

## **iSBiSTER International, Inc.**

1111 Beltline Road . Suite 204 . Garland TX 75040

### **Sales Forecast Pro v3.0**

*Implement "bottoms up" forecast reporting solutions within multi-level organizations.*

*Submitted forecasts automatically identify organization members and their selling opportunities.*

*View your forecast data as sorted tabular lists, as stacked bar chart displays and as printed reports.*

#### **Features and Benefits include:**

- \* Standard and custom time horizons for viewing your sales opportunities.  
... 1, 2, 3, 6, 9 and All Months ... date range, status, opportunity and product filters.
- \* Tabular reports of sales opportunities in your chosen horizon.  
... Sort by Opportunity, Status, Product, Close Date, Amount and Probability. %
- \* Stacked Bar Chart views of sales opportunity summaries.  
... View Owner, Product or Status values by Month for currently displayed horizon.
- \* User defined sales environment values are automatically maintained.  
... Products, Sales Cycle Status Values, and Success Probability Percentages.
- \* Sales organizational "roll ups" and "drill downs" for management visibility.  
... Implement "bottoms up" sales forecast reporting solutions.
- \* History database for easy storage of "Booked" and/or "Lost" opportunities.  
... Move items to and from history for sales reviews and history reporting.

#### **Licensing and Registration** **Distribution Points**

#### **Understanding Sales Forecast Pro**

[As a Sales Representative you can ...](#)

[As a First Level Sales Manager you can ...](#)

[As a Higher Level Sales Manager you can ...](#)

#### **Business Scenario and The iSBiSTER Sample Data**

[Organization Overview](#)

[Generation of the sample data](#)

[Viewing the sample data](#)

#### **Starting Your Own Sales Forecast Database**

[Replacing the iSBiSTER sample data](#)

[Creating an additional forecast database](#)

## **Using Sales Forecast Pro**

[Overview](#)

[Sales Forecast Summary](#)

[Recording your sales opportunities](#)

[Reviewing your sales opportunities](#)

[Submitting and/or Receiving Sales Forecasts](#)

[Getting sales opportunities from other databases](#)

[Putting sales opportunities into other databases](#)

[Your History Database](#)

[Moving sales opportunities to your History Database](#)

[Switching to your History Database](#)

## **Setting Up Your Sales Forecast Environment**

[Building your list of Products](#)

[Building your list of Sales Cycle Status Values](#)

[Building your list of Sales Success Probability Percentages](#)

## **Creating and Maintaining Sales Opportunity Records**

[Adding sales opportunity records](#)

[Modifying sales opportunity records](#)

[Deleting sales opportunity records](#)

## **Reviewing Sales Opportunities**

[Sales Opportunity Summary](#)

[Sorted Tabular Summaries](#)

[Graphical Displays](#)

[Standard Horizons](#)

[Custom Reports](#)

## **Navigating the Menus**

[File Menu](#)

[Organization Menu](#)

[Graphic Display Menu](#)

[Help Menu](#)

## Licensing and Registration

Prospective customers are licensed to evaluate the fully-functional unregistered version of Sales Forecast Pro for up to 21 days, for the purpose of deciding whether the program suits their needs. At the end of this 21-day trial period, users must either cease using Sales Forecast Pro or pay a registration fee of \$39.95 to iSBiSTER International Inc., for the right to continue using the program. Use of an unregistered copy of Sales Forecast for more than 21 days, or use of a registered copy by any person or business other than the registrants, is prohibited and a violation of international copyright law.

Each "user" of Sales Forecast Pro requires a license. However, each user is entitled to use Sales Forecast Pro on as many machines as he/she likes as long as it is for their use only.

Sales Forecast Pro is Network Ready. Each Sales Forecast "user" on the network requires their own license.

Registration brings other benefits besides the legal right to continue using Sales Forecast Pro. First, you will receive a Security ID code that you may enter into the program which will eliminate the "registration reminder" screens that begin to appear after an unregistered copy has been used for more than 21 days. Second, you will be entitled to free upgrades of the major version of Sales Forecast Pro you register as minor revisions are released. Third, technical support is available for registered customers.

## How to Register Your Copy of Sales Forecast Pro

The registration fee for each copy of Sales Forecast Pro is \$39.95 + \$5.00 (shipping and handling). ONLY Residents of Texas must add the 8.25% State Sales Tax.

For network quantities of 11 and up please call 214-495-6724 and ask for Sales.

Payment can be made by mail, by voice phone, FAX, or online.

By mail: send cash, checks, or international money orders **payable in U. S. funds and drawn upon a U. S. bank.**

iSBiSTER International, Inc.  
1111 Belt Line Road, Suite 204  
Garland, Texas 75040 USA

Sorry, we do not accept foreign checks drawn on foreign banks.

By phone: Visa, MasterCard, American Express and Discover are accepted: call 214-495-6724

Online: there are a few ways to register Sales Forecast online.

The iSBiSTER BBS (214-530-2762) will accept registrations by Visa, MasterCard, American Express or Discover cards.

Internet or Other Email Orders

Please Send the following information via Email to sales@isbister.com and we will be happy to process your order.

1. Complete Name and Mailing Address.

2. What you want to buy (inclusive of all options).
3. Credit Card Number with Expiration  
(We accept Visa, Mastercard, American Express or Discover)
4. Any notes or special instructions you wish to accompany the order.

FAX: You can fax to us at 214-530-6566 your orderfrm.wri along with your credit card information and we will ship the same day. We cannot reply back by fax.

#### Disclaimer of Warranties

iSBiSTER INTERNATIONAL, Inc. does not warrant that Sales Forecast software will meet your requirements or that the operation of the software will be uninterrupted or error free. Nor do we offer any Warranties or Guarantees of any kind. You are free to use Sales Forecast in any way you see fit, but AT YOUR OWN RISK!

iSBiSTER INTERNATIONAL, Inc. is not responsible for any problems or damage caused by the software or that may result from using the software; whether licensed or not. This includes, but is not limited to, computer hardware, computer software, operating systems, and any computer or computing accessories. End user agrees to hold iSBiSTER INTERNATIONAL, Inc. and/or any persons associated with the creation of this software harmless for any problems arising from the use of the software.

We regret having to place such a disclaimer in a piece of software. We have made every effort to make this software product as efficient and accurate as possible; however, in a world full of frivolous and ridiculous law suits, we have no alternative.

WE HOPE YOU ENJOY THE SOFTWARE and we trust that you will find it productive!

## **Distribution Points for iSBiSTER Products:**

Our BBS 214-495-6724

3 - 14,400 nodes, F8N1,

(Full Duplex, 8 Data Bits, 1 Stop Bit, NO PARITY)

Recommend ANSI emulation, ZMODEM download protocol.

