series without details***

**1** Navigate to the Administration - Forecast screen, then the Forecast Administration view.

**2** Create a forecast series.

For information, see ["Creating a Forecast Series" on page 39](#).

**3** In the new forecast series, from the Detail Depth drop-down list, select Summary Only.

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

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

This restricts the user's forecast to their own revenue records.

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

For information about adding dates, see ["Defining Forecast Series Dates" on page 43](#).

- 6 Click the Forecast Series Participants tab and add the appropriate users.

Alternatively, click the Forecast Series Organizations tab and add the appropriate organization.

For information about adding participants, see [“Adding Forecast Series Participants” on page 45](#). For information about adding organizations, see [“Adding Forecast Series Organizations” on page 46](#).

- 7 Click the Aggregation tab and add the required aggregation levels.

- 8 For information about adding aggregation levels, see [“Adding Aggregation Levels” on page 46](#).

## Creating a Standard Personal Forecast Series

The standard personal forecast series combines the features of the personal forecast with details (Revenue Details) and the personal forecast without details (Summary Only) to provide the manager with a detailed view of all subordinate forecasts, including a roll up of any adjustments made from the summary view. The standard personal forecast is an example of a rollup forecast.

The standard personal forecast series:

- Is hierarchical and structured, allowing visibility to an entire organization's forecast efforts
- Rolls up from the bottom to the top of an organization, one level at a time
- Eliminates the need of creating multiple forecast series
- Shows a summarized as well as a detailed view of subordinate forecasts
- Allows sales representatives and managers to make revenue adjustments in the Summary view only

Use the standard personal forecast series if:

- You want to be able to review several forecasting perspectives
- Managers need to be able to obtain a detailed view of revenue opportunities from subordinates and at the same time make adjustments to aggregated forecasts from the Summary view before submission

Do not use the standard personal forecast series if:

- Management is not interested in an opportunity's specific details
- The volume of records for each forecast is high
- Sales representatives, managers, and their subordinates need to be able to adjust their forecasted revenue from the Details view of forecasts

**Example:** Sales representatives and managers who participate in the forecasting process typically need to see details of the revenue projection over a period of time, line by line, as well as the aggregated revenue in the summary view where they can make appropriate adjustments and roll up to management as required.

### *To create a standard personal forecast series*

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 Create a forecast series.

For information, see ["Creating a Forecast Series" on page 39](#).

- 3 In the new forecast series, from the Detail Depth drop-down list, select Standard.

This provides the manager with a detailed view of all subordinate forecasts, and enables adjustments to be made from the summary view.

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

This restricts the user's forecast to their own revenue records.

5 Define an Auto Forecast Search Spec.

For information about defining a search specification for the forecast, see [“Creating Search Specifications for Forecast Series” on page 42](#).

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

For information about adding dates, see [“Defining Forecast Series Dates” on page 43](#).

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

Alternatively, click the Forecast Series Organizations tab and add the appropriate organization. Then, select the name (or position) of the sales representatives and sales managers that need to participate in the forecast.

For information about adding participants, see [“Adding Forecast Series Participants” on page 45](#). For information about adding organizations, see [“Adding Forecast Series Organizations” on page 46](#).

**NOTE:** Sales representatives and sales managers have opportunity revenue records.

8 Click the Aggregation tab and add the required aggregation levels.

For information about adding aggregation levels, see [“Adding Aggregation Levels” on page 46](#).

## Creating a Global Forecast Series

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 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 the Siebel product

### *To create a global forecast series*

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 Create a forecast series.  
For information, see ["Creating a Forecast Series" on page 39](#).
- 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 tab and add forecast dates.  
For information about adding dates, see ["Defining Forecast Series Dates" on page 43](#).
- 5 Click the Forecast Series Participants tab and add one or more forecast series participants, such as yourself or another administrator who runs the forecast for the company.  
For information about adding participants, see ["Adding Forecast Series Participants" on page 45](#).
- 6 Click the Aggregation tab and add the required aggregation levels.  
For information about adding aggregation levels, see ["Adding Aggregation Levels" on page 46](#).

## Creating a Departmental Forecast Series

The departmental forecast can be used as a supplement to other forecasting methods mentioned in this chapter. In many companies, the global forecast is 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 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 user to change it. The 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 mid management view of forecasting

### ***To create a departmental forecast series***

**1** Navigate to the Administration - Forecast screen, then the Forecast Administration view.

**2** Create a forecast series.

For information, see ["Creating a Forecast Series" on page 39](#).

**3** In the new forecast series, 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.

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

For information about adding dates, see ["Defining Forecast Series Dates" on page 43](#).

**5** Click the Forecast Series Participants 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" on page 45](#).

**6** Click the Aggregation tab and add the required aggregation levels.

For information about adding aggregation levels, see ["Adding Aggregation Levels" on page 46](#).

## Creating a Hybrid Forecast Series

A hybrid forecast allows you to have My Revenues and My Team's Revenues visibility in the same Forecast series, therefore 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 subordinates creating a formal forecast each period, yet another manager wants to have subordinates running 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 Navigate to the Administration - Forecast screen, then the Forecast Administration view.

2 Create a forecast series.

For information, see ["Creating a Forecast Series" on page 39](#).

3 Click the Forecast Series Participants tab and add the appropriate users.

For information about adding participants, see ["Adding Forecast Series Participants" on page 45](#).

4 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.

**NOTE:** For a forecast series where visibility is set to My Revenues - Indirect Sales, the Visibility column is not available from the Add Participants view.

**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.

## Setting Up Customer Adaptive Forecasting

Forecast participants in large enterprises are typically part of a matrix organization where the reporting structure does not necessarily match the forecast rollup hierarchy. For such situations, the customer adaptive forecasting feature was introduced to provide support for a forecast-specific hierarchy.

Customer adaptive forecasting:

- Allows sales representatives to roll up and submit forecasts to managers outside of their reporting hierarchy
- Allows sales managers to view forecasts from cross-functional teams across organizations

Use customer adaptive forecasting if you have a matrix organization where the forecasting hierarchy is not always the same as the reporting hierarchy.

Do not use customer adaptive forecasting if you want to maintain the Siebel Position Based Reporting Hierarchy.

Setting up customer adaptive forecasting involves defining a forecast-specific hierarchy that is specific to a particular forecast series. Sales administrators do this by specifying the visibility of the forecast as My Revenues - Indirect Sales, and the *Submit To* position for each participant in the forecast series (as required). The forecast-specific rollup hierarchy that you define for a forecast series does not need to match the sales reporting hierarchy.

### ***To create a forecast-specific forecast series***

- 1 Navigate to the Administration - Forecast screen, then the Forecast Administration view.
- 2 Create a new forecast series where Visibility is set to My Revenues - Indirect Sales.

For information about creating a forecast series, see ["Creating a Forecast Series" on page 39](#).

**NOTE:** A forecast-specific hierarchy can only be defined for participants in a forecast series when the visibility for that forecast series is set to My Revenues - Indirect Sales.

- 3 Go to the Forecast Series Participants tab and:

- a Add the appropriate participants to the forecast series.

For information about adding participants, see ["Adding Participants to a Forecast Series" on page 45](#).

- b Define a forecast-specific hierarchy for participants in the forecast series.

The forecast-specific hierarchy that you define for participants in a forecast series can be different to the sales reporting hierarchy. For more information, see ["Defining a Forecast-Specific Hierarchy For Participants in a Forecast Series" on page 45](#).

**NOTE:** By default, according to the position hierarchy, all participants in a forecast series report their forecasts to their manager; that is, unless a forecast-specific hierarchy is defined for participants in the forecast.

## **About Creating a Partner Forecast Series**

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*.

## **Deactivating Auto-Forecast**

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 subordinates who are listed as participants of that series who have not already created their forecasts. You can disable this feature if you want.

For more information about the Forecast: Auto-Forecast system preference, see [“Forecast: Auto-Forecast System Preference”](#) on page 34.

### *To deactivate auto-forecast*

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 In the System Preferences list, select the Forecast: Auto-Forecast record.
- 3 Change the System Preference Value to FALSE.
- 4 Restart the server.

## About Configuring Revenue and Forecast Spreadsheets

Spreadsheets in Siebel Business Applications allow the 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 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 clicking the desired hyperlink 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 topic explains how to make changes to Revenue and Forecasting spreadsheet applets.

- [“Modifying Spreadsheet Applets for Forecasting”](#) on page 61 describes how to change the configuration of a spreadsheet applet so that users can use spreadsheets in views other than Revenues, Forecasts, or Time Sheets.
- [“Configuring Spreadsheet Scrolling Buttons for Forecasting”](#) on page 64 describes how to set up spreadsheet scrolling buttons.
- [“Adding a Dynamic Column to the Spreadsheet”](#) on page 67 describes how to add or change a dynamic column on a spreadsheet view.

## 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 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 user requirements.

## Modifying Spreadsheet Applets for Forecasting

The following procedure describes how to change the configuration of a spreadsheet applet so that 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 can exist in 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 provides 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 Opportunities 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 Opportunities 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.

User Property	Value	Description
DC 1 Data DynColHdrKey	Field name	<p>Required. Indicates the data to be displayed as headers on recurring columns of the spreadsheet.</p> <p>For example, in the Opportunities Revenues view, the field name is Date, so each date in the group causes a new column to be displayed.</p>
DC 1 Data DynColCellValue	Field, Model	<p>Required. <i>Field</i> identifies the data to be displayed as the cell value in the spreadsheet. <i>Model</i> identifies the field on the primary business component that provides cell formatting information.</p>
DC 1 Data SubCol <i>N</i> ( <i>N</i> ≥ 1)	Field, Model	<p>Use this property if you want to display more than one repeating column.</p> <p><b>NOTE:</b> <i>Field</i> identifies another column to be displayed after the column indicated by <i>DynColHdrKey</i>. <i>Model</i> identifies the field on the primary business component that provides formatting information for this field.</p>
DC 1 DataLink	Link	<p>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.</p> <p>For example, on the Opportunity or Account Revenues spreadsheet, this field is blank and the Siebel application uses the default parent link.</p>
DC 1 Data SameAsPrimary	Y or N	<p>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 <i>DynColRowKey</i>, <i>DynColHdrKey</i>, <i>DynColCellValue</i>, and <i>DynColCellValueId</i>.</p> <p>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.</p>

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 Spreadsheet Scrolling Buttons for Forecasting

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 9](#) describes the buttons.



Table 9. 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.

You 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 that can be displayed on one screen. Window Size, as defined, does not include static or persistent columns.

**To configure spreadsheet scrolling buttons**

- From Siebel Tools set the following values in the Applet, then the User Properties:
  - DC Scrolling: Enabled
  - DC Scrolling: Set Size (Default = 6)
  - DC Scrolling: Window Size (Default = 6)

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

**Configuring the Position of Spreadsheet Scrolling Buttons**

The following procedure describes how to configure scrolling buttons to jump to the start or the end of the spreadsheet.

***To configure scrolling buttons to jump to the start or the end of the spreadsheet***

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

## Deactivating Scrolling Spreadsheet Buttons

The following procedure describes how to deactivate scrolling spreadsheet buttons.

***To deactivate 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, deactivate the following Applet, then the User Properties:
  - DC Scrolling: Enabled
  - DC Scrolling: Set Size
  - DC Scrolling: Window Size
- 3 For each applet, deactivate the following Applet, then the Controls:
  - GotoNextHorColumn
  - GotoNextHorSet
  - GotoPrevHorColumn
  - GotoPrevHorSet
- 4 For each applet, deactivate the corresponding Applet, Web Template, and then the 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

The following procedure describes how to add or change a dynamic column on a spreadsheet view. For example, users sometimes 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 the dynamic columns Price and Quantity to a spreadsheet*

- 1 Change the business component Revenue DynCol as follows:
  - Name: "DC 1 Data SubCol 1"
  - Value: "Price , Price"
  - Inactive: False
  - Name: "DC 1 Data SubCol 2"
  - Value: "Quantity , Quantity"
  - Inactive: False
- 2 Verify that the Quantity field is active on the data business component, Revenue. The Inactive property for this field is FALSE.
- 3 Verify the following for the applet: Opportunity Revenue Schedule List Applet DC. The properties for the List Column, Quantity are:
  - 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** Submit the changes.

