

## Opportunity Forecast

**Description:** The Opportunity Forecast report is used to show all opportunities, by date range, and their associated status and and cost/margin.

**Purpose:** The intended purpose of this report is to provide a central location where cost/margin, status details can be seen on one screen for each Account Manager.

### Criteria

Parameter	Description
Begin Date	The parameter defines the begin date for the close date or expected close date for the opportunity.
End Date	This parameter defines the end date for the close date or expected close date for the opportunity.
Probability	The parameter for selecting the probability of closing the opportunity, ranging form 0% - 100%.
AcctMgr	The parameter for selecting the account manager or all account managers.
Status	The parameter for selecting the forecast status.
Sales Stage	The parameter for selecting the sales stage associated with the opportunity.
Forecast Type	The parameter for selecting the forecast type.

### Report Fields

Report Field	Description	ConnectWise Screen	ConnectWise Field
Account Manager	The Account Manager(member) that is the owner of the opportunity.	My Opportunities	Sales Rep
Company	The Customer(company) with which there is an opportunity.	My Opportunities	Company
Opportunity	The name of the Opportunity.	My Opportunities	Opportunity Name
Forecast Type	The name of the Forecast Type.	My Opportunities	Forecast Name
Status	The name of the Status Type.	My Opportunities	Status Name
Revenue	Revenue for the opportunity from the so_forecast table.	My Opportunities	Forecast Type
Margin	Margin for the opportunity - calculated from subtracting the revenue minus the cost from the forecast table.		
Close Date	The date that the opportunity was closed.	My Opportunities	Close Date
Sales Stage	The Stage of the opportunity.	My Opportunities	Stage
Probability	The Probability percentage for the opportunity.	My Opportunities	Prob %

### Report Calculations

Calculation	Description
Account Manager Total	Total Revenue/Margin summarized by Account Manager.
Grand Total	Total Revenue/Margin by queried parameter range.