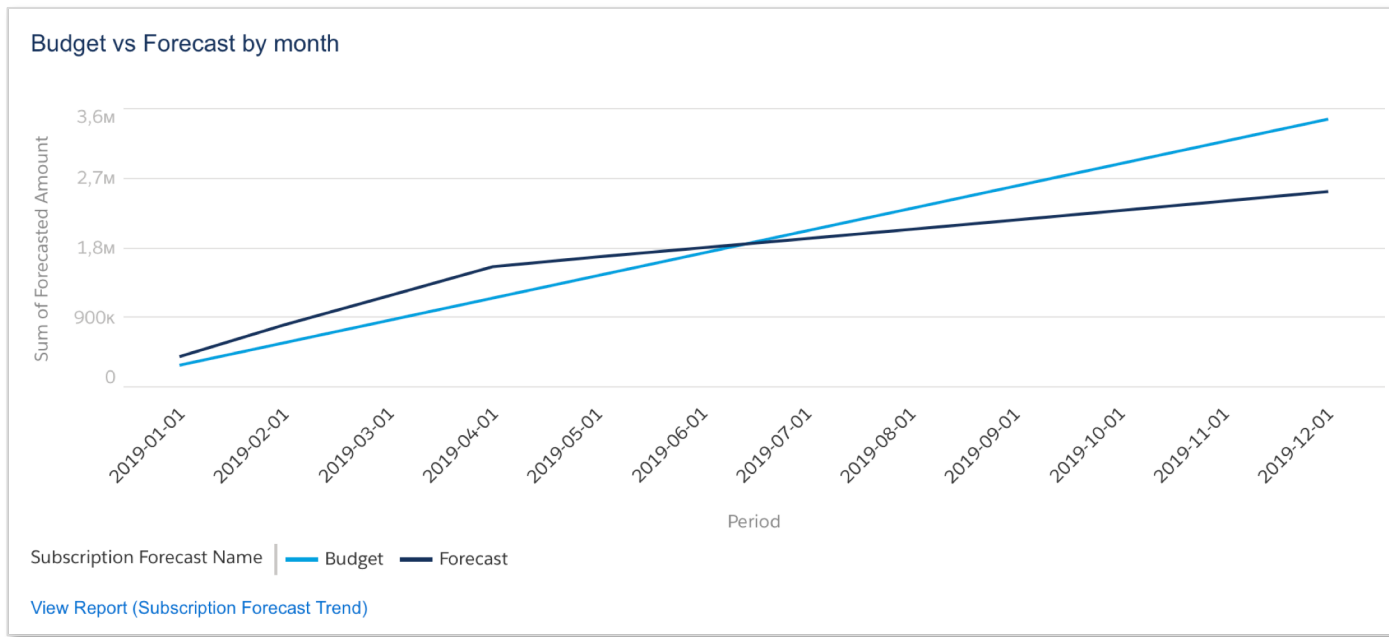




Budget vs Forecast by month

By defining a “Budget” forecast in addition to your regular forecast you can report and follow up budget vs forecast on a monthly basis. See step-by-step instructions on following pages.





1. Create your “Budget” Forecast

- Create a new “Budget” forecast, set type = Budget
- Add forecast objects to your Budget forecast

Subiterum MANAGE FORECASTS

New

DEFAULT	NAME	DESCRIPTION	TARGET	TYPE	STATUS	
Default	Forecast	Demo data forecast	1 080 000	Forecast	Enabled	
	Budget		0	Budget	Enabled	

User Guide

Subiterum MANAGE FORECAST OBJECTS

New

DISPLAY ORDER	FORECAST OBJECT	DESCRIPTION	REVENUE TYPE	SEASONAL VARIATION	CODE	ALGORITHM	ATTRIBUTION %
10	Subscriptions	Cloud subscription revenue	Recurring	No	CSUBS	100	
20	Consulting	Consulting revenue	One Time	No	PROFSERV	0	
30	Hardware	Hardware	One Time	No	HW	0	