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

# 7 Revenues

This chapter describes how users can add and manage revenue data. It includes the following topics:

- [“About Revenues” on page 69](#)
- [“About Opportunities, Accounts, and Products” on page 70](#)
- [“Scenario for Using Revenues” on page 70](#)
- [“About Configuring Revenue SmartScripts” on page 71](#)
- [“Creating Revenue Plan Templates” on page 72](#)
- [“Adding a New Revenue to an Opportunity \(End User\)” on page 73](#)
- [“Adding Multiple or Recurring Revenues Using SmartScripts \(End User\)” on page 74](#)
- [“Adding a Split Revenue \(End User\)” on page 75](#)
- [“Using a Revenue Plan \(End User\)” on page 75](#)
- [“Reviewing Revenues \(End User\)” on page 76](#)
- [“Modifying a Revenue Item \(End User\)” on page 77](#)
- [“Viewing the Revenue Spreadsheet \(End User\)” on page 77](#)
- [“Using Revenue Charts for Reporting \(End User\)” on page 78](#)
- [“About Using Revenue Reports \(End User\)” on page 78](#)
- [“About Distinguishing Between Revenues \(End User\)” on page 78](#)

## About Revenues

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

The Revenues screen includes every revenue associated with the opportunities, accounts, projects, and so on, to which you have access. The Revenues screen therefore provides users with a convenient place to perform updates of important revenue 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.

**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.

**TIP:** To make sure that any adjustments made to quantity, price, or revenues in the Revenues Screen is reflected in the existing forecasts, select Update Detail with Revenue Item from the menu in the Forecasts screen, then Details view.

## About Opportunities, Accounts, and Products

This topic discusses how opportunities, accounts, and products relate to revenues and forecasting.

An opportunity is a potential revenue-generating event. Opportunity-related information is recorded and tracked in the views associated with the Opportunities screen.

An account is a business external to your company. An account represents a current or potential client, a business partner, or a competitor. Accounts are a source of business for your company and opportunity records store information that you can use to manage accounts.

Specific products can be associated with an opportunity. For example, if a customer is interested in purchasing a new software suite, this information can be specified in the Products view.

For more information about creating accounts and opportunities, and adding products to opportunities, see *Siebel Applications Administration Guide*. For information about adding revenues to opportunities, accounts, and products, see [“Adding a New Revenue to an Opportunity \(End User\)” on page 73](#).

## Scenario for Using Revenues

This scenario gives one example of how revenues can be used. You can use revenues differently, depending on your business model.

The forecast administrator for a large company needs to make sure users can use the Revenues screen to analyze their revenues. If necessary, the administrator configures revenue SmartScripts so that users can add recurring revenues to the application, and creates revenue plan templates. SmartScripts configuration is optional and is already set up in the default Siebel application. The administrator also creates a revenue template so that the sales representatives in the 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 the opportunities (belonging to the district manager). From the Revenues view in the Opportunities screen, the district manager adds multiple product revenues to an opportunity using SmartScripts. The district manager also has two sales representatives working on the same opportunity revenue item. As such, the district manager 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. The vice president can also view revenue spreadsheets and use revenue charts to gain further information about each revenue. When the vice president examines the revenues, the vice president finds that modifications need to be made to some of them. The vice president does this directly in the Revenues view, as this (making changes to revenue records rather than adjusting a forecast) allows for more consistent forecasting.

## About Configuring Revenue SmartScripts

Using the Administration - SmartScripts 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 required, you can build a VB script that is invoked during the execution of the SmartScript.

For more information about SmartScripts, see *Siebel SmartScript Administration Guide*.

## Creating Revenue Plan Templates

You can create revenue plan templates for revenue plans that sales managers and sales representatives use for a series of recurring revenues or a particular group of revenues. For example, a predefined product or service package that consists of recurring revenues can be a revenue plan.

Users select a revenue plan template in a Revenue Plans view, which is available in each screen that has a Revenues view, such as Opportunities, Accounts, and Projects. Use revenue plans only for simple grouped revenues. For more information about using revenue plans, see [“Using a Revenue Plan \(End User\)” on page 75](#).

### To create a revenue plan template

- 1 Navigate to the Administration - Forecast screen, then the Revenue Templates view.
- 2 Create a new record and complete the necessary fields. Some fields are described in the following table.

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

- 3 Click the Revenue Template Details tab and add new records to associate revenue line items with the parent template.

Some fields are described in the following table.

Field Name	Description
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 user. For example, if Revenue Multiplier is 1, and the 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 (End User)

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

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

To add a new revenue to an opportunity, complete the steps in the following procedure.

### *To add a new revenue to an opportunity*

- 1 Navigate to the Opportunities screen, then the List view.
- 2 In the Opportunities list, drill down on the opportunity to which the revenue is being added.
- 3 Click the Revenues tab, create a new record and complete the necessary fields.

Some fields are described in the following table.

Field Name	Description
Forecasted	Checking this box indicates that there is a high probability the deal will close and that it will be included in forecasts.
Product	Use the selection dialog box to associate this revenue with a product.
Quantity	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.
Best Case	Enter a best case estimate of what revenue will be produced.
Product Line	Use the selection dialog box to associate this revenue with a product line.
Quote	If this is checked, product revenue is included in the auto-quote function in the Quotes module.
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.
Probability	Enter the percentage likelihood of winning this revenue for this opportunity.
Expected Revenue	Number based on the value in the Probability field.
Worst Case	Enter a worst case estimate of what revenue will be produced.
Unit of Measurement	Select the appropriate unit of measurement.

## Adding Multiple or Recurring Revenues Using SmartScripts (End User)

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:** 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 Navigate to the Opportunities screen, then the List view.
- 2 In the Opportunities list, drill down on the opportunity to which you want to add revenues.
- 3 Click the Revenues tab, click the menu button, and then click Script.
- 4 In the SmartScripts screen in the Revenue Schedule - Date Range 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 - Default Values form, complete the necessary fields, and then click Next.
- 7 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 user navigates to the spreadsheet view.

**NOTE:** A substantial number of the Script's fields are not necessary for the user's specific needs; fields that are marked are required. 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 is selected, 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 (End User)

A revenue split allows a 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 Navigate to the Opportunities screen, then the List view.
- 2 In the Opportunities list, drill down on the opportunity to which you want to add revenues.
- 3 Click the Revenues tab and then click the Splits hyperlink.
- 4 Create a new record and complete the necessary fields. For information on the fields, see [“Adding a New Revenue to an Opportunity \(End User\)”](#) on page 73.

**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 specifications accordingly. For information about creating search specifications, see [“Creating Search Specifications for Forecast Series”](#) on page 42.

## Using a Revenue Plan (End User)

Revenue plans are created by the forecast administrator to create recurring revenues or a particular group of revenues. Revenue plans are based on revenue plan templates, which are created and activated by the Siebel administrator, see [“Creating Revenue Plan Templates”](#) on page 72.

You create revenue plans in the Revenue Plans view from any screen where Revenues views are found, for example, Opportunities, Accounts, Projects, Contacts, Products, Partners, and Agreements.

You can edit the Price, Quantity, and Revenue fields for an existing revenue plan. Data updated at the parent level of the plan updates each of the child revenue items automatically, however:

- You can use the Lock field to prevent selected revenue details from being updated.
- You can use the Update All button to update each revenue record with the parent-level changes, regardless of whether the detail records are locked.
- Values entered by 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 plan template, and the results populate the detail records.

### *To use a revenue plan*

- 1 Navigate to the Opportunities screen, then the List view.
- 2 In the Opportunities list, drill down on the opportunity you want to associate with a revenue plan, and then click the Revenue Plans tab.

- 3 In the Revenue Plans list, create a new record and then 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.

- 4 (Optional) Edit the Price, Quantity, and Revenue fields for the revenue plan as required, and click the Update All button to update the revenue items.

## Reviewing Revenues (End User)

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. Users need to define the search specification or define appropriate criteria for a query to select the correct revenue records for forecasting. For details on defining the search spec, see [Table 6 on page 43](#).

Users must define the appropriate criteria for a query or search specification 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 criterion 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 Navigate to the Revenues screen, then the List view and select My Team's Revenues from the visibility filter.
- 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 *Siebel Fundamentals*.

## Modifying a Revenue Item (End User)

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 user adjusts the same item week after week.

**NOTE:** Users can update revenue items from a forecast. This allows a user to update live revenue records with the current forecast updates. For more information, see [“Updating Revenues from a Forecast” on page 94](#). Users can also update a forecast with revenue items. This allows a user to update forecast detail records with the current revenue updates. For more information, see [“Updating a Forecast with a Revenue Item” on page 95](#)

### *To modify a revenue item*

- 1 Navigate to the Revenues screen, then the List view.
- 2 In the Revenues list, select the revenue item you want to modify and edit the necessary fields, for example, Quantity, Price, and Revenue.

## Viewing the Revenue Spreadsheet (End User)

Users sometimes 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, Agreements, and Projects.

### *To view the revenue spreadsheet*

- 1 Navigate to the Opportunities screen, then the List view.
- 2 In the Opportunities list, drill down on the opportunity for which the information will be displayed.
- 3 Click the Revenues tab and then click the Spreadsheet hyperlink.

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

**NOTE:** To make sure that revenues are grouped in rows as intended in the spreadsheet, enter revenue data 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 (End User)

The Charts view provides users with a graphical representation that 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.

To use the Charts view, the Chart Server must be configured.

**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 Navigate to the Opportunities screen, then the List view.
- 2 In the Opportunities list, drill down on the opportunity with which the information will be displayed.
- 3 Click the Revenues tab and then click the Chart hyperlink.

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.

## About Using Revenue Reports (End User)

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

## About Distinguishing Between Revenues (End User)

Users can 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 a forecast or a predefined query, they can view charts or reports that 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 that discusses working with LOVs in *Siebel Applications Administration Guide*.

# 8

## Forecasting (End User)

This chapter describes how users, both sales representatives and managers, create, adjust, and work with forecasts. It includes the following topics:

- [“Scenario for Forecasting” on page 79](#)
- [“Scenario for Forecasting - Product Quantity Forecasting” on page 80](#)
- [“Setting a Default Unit of Measurement” on page 80](#)
- [“Creating a Forecast” on page 81](#)
- [“Adding Forecast Details” on page 82](#)
- [“Adding Ad-Hoc Revenue Line Items to a Forecast” on page 83](#)
- [“Viewing Forecasts” on page 84](#)
- [“About Forecast Adjustments” on page 86](#)
- [“API Driven Forecasting” on page 91](#)
- [“Submitting a Forecast” on page 91](#)
- [“Rolling Up a Forecast” on page 91](#)
- [“Refreshing a Forecast” on page 92](#)
- [“Rejecting a Subordinate’s Forecast” on page 94](#)
- [“Updating Revenues from a Forecast” on page 94](#)
- [“Updating a Forecast with a Revenue Item” on page 95](#)
- [“About Analyzing Forecasts” on page 96](#)

### Scenario for Forecasting

This scenario gives one example of how Siebel Forecasting can be used. You can use forecasting differently, depending on your business model.

A sales representative at a large company is responsible for forecasting. The sales representative creates a periodic forecast by selecting a predefined forecast series. The application automatically creates the forecast by applying the forecast search rules, or a query to the account, opportunity, and partner-related revenue that is being managed. The sales representative analyzes the forecast data, viewing the anticipated revenues by product line and then by account. The sales representative then adds a revenue item and modifies an existing revenue item before submitting the forecast to their 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 does not carry over to any corresponding revenue records. To keep the data accurate, the sales manager updates the corresponding live revenue records with the changes made to the forecast.

The sales manager then remembers that the last time this same forecast was created, that changes were made to it as well. The sales manager 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, the sales manager analyzes the forecast using charts and reports, and when satisfied with it, submits the forecast to management.

## Scenario for Forecasting - Product Quantity Forecasting

A regional sales manager runs a forecast report on a monthly basis. The sales manager needs to view the forecast results grouped by Accounts, by Product Line within the accounts, and by Products within product lines (three dimensions). The sales manager creates the forecast by selecting a predefined forecast series for which the aggregate levels for the three dimensions have been defined.

The sales manager has three direct reports and usually creates the forecast for their own use as well as for use by all direct reports, so that subordinates can focus their time and energy on managing the revenue pipeline and keeping opportunities up to date. The sales manager drills down into the forecast and uses the Forecast Summary view to easily find out the forecasted revenue and quantity of the products being forecasted and sold in each quarter of the year. After running the forecast, the sales manager analyzes all revenue records in the List and Tree view tabs.

The sales manager rejects or approves and adjusts the subordinates' forecasts as appropriate. The sales manager makes appropriate adjustments for individual products, aggregated revenues for Product Lines, as well as total revenues for some Accounts. The sales manager notices that when changing the revenue or quantity values for a particular product, the adjusted value is automatically rolled up to its parent Product Line and in turn to its immediate parent Account. The same is true if the sales manager changes the revenue/quantity values for a Product Line or Account, that is, their respective aggregated values are rolled up to their immediate parent (for example, Account rolls up to Date). After making the adjustments the sales manager submits the forecast to management.