Others supported.

Compuserve Information Service (CIS)

WinShare forum

Keyword search on iSBiSTER

America On Line (AOL)

Goto the Software Center

Keyword Search on iSBiSTER

Internet Distribution:

Our web homepage is: <http://www.isbister.com/isbister>

We have created links to our files from this homepage to make it easier for you to download them.

You can also download the latest release of our family of products via ftp with an anonymous logon.

To ftp the files follow these simple steps

1. ftp to ftp.isbister.com
2. logon with anonymous
3. password will be your email address (Example: user@yoursystem.com)
4. Then cd/pub/isbister
5. Tell your system you are about to do a binary transfer by typing binary and pressing enter.
6. Then type get filename.

This will transfer these files to your local space and it is a normal download from there on if you have a shell account.

We have a 'readme.txt' file that will detail the contents of the archives.

## Overview

Sales Forecast Pro is used by sales professionals to implement sales forecast reporting solutions. These solutions usually span many levels of the sales organization; thus providing visibility into anticipated sales for each sales representative and each sales manager.

Sales Representatives use Sales Forecast Pro to create and maintain their database of sales opportunities. Sales Representatives also use Sales Forecast Pro to submit their forecast to Sales Management.

For each sales opportunity, you supply ...

- . Description of sales opportunity
- . Product being proposed
- . Unit Quantity of the Product being proposed
- . Total value (your currency) of the opportunity
- . Status of opportunity (within your sales cycle)
- . Date when you expect to receive the order
- . Probability that you will win the business
- . Comments ... if desired

Sales Forecast Pro checks the values entered for each opportunity and automatically builds files for your Products, your Status Values, and your Probability Percentages. These files are then used to provide drop down list options when entering additional sales opportunities.

Sales Managers use Sales Forecast Pro to receive forecasts from each of their Sales Representatives and create a composite forecast for their management level. Sales Managers then use Sales Forecast Pro to tailor their composite forecast for submission to the next level of sales management.

At each level of usage, Sales Forecast Pro provides complete visibility into the items being forecasted.

*Let's review the major aspects of Sales Forecast Pro's main screen ...*

The *central section of the main screen* is used to display a list of forecasted items. This tabular list shows the description of each opportunity along with the product being forecast, the status of the forecasted item, the date the order is expected, the total value of the forecasted item and the probability percentage assigned to the item to represent its chance of closure.

At any time you can instruct Sales Forecast Pro to produce a *printed report* containing the currently displayed forecast items. You can also instruct Sales Forecast Pro to present these items in a *bar chart* format. The bars displayed for each month can be the various products within the forecast, the various status values found within the forecast or the various organization members represented by the forecast.

*Above the tabular list* you will find six index tabs (two rows of three) that allow you to quickly sort the currently displayed list of forecasted items. There is a tab for each column of information being displayed and with the simple click of your mouse, you can rearrange the list. You may wish to view the items from the highest amount to the lowest amount or maybe you will want to see them in order by expected order date. Thus you can easily

change your vantage point relative to the currently displayed list of opportunities.

*But how do you control which items show up on the currently displayed list?*

*Below the tabular list* you will find index tabs that represent your organizational position within the company. These tabs are used to filter the forecast items within your database; thus controlling which items become part of the currently displayed list. *Your* tab is the left most of these organization tabs and *there is a tab (to the right) for each of your direct reports*. If you click on one of the tabs to the right then the records are filtered and only those belonging to that part of the organization will be displayed. If any of the tabs to the right have a [+] on them (indicating that additional organization levels exists below) and you double click on one of these tabs you will be moved down one level in the organization. That tab will become the left most tab and the tabs to its right will represent the organization components one level below it. These newly exposed tabs can now be used to further filter the forecasted items based on organization. If you double click on the left most tab you will be moved back up the organization one level. Moving up and down the organization and filtering allows a sales manager to gain value insight into the sales opportunities being forecasted.

*Further below the tabular list (just below the organization tabs)* you will find option selection (radio buttons) controls that allow you to filter your forecast records on various time horizons. There are standard horizons of 1, 2, 3, 6, 9 and ALL months. So ... with a single click of your mouse, you can change your view of the forecasted items to suit your business interests.

Using the combination of the *organization tabs* and the *time horizons* provides extensive flexibility for viewing forecasted sales opportunities.

*To the right of the time horizon controls* you will find another set of radio buttons that allow you to decide which item type(s) are to be considered while filling the display list. Sales Forecast Pro accommodates two item types ... Report To Management (RTM) and Private. Item types allow you to easily control which items are displayed and which items are submitted to your management. You can choose to display just RTM items, just Private items or ALL items.

*Further to the right of the time horizon controls* you will find the access point to the final and most powerful aspect of Sales Forecast Pro's filtering capability ... *Custom Reports*.

When you click on the *Custom Reports* button, Sales Forecast Pro will take you into a new screen from which you can either create a new report or select from your previously cataloged reports. Using the Custom Reports feature you can filter on combinations of time frames, selected opportunities, selected products, selected status values, total order values above a specified amount and closing probabilities above a specified percentage.

*Conclusions ...*

Your forecast database contains either your own personal sales opportunities or those that you received from your direct reports one level down in the organization.

You have extensive controls available to you with which you can filter these records into your tabular display. You can create, store and retrieve custom reports for your use in filtering your forecast items.

You have tabs that can be used to select the sort control data field and thus view the displayed items in various top to bottom fashions.

At any time you can instruct Sales Forecast Pro to produce a *printed report* containing the currently displayed forecast items. You can also instruct Sales Forecast Pro to present these items in a *bar chart* format. The bars displayed for each month can be the various products within the forecast, the various status values found within the forecast or the various organization members represented by the forecast.

When you are ready, you instruct Sales Forecast Pro to submit your forecast (currently displayed items by default ... or other special choices) to your manager. This set of forecast records is stored on a standard diskette (drive of your choice) by default ... or you can be placed in a file directory of your choice anywhere or your network.



## Recording Sales Opportunities

Sales Forecast Pro provides complete facilities for [adding](#), [modifying](#) and [deleting](#) sales opportunities.

Each sales opportunity records the description of the opportunity (usually a company name), its sales cycle status, the product involved, the planned closure date, the success probability percentage, the product quantity (optional), the currency amount forecasted and any comments (optional).

This information is displayed on the [main screen](#) in the [Sales Opportunity Summary](#). This summary is controlled by user specified filters.

To add a new sales opportunity simply click on the [New Item] button in the lower left corner of the main screen. If you are a sales manager you cannot add new items using this button. It will be shown as a [Print Report] button. If you need to add a new item (forgotten by someone within your part of the organization) you can move down into the organization and select the organization tab for that person and then use the Add New option under the File Menu.