Budget Forecast Object Add

FORECAST OBJECT

Subscriptions X

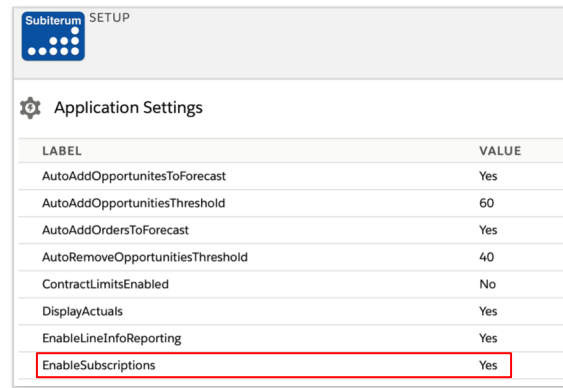
Consulting X

User Guide



2. Add Lines to Budget Forecast

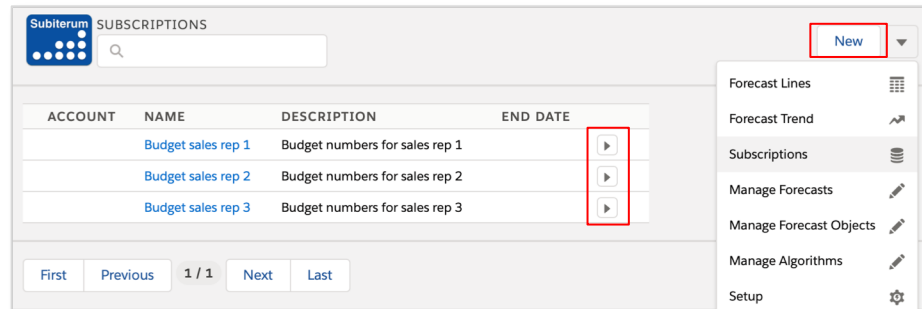
- Update the application setting “EnableSubscriptions” to “Yes”
 - This enables the use of a generic Subscription entity in Subiterum which means you don’t have to create dummy opportunities to store your budget numbers
- Create Subscriptions and add them to your Budget forecast
 - If you want to follow budget achievement on sales rep level you can create one per sales rep



Subiterum SETUP

Application Settings

LABEL	VALUE
AutoAddOpportunitiesToForecast	Yes
AutoAddOpportunitiesThreshold	60
AutoAddOrdersToForecast	Yes
AutoRemoveOpportunitiesThreshold	40
ContractLimitsEnabled	No
DisplayActuals	Yes
EnableLineInfoReporting	Yes
EnableSubscriptions	Yes



Subiterum SUBSCRIPTIONS

New

ACCOUNT	NAME	DESCRIPTION	END DATE
	Budget sales rep 1	Budget numbers for sales rep 1	
	Budget sales rep 2	Budget numbers for sales rep 2	
	Budget sales rep 3	Budget numbers for sales rep 3	

Forecast Lines
Forecast Trend
Subscriptions
Manage Forecasts
Manage Forecast Objects
Manage Algorithms
Setup



3. Enter your budget numbers

Enter values for your Subscriptions to get your “Budget Forecast” on your granularity of choice

FORECAST LINES

Budget

Current Fiscal Year

-- Owner --

-- Stage --

<input checked="" type="checkbox"/>	STAGE	OPPORTUNITY/ORDER	FORECAST OBJECT	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	SUM*	
	Budget sales rep 1		Subscriptions	85 000	85 000	85 000	85 000	85 000	85 000	85 000	85 000	85 000	85 000	85 000	85 000	1 020 000	
	Budget sales rep 1		Consulting	15 000	15 000	15 000	15 000	15 000	15 000	15 000	15 000	15 000	15 000	15 000	15 000	180 000	
	Budget sales rep 2		Subscriptions	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	90 000	1 080 000	
	Budget sales rep 2		Consulting	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000	60 000	
	Budget sales rep 3		Subscriptions	95 000	95 000	95 000	95 000	95 000	95 000	95 000	95 000	95 000	95 000	95 000	95 000	1 140 000	
	Budget sales rep 3		Consulting	0	0	0	0	0	0	0	0	0	0	0	0	0	
			Sum*	290 000	290 000	290 000	290 000	290 000	290 000	290 000	290 000	290 000	290 000	290 000	290 000	3 480 000	
			ARR*	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	3 240 000	
			Forecast Target	0	0	0	0	0	0	0	0	0	0	0	0	0	
			Sum All Pages*														

Cancel

Save

First

Previous

1 / 1

Next

Last

*Actuals are used when present - [User Guide](#)



REPORT

Subscription Forecast Trend

Got Feedback?

Save & Run

Save

Close

Run

OUTLINE

FILTERS

Previewing a limited number of records. Run the report to see everything.

Groups

GROUP ROWS

Period

Subscription Forecast Name

Subscription: Name

GROUP COLUMNS

Columns

Add column...

Opportunity: Opportunity Name

Actual Amount

Forecasted Amount

Bar

Column

Stacked Bar

Stacked Column

Line

Donut

Funnel

Scatter Plot

Chart Attributes

Chart Title

Budget vs Forecast by month

X-Axis

Period

Subscription Forecast Name

Y-Axis

Sum of Forecasted Amount

Show Reference Line

Cumulative

Legend Position

Bottom

Budget vs Forecast by month

Period	Subscription Forecast Name	Subscription: Name	Sum of Actual Amount	Sum of Forecasted Amount
2019-03-01	Forecast	-	0	3 333
	Subtotal		0	3 333
2019-04-01	Forecast	-	0	6 167
	Subtotal		0	6 167
2019-05-01	Forecast	-	0	4 367
	Subtotal		0	4 367

Row Counts

Detail Rows

Subtotals

Grand Total

Budget vs Forecast by month

Period	Budget	Forecast
2019-01-01	0.2M	0.3M
2019-02-01	0.4M	0.6M
2019-03-01	0.6M	0.9M
2019-04-01	0.8M	1.7M
2019-05-01	1.1M	1.7M
2019-06-01	1.4M	1.7M
2019-07-01	1.7M	1.7M
2019-08-01	2.0M	1.8M
2019-09-01	2.3M	1.9M
2019-10-01	2.6M	2.0M
2019-11-01	2.9M	2.1M
2019-12-01	3.4M	2.5M

Subscription Forecast Name | Budget Forecast

[View Report \(Subscription Forecast Trend\)](#)