When the sales manager's manager logs into the Siebel Sales application, all subordinates' forecasts including the regional sales manager's forecasts are visible in the forecast screen. The sales manager's manager looks at the sales manager's revenue adjustment and makes a note to call and discuss the changes with the sales manager over the telephone.

## Setting a Default Unit of Measurement

All participants must define a default unit of measurement (UoM) in each category of UoM that they use in their forecasts.



**To set a default unit of measurement**

- 1 From the application-level menu, choose Tools, then User Preferences.
- 2 On the link bar, click Unit of Measurement.
- 3 Either create a new record and select the required category and unit of measurement, or change the unit of measurement in an existing record.

The fields are described in the following table:

Fields	Description
Category	The category of unit of measurement. Select Length, Volume, or Weight.
Unit of Measurement	The preferred unit of measurement for the user (manager or sales representative)

## 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 Navigate to the Forecasts screen.
- 2 In the Forecasts list, add a new record and click the Forecast Series select button.
- 3 In the Pick Forecast Series dialog box, select the forecast series you are basing this forecast on, and then click OK.
- 4 Click the Forecast Date select button.
- 5 In the Pick Forecast Series Date dialog box, select the forecast date you want to apply to this forecast, and then click OK.
- 6 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. Some fields are described in the following table.

Field Name	Description
Forecast Date	Indicates the start range of the forecast.
Forecast Series	Indicates the forecast series this forecast is based on.
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.
Submitted By	Read-only. Indicates the name of the person who submitted the forecast.

Field Name	Description
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.
Forecast Revenue	Read-only. The sum of the revenues included in this forecast, that is, the <i>total forecast revenue</i> .
Total Adjustment By Subordinate	Read-only. The sum of all revenue adjustments made by all subordinates in this forecast for this manager.
Best Case	Read-only. A best case estimate of what revenue will be produced by an opportunity.
Expected Revenue	Expected Revenue = Win Probability * Revenue / 100.
Updated	Read-only. Indicates the date and time the forecast was last changed.
Status	Choose from Pending, Active, and Submitted.
Worst Case	Read-only. A worst case estimate of what revenue will be produced by an opportunity.
Cost	Read-only. Expense associated with an opportunity.
Margin	Read-only. A calculated field that displays the revenue figure minus the cost.

- 7 Drill down on the forecast record to view revenue details.
- 8 Drill down on each revenue item to view further information.

**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 ["Deactivating Auto-Forecast" on page 59](#).

## Adding Forecast Details

Occasionally, the forecast that is created does not include each of the revenue items that it needs to include. Additional revenue records can be added manually.

The list of records that can be added is determined by the Associate Search Spec of the forecast series, see ["Creating Search Specifications for Forecast Series" on page 42](#).

### *To add forecast details*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast to which details will be added.

- 3 In the Details view, add a new record.
- 4 In the Add Revenue Items dialog box, select the appropriate revenue item and click OK.

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

## Adding Ad-Hoc Revenue Line Items to a Forecast

Managers and sales representatives who are responsible for sales forecasts that span wide horizons in terms of, for example, larger territories or product lines, can add an ad-hoc revenue line item to a forecast. The ad-hoc revenue line item is reflected in both the pipeline revenue and the forecast rollup, and can be assigned to any of the subordinates in the forecast.

Manager ability to add an ad-hoc revenue line item to a forecast helps to achieve more accurate forecasts and improve quota attainment.

### *To add an ad-hoc revenue line item to a forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, either drill down on the forecast to which you want to add an ad-hoc revenue line item, or create a new forecast.

For more information about creating a forecast, see [“Creating a Forecast” on page 81](#).

- 3 In the forecast Details view, click New to add a new ad-hoc revenue line item, and complete the necessary fields.

Some fields are described in the following table.

**NOTE:** When adding an ad-hoc revenue line item to a forecast, it is not necessary to associate it with a Product, Product Line, or Opportunity.

Field Name	Description
Product	Use the selection dialog box to associate this new ad-hoc revenue line item with a product, if required.
Product Line	Use the selection dialog box to associate this new ad-hoc revenue line item with a product line, if required.
Quantity	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 new ad-hoc revenue line item will produce.
Opportunity	Specifying an opportunity is optional when adding a new ad-hoc revenue line item to a forecast. Sales representatives and sales managers have opportunity revenue records.

## Viewing Forecasts

By default, according to the position hierarchy, all participants in a forecast series report their forecasts to their manager. However, if a forecast-specific hierarchy is defined for a forecast series of type My Revenues - Indirect Sales, then users can roll up and submit forecasts to managers that are outside their reporting hierarchy.

**NOTE:** A forecast-specific hierarchy can only be defined for a forecast of type My Revenues - Indirect Sales.

The Forecast List screen displays a list of all forecasts where the user is a participant or the user has a subordinate. When viewing the list of forecasts, it is possible to filter on a number of options. To view the list of forecasts, complete the steps in the following procedure.

### To view a list of forecasts

- 1 Navigate to the Forecasts, then Forecast List screen.
- 2 Select an option from the My Forecasts drop-down list.

The following table describes the options that are available.

All Forecasts drop-down list	Option
My Forecasts	Select to display a list of your forecasts.
My Direct Team's Forecasts	Select to display a list of forecasts belonging to your direct reports.
All Forecasts	Select to display a list of all forecasts, including those belonging to you and your direct reports.
My Indirect Forecasts	<p>Select to access a list of forecasts of type My Revenues - Indirect Sales, which may have been generated outside of your reporting hierarchy.</p> <p>When you first select this option, the forecast list does not display. You must select a forecast series from the Select a Forecast Series drop-down list, then click Go to display the list of forecasts.</p> <p><b>NOTE:</b> Forecasts of type My Revenues - Indirect Sales are listed only in the My Indirect Forecasts list view. They are not included in the My Forecasts, My Direct Team's Forecasts, All Forecasts, or All Forecasts Across Organizations list views.</p>
All Forecasts Across Organizations	Select to display a complete list of forecasts across all organizations.

## Viewing Forecast Details

The Forecast Details view contains the elements that sum to the total forecast revenue. 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 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.

The Link Type field in the Details view indicates the type of records. The possible values are:

- **Direct Summary.** A summary record of a direct subordinate forecast.
- **Item.** A record owned by a subordinate.
- **Own Item.** A revenue record owned by the current forecast. Users can adjust their own item records, which allows for changing expectations for the forecast without changing the actual revenue record.
- **Own Summary.** A summary record for the current user. These records represent the detail records grouped only by date. The totals are the sums of all the detail records.

**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 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, and Chart. To view the details of a particular forecast, complete the steps in the following procedure.

### *To view forecast details*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast for which you want to view the details.
- 3 In the Details view, drill down on each revenue item to view more information or click the List, Spreadsheet, or Chart hyperlink to view all details. The information is displayed based on your selection.

## Viewing the Forecast Summary

The Forecast Summary view displays the total forecast revenue broken down into the periods specified by the forecast series and grouped according to the aggregate levels defined for the forecast series. For example, the aggregated revenue, price, and quantity information can be grouped according to Account by Product Line by Product.

The summary periods are indicated by their respective start dates. For example, the calendar month of November 2004 is displayed as Nov 04 in the Summary view. The Revenue field shows the sum of revenues for each summary period. The owner can modify these *summary revenue* values. Changes to the summary revenue values immediately update the total forecast revenue.

The fields in the Summary view are displayed from left to right according to the aggregation level defined by the administrator. The Date field is considered to be at level 0 and is always the left-most column. The next field is the level 1 field, then the level 2 field and so on. For more information about how the administrator defines the aggregation levels, see [“Adding Aggregation Levels” on page 46](#).

Every cell in the Summary view is editable, however new records can only be added in the Detail view.

Three options are available for viewing the forecast summary: List, Tree, and Chart.

**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 a Subordinate’s Forecasts

From the Subordinates view, users can add or delete forecast participants who report to them, and they can drill into a subordinate’s forecasts by using the Owner hyperlink. For summary forecasts, managers can make broad percentage adjustments. For more information, see [“Adjusting a Subordinate’s Forecast” on page 90](#).

**NOTE:** To create and add a subordinate’s forecast, create the forecast from the My Team’s Forecasts view, and then add the subordinate in the Subordinates view.

## Viewing and Creating Subordinate’s Forecasts Remotely

Managers can create a forecast and see their subordinates’ forecasts remotely only if the forecasts of the subordinates have already been created and synchronized to the manager’s local database.

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, needs 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 Oracle’s Application Expert Services.

## About Forecast Adjustments

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

- At the detail level from the Forecasts, then Details view for a detail type forecast
- By summary period from the Forecasts, then Summary view 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 tab. When summary records are updated, the total displayed in the Forecast Revenue field is also updated. 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. For more information about forecast adjustments, see the following:

- [“Adjusting a Detail Depth Forecast” on page 87](#)
- [“Adjusting a Summary Depth Forecast” on page 88](#)
- [“Adjusting a Standard Depth Forecast” on page 89](#)
- [“Auto-Adjusting a Forecast” on page 89](#)
- [“Unadjusting a Forecast” on page 90](#)
- [“Adjusting a Subordinate’s Forecast” on page 90](#)

## Adjusting a Detail Depth Forecast

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

If the detail depth is Revenue detail, a manager can edit the Adjustment field for subordinates only in the Forecast Detail view. In the manager’s Forecast Summary view, the Adjustment field for subordinates is read-only as shown in [Table 10](#).

Table 10. Adjusting Detail Depth, Summary Depth, and Standard Depth Forecasts

Forecast Series Detail Depth	Adjustment Column in View	
	Summary View	Detail View
Summary Only	Editable	Read-only
Revenue Detail	Read-only	Editable
Standard	Editable	Read-only

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 unclear about the forecast type your company uses, consult your Siebel administrator or a member of your sales operations team.

### *To adjust a detail depth forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast you want to adjust.
- 3 In the Details view:
  - a Select the revenue line item detail you want to adjust, and change the adjustment, revenue, quantity, price, or other value as appropriate. Repeat for each line item you want to adjust.
  - b Click New to add a new ad-hoc revenue line item.

For more information about adding an ad-hoc revenue line item, see [“Adding Ad-Hoc Revenue Line Items to a Forecast” on page 83.](#)
- 4 Click the menu button, and then click Rollup Forecast to recalculate the forecast.

The adjusted forecast amount is posted by period to the summary list in the Summary view.
- 5 (Optional) Click the Summary tab to view the summary list by period.

**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 the detailed line item records (that belong to the manager) and the summary records of direct subordinates from the 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 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 90.](#)

If the detail depth is Summary Only, a manager can edit the Adjustment field for subordinates only in the Forecast Summary view. In the manager's Forecast Detail view, the Adjustment field for subordinates is read-only as shown in [Table 10.](#)

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

### *To adjust a summary depth forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast you want to adjust.
- 3 Click the Summary tab and then select the summary record you want to adjust.
- 4 Adjust the revenue, best case, worst case, or other value you want to modify.



Repeat [Step 3](#) through [Step 4](#) for each line item you want to adjust.

Adjustments to summary records immediately update the totals for the Forecast record.

**NOTE:** Any adjustments made to summary records overwrite the sum of the adjustments made to the detail records.

## Adjusting a Standard Depth Forecast

In a standard depth forecast, each revenue line item in the Details view is rolled up through the reporting hierarchy. As a result, a manager can see the detailed line item records of subordinates and of the manager from the forecast Details view. Users can only make adjustments in the Summary view, but can review the revenue details of subordinates in the Details view.

If the detail depth is Standard, a manager can edit the Adjustment field for subordinates only in the Forecast Summary view. In the manager's Forecast Detail view, the subordinate Adjustment field is read-only as shown in [Table 10](#).

### *To adjust a standard depth forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast you want to adjust.
- 3 Click the Summary tab and then select the summary record you want to adjust.
- 4 Change the Adjustment field as required.

Repeat [Step 3](#) through [Step 4](#) for each line item you want to adjust.

Adjustments to summary records immediately update the totals for the Forecast record.

## 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. Any fields that have changed, such as, Probability, Qty (quantity), Revenue, Expected Revenue, Price, Commit, Close Date, Best Case, Worst Case, Margin, and Cost are updated in the current record.

### *To auto-adjust a forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast to be updated.
- 3 In the Details view, select the revenue line item or items you want to apply adjustments to.
- 4 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, you can use unadjust. Unadjusting a forecast only applies to forecasts with details.

### *To unadjust a forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast to be updated.
- 3 In the Details view, select the record or records you want to unadjust.
- 4 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.

A manager cannot edit any of the other fields in the Subordinates view and this also applies to new fields added to the view. If a manager needs to adjust revenue or other details for subordinates, the manager must do so in the Details view.

