Benefits

- Track planned, booked, and actual revenue from a variety of sources
- Relate revenue to accounts, contacts, and opportunities
- Copy or split revenue over one to many time intervals
- Group and aggregate revenue by user-defined categories
- Create related revenue in bulk from the form command bar
- Compare revenue by date, type, and category
- View monthly, quarterly, and annual revenue trends

Arbela Revenue Planner

Why forecast based on sales when you can plan based on revenue?

Sales forecasting only takes you so far.

If you're dealing with multi-stage, extended-duration projects or programs, there is a host of external and internal variables (e.g., market fluctuations, supply chain disruptions, staffing changes, and more) that can make forecasting based on "expected sales" into a rather risky proposition.

A safer, more effective strategy is now using revenue planning as your forecasting foundation.

Rather than focus exclusively on the sales data in your CRM system, revenue planning enables you to draw from myriad data sources to create the most accurate picture possible of potential revenue.

Arbela Revenue Planner is the ideal solution to extend Dynamics 365 Sales, and improves both the accuracy of your forecasting data, and the ability to act on it, too.

Recognized revenue + real-time data = reliable forecasts

Built on Microsoft Dynamics 365 Sales, Arbela Revenue Planner can automatically connect and collate upcoming, estimated revenue from CRM (planned revenue) as well as previously recognized revenue from ERP (actual revenue). The solution then

merges and analyzes that data to empower sales leaders to 1. create more accurate forecasts, and 2. make more informed decisions sooner.

With Arbela Revenue Planner, a business can forecast based on customer accounts, programs, or even at the project level — and over any period of time. Additionally, reports may be created across multiple revenue categories (e.g., planned, booked, invoiced, actual).

Arbela Revenue Planner gives you more than just a view of a sales pipeline: you can now view, and act on, revenue-driving opportunities across your entire infrastructure.

Contact info@arbelatech.com to learn more about how Arbela Revenue Planner can evolve forecasting for your business.