To modify an existing forecast item simply double click it (or select it and then press the [Enter] key) and all of its details will be displayed in a screen within which you can change field values. Click on the [OK] button to save your results.

To delete an existing item you single click it to select it and then press the [Delete] key on your keyboard. You can also delete an item from within the modify screen mentioned above.

## Reviewing Your Sales Opportunities

Sales Forecast Pro provides many formats whereby you can review your sales opportunities. On the [main screen](#), Sales Forecast Pro presents your [Sales Opportunity Summary](#). This summary is available in [tabular](#) list and in [graphical](#) formats.

*Below the tabular list you will find index tabs that represent your organizational position within the company. These tabs are used to filter the forecast items within your database; thus controlling which items become part of the currently displayed list. Your tab is the left most of these organization tabs and there is a tab (to the right) for each of your direct reports. If you click on one of the tabs to the right then the records are filtered and only those belonging to that part of the organization will be displayed. If any of the tabs to the right have a [+] on them (indicating that additional organization levels exists below) and you double click on one of these tabs you will be moved down one level in the organization. That tab will become the left most tab and the tabs to its right will represent the organization components one level below it. These newly exposed tabs can now be used to further filter the forecasted items based on organization. If you double click on the left most tab you will be moved back up the organization one level. Moving up and down the organization and filtering allows a sales manager to gain value insight into the sales opportunities being forecasted.*

*Further below the tabular list (just below the organization tabs) you will find option selection (radio buttons) controls that allow you to filter your forecast records on various time horizons. There are standard horizons of 1, 2, 3, 6, 9 and ALL months. So ... with a single click of your mouse, you can change your view of the forecasted items to suit your business interests.*

Using the combination of the *organization tabs* and the *time horizons* provides extensive flexibility for viewing forecasted sales opportunities.

*To the right of the time horizon controls you will find another set of radio buttons that allow you to decide which item type(s) are to be considered while filling the display list. Sales Forecast Pro accommodates two item types ... Report To Management (RTM) and Private. Item types allow you to easily control which items are displayed and which items are submitted to your management. You can choose to display just RTM items, just Private items or ALL items.*

*Further to the right of the time horizon controls you will find the access point to the final and most powerful aspect of Sales Forecast Pro's filtering capability ... Custom Reports.*

When you click on the *Custom Reports* button, Sales Forecast Pro will take you into a new screen from which you can either create a new report or select from your previously cataloged reports. Using the Custom Reports feature you can filter on combinations of time frames, selected opportunities, selected products, selected status values, total order values above a specified amount and closing probabilities above a specified percentage.

## Submitting and/or Receiving Sales Forecasts

When you are ready, you can instruct Sales Forecast Pro to submit your forecast (currently displayed items by default ... or other special choices) to your manager. This set of forecast records is stored on a standard diskette (drive of your choice) by default ... or you can be placed in a file directory of your choice anywhere or your network.

If you are a sales manager, Sales Forecast Pro also allows you to receive sales opportunities from one or many individuals one level below you in the organization. These records are merged into your current database to build consolidated [Sales Opportunity Summaries](#). Each set of forecast records is taken from a standard diskette (drive of your choice) by default ... or you can be taken from a file of your choice anywhere or your network.

## Sales Opportunity Product Values

Sales Forecast Pro allows you to create and maintain a list of Product Values.

The Product Values list is used when adding new sales opportunities to indicate the product being sold in the forecasted sales opportunity.

Examples could include ... Product A, Metal Doors, Software, etc.

Any time a new value is used it is automatically added to the list of product values and stored in a disc file [PRODUCT.ISS] on your system.

To delete an item selected from this list, simply type the [Delete] key. Sales Forecast Pro will ask you to confirm this action.

## Sales Cycle Status Values

Sales Forecast Pro allows you to create and maintain a list of Sales Cycle Status Values.

The Sales Cycle Status Values list is used when adding new sales opportunities to indicate the position within your sales cycle that the forecasted opportunity should be considered.

Examples could include ... Above Funnel, In Funnel, Middle, Top, Bottom, etc.

Any time a new value is used it is automatically added to the list of status values and stored in a disc file [STATUS.ISS] on your system.

To delete an item selected from this list, simply type the [Delete] key. Sales Forecast Pro will ask you to confirm this action.

## **Sales Success Probability Percentages**

Sales Forecast Pro allows you to create and maintain a list of success probability percentages. These are stored as three digit numbers ranging from 000 to 100.

The success probability percentage list is used when adding new sales opportunities to indicate your degree of confidence that the forecasted opportunity will be closed.

Examples could include ... 025, 050, 075, 100.

Any time a new value is used it is automatically added to the list of percentages and stored in a disc file [PROBABIL.ISS] on your system.

To delete an item selected from this list, simply type the [Delete] key. Sales Forecast Pro will ask you to confirm this action.

## Adding Sales Opportunity Records

Sales Forecast Pro allows you to input full details to describe a new sales opportunity.

While on the [main screen](#), click on the ICON labeled [Add New] and Sales Forecast Pro will take you to the detail entry screen.

First, you identify the sales opportunity by entering a new description or by selecting from the existing database of opportunities. To select from the existing database, simply click on the down arrow at the end of the Opportunity text box.

Next, you identify the [sales cycle status](#) of this opportunity by entering a new status or by selecting from existing status values. To select from the existing status values, simply click on the down arrow at the end of the Status text box.

Next, you identify the [product](#) for this opportunity by entering a new product or by selecting from existing products. To select from the existing product values, simply click on the down arrow at the end of the Product text box.

Next, you identify the [success probability percentage](#) for this opportunity by entering a new success probability percentage or by selecting from existing success probability percentages. To select from the existing success probability percentage values, simply click on the down arrow at the end of the Probability text box.

Now, fill in the remaining fields to supply ...

Quantity ... the number of products forecasted (optional),  
Amount ... the value of the forecasted business (whole numbers, in your  
currency),  
Planned Closure Date ... the date on which you forecast booking the order,  
(Click on the down arrow to select from a  
calendar)  
Comment ... any text string you wish (optional).

Select the [record classification](#) ... Report To Management (TRM) or Private.

The First Forecasted date and Last Updated date are automatically set by Sales Forecast Pro.

The short and long identification for this forecast database are automatically used by Sales Forecast Pro to identify the new record.

## Modifying Sales Opportunity Records

Sales Forecast Pro allows you to modify (edit) the contents of an existing sales opportunity.

Double clicking the desired sales opportunity from the [Sales Opportunity Summary](#) list in the [main screen](#) instructs Sales Forecast Pro to display the record's full details. You can then edit any or all of the fields. Click on the [OK] button to store the results of your editing.

You may also click on [Cancel] to return to the Sales Opportunity Summary without recording any of your changes.