**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 hyperlink.

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

### *To adjust a subordinate's forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the summary forecast that includes subordinate forecasts.
- 3 Click the Subordinates tab.
- 4 Locate the record that requires adjustment, select the Adjust % field and then 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 6.x, managers used a Revise Forecast button to adjust forecasts after they had been submitted. In Siebel 7.0 and later, the Revise button is no longer needed to revise subordinate forecasts because 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 conversely.

## API Driven Forecasting

You can generate forecasts through batch mode using the Forecast 2000 - Forecast Service, which is provided by default with your Siebel business application.

To generate forecasts through batch mode, you must implement the functionality that is available with the Forecast 2000 - Forecast Service and decide, for example, when and how often to run the batch mode forecasting job.

For more information about API driven forecasting, see [Appendix C, "API Driven Forecasting,"](#) which describes the functionality available with the Forecast 2000 - Forecast Service.

## Submitting a Forecast

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

### *To submit a forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast to be submitted.
- 3 In the forecast form click the Submit button.

After submitting the forecast, the Status changes from Active to Submitted. A user who submits a forecast to their manager cannot change the status, as all the fields becomes read-only fields.

**NOTE:** A Siebel administrator or sales manager can change the status of a submitted forecast to enable the user or sales representative to revise a forecast and submit it again.

## Rolling Up a Forecast

When 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 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" on page 39.](#)

## Refreshing a Forecast

Managers' forecasts can contain subordinates' forecasts that are not up-to-date, because subordinates can add revenue records to their forecasts after the manager creates the forecast.

However, a manager can see which forecast contains subordinate's updated forecasts by means of the Refresh Alert column in the Forecast List view. (A Refresh Alert flag is set for the forecast containing the subordinate's updated forecasts.) The manager can drill down on such a forecast and navigate to the Subordinate view. In the Subordinate view, the Forecast Updated field contains a check mark for each subordinate forecast that is updated. The manager can then click the Refresh button in the Subordinate view to update the forecast. The Forecast Updated field is then unchecked and the Refresh Alert flag is reset indicating that the refresh of the forecast is completed. The entire forecast is not re-created; it is only updated with the changed revenue records. The refresh process flow is shown in [Figure 2](#).

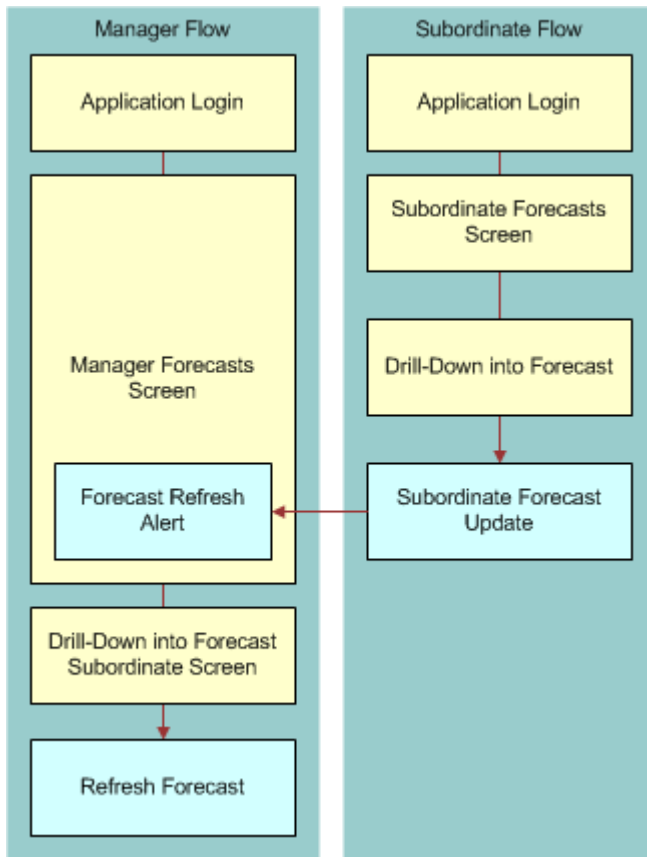


Figure 2. Refresh Process Flow

The refresh functionality is applicable only to the first level subordinate in the hierarchy. Therefore, a manager can refresh forecasts belonging to direct subordinates but not the subordinate's subordinate forecasts. When a manager refreshes the forecast, the manager's manager sees that the forecast is updated and that manager must refresh the forecast in turn.

If the manager has made any adjustment to the subordinate's revenue forecast, the adjusted values are not preserved after the refresh. The manager must then re-evaluate the newly-created records and adjust accordingly.

The refresh function works differently depending on whether the updated forecast is a Revenue Details or Summary Only type of forecast.

In a Summary Only forecast, the new revenue records are automatically pulled into the manager's Details view even before the manager clicks the Refresh button. However, the manager's forecast does not actually reflect the changes until the manager clicks the Rollup button to align the Summary and Details views. Siebel Forecasting rolls up from the Summary view, or subordinate, and the changes in the Details views are discarded if not aligned with the Summary. Clicking the Refresh button:

- Performs a rollup operation to align the Summary and Details views
- Resets the flag for the Refresh Alert column

In a Revenue Details forecast, the new revenue records are *not* automatically pulled into the manager's forecast. First, the alert flag is set so that the manager is aware of the subordinate's forecast revenue changes. So clicking the Refresh button:

- Pulls in the data from the subordinate's forecast into the manager's forecast
- Performs a rollup operation to align the Summary and Details views
- Resets the flag for the Refresh Alert Column

**NOTE:** The refresh functionality does not work if a user deletes a forecast record and then recreates it. This generates a new row ID for the record and therefore breaks the association with the manager's forecast. The manager can then no longer see the subordinate's record, making a refresh impossible.

## Refreshing a Forecast

A manager uses the following procedure when the manager notices that one of the forecasts contains subordinate's updated forecasts as indicated in the Refresh Alert column in the Forecast List view.

### *To refresh a forecast*

- 1 In the Forecasts list, drill down on a forecast that contains a red flag in the Refresh Alert column.
- 2 Navigate to the Subordinates view.  
The Forecast Updated field contains a checkmark for each subordinate forecast that is updated.
- 3 Select the subordinate forecasts that have been updated.
- 4 Click the Refresh button.

## Rejecting a Subordinate's Forecast

A manager can select any subordinate's forecast and reject the forecast by clicking the Reject button. After the forecast is rejected for a subordinate, the subordinate can update the forecast and re-submit it.

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

### *To reject a subordinate's forecast*

- 1 Log in as Manager.
- 2 Navigate to the Forecasts screen.
- 3 In the Forecasts list, drill down on the forecast that includes subordinate forecasts.
- 4 Click the Subordinates tab.
- 5 Locate the record that requires rejecting and click the Reject button.

## Updating a Rejected Forecast

The following procedure describes how to update a rejected forecast.

### *To update a rejected forecast*

- 1 Log in as Subordinate.
- 2 Navigate to Forecasts Screen. The status for the forecast changes to Active.
- 3 Make changes to the forecast and resubmit it.

## Updating Revenues from a Forecast

Updating revenues from a forecast allows a 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.

After a user (manager or subordinate) edits the Adjustment field, that user can update the revenues in the Revenue screen by selecting the Update Revenue Item menu option. The Revenue field in the Forecast Detail record is then updated with the total of the adjustment and the previous revenue value, and the Adjustment value is reset to zero.

Managers can update their own revenues and a subordinate's revenues under the following circumstances:

- If the forecast detail depth is Revenue Detail, managers can update a subordinate's revenues and their own revenues
- If the forecast detail depth is Summary Only or Standard, managers can update their own revenues only

Subordinates can update their own revenues for forecasts with a detail depth of Revenue Detail, Standard, or Summary.

## Updating Revenues Containing Custom Fields

Any custom fields added to the Revenue business component are not by default updated when a user selects Update Revenue Item.

To enable the updating of custom revenue fields, the user must add a Revenue Field Map: *Forecast Item Detail Field Name* user property to the Forecast 2000 -- Forecast Item and Forecast 2000 -- Forecast Item Detail business components with a value of *Corresponding Revenue Custom Field Name*.

For example, if a user has added the custom field Global Business Unit to the Revenue and Forecast Item Detail business components, the following user property must be added to the Forecast 2000 -- Forecast Item Detail business component:

Revenue Field Map: Global Business Unit

Value: Global Business Unit

For more information about this user property, see [Table 13](#).

### *To update revenue items from a forecast*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast to be updated.
- 3 In the Details view, select the revenue item to be updated.
- 4 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 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast to be updated.
- 3 In the Details view, select the revenue line item or items you want to update.
- 4 Click the menu button, and then click Update Detail with Revenue Item.

## About Analyzing Forecasts

Forecasts can be analyzed a number of ways.

- **Using Charts to Analyze Forecasts.** Users can view forecasts by clicking the Chart hyperlink 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, 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, 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.

To use the Charts view, the Chart Server must be configured.

- **Using Reports to Analyze Forecasts.** For information about running reports, see *Siebel Fundamentals*.
- **Using Analytics to Analyze Forecasting.** For more information about Oracle Business Intelligence Applications, formerly known as Siebel Business Analytics Applications, see the relevant documentation for the version of the software that you are running:
  - For versions earlier than 7.9, see Oracle's Siebel Business Analytics Applications documentation.
  - For versions 7.9 or higher, see the Oracle Business Intelligence Applications documentation.

For more information about the analytics platform on which your analytic application runs, see the relevant documentation for the version of the platform that you are running:

- For versions earlier than 10.1.3.2, see the Siebel Business Analytics Platform documentation.
- For versions 10.1.3.2 or higher, see the Oracle Business Intelligence Enterprise Edition documentation.



# 9

## Matrix Sales Organization

This chapter covers the methods that you can use to provide visibility into the business pipeline for managers in a matrix sales organization. It includes the following topics:

- [“About the Matrix Sales Organization” on page 97](#)
- [“About Changing the Visibility of My Team’s Opportunities View” on page 98](#)
- [“About Using the My Team’s Revenues View \(End User\)” on page 98](#)
- [“About Using the All and All Across Organization Views \(End User\)” on page 98](#)
- [“About Adding Overlay Managers to the Sales Team \(End User\)” on page 99](#)

### About the Matrix Sales Organization

A *sales team* can 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. In such a matrix sales organization, these individuals can report to different managers, each of whom wants to see 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

## About Changing the Visibility of My Team's Opportunities View

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 can 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 the *Siebel Developer's Reference*.

## About Using the My Team's Revenues View (End User)

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 can also take credit for some portion of the opportunity, while each product specialist takes credit for their product-related revenues. Their respective managers 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 \(End User\)" on page 76](#).

## About Using the All and All Across Organization Views (End User)

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 designate 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 uses 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 runs 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 [Table 5 on page 41](#).

## About Adding Overlay Managers to the Sales Team (End User)

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

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



# 10 Importing and Exporting Forecast Information

This chapter explains how users can export forecast information and import and export revenue information. It also discusses the administrative task that is required to update predefined mappings when the display name of a field in the Revenues screen is changed or a new field is added.

This chapter includes the following topics:

- [“Scenario for Importing and Exporting” on page 101](#)
- [“Exporting Forecast Data \(End User\)” on page 101](#)
- [“Importing Revenue Data \(End User\)” on page 102](#)
- [“Exporting Revenue Data \(End User\)” on page 103](#)
- [“About Updating Predefined Mapping in the Revenue Import Process” on page 103](#)

## Scenario for Importing and Exporting

This scenario gives one example of how you can use importing and exporting of forecast and revenue information. You can import and export differently, depending on your business model.

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

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

## Exporting Forecast Data (End User)

Users can export forecast data from the Forecasts screen. To export forecast data, complete the steps in the following procedure.

### *To export forecast data*

- 1 Navigate to the Forecasts screen.
- 2 In the Forecasts list, drill down on the forecast information you want to export.
- 3 In the Details view, select the forecast detail item or items you want to export, 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 to open this file from its current location or click Save to save this file to your computer.

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

- 6 Close the Export dialog box by clicking Close.

## Importing Revenue Data (End User)

Users can import modified revenue files back into the application. To import revenue data, complete the steps in the following procedure.

### *To import revenue data*

- 1 Navigate to the Revenues screen, then the List view.
- 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 is saved in the same format you select from the Input Format field.
- 6 In the Input Source field, select Predefined Mapping.
- 7 From the drop-down list beneath the Input Source field, select Opportunity Revenues or Default.  
**NOTE:** If you originally exported the revenues from the Revenues view in the Opportunities screen, select Opportunity Revenues. If you originally exported the revenues from the Revenues screen, select Default.
- 8 In the Conflict Resolution field, select the preferred method to use if the import encounters 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 Back.

