



c360 Forecast Manager for Microsoft CRM 3.0

Overview

c360 Solutions Forecast Manager is a Microsoft CRM enhancement that improves sales forecast accuracy by simplifying the process of reviewing and updating sales opportunity forecast information. The key benefits of Forecast Manager are:

- Improved forecast accuracy
- Reduced time spent updating forecasts
- Improved Microsoft CRM user adoption

Forecast Manager presents the sales user with a single, editable screen listing all active sales opportunities. Sales personnel can quickly update the opportunity sales stage, close probability and close date. Sales Managers can view and update opportunities assigned directly to them and/or to their direct reports. Forecast Manager can also retrieve Advanced Find queries allowing users to configure complex queries to show opportunities meeting specific criteria.

The screenshot displays the c360 Forecast Manager interface within a Microsoft Internet Explorer browser window. The browser title is "http://192.168.66.134:5555 - Microsoft CRM V.Next Beta - Microsoft Internet Explorer provided by c360 Solutions". The user is identified as "User: Gravelly, John".

The main content area is titled "Forecast Manager" and shows a list of opportunities. The table has the following columns: Topic, Potential Customer, Est. Revenue, Sales Stage, Prob. (%), Est. Close Date, and Owner. The data rows are as follows:

Topic	Potential Customer	Est. Revenue	Sales Stage	Prob. (%)	Est. Close Date	Owner
100 user deal	Affordable Sports Equi...	\$25,000.00	Qualified Lead (S)	10	11/30/2005	Gravelly, John
25 license deal	Flying wheels	\$75,000.00	Qualified Lead (S)	10	12/14/2005	Gravelly, John
Alliance Deal	Divina Bikes	\$120,000.00	Win (W)	100	11/15/2005	Gravelly, John
Arvin's opportunity for s...	Ramen Corp	\$45,000.00	Qualified Lead (S)	10	11/30/2005	Gravelly, John
Custom Opportunity	Convenient Bike Shop	\$15,000.00	Qualified Lead (S)	10	12/20/2005	Gravelly, John
Linked Opportunity	October 10 Test Account	\$40,000.00	Qualified Sponsor (D)	25	10/31/2005	Gravelly, John
Portal Deal	Bike Boutique	\$35,000.00	Qualified Power Sponsor (C)	50	11/30/2005	Gravelly, John
Site license	Amazing bikes	\$75,000.00	Decision Due (E)	75	12/31/2005	Gravelly, John

Summary statistics shown below the table:

- Estimated Revenue: \$15,000.00
- Probability: 10%
- Weighted Revenue: \$1,500.00
- Revenue: User Provided
- Rating: Warm
- Status Reason: In Progress

The interface also includes a left-hand navigation pane with options like "My Work", "Customers", "Sales", "Marketing", "Service", and "Settings". At the bottom, it shows "Records 1 through 8 of 8" and a "Page 1 of 1" indicator.

c360 Forecast Manager allows sales users to easily update all critical sales opportunity data points from a single, editable screen



Support, Upgrades and Enhancements

The list price of Forecast Manager includes first year support, upgrades and enhancement per the c360 Solutions Software license agreement. After the first year, a support and enhancement plan can be purchase for 20% of the total cost of all Forecast Manager licenses.

c360 Partner Program

Forecast Manager and an unlimited use Adventure Works Cycle Forecast Manager license can be downloaded at www.c360.com. For details on the c360 partner program please send an e-mail to Partners@c360.com.

Information

For more information on c360 Summary and the Core Productivity Pack, contact your c360 reseller:

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