While you are in the detail screen, you may also choose to Delete the sales opportunity.

The results of your edits are immediately reflected in the Sales Opportunity Summary upon return to the main screen.



## Deleting Sales Opportunity Records

Individual sales opportunity records may be deleted one at a time.

While in the [main screen](#), select the item to be deleted from the [Sales Opportunity Summary](#) list (single click on it or move to it using the Up/Down arrows) and then type the [Delete] key. Sales Forecast Pro will ask you to confirm your action.

Items can also be deleted while using the [Modify](#) function.

You can also invoke the delete action by using the Delete menu item under the [File Menu](#) on the main screen's menu bar.

A special 'Delete All' function also exists. When selected, Sales Forecast Pro will ask you to confirm your action. This will permanently delete all sales opportunity records in your current database. This is invoked by using the Special Database Transactions menu item under the [File Menu](#) on the main screen's menu bar.

## Sorted Tabular Summaries

Sales Forecast Pro displays your currently selected [Sales Opportunity Summary](#) on its main screen. The items within this summary are arranged top-to-bottom based on the sort you specify.

Above the items listed are six (6) tabs that allow you to specify the desired sort sequence ... (Sort by Opportunity, Sort by Status, Sort by Product, Sort by Planned Close Date, Sort by Amount and Sort by Probability).

For each sales opportunity, the summary contains the sales cycle status, the product, the planned closure date, the amount and the success probability percentage.

The total summary amounts (forecasted amount and probability amount) are shown at the top of the display.

## Graphical Displays

Sales Forecast Pro allows you to display your current [Sales Opportunity Summary](#) in stacked bar chart formats. In the lower left corner of Sales Forecast Pro's main screen you will find a [Bar Chart] button to invoke these features.

The sales opportunity records being displayed are converted to stacked bars that represent forecasted amounts for each month of the range of the sales opportunity summary. The bars can represent individual products within the forecast or they can represent the various status values of the records within the forecast. *If you are a sales manager* then the bars could also represent the various parts of the sales organization one level below you.

Thus, Sales Forecast Pro allows you to quickly view your forecast sales as stacked bars comparing parts of the organization, comparing products or comparing the various status values within your sales cycle.

You may choose to display total forecasted amounts or you can choose to display probability amounts (forecasted amount multiplied by the success probability percentage) for the sales opportunities. This is specified by using selecting the appropriate option the Graph Menu item in the main screen.

## Standard Horizons

Sales Forecast Pro allows you to filter your sales opportunity records into the Sales Opportunity Summary using six standard time horizon values:

- 1 Month ... Includes records with planned closure dates in the current month,
- 2 Months ... Includes records with planned closure dates in the current most two months,
- 3 Months ... Includes records with planned closure dates in the current most three months,
- 6 Months ... Includes records with planned closure dates in the current most six months,
- 9 Months ... Includes records with planned closure dates in the current most nine months, and
- ALL Months ... Includes records without regard to planned closure dates.

The chosen time horizon is combined with other record selection parameters to control the filtering of sales opportunity records into the Sales Opportunity Summary.

## Custom Reports

In addition to the [standard horizons](#), Sales Forecast Pro allows you to define very comprehensive selection criteria for filtering your sales opportunities into the Sales Opportunity Summary to be displayed.

This feature is invoked from the [main screen](#) by clicking on the [Custom Report] button.

When you click on the *Custom Reports* button, Sales Forecast Pro will take you into a new screen from which you can either create a new report or select from your previously cataloged reports. Using the Custom Reports feature you can filter on combinations of time frames, selected opportunities, selected products, selected status values, total order values above a specified amount and closing probabilities above a specified percentage.

On the new screen you are presented with two tabs ... one to select from existing custom reports and one to create new custom reports. By default, you are shown the custom report selection options. To choose from your existing reports simply click on the down arrow to view a list of your current reports.

Sales Forecast Pro allows you to maintain a database of custom reports and this list (titles) represents your current custom report offerings.

Single click on the report title of your choice (within the drop down list) and Sales Forecast Pro will retrieve its properties from the reports database. These properties are used to set up all of the record filtering parameters. All you have to do is click on the [Execute] button and Sales Forecast Pro will filter the records in your current forecast database and display them on the main screen.

When you wish to create a new custom report simply click on the [Define A New Report] tab and Sales Forecast Pro will present you with a template within which you can begin the definition of your new report.

After you have supplied the title, report header and description you may begin the process of specifying your record filtering parameters ... you can ...

- Filter by record type (i.e., Report to Management (RTM), Private or ALL).

- Filter by date range ... 1, 2, 3, 6, 9, All Months or an actual date range.

- Select one or many Sales Opportunity values from those currently in your forecast database.

- Select one or many Products from those currently within your forecast database.

- Select one or many Status Values from those currently within your forecast database.

- Specify an amount to be used as a record selection criteria.

- Specify a success probability percentage to be used as a record selection criteria.

At any point, you may click on the [Execute] button to see your report results. Sales Forecast Pro will also allow you to save your report for future use.



## Getting sales opportunities from other databases

Sales Forecast Pro allows you to import sales opportunity records from another Sales Forecast Pro database into your present database.

You can choose to import All Records or Actual Forecast Item records only. If you choose Actual Forecast Item records only, Sales Forecast Pro skips any records that were classified as 'What If' or 'Closed'.

Imported records will replace duplicate records in the existing database, thus ensuring that your forecast summary will contain the most recently imported information.

To specify the source file click on the [...] button. This will take you to a standard file dialog box. You can then browse the system and/or network to choose the file you wish to import from.

## **File Menu**

### **Add New Forecast Item**

This menu selection instructs Sales Forecast Pro to display the detail screen that allows you to enter a [new sales opportunity](#).

### **Delete Selected Item**

This menu selection instructs Sales Forecast Pro to "[Delete](#)" the currently selected (highlighted) item on your .

### **Printer Setup**

This menu selection instructs Sales Forecast Pro to invoke the normal windows dialog box for printer setup. You can reassign your default printer and/or change any of its setup parameters. These changes are actual system changes just as if you had used the Windows Control Panel.

### **Print All Currently Displayed Items**

This menu selection instructs Sales Forecast Pro to produce a printed report on your default printer using the currently displayed [Sales Opportunity Summary](#).

### **Backup Forecast Data**

This menu selection instructs Sales Forecast Pro to copy your current Sales Opportunity database, your current History Database (if present) and your sales environment files to an existing DOS directory. You may use a browse capability to select the desired directory to which the files will be copied. Sales Forecast Pro will suggest that you use a sub-directory named "Backup" positioned below the DOS directory containing your current files. If the directory specified does not exist, Sales Forecast Pro will ask your permission to create it for you.