**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 (End User)

Users can query data on an ad hoc basis in the Revenues screen. The resulting records can then be exported in a variety of formats. To export revenue data, complete the steps in the following procedure.

### To export revenue data

- 1 Navigate to the Revenues screen, then the List view.
- 2 In the Revenues list, locate the revenue information you want to export.
 

**NOTE:** If you are exporting files into more than one file format type, you must perform separate exports for each file type.
- 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 to open this file from its current location or click Save to save this file to your computer.

The file opens or you have to save it to a location on your computer, depending on your instructions.

- 6 Close the Export dialog box by clicking Close.

**CAUTION:** Do not select Visible Columns when you export revenue data, otherwise you cannot 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.

## About Updating Predefined Mapping in the Revenue Import Process

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 a 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 a user changes the Revenue Analysis List Applet List Column *Upside* display name to *Best Case*, you must 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, and then change column to Best Case.

### Updating a New Field

When a 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 the 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 submit the changes to the Siebel runtime repository.



# 11

## Troubleshooting Forecasting and Revenues

The chapter discusses some of the problems you can encounter as you use Siebel Forecasting.

### Troubleshooting Forecasting and Revenues

To resolve a problem, look for it in the list of Symptoms/Error messages in [Table 11 on page 105](#).

Table 11. Resolving Siebel Forecasting Problems

Symptom or Error Message	Diagnostic Steps or Cause	Solution
Queries run in the Details view in the Forecasts screen affect the information shown in the Summary view in the Forecasts screen.	Not applicable.	Users sometimes 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, users do have the ability to delete an opportunity. If a user deletes an opportunity, but does not delete the associated revenues, those revenues are maintained, and are included in the next forecast.	Users must delete each revenue associated with the opportunity before deleting the opportunity if those revenues are not meant to be forecasted.
Revenues in the Opportunities screen, then Revenues view do not appear in the parent account	Users can find that if they create an opportunity and assign revenues to it before they define the parent account, those revenues are not associated with the parent account.	If users set the parent account in the opportunity first, and then create the revenues, the revenues are correctly associated with the parent account.

Table 11. Resolving Siebel Forecasting Problems

Symptom or Error Message	Diagnostic Steps or Cause	Solution
<p>Cannot create a forecast.</p> <p>[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.</p>	<p>Check the forecast log file on your server to find the source of this problem. These files are typically located as follows:</p> <p>Siebel Mobile Client (siebel.exe) installation:</p> <ul style="list-style-type: none"> <li>■ xxx: \$install/log directory</li> <li>■ yyy: siebel.log, or siebel_N.log, if the client has run N times since the crash occurred. (The names of the log files are incremented by one for each run, for example, siebel.log is renamed siebel_01.log, siebel01.log is renamed siebel02.log.)</li> </ul> <p>Microsoft Windows server:</p> <ul style="list-style-type: none"> <li>■ xxx: \$install/siebsrvr/log</li> <li>■ yyy: SrvrComponent_ProcessId.log, for example, SSEObjMgr_50231.log</li> </ul> <p>UNIX server:</p> <ul style="list-style-type: none"> <li>■ xxx: \$install/siebsrvr/enterprises/\$enterprise_name/\$srvr_name/log</li> <li>■ yyy: SrvrComponent_TaskId.log, for example, SSEObjMgr_50231.log</li> </ul> <p>A component can have many tasks running and generating logs. See <i>Siebel System Monitoring and Diagnostics Guide</i> for information about the location of log files.</p>	<p>In the log file, there are records similar to the following:</p> <pre>FCSTLOG_EVENT Error 1 2004-10-30 16:16:02 &lt;WW Sales, 10/01/2004, Product Line Manager-00004456, BGROVES&gt; Error occurred when setting field "Revenue Class" to value "Backlog"</pre> <p>The error in the previous example occurred on October 30th, 2004, 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, you can correct the error 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.</p> <p><b>NOTE:</b> 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.</p> <p>After this issue is corrected, you can delete and rerun the forecast, or add the missing revenue record manually.</p>





# A

## Common High-Level Forecast Usage Examples

This appendix provides you with examples of the ways in which forecasts can be used. Using a number of examples, it offers a glimpse into the requirements of different situations. It also describes how administrators and users can create and use these different forecasts.

This appendix contains the following topics:

- [“Product Quantity Forecasting” on page 109](#)
- [“Opportunity Forecasting” on page 111](#)
- [“Service Forecasting” on page 113](#)
- [“Product Level Forecasting” on page 114](#)
- [“Cost-Margin Forecasting” on page 115](#)
- [“Worst, Expected, Best \(WEB\) Forecasting” on page 116](#)
- [“Partner Forecasting Option I: Partner Portal” on page 117](#)
- [“Partner Forecasting Option II: Triggered by Partner Manager” on page 118](#)
- [“Opportunity Product Forecasting” on page 119](#)
- [“Weighted Average—Expected Revenue Forecasting” on page 120](#)
- [“Global Account or Product Forecasting” on page 121](#)
- [“Indirect Sales Forecasting” on page 121](#)
- [“Forecast Summary Spreadsheets” on page 123](#)
- [“Last Forecast Adjustment Amounts” on page 124](#)

Use this topic after learning the details of how to create forecasts using the Siebel application as described in the rest of this guide. This topic is designed to familiarize you with how forecasts are used.

The following examples illustrate situations in which you can decide to forecast. Each specific situation discusses, in general terms, what steps an administrator and user performs to forecast a certain way. Each example is not detailed enough to allow you to perform each task. Use this section to gain an understanding of how forecasts work with regard to the data you want to analyze.

### Product Quantity Forecasting

Often users need forecasts that break down revenues according to business requirements. For example, they sometimes want revenues grouped by Account by Product by Product Line.

## Forecast Requirements

The forecast must group results by Accounts, by Product Line within the accounts and by Products within product lines (three dimensions).

## Administrator Usage Example

The administrator:

- 1 Creates a forecast series with Quarterly summary period type and Monthly Interval period.
- 2 Specifies simple Auto and Associated Search Specs. For example, the Auto Search Spec is set as follows:

[Calculated Primary Flag] = 'N' AND [Committed] = 'Y'

The Associated Search Spec is set as follows:

[Calculated Primary Flag] = 'N'

- 3 Defines the aggregation dimensions as follow:
  - Account 1
  - Product Line 2
  - Product 3
- 4 Defines Forecast Dates, at least one for each quarter.
- 5 Defines Forecast Participants to include the managers and subordinates.

## User Revenue Example

The user:

- Adds new opportunities with assigned accounts.
- Maintains relevant opportunity data including revenue records with product line, product, quantity, price, and calculated revenue values.

## User Forecast Example

The user:

- 1 Creates a new forecast based on the forecast series.

Users can use the Forecast Summary view to easily find out the forecasted revenue and quantity of the products being forecasted and sold in each quarter of the year.
- 2 Analyzes all revenue records in the List and Tree view tabs.

- 3 Makes adjustments for individual products, aggregated revenues for Product Lines, as well as total revenues for some Accounts.

When changing the revenue or quantity values for a particular product, the adjusted value is automatically rolled up to its parent Product Line and in turn to its immediate parent Account. The same is true for changes to the revenue/quantity values for a Product Line or Account, that is, their respective aggregated values are rolled up to their immediate parent (for example, Account rolls up to Date).

- 4 Submits the forecast.

## Opportunity Forecasting

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

### Forecast Requirements

The forecast must allow opportunity management consistent with the company's sales methodology, for example, sales stage, revenue class, and probability.

### Administrator Usage Example

The administrator defines a forecast series with the name WW Sales. The Auto Forecast Search Spec is set as follows:

```
[Calculated Primary Flag] = 'Y'
```

This search pulls opportunity-level revenue items into the forecast.

### User Revenue Example

The user:

- Adds a new opportunity.
- Maintains relevant opportunity data.
- (Optional) Uses the Revenue Type field in each revenue item to add booked, billed, and actual status as revenue data is actualized over time. Users can use the Revenue Class field to categorize each revenue item with service/hardware/software attributes.

### User Forecast Example

The user:

- 1 Creates a new forecast based on the WW Sales forecast series.  
In the Details view, users can see opportunity data they are working on being automatically pulled into their forecast.
- 2 Makes adjustments and views the adjustment history.

- 3 Submits the forecast.



# Service Forecasting

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

## Forecast Requirements

The forecast must include revenue scheduling, spreadsheets, services as products, easy to add recurring revenues, and pull scheduled revenue into the correct lengths of time.

## Administrator Usage Example

The administrator defines a forecast series with the name Service. The Auto Forecast Search Spec is set as follows:

```
[Product] IS NOT NULL and [Calculated Primary Flag] = 'N'
```

This search specification pulls revenue line items that have a product indicated into the forecast.

## User Revenue Example

The user:

- Creates a new opportunity or project.
- Associates and creates revenues using revenue scripts or revenue plans to establish a revenue group ID.
- Uses the revenue spreadsheet to view and maintain revenues over the scheduled time. As revenues become backlog or actual revenues, they must be updated by the practice manager.
- Uses revenue charts and reports to graphically display data and to perform ad hoc analysis.

## User Forecast Example

The user:

- 1 Creates a forecast based on the Service forecast series.
- 2 In the Details view, uses the spreadsheet and chart views to evaluate and adjust scheduled revenues.
- 3 Uses predefined queries to see details by service.
- 4 Submits the forecast.

## Product Level Forecasting

Often 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)
- Product marketing decisions (product mix, discount analysis, and pricing strategies)

### Forecast Requirements

The forecast needs:

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

### Administrator Usage Example

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 specification pulls product revenue line items that have a product indicated into the forecast.

### User Revenue Example

The user:

- Creates a new opportunity or account.
- Associates and creates product revenue line items using the New Record command, revenue scripts, or revenue plans.
- Uses the revenue list or spreadsheet views to edit and maintain product revenues. The user adds values in the following fields: Qty, Cost, Margin, Price, and Product Line.
- Uses revenue charts and reports to graphically display data and to perform ad hoc analysis. For example, the user creates charts and reports with parameters of:
  - Quantity by product line by month
  - OR
  - Margin by product by quarter

## User Forecast Example

The user:

- 1 Creates a forecast based on the product forecast series.
- 2 In the Details view, uses the spreadsheet and chart views to evaluate and adjust product revenues.
- 3 Uses forecast detail filters to see details by product.
- 4 Uses charts and reports to perform analysis.
- 5 Submits the forecast.

**NOTE:** To roll up total quantity, the administrator needs to make the quantity rollup available in the total forecast. This is a simple configuration procedure.

## Cost-Margin Forecasting

Many companies emphasize cost and margin analysis in product planning and sales strategy. Such companies want to use cost and margin analysis to drive lifetime value.

### Forecast Requirements

The forecast must allow users 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 lose money initially, but can be highly profitable over the long term.

### Administrator Usage Example

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 specification pulls product revenue line items that have a product indicated into the forecast.

### User Revenue Example

The user:

- Creates a new opportunity or account.
- Associates and creates product revenue line items using the New Record command, revenue scripts, or revenue plans.
- Instead of adding just revenue information, adds cost data for every product added.
- Using the revenue spreadsheet, views each product and its cost and margin expectations by month or week. The user can modify these costs and margins accordingly and view them graphically using the Chart view.

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

## User Forecast Example

The user:

- 1 Creates a forecast based on the product cost/margin forecast series.  
In the forecast Details they see the revenues they are working on automatically pulled into their forecast.
- 2 Views the total revenue expected from each of these revenues from the Forecast Details list view, or views the cost and margin expectations over time for each product using the spreadsheet view.
- 3 Views a graphical presentation of this data using the Chart view, or by creating reports.
- 4 Adjusts and submits the forecast.

**NOTE:** This example 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 [“About Configuring Revenue and Forecast Spreadsheets”](#) on page 60.

# Worst, Expected, Best (WEB) Forecasting

Sometimes there is a need for Worst, Expected, Best (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

The forecast must allow evaluation of each opportunity, product revenue, or service revenue using WEB analysis.

## Administrator Usage Example

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

## User Revenue Example

The user:

- Creates 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.

## User Forecast Example

The user:

- Creates a new forecast based on the WEB forecast series.  
The correct revenues with their WEB data are automatically pulled into the forecast.
- Adjusts and submits the forecast.

# Partner Forecasting Option I: Partner Portal

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

In this example, a partner user is responsible for entering partner revenues through the Partner Portal and for creating the forecast.

## Forecast Requirements

The forecast must incorporate partner opportunities and revenues automatically.

## Administrator Usage Example

The administrator defines a forecast series with the name WW Sales. The Auto Forecast Search Spec is set up as follows to include partner revenues:

```
[Partner] IS NOT NULL and [Committed] = 'Y'
```

This search specification pulls revenue line items that have a partner indicated into the forecast.

