FORECAST MANAGEMENT

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Learn More
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MAX's Forecast Management Solution for Microsoft Dynamics CRM is a robust tool that enables sales executives and operations teams to develop detailed sales forecasts to support the Sales and Operations Planning (S&OP) process.

By using this solution companies can support the design win lifecycle - from samples management to design registration and through to Design Win and Sales Forecasting. Design Win and Samples Management for Microsoft Dynamics CRM includes distributor and manufacturer rep portals that enable a seamless coordination between the production and distribution network. It also supports the ability to track and assign the right contract manufacturer (ODM) and end customer, often an OEM manufacturer. This solution is built upon the Microsoft Dynamics CRM platform and can be integrated into any ERP to seamlessly in pull pricing and push out orders from closed opportunities.

Using this solution, companies can combine the sales pipeline of new business with sales forecasts of current customers and sales wins for robust forecasting. This solution also provides a view into the actual revenue and netted for billings, bookings, and backlog.

Not only does MAX's Forecast Management solution for Dynamics CRM provide a clear view into sales revenue, it streamlines and automates the entire forecasting process. Companies can save time, increase accuracy and reduce the excess inventory that results from poor planning.

With MAX's Forecast Management Solution for Microsoft Dynamics CRM, sales leaders can leverage rich, interactive and drillable graphical representations of sales forecasts displayed in pie charts, line graphs and bar charts to support a wide variety of complex forecasting needs, including:

- Forecast by customer, product, opportunity, territory, direct vs channel and much more

- Top down or bottom up forecasting

- Forecast by revenue, parts quantity, or both

- Budget to forecast analysis and comparisons

- Forecast to Forecast period comparisons

- Forecast to actual revenue accuracy measurement

- Visibility of distribution channel inventory and sell through forecasts

- Direct and distributor views of sales for a total global forecast

- Includes manager override capabilities

Features and Screenshots from the Forecast Management Solution for Microsoft CRM

Forecast management provides Dynamics CRM users the ability to spread the value of an opportunity out over an extended period of time to provide more accurate monthly forecasting planning.

Forecasting data can be seen in a variety of contexts, including the ability to compare forecasted amounts from Microsoft Dynamics CRM with actual delivered amounts from an ERP application. Furthermore, users can review these comparisons by sales rep, region, time frame and many other variables.

Using advanced pivot table functionality, our forecast management solution operates in real-time. This enables users to slice data as needed and filter for desired content.

Forecast Pivot

Row Labels	Forecast Quantity	Sold Quantity	Forecast Revenue	Actual Revenue	Average of Variance %
2012	13,200.00	14,350.00	$33,000.00	$35,875.00	201.38 %
2013	98,150.00	98,900.00	$224,337.50	$223,925.00	86.39 %
2014	82,000.00	0.00	$205,000.00	$0.00	0.00 %
Grand Total	193,350.00	113,250.00	$462,337.50	$259,800.00	101.51 %
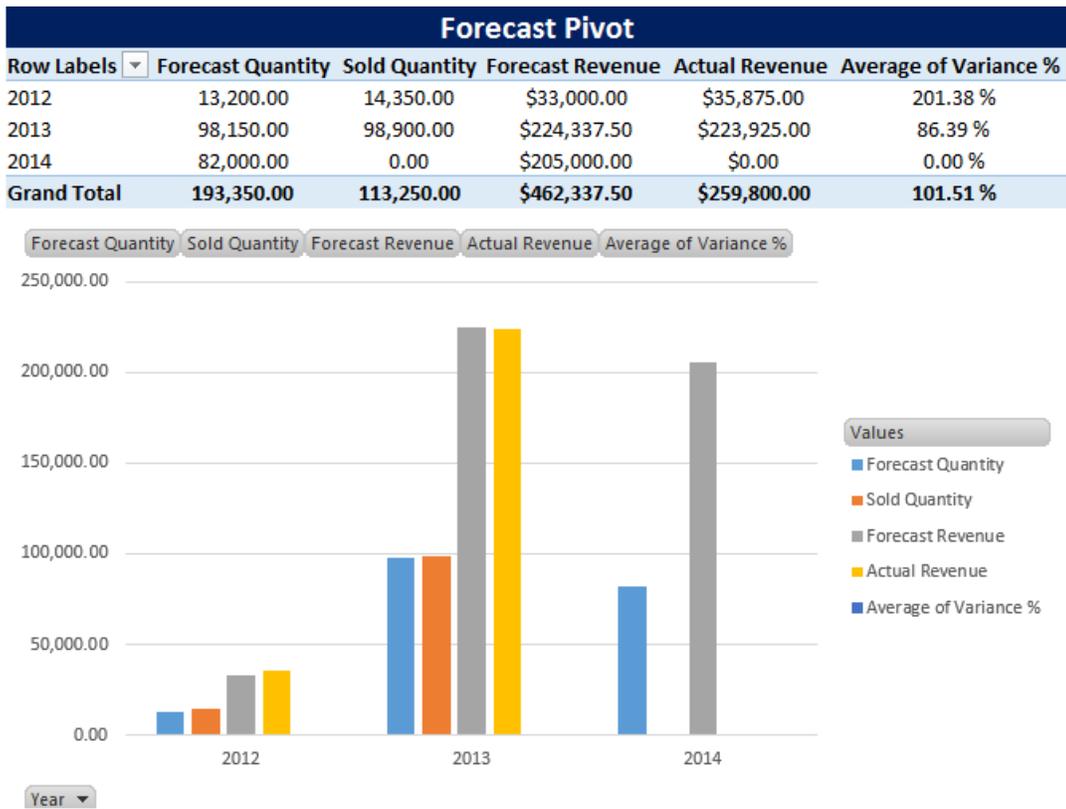
Forecast vs actual revenue amounts can also be shown in an animated representation over time. By pressing the "play" button, users can watch forecasted revenue grow or shrink over time.