You can also ask Sales Forecast Pro to save your backup location for easy retrieval.

### **Restore Forecast Data**

This menu selection instructs Sales Forecast Pro to copy your Sales Opportunity database, your History database (if present) and your sales environment files from an existing DOS directory to your currently active directory; thus replacing the existing files. You may use a browse capability to select the desired directory from which the files will be copied. You can also ask Sales Forecast Pro to suggest a DOS directory (a sub-directory named "Backup" positioned below the active DOS directory will be used) or you can ask Sales Forecast Pro to retrieve the location used in your previous backup.

### **Special Database Transactions**

This menu selection provides access to four sub-menu items:



**Auto Update Stale Forecast Items** ... this instructs Sales Forecast Pro to examine all of your sales opportunity records to see if any of them need to have their "planned closure" date updated to the current month. Each month, you may have one or more sales opportunity records that you had planned to close in the previous month. The records that did not close, need to be updated to reflect the change in "planned closure" date. This auto update function changes any past-due "planned closure" dates to the current month. You will be asked to confirm this action.

**Delete All Forecast Items** ... this instructs Sales Forecast Pro to DELETE all records from your sales forecast database. This is handy any time you wish to start with a clean slate (i.e., prior to importing forecast records, starting a new usage of the program). You will be asked to confirm this action.

**Modify Database Properties** ... this instructs Sales Forecast Pro to display a screen within which your current database properties will be shown. You may edit any of these properties.

The database properties include ...

Company Name ... the name of your company (50 characters max)  
Short Identification ... your organizational short identification code (5 characters max)  
this is usually an organization accounting code  
Long Identification ... your organizational long identification value (20 characters max)  
this may be your name of the name of your sales group  
Field Headings ... data fields on the forecast summary display that can be changed  
Opportunity ... might be changed to "Customer", "Prospect", "Company", etc.  
Status ... might be changed to "Step", "Stage", etc.  
Product ... might be changed to "Service", "Plan", etc.  
Close Date ... might be changed to "Order Date", "To Close On", etc.  
Amount ... might be changed to "Value", "Dollars", etc.  
Probability ... might be changed to "Factor", "Chance", etc.

**Eliminate All Data/Start a New Database** ... this instructs Sales Forecast Pro to DELETE all files associated with your current use of Sales Forecast Pro (i.e., your Forecast database, your History database and your sales environment files) and allow you to define a new database with properties of your choosing.

## **Register Sales Forecast Pro**

This menu selection instructs Sales Forecast Pro to display the registration screen so that you can enter your security code. iSBiSTER requires that you register your copy of Sales Forecast Pro. You will be supplied your security code upon registration. The registration screen allows you to enter the text for Licensee (could be your name, for a personal copy, or a company name for corporate usage) and the security code provided by iSBiSTER. After typing the correct (case sensitive) value for licensee and clicking your security code, you click on the [OK] button and the program will change its status to "Registered". Sales Forecast Pro is distributed as an unregistered, fully functional program. You have twenty (20) days to fully evaluate its capabilities before it begins to notify you that it needs to be registered. THANKS for your Support !!

## **Transfer Items**

This menu selection instructs Sales Forecast Pro to display the transfer items screen ... paving the way for you to move forecast records into or out of your present sales opportunity database.

This screen was designed for easy submission or receipt of sales forecasts. The default situation is for you to place or receive the forecast via a standard diskette (drive of your choice). If you are a sales representative ... the screen restricts you to forecast submissions. If you are a sales manager you may submit or receive forecasts.

If you need to perform more flexible transfers simply click on the "Advanced" tab at the bottom of the transfer screen. Sales Forecast Pro will then give you access to options as follows ...

Transfer Action ...

Submit Forecast ... send forecast records from your current database to another forecast database ... anywhere on your network.  
Roll-In Items From Another Database ... receive forecast records from another forecast database anywhere on your network.  
Move Items To History Database ... move the items currently selected (highlighted) on the main screen to your History Database.  
Get Items "From" Another Database ... merge the forecast records from another database into your currently forecast database ... the records are given your identification codes.  
Put Items "Into" Another Database ... Place forecast records from your current database into a database of your choice, anywhere on your network.

Items To Be Included In The Transfer ...  
All Items ... all items in the "source" database (no filtering).  
Report To Management Items Only ... Private items will not be transferred.  
Currently Displayed Items Only ... all records in the present [Forecast Summary](#) will be transferred.  
Highlighted Items Only ... only the selected (highlighted) items from the present Forecast Summary will be transferred.  
All Except Highlighted Items ... all records in the present Forecast Summary will be transferred except those that are selected.

Transfer Method ... browse your system or your network to specify the desired information.

Allow Additional Requests ... instructs Sales Forecast Pro to remain in the Transfer screen after this transfer action so that you can perform additional transfer actions.

"Advance Options" ... Default Condition ... instructs Sales Forecast Pro to bring you to the

advanced options screen each time you select the Transfer Items function.

## **Move Highlighted Items to History Database**

Sales Forecast Pro allows you to easily move items from your forecast database to your history database. As items are booked or otherwise become inactive you may wish to move them into your history database. Items to be moved are simply selected (highlighted) within the present [Forecast Summary](#) before you activate this function. Items moved to the history database are automatically deleted from your forecast database.

## **Move Highlighted Items to Forecast Database**

If you are currently accessing your history database, this option will be available to you. Simply select (highlight) any items within the displayed list on the main screen that you wish to move back to your active forecast database before you activate this function. Items moved to the forecast database are automatically deleted from your history database.

## **Switch to History Database**

This instructs Sales Forecast Pro to close your forecast database and open your history database. All filtering and sorting controls will now operate on the records found in your history database.

## **Switch to Forecast Database**

If you are currently accessing your history database, this option will be available to you. This instructs Sales Forecast Pro to close your history database and reopen your forecast database.

## **Exit**

This menu selection instructs Sales Forecast Pro to terminate.

## Graphic Display Menu

### Show Owner Values By Month

This menu selection instructs Sales Forecast Pro to display your present [Sales Opportunity Summary](#) in a stacked [bar chart](#) format. Opportunity records are displayed by month with the stacked bars representing the organization members one level below your position in the organization (i.e., the tabs to the right of yours on the organization tabs below your summary list).

This action also instructs Sales Forecast Pro to set this type of bar chart display as your current default. All graphical displays will use this selection until you change it.

This is the default selection for forecast databases belonging to sales managers.

### Show Product Values By Month

This menu selection instructs Sales Forecast Pro to display your present [Sales Opportunity Summary](#) in a stacked [bar chart](#) format. Opportunity records are displayed by month with the stacked bars representing the various products found within your current sales opportunity summary.

This action also instructs Sales Forecast Pro to set this type of bar chart display as your current default. All graphical displays will use this selection until you change it.