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*.

## User Revenue Example

The partner user:

- Enters revenues using the Partner Portal and creates appropriate opportunities and product revenues.
- Creates scheduled revenues and uses the Chart view to see data graphically.

## User Forecast Example

The partner user:

- 1 Creates a standard forecast as if they were part of the sales force, WW Sales.

2 Makes adjustments and submits the forecasts to their appropriate internal partner manager.

The partner manager then:

3 Creates their own forecast.

4 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 Forecasting Option II: Triggered by Partner Manager

Sometimes, a partner's revenues are a large part of a company's overall revenues and the company needs to be more proactive in managing these revenues, measuring the partners, and allocating resources to the channel partners.

In this example, a partner manager is responsible for entering partner revenues and for creating the partner forecast.

### Forecast Requirements

The forecast must incorporate partner opportunities and revenues using an internal source, such as a partner manager, to minimize partner's responsibilities.

### Administrator Usage Example

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'
```

This search specification pulls revenue line items that have a partner indicated into the forecast.

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

### User Revenue Example

The partner manager:

- Enters partner revenues or else they are imported into the Siebel application.
- Maintains and manages the partner-specific revenues in the Partners, then Revenues view or the Accounts or Opportunities, then Revenues view.

### User Forecast Example

The partner manager:

- 1 Creates a partner forecast or sales forecast and the partner revenues are automatically pulled into the forecast.
- 2 Reviews, adjusts, and submits the forecast to their manager.

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

## Opportunity Product Forecasting

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

### Forecast Requirements

The forecast must incorporate both opportunity and product revenues related to opportunities.

### Administrator Usage Example

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 specification pulls product revenue line items that have the product indicated into the forecast.

### User Revenue Example

The user:

- Creates a new opportunity.
- Associates and creates product revenue line items using the New Record command, revenue scripts, or revenue plans.
- Uses the Revenues list or spreadsheet views to edit and maintain product revenues (add quantity, cost, margin, price, and product line).
- Uses revenue charts and reports to graphically display data and to perform ad hoc analysis. For example, the user can create charts and reports with the parameters revenue by opportunity or quantity by opportunity.

### User Forecast Example

The user:

- 1 Creates an opportunity product forecast.
- 2 In the Details view, uses the spreadsheet and chart views to evaluate and adjust product revenues.
- 3 Uses charts and reports to view product revenues by opportunity and to see aggregates of product quantity and revenue by opportunity.

- 4 Uses queries to view live forecast details by opportunity.  
Preconfigured, these queries are set up to query by product.
- 5 Adjusts and submits forecasts.

**NOTE:** To roll up total quantity, the administrator needs to make the quantity rollup available 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.

## About Forecasting Opportunity Products

The Expected Delivery Date field in the Opportunities screen, then the 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 can 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 can still remain with slightly lower quantities or a slightly different average price.

# Weighted Average—Expected Revenue Forecasting

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 forecast must allow expected value forecasting using revenue, probabilities (driven by sales stages), and expected revenue.

## Administrator Usage Example

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 are 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.

## User Revenue Example

The user:

- Creates a new opportunity or revenue items.



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

## User Forecast Example

The user:

- 1 Creates a new expected revenue forecast that automatically pulls in the correct revenues with their probabilities, sales stages, and expected revenues.
- 2 Adjusts and submits the forecast.

# Global Account or Product Forecasting

A global account or product can be forecasted in three ways as described in the following sections.

## 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\*'.  
`Account = CompanyName and [Calculated Primary Flag] = 'Y' (for opportunity level revenue management)`

**NOTE:** You can also do this 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, business intelligence, 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:** You can also define and save a predefined query 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:** You can also manage and evaluate revenues by Product, Contact, Partner, or Project.

# Indirect Sales Forecasting

This type of forecasting allows participants to roll up and submit their forecasts to managers outside of their reporting hierarchy.

## Forecast Requirements

The forecasts must roll up to the manager as defined by the forecast hierarchy and not by the position hierarchy (which is the default).

## User Revenue Example

The user:

- Creates revenue line items and opportunities so that they can be rolled up.

## Administrator Usage Example

The administrator:

- Creates a forecast series where:
  - Visibility is defined as My Revenues - Indirect Sales.
  - The Submit To position for each participant in the forecast series is specified (as required).

## User Forecast Example

The user:

- Creates a new forecast based on the forecast series
- Reviews the manager-subordinate relationships.
- Reviews the revenue details of direct and indirect subordinates, as defined by the forecast series.
- Submits the forecast.

# Forecast Summary Spreadsheets

Often users want to view the aggregated summary of a forecast in a spreadsheet format. Summary Spreadsheet view is a read only view that allows users to view Total Revenues combined by period. The period for the combined Total Revenues is in the Summary Period Type field in Forecast Series.

## Forecast Requirements

The user must be able to view a forecast summary spreadsheet.

## Administrator Usage Example

The administrator:

- Creates a Summary Only quarterly forecast series where:
  - Aggregation levels are defined
  - Summary Period Type is defined

## User Forecast Example

The user:

- 1 Generates a forecast in the forecast series defined by the administrator

- 2 Navigates to the Forecast, and selects the Summary Spreadsheet view

The user will be able to see the Total Revenues and Last Forecast Total Revenues in a spreadsheet format. The data is shown using aggregation levels defined in Forecast Series and the revenue is combined by the period defined in the Summary Period Type field in Forecast Series. The Total Revenues reflects the amounts after adjustment.

**NOTE:** The Last Forecast Total Revenues columns can be hidden using Siebel Tools.

## Last Forecast Adjustment Amounts

Often users require the ability to view the last forecast adjustments while making adjustments to the current forecasts. Two columns in the Summary Tree and Summary List views allow users to quickly reference the corresponding summary records of the last forecast generated in the same series :

- Last Forecast Adjustment
- Last Forecast Total Revenue

### Forecast Requirements

After a forecast has been created, the Summary Tree and List views will be visible. The user will then be able to view the corresponding numbers from the previous forecast in the Last Forecast Adjustment and Last Forecast Total Revenue columns.

### Administrator Usage Example

The administrator creates a Summary Only quarterly forecast series where the forecast has multiple forecast dates.

### User Forecast Example

The user:

- 1 Generates a forecast in the forecast series defined by the administrator
- 2 Adjusts the Total Revenue for the forecast
- 3 Creates the next forecast in the same forecast series
- 4 Navigates to Forecast, and selects the Summary Tree view

The adjustments made in [Step 2](#) will be reflected in the Last Forecast Adjustment, and the Total Revenue amount from the previous forecast will be in the Last Forecast Total Revenue column.

# B

## Forecasting User Properties

This appendix describes the user properties associated with a number of Forecasting business components. Forecasting user properties are in Siebel Tools. This appendix contains the following topics:

- ["About Forecasting User Properties" on page 125](#)
- ["Forecast 2000 - Forecast User Properties" on page 126](#)
- ["Forecast 2000 - Forecast Item User Properties" on page 128](#)
- ["Forecast 2000 - Forecast Item Detail User Properties" on page 131](#)
- ["Forecast 2000 - Forecast Item Detail Flat User Properties" on page 132](#)
- ["Forecast 2000 - Forecast Item DynCol User Properties" on page 134](#)
- ["Forecast 2000 - Forecast Series User Property" on page 136](#)
- ["Forecast 2000 - Forecast Series Aggregation User Property" on page 136](#)
- ["Forecast 2000 - Forecast Series Date User Properties" on page 137](#)

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

## About Forecasting User Properties

The following business components are relevant to Siebel Forecasting:

- **Forecast 2000 - Forecast.** The business component for forecasts.
- **Forecast 2000 - Forecast Item.** Used internally by the forecast engine.
- **Forecast 2000 - Forecast Item Detail.** Used internally by the forecast engine.
- **Forecast 2000 - Forecast Item Detail Flat.** Joins both the Forecast Item and Forecast Item Detail business components to form a *flat* view (the Forecast Item business component usually stores the nonnumeric properties that can be shared by child details). In general, this means that new fields, and user properties referencing that field, are added to both business components.
- **Forecast 2000 - Forecast Item DynCol.** 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 ["Modifying Spreadsheet Applets for Forecasting" on page 61](#).
- **Forecast 2000 - Forecast Series.** The business component for forecast series.
- **Forecast 2000 - Forecast Series Aggregation.** The business component for aggregation levels associated with forecast series.
- **Forecast 2000 - Forecast Date.** The business component for dates associated with forecast series.

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

## Forecast 2000 - Forecast User Properties

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

Table 12. Forecast 2000 - Forecast

User Property	Value	Description
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.
Forecast Refresh	Y or N	If this property is not defined, the Refresh button is not enabled.
Forecast Rollup	[Link Type] = LookupValue ('FCST_FCSTITEM_LINK_TYPE', 'Own Item'), or [Link Type] = LookupValue ('FCST_FCSTITEM_LINK_TYPE', 'Item')	If active, this search specification is applied on the Forecast Detail business component during rollup.  This search specification defines that only those records that have a Link Type value of Own Item or Item are rolled up.
Forecast UoM Conversion	Y or N	If enabled, the UoM conversion is done when generating a forecast.
Skip Existing Forecast Series Date	Y	If enabled, does not show dates for which forecasts of the currently selected series already exist.

Table 12. Forecast 2000 - Forecast

User Property	Value	Description
Named Search: Forecast Series Date Range	[Date] >= '&FCST_DATE_LOWER_BOUND' and [Date] <= '&FCST_END_DATE'	If active, this search specification is applied to the Revenue business component during forecast creation. This forecast is typically activated to make sure that the revenues returned by the search are within the Forecast Date range. For more information about this user property, see <a href="#">Using the Named Search: Forecast Series Date Range User Property on page 127</a> .
Revenue Aggregation Field <i>n</i>	<i>Field names on the Forecast 2000 - Forecast Item Detail Flat business component</i>	The fields that 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.  The Revenue Aggregation Field 6 user property is deactivated. You must use this user property as the first of any custom user properties.
Skip Existing Forecast Series Date	Y	If enabled, does not show dates for which forecasts of the currently selected series already exist.

### Using the Named Search: Forecast Series Date Range User Property

Use this user property when querying the revenue records to include in the current forecast. The default is to include all records, in the range specified by the forecast.

The value of the Named Search: Forecast Series Date Range user property must be a valid search specification. The search specification (as well as the Auto and Assoc search specifications) can use special variables as defined in the Forecast Series and Forecast Series Date business components. For example, if the default value of Named Search: Forecast Series Date Range is:

