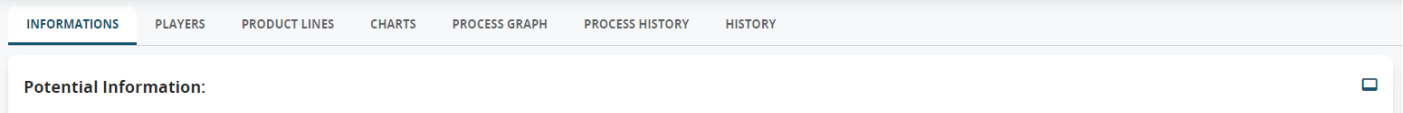
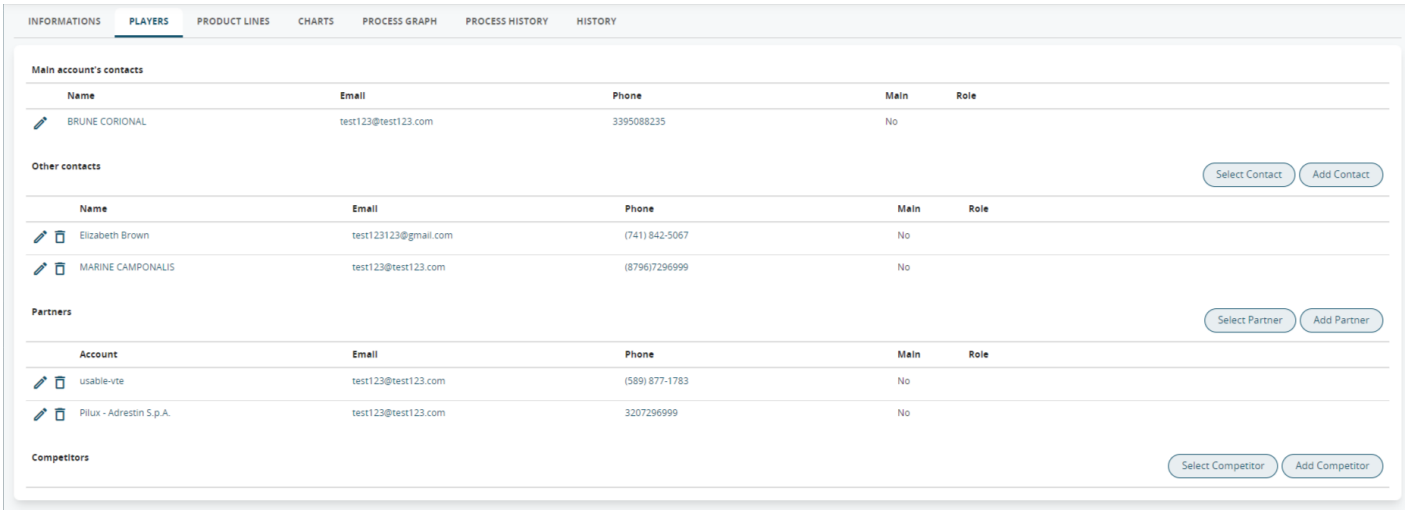
9.4 Budget

The Potentials module shows information relating to their progress in relation to other linked items. The Budget module is navigable through the tabs shown in the figure:

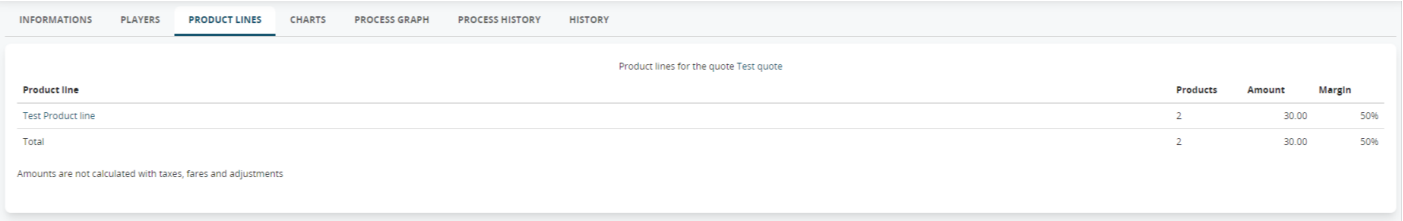


The Information tab directly relates to the potential, while other data sheets relate to the Budget.

- **Players:** if inserted, they are data related to contacts, partners and competitors, useful for the negotiation phase.They can be added as new or selected if already present in CRM, and can be profiled according to their role in the negotiation
- **Other contacts**: if inserted, they are the contacts (also of different companies) linked to the potential
- **Partners:** if inserted, they are the companies that have a partnership relationship with the sales potential company
- **Competitors:** if entered, they represent one or more competitors (Companies with field Type = Competitor) linked to the sales potential. Also in this case, they can be selected from the CRM database or added as new

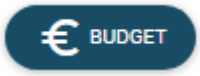


Product lines: information on amounts and profit margins organised by product lines. The products are those included in the related sales order or quote, grouped as set out in the Product Lines module. The amount is the sum of the economic values of all the products present in the potential belonging to a given line. The margin is calculated, again per line, based on the difference between the sales price of the product and its cost. The margin is expressed as a percentage and is calculated by making a weighted average of the products present in the line. The formula used to calculate the margin is: [SUM(prices) - SUM(costs)] / SUM(prices)]. The cost of each product must be defined in the relevant data sheet via the Unit cost field.



Charts: show the historical amounts of the different deals made through the sales potential.
vtenext also provides general budget management features based on the information contained in Potentials, Products, Product Lines, Quotes and Sales Orders. Some values in these modules will feed the Budget by Product Line report contained in the Budget folder in the Reports module.

You can access them directly by clicking on the "Budget" button in the Potentials menu.



This report allows you to have an immediate view of your business situation, organised by period of time.
You can navigate the data by year, half-year, quarter or month. The following data are presented:

- **Budget:** information established in the Yearly Budget field contained within the sections of the Product Lines module
- **Best:** sum of the amounts of potentials that have at least 70% probability of closure
- **Forecast:** sum of the amounts of potentials that have at least 80% probability of closure
- **Worst:** sum of the amounts of potentials that have at least 90% probability of closure
- **Closed orders:** sum of the amount of closed sales orders
- **Budget Delta:** the difference between the budget established in the relative product line and the amount of sales orders, always relative to the same product line. In essence, it expresses what remains to be done to achieve the planned budget.

By default, the report presents information organised by product line. It is, however, also possible to organise it by user assignee of the potential.

Summing up briefly

The Best, Forecast, Worst columns are then counted based on the% chance of closing the opportunity. To be counted in the "Best" column, the opportunity must have a probability of at least 70% closing, to be counted in the "Forecast" column, at least 80% and to appear in the "Worst" column, it must be at least 90%.

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