This is the default selection for forecast databases belonging to sales representatives.

### Show Status Values By Month

This menu selection instructs Sales Forecast Pro to display your present [Sales Opportunity Summary](#) in a stacked [bar chart](#) format. Opportunity records are displayed by month with the stacked bars representing the various sales cycle status values found within your current sales opportunity summary.

This action also instructs Sales Forecast Pro to set this type of bar chart display as your current default. All graphical displays will use this selection until you change it.

### Use Total Forecasted Amounts

This menu selection instructs Sales Forecast Pro to display your present [Sales Opportunity Summary](#) in a stacked [bar chart](#) format. Opportunity records are displayed by month using "total forecasted" amounts.

This action also instructs Sales Forecast Pro to set this amount selection as your current default. All graphical displays will use this selection until you change it.

### Use Probability Amounts

This menu selection instructs Sales Forecast Pro to display your present [Sales Opportunity Summary](#) in a stacked [bar chart](#) format. Opportunity records are displayed by month using "probability" amounts. Probability amounts are computed by multiplying the total

forecasted amount by the success probability percentage.

This action also instructs Sales Forecast Pro to set this amount selection as your current default. All graphical displays will use this selection until you change it.

## **Help Menu**

### **Help with Sales Forecast Pro**

This menu selection invokes the Windows Help file that you are currently viewing.

### **What's New in This Version**

This menu selection invokes the Sales Forecast Pro README.TXT file.

### **About Sales Forecast Pro**

This menu selection displays the About screen for Sales Forecast Pro.

## Sales Opportunity Summary

Sales Forecast Pro uses its main screen to display your currently selected sales opportunity records. This display is known as your Sales Opportunity Summary.

This summary consists of a list of sales opportunities selected from your database and sorted according to the tab chosen (Sort by Opportunity, Sort by Status, Sort by Product, Sort by Planned Close Date, Sort by Amount and Sort by Probability).

The records from your forecast database are filtered (by organization, time frame, etc.) to produce the currently displayed items.

For each sales opportunity selected, the summary contains the sales cycle status, the product, the planned closure date, the amount and the success probability percentage.

The total summary amounts (forecasted amount and probability amount) are shown at the top of the display.

The summary list can be re-sorted by clicking on a different 'Sort by' tab.

At any time you can instruct Sales Forecast Pro to produce a *printed report* containing the currently displayed forecast items. You can also instruct Sales Forecast Pro to present these items in a *bar chart* format. The bars displayed for each month can be the various products within the forecast, the various status values found within the forecast or the various organization members represented by the forecast.

## **Record Types**

### **Report To Management**

Sales opportunity that you plan to close and that you wish to have reported to management.

### **Private**

Sales opportunity that you want to include for "Personal" planning but that you do not wish to have reported to management.



## Main Screen

Sales Forecast Pro uses its main screen to display the current [Sales Opportunity Summary](#) as controlled by the user's filtering process.

*Let's review the major aspects of Sales Forecast Pro's main screen ...*

The *central section of the main screen* is used to display a list of forecasted items. This tabular list shows the description of each opportunity along with the product being forecast, the status of the forecasted item, the date the order is expected, the total value of the forecasted item and the probability percentage assigned to the item to represent its chance of closure.

At any time you can instruct Sales Forecast Pro to produce a *printed report* containing the currently displayed forecast items. You can also instruct Sales Forecast Pro to present these items in a *bar chart* format. The bars displayed for each month can be the various products within the forecast, the various status values found within the forecast or the various organization members represented by the forecast.

*Above the tabular list* you will find six index tabs (two rows of three) that allow you to quickly sort the currently displayed list of forecasted items. There is a tab for each column of information being displayed and with the simple click of your mouse, you can rearrange the list. You may wish to view the items from the highest amount to the lowest amount or maybe you will want to see them in order by expected order date. Thus you can easily change your vantage point relative to the currently displayed list of opportunities.

*But how do you control which items show up on the currently displayed list?*

*Below the tabular list* you will find index tabs that represent your organizational position within the company. These tabs are used to filter the forecast items within your database; thus controlling which items become part of the currently displayed list. *Your* tab is the left most of these organization tabs and *there is a tab (to the right) for each of your direct reports*. If you click on one of the tabs to the right then the records are filtered and only those belonging to that part of the organization will be displayed. If any of the tabs to the right have a [+] on them (indicating that additional organization levels exists below) and you double click on one of these tabs you will be moved down one level in the organization. That tab will become the left most tab and the tabs to its right will represent the organization components one level below it. These newly exposed tabs can now be used to further filter the forecasted items based on organization. If you double click on the left most tab you will be moved back up the organization one level. Moving up and down the organization and filtering allows a sales manager to gain value insight into the sales opportunities being forecasted.

*Further below the tabular list (just below the organization tabs)* you will find option selection (radio buttons) controls that allow you to filter your forecast records on various time horizons. There are standard horizons of 1, 2, 3, 6, 9 and ALL months. So ... with a single click of your mouse, you can change your view of the forecasted items to suit your business interests.

Using the combination of the *organization tabs* and the *time horizons* provides extensive flexibility for viewing forecasted sales opportunities.

*To the right of the time horizon controls* you will find another set of radio buttons that allow you to decide which item type(s) are to be considered while filling the display list. Sales Forecast Pro accommodates two item types ... Report To Management (RTM) and Private.

Item types allow you to easily control which items are displayed and which items are submitted to your management. You can choose to display just RTM items, just Private items or ALL items.

*Further to the right of the time horizon controls you will find the access point to the final and most powerful aspect of Sales Forecast Pro's filtering capability ... Custom Reports.*

When you click on the *Custom Reports* button, Sales Forecast Pro will take you into a new screen from which you can either create a new report or select from your previously cataloged reports. Using the Custom Reports feature you can filter on combinations of time frames, selected opportunities, selected products, selected status values, total order values above a specified amount and closing probabilities above a specified percentage.

The menu bar on the main screen is used to invoke many of the additional features of Sales Forecast Pro.

Single clicking one of the items in the [Sales Opportunity Summary](#) list instructs Sales Forecast Pro to display further details on that opportunity in the lower right corner of the main screen. The UP/DOWN arrows can also be used to accomplish this.

Double clicking on an item in the list instructs Sales Forecast Pro to display full details for the selected item and allow you to [edit the data](#) if you choose. The ENTER key can also be used to accomplish this.

Pressing the [\[Delete\]](#) key instructs Sales Forecast Pro to delete the currently selected item in the summary list.

## Putting sales opportunities into other databases

Sales Forecast Pro allows you to put sales opportunity records into another Sales Forecast Pro database; thus, removing them from your present database.