```
[Date] >= '&FCST_DATE_LOWER_BOUND' and [Date] <= '&FCST_END_DATE'
```

then values between the Date - Lower Bound field and the End Date field of the Forecast 2000 -- Forecast Series Date business component are returned. In such a case:

- The variable &FCST\_DATE\_LOWER\_ BOUND represents the Date - Lower Bound field, which is the History View Date if it has a value.
- If History View Date does not have a value, the Date - Lower Bound field is the History Edit date if it has a value, or the Start Date if the History Edit date does not have a value.

You can deactivate and modify the values of the Named Search: Forecast Series Date Range user property; however, you cannot create new instances of it.

**NOTE:** If you deactivate the Named Search: Forecast Series Date Range user property, you can make sure that the revenues that enter the forecast are limited by date, by modifying the Auto and Assoc search specifications of the Forecast Series to include similar criteria.

## Forecast 2000 - Forecast Item User Properties

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

Table 13. Forecast 2000 - Forecast Item

User Property	Value	Description
Adjustment: Adjustable	Y	<p>Indicates that adjustments are enabled on Forecast Item business component.</p> <p>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.</p> <p>Also, the manager's record is visible to the positions above the manager, for example the change shadows the original record. The record created by the manager is called an <i>adjustment</i> of the original.</p> <p>If adjustments are disabled, changes are made on the same record and are visible throughout the hierarchy.</p>
Adjustment: Adjustable Field <i>n</i>	<i>Field names on the Forecast 2000 - Forecast Item business component</i>	<p>Fields that managers can adjust.</p> <p>If a field is not configured here, it appears to be uneditable to managers when they view forecast details included from subordinate forecasts.</p>
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	<p>Used internally.</p> <p>Do not disable.</p>



Table 13. Forecast 2000 - Forecast Item

User Property	Value	Description
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally.  The value is the business component that includes information indicating the ownership or 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 business component that indicates position of owner.
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally.  Indicates if a record was adjusted and is used in other methods. For example, it is used for determining if the user can invoke the Unadjust Record method.  <b>NOTE:</b> The Adjusted Flag is set only when the adjustment is made by a manager. It does not get set when the adjustment is made by the primary sales team member.
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally.  Field that stores base record identifier (usually, but not necessarily the value of row_id) for which this record is an adjustment.
Adjustment: Adjustment for Id Matching Field Name	Forecast Item Number	Used internally.  Field which, when matched against [Adjustment For Id], determines if a record was adjusted. This is part of the criteria used in calculating the value of the Adjustment Flag.
Adjustment: Context BC Position Id Field Name	Owner Position Id	Used internally.  Field on the Context business component that stores the position of the owner. Because Oracle's 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.

Table 13. Forecast 2000 - Forecast Item

User Property	Value	Description
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 is updated during adjustments.
Adjustment: Owner Position Id Field Name	Owner Position Id.	Used internally.  Field on this business component that stores the owner's Position Id.
Revenue Associate List	Y	When active, the associate applet shows the revenue, and not a standard child business component. It also applies the Associate search specification and the Forecast Date Range search when querying the Revenue business component.  When inactive, the behavior defaults to standard association and the business component is defined in the associate applet.
Revenue Field Map: Forecast Item Field	<i>Revenue Field</i>	Maps fields from the Revenue business component to the Forecast Item business component, which are copied when creating the forecast.  This is most commonly configured by administrators who have added fields to the Revenue business component and want the fields to be carried over in the forecast.

## Forecast 2000 - Forecast Item Detail User Properties

Table 14 describes the user properties associated with the business component: Forecast 2000 - Forecast Item Detail.

Table 14. Forecast 2000 - Forecast Item Detail

User Property	Value	Description
Adjustment: Adjustable	Y	Used internally.
Adjustment: Adjustable Field <i>n</i>	<i>Forecast Item Detail field</i>	See Forecast Item: Adjustable Field <i>n</i> in <a href="#">Table 13</a> .
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	Used internally. See Forecast Item: Adjustment Allowed Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally. See Forecast Item: Adjustment Context BC Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Context Id Field Name	Owner Forecast Id	Used internally. See Forecast Item: Adjustment Context Id Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally. See Forecast Item: Adjustment Flag Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally. See Forecast Item: Adjustment For Id Field Name in <a href="#">Table 13</a> .
Adjustment: Context BC Position Id Field Name	Owner Position Id	Used internally. See Forecast Item: Context BC Position Id Field Name in <a href="#">Table 13</a> .
On Field Update Set 1	"Amount Revenue", "Expected Value", "IIF([Win Probability] = 0", or,  [Amount Revenue] = 0, 0.0, [Win Probability] * [Amount Revenue]/100)"	Used internally.  Determines how the Expected Revenue is calculated when there are updates to the Revenue or Probability fields.

Table 14. Forecast 2000 - Forecast Item Detail

User Property	Value	Description
On Field Update Set 2	"Win Probability", "Expected Value", "IIF([Win Probability] = 0", or,  [Amount Revenue] = 0, 0.0, [Win Probability] * [Amount Revenue]/100)"	Used internally.  Determines how the Expected Revenue is calculated when there are updates to the Revenue or Probability fields.
Revenue Field Map: <i>Forecast Item Detail Field</i>	<i>Revenue Field</i>	See Forecast Item: Revenue Field Map in <a href="#">Table 13</a> .

## Forecast 2000 - Forecast Item Detail Flat User Properties

[Table 15](#) describes the user properties associated with the business component: Forecast 2000 - Forecast Item Detail Flat.

Table 15. Forecast 2000 - Forecast Item Detail Flat

User Property	Value	Description
Adjustment: Adjustable	Y	Used internally.  See Forecast Item: Adjustable in <a href="#">Table 13</a> .
Adjustment: Adjustable Field <i>n</i>	<i>Forecast Item Detail Flat field</i>	See Forecast Item: Adjustable Field <i>n</i> in <a href="#">Table 13</a> .
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	Used internally.  See Forecast Item: Adjustment Allowed Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally.  See Forecast Item: Adjustment Context BC Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Context Id Field Name	Owner Forecast Id	Used internally.  See Forecast Item: Adjustment Context Id Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally.  See Forecast Item: Adjustment Flag Field Name in <a href="#">Table 13</a> .

Table 15. Forecast 2000 - Forecast Item Detail Flat

User Property	Value	Description
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally. See Forecast Item: Adjustment For Id Field Name in <a href="#">Table 13</a> .
Adjustment: Context BC Position Id Field Name	Owner Position Id	Used internally. See Forecast Item: Context BC Position Id Field Name in <a href="#">Table 13</a> .
Adjustment: Owner Position Id Field Name	Owner Position Id	Used internally. See Forecast Item: Owner Position Id in <a href="#">Table 13</a> .
Adjustment: Force Unadjust Parent BC	Forecast 2000 - Forecast Item	Used internally. When unadjusting this business component, the parent business component sometimes also needs to be unadjusted, for example, if it drives the visibility of this business component.
Adjustment: Force Unadjust Parent BC Id Field Name	Forecast Item Id	Used internally. When unadjusting this business component, the field on this business component that links to the parent business component that it needs to unadjust.
Aggregation Level Rollup	Y or N	Indicates whether or not rollup happens at each aggregation level.
Aggregation Column Enabled	Aggregation Column Enabled	Indicates whether the column must be queried according to the aggregation hierarchy defined in the forecast series.
On Field Update Invoke 1	"Amount Revenue", "Forecast 2000 -- Forecast", "ForecastSetUpdateFlag"	Used internally. If a subordinate updates their forecast by changing the Revenue amount, this property invokes a function to set the Refresh Alert field so that the manager will refresh the forecast.
On Field Update Set 1	"Amount Revenue", "Expected Value", "IIF([Win Probability] = 0", or, [Amount Revenue] = 0, 0.0, [Win Probability]*[Amount Revenue]/100)"	Used internally. Determines how the Expected Revenue is calculated when there are updates to the Revenue or Probability fields.

Table 15. Forecast 2000 - Forecast Item Detail Flat

User Property	Value	Description
On Field Update Set 2	"Win Probability", "Expected Value", "IIF([Win Probability] = 0", or,  [Amount Revenue] = 0, 0.0, [Win Probability]*[Amount Revenue]/100)"	Used internally.  Determines how the Expected Revenue is calculated when there are updates to the Revenue or Probability fields.
Revenue Associate List	Y	See Forecast Item: Revenue Associate List in <a href="#">Table 13</a> .
Revenue Field Map: <i>Forecast Item Detail Field</i>	<i>Revenue Field</i>	See Forecast Item: Revenue Field Map in <a href="#">Table 13</a> .

## Forecast 2000 - Forecast Item DynCol User Properties

[Table 16](#) describes the user properties associated with the business component: Forecast 2000 - Forecast Item DynCol.

Table 16. Forecast 2000 - Forecast Item DynCol

User Property	Value	Description
Adjustment: Adjustable	Y	Used internally.  See Forecast Item: Adjustable in <a href="#">Table 13</a> .
Adjustment: Adjustable Field <i>n</i>	<i>Field names on the Forecast 2000 - Forecast Item business component</i>	See Forecast Item: Adjustable Field <i>n</i> in <a href="#">Table 13</a> .
Adjustment: Adjustment Allowed Field Name	Adjustment Allowed	Used internally.  See Forecast Item: Adjustment Allowed Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Context BC Name	Forecast 2000 - Forecast	Used internally.  See Forecast Item: Adjustment Context BC Name in <a href="#">Table 13</a> .
Adjustment: Adjustment Context Id Field Name	Owner Forecast Id	Used internally.  See Forecast Item: Adjustment Context Id Field Name in <a href="#">Table 13</a> .

Table 16. Forecast 2000 - Forecast Item DynCol

User Property	Value	Description
Adjustment: Adjustment Flag Field Name	Adjusted Flag	Used internally.  See Forecast Item: Adjustment Flag Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment For Id Field Name	Adjustment For Id	Used internally.  See Forecast Item: Adjustment For Id Field Name in <a href="#">Table 13</a> .
Adjustment: Adjustment for Id Matching Field Name	Forecast Item Number	Used internally.  See Forecast Item: Adjustment For Id Matching Field Name in <a href="#">Table 13</a> .
Adjustment: Context BC Position Id Field Name.	Owner Position Id	Used internally.  See Forecast Item: Context BC Position Id Field Name in <a href="#">Table 13</a> .
Adjustment: InterTable	Y	Used internally.  See Forecast Item: Adjustment InterTable in <a href="#">Table 13</a> .
Adjustment: InterTable BC	Forecast 2000 - Forecast/ Forecast Item	Used internally.  See Forecast Item: Adjustment InterTable BC in <a href="#">Table 13</a> .
Adjustment: InterTable Child Field Name	Forecast Item Id	Used internally.  See Forecast Item: Adjustment InterTable Child Field in <a href="#">Table 13</a> .
Adjustment: InterTable Parent Field Name	Forecast Id	Used internally.  See Forecast Item: Adjustment InterTable Parent Field in <a href="#">Table 13</a> .
Adjustment: InterTable Update	Y	Used internally.  See Forecast Item: Adjustment InterTable Update in <a href="#">Table 13</a> .
Revenue Associate List		Used internally.  See Forecast Item: Revenue Associate List in <a href="#">Table 13</a> .
Revenue Field Map: <i>Forecast Item Field</i>	<i>Revenue Field</i>	See Forecast Item: Revenue Field Map in <a href="#">Table 13</a> .

## Forecast 2000 - Forecast Series User Property

Table 17 describes the user property associated with the business component: Forecast 2000 - Forecast Series.

Table 17. Forecast 2000 - Forecast Series

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

## Forecast 2000 - Forecast Series Aggregation User Property

Table 18 describes the user property associated with the business component: Forecast 2000 - Forecast Series Aggregation.

Table 18. Forecast 2000 - Forecast Series Aggregation

User Property	Value	Description
On Field Update Set 1	"Aggregate Level", "Mapped Field", "Aggregation Field Level + ' ' + ToChar([Aggregate Level])"	Used Internally.  Updates the fields called Mapped Field according to the aggregation level selected.



## Forecast 2000 - Forecast Series Date User Properties

Table 19 describes the user properties associated with the business component: Forecast 2000 - Forecast Series Date.

Table 19. Forecast 2000 - Forecast Series Date

User Property	Value	Description
Auto-Set Start/End Dates	N	<p>If enabled, when the user creates a new record and sets the Forecast Date field, Start Date automatically defaults to the period that the Forecast Date falls in.</p> <p>If the user is copying a record, the End Date defaults so that the difference (number of periods) between the source record's Start Date and End Date is maintained.</p>
Series Subst Var: FCST_DATE_LOWER_BOUND	Date - Lower Bound	<p>Special variable available for use in Auto, Assoc, and Date Range search specifications.</p> <p>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.</p>
Series Subst Var: FCST_EFFECTIVE_DATE	Forecast Date	<p>Special variable available for use in Auto, Assoc, and Date Range search specifications.</p> <p>Using this variable, administrators can access the Forecast Date.</p>
Series Subst Var: FCST_END_DATE	End Date	<p>Special variable available for use in Auto, Assoc, Date Range search specifications.</p> <p>Through this variable, administrators can access the End Date.</p>
Series Subst Var: FCST_HISTE_START_DATE	History Edit Date	<p>Special variable available for use in Auto, Assoc, and Date Range search specifications.</p> <p>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.</p>

Table 19. Forecast 2000 - Forecast Series Date

User Property	Value	Description
Series Subst Var: FCST_HISTV_START_DATE	History View Date	<p>Special variable available for use in Auto, Assoc, and Date Range search specifications.</p> <p>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}.</p>