Distributor Forecast vs Actual Revenue
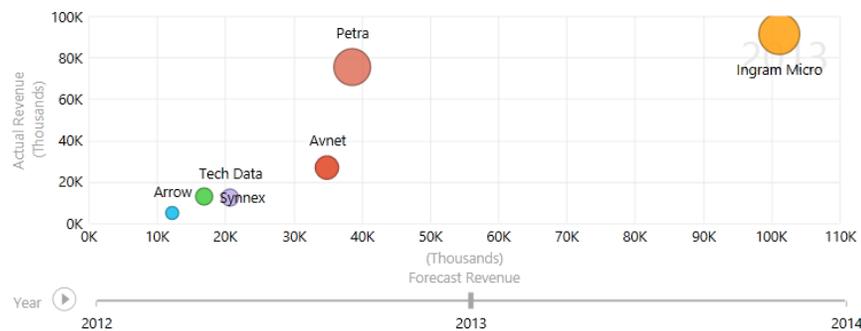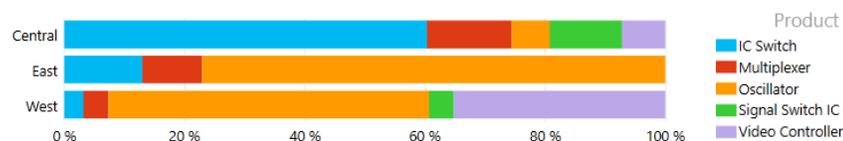
Microsoft Dynamics CRM dashboards can be utilized to show forecasts by product, forecasts by month, and detailed lists of itemized forecast numbers that can be modified with in-grid editing. Users can start out with a high-level view and then drill into specific pieces of information for a detailed look into individual data sets.
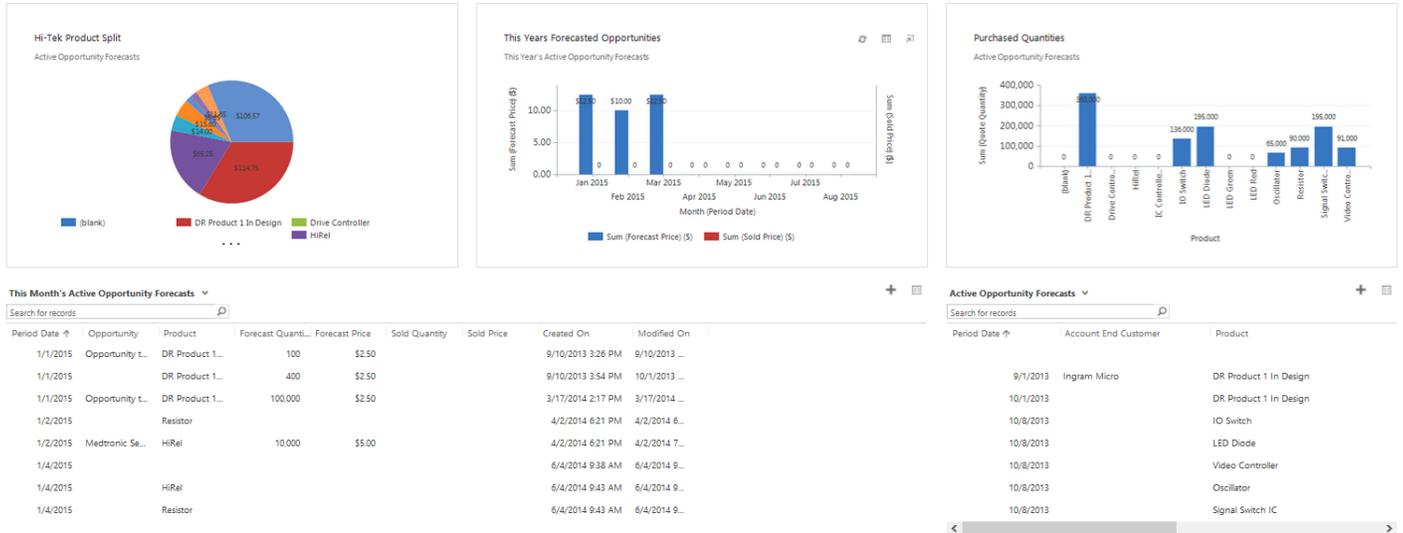
About MAX

MAX is the result of the Trans-Atlantic partnership between Swiss based DotWood CRM and United-States (California) based Armanino: Microsoft Dynamics CRM Partners with deep manufacturing process knowledge and innovative, cutting-edge solutions built directly into Dynamics CRM.

- International & Multilingual Microsoft Dynamics CRM Partners

- MAX Solutions are adapted to your Industry and the way you do business

- Wealth of experience and insights across a broad range of industries and services

- Working with a Gold Certified Microsoft Dynamics CRM Partner, Customer Excellence Award Winner and Microsoft Inner Circle Partner