You can choose to export All Records, Actual Forecast Item records only or only the records represented by your current [Sales Opportunity Summary](#). If you choose Actual Forecast Item records only, Sales Forecast Pro skips any records that were classified as What If or Closed.

If you choose the Current Sales Opportunity Summary, Sales Forecast Pro operates only on the records contained in the current summary list on the front screen.

To specify the destination file click on the [...] button. This will take you to a standard file dialog box. You can then browse the system and/or network to choose the file you wish to export to. You can optionally specify a new file from within the dialog box.

## As a Sales Representative you can ...

- . Create and maintain your database of sales opportunity records
  - . Description of sales opportunity
  - . Product being proposed
  - . Unit Quantity of the Product being proposed
  - . Total value (your currency) of the opportunity
  - . Status of opportunity (within your sales cycle)
  - . Date when you expect to receive the order
  - . Probability that you will win the business
  - . Comments ... if desired
  
- . View your sales opportunity records
  - . Within standard time horizons (1, 2, 3, 6, 9 and all months)
  - . Using your own custom report filters
  - . Sorted by Description, Status, Product, Close Date, Value or
    - . Charted as stacked bars by Product or by Status
    - . As printed reports
  
- . Submit your forecast to your manager
  - . Using a standard diskette
  - . Via your network

Probability

## As a First Level Sales Manager you can ...

- . Receive forecasts from your Sales Representatives
  - . Using standard diskettes
  - . Via your network
- . View your composite forecast and/or that of individual Sales Representatives
  - . Within standard time horizons (1, 2, 3, 6, 9 and all months)
  - . Using your own custom report filters
  - . Sorted by Description, Status, Product, Close Date, Value or
    - Probability
    - Status
  - . Charted as stacked bars by Sales Representative, by Product or by
    - Status
  - . As printed reports
- . Tailor your forecast for submission to your manager
  - . Modify/Delete any of the existing sales opportunity records
  - . Add sales opportunities records for any of your Sales Representatives
  - . Roll in your house accounts forecast (if applicable)
- . Submit your forecast to your manager
  - . Using a standard diskette
  - . Via your network

## As a Higher Level Sales Manager you can ...

- . Receive forecasts from lower level Sales Managers
    - . Using standard diskettes
    - . Via your network
  - . View your composite forecast and/or that of individual Sales Managers
    - . Within standard time horizons (1, 2, 3, 6, 9 and all months)
    - . Using your own custom report filters
    - . Sorted by Description, Status, Product, Close Date, Value or
- Probability
- . Charted as stacked bars by Sales Manager, by Product or by Status
  - . As printed reports
- levels
- . Drill down into the organization and view sales opportunities at all lower
- . Tailor your forecast for submission to your manager
    - . Modify/Delete any of the existing sales opportunity records
    - . Add sales opportunities records for any of your Sales Representatives
    - . Roll in your house accounts forecast (if applicable)
  - . Submit your forecast to your manager
    - . Using a standard diskette
    - . Via your network

## Organization Overview

The iSBiSTER sample data represents a top down view of forecasted sales opportunities at the highest level in the sales organization. To help you maximize your use of the sample data we must first review the business scenario of the company depicted by the sample data.

The company has a multi-level, outside sales organization selling various products across the United States. The organization should be viewed as follows ...

- . Sales Representatives (SR) own the individual selling opportunities.
- . SR's report to District Sales Managers (DM).
- . DM's report to Area Sales Managers (AM).
- . AM's report to Region Sales Managers (RM).
- . RM's report to a Company Sales Manager (CO).

## Generation of the sample data

An [Organization Overview](#) was presented earlier identifying the various players.

- . Each SR installed Sales Forecast Pro on their PC and created their individual database of sales opportunity records. At the creation of the databases, each SR identified themselves by organization code and by name. This identification is stored as a property of each database.
- . Each SR then used Sales Forecast Pro submit their forecast to their DM.
- . Each DM installed Sales Forecast Pro on their PC and created their individual database to hold sales opportunity records received from their SR's. At the creation of the databases, each DM identified themselves by organization code and district name.
- . Each DM then used Sales Forecast Pro to received the forecast from their SR's and build the composite forecast for their district.
- . Each DM then used Sales Forecast Pro to submit their forecast to their AM.

Each AM installed Sales Forecast Pro on their PC and created their individual database to hold sales opportunity records received from their DM's. At the creation of the databases, each AM identified themselves by organization code and area name.

by

- . Each AM then used Sales Forecast Pro to received the forecast from their DM's and build the composite forecast for their area.
- . Each AM then used Sales Forecast Pro to submit their forecast to their RM.

Each RM installed Sales Forecast Pro on their PC and created their individual database to hold sales opportunity records received from their AM's. At the creation of the databases, each RM identified themselves by organization code and region name.

by

- . Each RM then used Sales Forecast Pro to received the forecast from their AM's and build the composite forecast for their region.
- . Each RM then used Sales Forecast Pro to submit their forecast to the CO.



## Viewing the sample data

An [Organization Overview](#) was presented earlier identifying the various players.

Your perspective of the sample data is that of the Company Sales Manager. You have installed Sales Forecast Pro on your PC and have received the forecast from each of your Region Managers. Notice the tabs across the bottom of Sales Forecast Pro's main screen. The left most tab identifies you as "Company" the tabs to the right identify each of your sales regions. While the "Company" tab is selected the forecast records displayed represent the composite forecast for both of the regions. Clicking on one of the region tabs instructs Sales Forecast Pro to filter the records to show just those from the selected region.

As the Company manager you can instruct Sales Forecast Pro to produce stacked bar chart displays showing the value of the forecast with each bar representing one of your regions. You may also ask for the bars to represent the individual products being forecasted or the various sales cycle status values used by your company.

To make it even more interesting, you can double click on one of the region tabs and thus instruct Sales Forecast Pro to move down into the organization so that your perspective is that of the selected region manager. Now the left most tab identifies you as the sales manager for the selected region and the tabs to the right identify each of your sales areas.

As a region manager you can instruct Sales Forecast Pro to produce stacked bar chart displays showing the value of the forecast with each bar representing one of your areas. You can also ask for the bars to represent the individual products being forecasted or the various sales cycle status values used by your region.

This process of doubling clicking on a tab and moving down into the organization can be repeated until you become one of the first level managers and the tabs to the right represent the individual SR's.

Doubling clicking on the left most tab (at each of the organizational levels) instructs Sales Forecast Pro to move up one level in the organization.

Thus Sales Forecast Pro allows you to move vertically within the organization to provide insight into forecasted sales at any desired level.

## Replacing the iSBiSTER sample data

Sales Forecast Pro provides a very simple way to replace iSBiSTER's sample data with your new

forecast database. You start by opening Sales Forecast Pro's File Menu; then ...