Series Subst Var: FCST_START_DATE	Start Date	<p>Special variable available for use in Auto, Assoc, and Date Range search specifications.</p> <p>Using this variable, administrators can access the Start Date, which cannot be null.</p>

# C

## API Driven Forecasting

The appendix describes the business service methods and arguments that are associated with the Forecast 2000 - Forecast Service business service. The following topics are included in this appendix:

- ["About API Driven Forecasting" on page 139](#)
- ["Forecast 2000 - Forecast Service" on page 139](#)
- ["Forecast 2000 - Forecast Service Business Service Methods" on page 140](#)
- ["Forecast 2000 - Forecast Service Business Service Method Arguments" on page 140](#)

### About API Driven Forecasting

You can generate forecasts through batch mode using the Forecast 2000 - Forecast Service business service, which is provided by default with your Siebel business application.

To generate forecasts through batch mode, you must implement the functionality that is available with the Forecast 2000 - Forecast Service and decide, for example, when and how often to run the batch mode forecasting job.

The same forecast-related limitations apply to API driven forecasting as apply to forecast generation and rollup in general.

**NOTE:** When generating forecasts through batch mode, if a forecast is being created for a participant who has subordinates and the subordinates have not created their forecasts yet, then the forecasts for subordinates are created automatically.

### Forecast 2000 - Forecast Service

This business service allows the generation and, or the roll up of forecasts without the need for any user interface interaction.

<b>Name:</b>	Forecast 2000 - Forecast Service
<b>Project:</b>	Forecast 2000
<b>Class:</b>	CSSSvcForecast
<b>Display Name:</b>	Forecast Service

## Forecast 2000 - Forecast Service Business Service Methods

There are two methods associated with the Forecast 2000 - Forecast Service:

- GenerateForecast
- RollUpForecast

### GenerateForecast Method

This business service method generates forecasts.

**Name:** GenerateForecast  
**Display Name:** Generate Forecast

### RollUpForecast Method

This business service method rolls up forecasts.

**Name:** RollUpForecast  
**Display Name:** Rollup Forecast

## Forecast 2000 - Forecast Service Business Service Method Arguments

This topic describes the arguments that are associated with the GenerateForecast and RollUpForecast methods.

### GenerateForecast Method Arguments

There following arguments are associated with the GenerateForecast method:

GenerateForecast (Forecast Series Date Id, Forecast Series Id, Position Id)

#### Forecast Series Date ID

This argument takes the row ID of the date for which the forecast is to be generated.

**Name:** Forecast Series Date Id  
**Data Type:** String  
**Type:** Input  
**Storage Type:** Property

### Forecast Series ID

This argument takes the row ID of the forecast series for which the forecast is to be generated.

**Name:** Forecast Series Id  
**Data Type:** String  
**Type:** Input  
**Storage Type:** Property

### Position ID

This argument takes the row ID of the position of the participant for whom the forecast is to be generated.

**Name:** Position Id  
**Data Type:** String  
**Type:** Input  
**Storage Type:** Property

## RollUpForecast Method Arguments

There following arguments are associated with the RollUpForecast method:

RollUpForecast (Forecast Id, Position Id)

### Forecast ID

This argument takes the row ID of the forecast record for which rollup needs to be done.

**Name:** Forecast Id  
**Data Type:** String  
**Type:** Input  
**Storage Type:** Property

### Position ID

This argument takes the row ID of the position of the participant for whom the forecast is to be rolled up.

**Name:** Position Id  
**Data Type:** String  
**Type:** Input  
**Storage Type:** Property



# Index

## A

**ad-hoc revenue line items, adding** 83

**All and All Across Organization view, using** 98

**API driven forecasting**

about 91

Forecast 2000 - Forecast Service 139

**applet**

spreadsheet, changing configuration of 61

spreadsheet, configuring static columns 64

**Associate Search Spec, about** 42

**Auto Forecast Search Spec, about** 42

**auto-adjust, using** 89

**auto-forecast, inactivating** 60

**automatic upgrade feature**

about using 23

planning 24, 25

## B

**business component user properties**

about forecasting user properties 125

Forecast 2000 - Forecast 126

Forecast 2000 - Forecast Item 128

Forecast 2000 - Forecast Item Detail 131

Forecast 2000 - Forecast Item Detail

Flat 132

Forecast 2000 - Forecast Item DynCol 134

Forecast 2000 - Forecast Series 136

Forecast 2000 - Forecast Series

Aggregation 136

Forecast 2000 - Forecast Series Date 137

**business intelligence, about using to analyze forecasts** 96

**business scenario, for forecast set up** 38

**business service, Forecast 2000 - Forecast Service** 139

## C

**configuration files, about changing for mobile client** 36

**charts**

forecasts, about using to analyze 96

revenues, viewing in 78

tip, for using correct revenues 78

**configuration files, about changing for mobile client** 36

**corporate snapshot forecast type, description** 15

**currencies table, about using** 30

**Currency Exchange Rates, setting up** 31

**customer adaptive forecasting, set up** 58

## D

**data migration and automatic upgrade** 24, 25

**data migration utility**

about automatic upgrade 23

upgrading forecasting using 25

**data, minimizing duplication and improving performance** 20

**dates, moving automatically** 49

**departmental forecast series**

about 56

creating (procedure) 57

**detail depth**

forecast type, about 15

forecast type, adjusting 88

## E

**employee positions, setting up** 33

**employee reporting structure, setting up exporting** 33

business scenario 101

forecast data, exporting 101

revenue data, exporting 103

## F

**Forecast Administration screen, about** 14

**forecast data, exporting** 101

**forecast dates, moving automatically** 49

**Forecast Details view, shows deleted items** 105

**forecast period, defined** 12

**forecast series**

aggregation levels, adding to 46

API driven forecasting 91, 139

creating 39

dates, about 43

dates, defining 44

departmental forecast series, about 56

departmental forecast series, creating

(procedure) 57

example 37

forecast-specific hierarchy, creating 59

forecast-specific hierarchy, defining for participants 45

- global forecast series, about 55
  - global forecast series, creating (procedure) 56
  - hybrid forecast series, about 58
  - hybrid forecast series, creating (procedure) 58
  - organization, adding to 46
  - participants, adding 45, 46
  - partner forecast series, about creating 59
  - personal forecast series, about creating with details 50
  - personal forecast series, about creating without details 51
  - personal forecast series, creating with details (procedure) 51
  - personal forecast series, creating without details (procedure) 52
  - personal forecast series, example process (diagram) 50
  - standard personal forecast series, about creating 54
  - standard personal forecast series, creating (procedure) 54
  - forecast series dates**
    - about 43
    - defining 44
  - forecast series participants, adding** 45
  - forecast spreadsheet**
    - buttons, activating scrolling buttons 66
    - buttons, configuring 64
    - buttons, inactivating scrolling buttons 66
    - column types, about 61
    - configuring, about 60
    - groups, about 61
  - forecast spreadsheet, about column types** 61
  - forecast spreadsheet, about configuring** 60
  - forecast spreadsheets, about groups** 61
  - forecast summary spreadsheets** 123
  - forecast summary, viewing** 85
  - forecast types**
    - about 15
    - corporate snapshot 15
    - hybrid forecast 16
    - rollup forecast 15
  - forecast visibility**
    - modes (table) 41
    - opportunity visibility, changing 98
  - forecasting**
    - ad-hoc revenue line item, adding 83
    - analyzing, ways to 96
    - API driven forecasting 91, 139
    - auto-adjust, using 89
    - business scenario 79
    - consistency, guaranteeing 70
    - creating 81
    - customer adaptive forecasting, about 58
    - design process 19
    - detail depth forecast, adjusting 88
    - forecast details, adding 82
    - forecast details, viewing 85
    - forecast summary, viewing 85
    - forecasts, refreshing 92
    - opportunity visibility, changing 98
    - overlay managers, adding to sales team 99
    - performance considerations 20, 21
    - revenue, updating forecast with 95
    - rollups, about and the Forecasts screen 91
    - standard depth forecast, adjusting 89
    - submitting 91
    - subordinate's forecast, adjusting 90
    - subordinate's forecast, rejecting 94
    - subordinates forecasts, viewing 86
    - summary depth forecast, adjusting 88
    - unadjusting 90
    - viewing revenue items 98
  - forecasting process**
    - design, process of 17
    - performance, minimizing complexity of 21
    - performance, minimizing number of aggregation levels 21
  - forecasting requirements**
    - currencies table, using 30
    - Currency Exchange Rates, setting up 31
    - employee positions and reporting structure, setting up 33
    - Periods table, using 29
    - revenue classes and revenue types, using 33
    - system preferences, setting up 34
    - units of measurement, using 31
  - forecasting table, minimizing number of records** 20
  - forecasting terms, table of** 12
  - Forecasts screen, about** 14
  - forecast-specific hierarchy**
    - creating 59
    - defining for participants 45
- G**
- global forecast series**
    - about 55
    - creating (procedure) 56
- H**
- hybrid forecast series**
    - about 58
    - creating (procedure) 58
  - hybrid forecast type, description** 16



- I**
- importing**
    - business scenario 101
    - revenue data, importing 102
    - Revenue Import process, updating predefined mapping 103
  - interval period, defined** 12
- L**
- last forecast adjustment amounts** 124
- M**
- mobile users, setting up (system preferences)** 36
  - multidimensional forecasting, defined** 12
  - multiple revenue, adding** 74
  - My Team's Opportunities view, changing visibility** 98
  - My Team's Revenues**
    - caution, limiting the number of participants 41
    - reviewing 76
    - view, using 98
- O**
- opportunities**
    - opportunity data, automatic update of 24
    - revenue items for subordinates, viewing 98
  - overlay sales managers, adding to sales team** 99
- P**
- parent account, revenues not showing up** 105
  - participants, minimizing number of** 20
  - partner forecast series, about creating** 59
  - performance considerations**
    - complexity of forecasting process, minimizing 21
    - data, minimizing the duplication of 20
    - forecasting table, minimizing number of records in 20
    - number of aggregation levels, minimizing 21
    - participants, minimizing the number of 20
  - Periods table, using** 29
  - personal forecast series**
    - about creating with details 50
    - about creating without details 51
    - creating a standard 54
    - creating with details (procedure) 51
    - creating without details (procedure) 52
    - process example (diagram) 50
  - positional hierarchies, setting up employee reporting structure** 33
  - product quantity forecasting, defined** 12
- Q**
- queries, affecting Summary view** 105
- R**
- recurring revenue, adding** 74
  - reports**
    - forecasts, about using to analyze 96
    - revenue reports, about creating 78
  - requirements**
    - currencies table, using 30
    - Currency Exchange Rates, setting up 31
    - employee positions and reporting structure, setting up 33
    - Periods table, using 29
    - revenue classes and revenue type, using 33
    - system preferences, setting up 34
    - units of measurement, setting up 32
    - units of measurement, using 31
  - Resonate, about specifying the RequestServer parameter** 36
  - revenue spreadsheets**
    - about configuring 60
    - about groups 61
    - column types 61
    - revenues grouped in rows, guaranteeing 77
    - viewing 77
  - revenues**
    - business scenario 70
    - charts, tip for using correct revenues 78
    - charts, viewing revenues in 78
    - classes, using 33
    - data, exporting 103
    - importing revenue data 102
    - multiple or recurring revenue, adding 74
    - My Team's Revenues, reviewing 76
    - new revenue, adding to opportunity 73
    - reports. about creating 78
    - revenue data, automatic update of 24
    - revenue item, modifying 77
    - revenue items, viewing 98
    - revenue plan templates, creating 72
    - revenue plan, using 75
    - revenue SmartScripts, configuring 71
    - revenue spreadsheet, viewing 77
    - reviewing 76
    - split revenue, setting up 75
    - spreadsheet, about column types 61
    - spreadsheet, about configuring 60
    - spreadsheet, about groups 61
    - spreadsheet, activating scrolling buttons 66
    - spreadsheet, configuring buttons on 64

- spreadsheet, inactivating scrolling buttons 66
- troubleshooting, parent account display 105
- types, using 33
- Revenues screen, about** 14
- Revise button, about in Siebel 7.0** 91
- rollup forecast type, description** 15
- Rollup Search Spec, about** 42
- rollups**
  - about and the Forecasts screen 91
  - defined 12
- S**
- sales organization**
  - All and All Across Organization views, using 98
  - matrix sales organization overview 97
  - My Team's Opportunities view, changing visibility 98
  - My Team's Revenues view, using 98
  - overlay sales managers. adding to sales team 99
- scrolling buttons**
  - activating scrolling buttons 66
  - configuring 64
  - inactivating scrolling buttons 66
- search**
  - specification testing 43
  - specifications, common search specs (table) 43
  - specifications, list of 42
- Siebel Remote Web client, about creating forecasts** 86
- SmartScripts, about configuring revenue** 71
- split revenue, setting up** 75
- spreadsheet applet**
  - about using 60
  - configuration, changing 61
  - static columns, configuring 64
  - user properties, configuring 62
- standard depth**
  - forecast type, about 15
  - forecast type, adjusting 89
- standard personal forecast series**
  - about 54
  - creating (procedure) 54
- subordinate's forecast**
  - adjusting 90
  - refreshing 92
  - rejecting 94
  - viewing 86
- summary depth**
  - forecast type, about 15
  - forecast type, adjusting 88
- summary period, defined** 12, 39
- summary revenues, defined** 12, 86
- system preferences**
  - Forecast Auto-Forecast 34, 59
  - Forecast Use Server 36
  - Forecast User Server Task 35
  - setting up 34
- T**
- template, creating revenue plan template** 72
- terms, forecasting (table of)** 12
- total forecast revenue, defined** 12, 82
- troubleshooting**
  - Forecast Details view, shows deleted items 105
  - parent account, revenues not showing up 105
  - Summary view, queries affect information 105
- U**
- units of measurement**
  - setting up 32
  - using 31
- V**
- visibility**
  - modes, table of 41
  - opportunity visibility, changing 98