- . Select the "Special Database Transactions" option
- . Within this menu select the "Eliminate All Data ..." option
- . Confirm your intentions to start a new database

Sales Forecast Pro will then display a new screen within which you supply the properties of your new forecast database. You must supply your database identifications and specify that this database is either for a Sales Representative or a Sales Manager. The default field headings may also be changed.

These values may also be modified at a later time using the "Modify Database Properties" option under the "Special Database Transactions" menu. Note however; that once you specify the nature of the database (i.e., Sales Representative or Sales Manager) it cannot be changed. Thus, if you incorrectly specify this property you will have to repeat this entire process.

The database identifications include your company name (30 characters maximum), your short organization identification (usually a company assigned code ... 5 characters maximum) and your long organization identification (usually your name or the name of your specific part of the sales organization ... 20 characters maximum).

## Creating an additional forecast database

In addition to your primary forecast database, you may wish to have other forecast databases. You

may wear several hats (i.e., you may function as more than one Sales Representative or you may be a working manager with sales responsibilities of your own) and will want to have separate forecast databases for each of your roles.

*Let's review a primary design issue at this time ...*

Sales Forecast Pro has to be told where to look for the forecast database (on which it will operate) each time it starts. This information is provided by one of the properties of the Program Manager ICON used to launch Sales Forecast Pro. Each Program Manager ICON (those used to launch applications) has three properties ... the description of the application, the command line used to start the application and the DOS working/startup directory to be set before the application is launched.

When Sales Forecast Pro was installed, this launching ICON was built for you and the above properties were provided. The working/startup directory was set to be the DOS directory into which Sales Forecast Pro was installed (C:\SFPRO by default) and the iSBiSTER sample data was also placed in this directory.

When you double click on this launching ICON to start Sales Forecast Pro you end up accessing the forecast database that is in the DOS directory where Sales Forecast Pro was installed and everything is wonderful.

*Now on with the creation of a new forecast database ...*

To create additional forecast databases you must do two major things ...

- . Create a new DOS directory to hold the database
- . Create a new launching ICON to start Sales Forecast Pro.

You should use the Windows File Manager to create the new DOS directory and then use the Windows Program Manager to create the new launching ICON. Your use of the File Manager is taken for granted; however, let's quickly review how to best create the new launching ICON.

- . Using the Program Manager, locate the existing ICON used to launch Sales Forecast Pro.
  - . Single click this ICON to select it.
  - . With the existing ICON selected open the Program Manager's File Menu.
  - . Select the "Copy" option and make a copy of the existing ICON within the current Program Group.
  - . While holding down the [Alt] key on your keyboard ... double click the new ICON.
  - . Within the ICON properties dialog box ... set the working/startup directory property to point to the new DOS directory you created with the File Manager.
  - . Also edit the application description to reflect the purpose of this copy of Sales Forecast Pro.
  - . Save the results of your efforts by clicking on the [OK] button.

When you use the new ICON to start Sales Forecast Pro you will be provided a screen within which you will supply the properties of a new forecast database. You must supply your database identifications and specify that this database is either for a Sales Representative or a Sales Manager. The default field headings may also be changed.

These values may also be modified at a later time using the "Modify Database Properties" option under the "Special Database Transactions" menu. Note however; that once you specify the nature of the database (i.e., Sales Representative or Sales Manager) it cannot be changed. Thus, if you incorrectly specify this property you will have to repeat this entire process.

The database identifications include your company name (30 characters maximum), your short organization identification (usually a company assigned code ... 5 characters maximum) and your long organization identification (usually your name or the name of your specific part of the sales organization ... 20 characters maximum).

## Moving sales opportunities to your History Database

Moving records from your forecast database to your history database is very easy. Simply select the items within your current Sales Forecast Summary list that you wish to move and then exercise provided option under the File Menu.

Multiple items within the Sales Forecast Summary list can be selected before you start the move. You can click on individual items while holding down the [Ctrl] key to select them or you can select one item and then click on another item while holding down the [Shift] key to select all items between the first one clicked and the one clicked while holding down the [Shift] key.

Items moved to your history database are automatically removed from your forecast database.

### NOTE:

If you are presently accessing your history database, the moving process takes items from your history database and moves them to your forecast database.

## Your History Database

While Sales Forecast Pro was designed to primarily manage forecasted (future) sales opportunities it also provides an excellent tool for managing actual sales (history) records that you have indicated as inactive and no longer in your forecast database.

Sales Forecast Pro inherently creates and provides you access to a history database. The history database is just like the forecast database except that it should contain records that are no longer actively being forecasted. You may wish to store records here that indicate your "booked" orders and/or sales opportunities that you "lost" (rare ... but possible).

You can move items from your forecast database to your history database or from your history database to your forecast database. Sales Forecast Pro also allows you to easily switch back and forth. A File Menu option is used to [switch](#) between these two databases.

While you are accessing your history database, all appropriate field headings are changed to reflect your presence in the history database. Menu options, etc. are also changed to reflect your position.

Sales Forecast Pro further accommodates your presence in the history database by implementing the standard time horizons ( 1, 2, 3, 6, 9 and ALL Months) *into the past*.

All other aspects of Sales Forecast Pro (during your access to the history database) function just the same as when you are accessing your forecast database.

## **Organization Menu**

### **Return To Top Level**

If you are a sales manager, you have one or more levels of the organization visible to you within your current forecast database. You can move down into the organization one level at a time and you can move up in the organization one level at a time. This will usually be done by double clicking on the organization tabs below your present forecast summary list.

This menu option instructs Sales Forecast Pro to move all the way back to the top of the organization based on your current forecast database.

### **Move Down One Level**

Instructs Sales Forecast Pro to move down to the next lower level of the organization.

### **Move Up One Level**

Instructs Sales Forecast Pro to move up to the next higher level of the organization.

### **Use Short Identifications**

Every forecast database belongs to a member of your organization and is identified with both a short and long organization code. This option instructs Sales Forecast Pro to display the short identification codes on the organization tabs on your main screen.

This action also instructs Sales Forecast Pro to set this choice of identification display as your current default. All identification displays will use this selection until you change it.

### **Use Long Identifications**

This option instructs Sales Forecast Pro to display the long identification codes on the organization tabs on your main screen.

This action also instructs Sales Forecast Pro to set this choice of identification display as your current default. All identification displays will use this selection until you change it.

## Switching To Your History Database

While Sales Forecast Pro was designed to primarily manage forecasted (future) sales opportunities it also provides an excellent tool for managing actual sales (history) records that you have indicated as inactive and no longer in your forecast database.

You can switch to your history database at any time by using the appropriate option under Sales Forecast Pro's File Menu.

When you are accessing the History database, this option allows you to switch back to the Forecast database.



