



Autotask Professional  
Services Automation

# Performance Analytics: Sales Workbook

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## Welcome!

Whether you are already using business metrics to help manage your business, or you are just beginning to realize the benefits of analyzing your business data, Autotask Performance Analytics (formerly Performance Dashboards) will make this task easier.

### What is a Performance Analytics Workbook?

Every customer or potential customer, every ticket and project task, every sales opportunity and quote is stored in your Autotask database. Your database tells the story of your business. And as more business owners are realizing, this story can provide useful insights into how to make your business better.

Autotask Workbooks pull out the information you need, and presents it in an easy and accessible format.

- Each workbook brings together core metrics for one area of your business workflow to analyze your business's trends, successes, and challenge points.
- Workbooks present data visually so you can compare and analyze at a glance.
- Workbooks are easy to set up; simply open the workbook, enter the credentials provided by Autotask, and you're ready to go.
- Workbooks are even easier to use. Click one button to refresh data directly from pre-selected Autotask Performance Dashboards Data Cache and then start scanning the charts.
- Workbooks are portable; you can work anywhere. All you need is a computer that can open an MS Excel (version 2010 or greater) file and, to update your data, a network connection. And, workbooks are compatible with Share Point and Sky Drive.
- Workbooks bring together related data on one worksheet so you can easily compare relationships and trends.
- Workbooks have some basic features that any user can customize for their own business preferences.



Workbooks require access to the Workbooks Data Cache, a fee based service.

### Ready to get your workbooks?

Autotask Performance Analytics workbooks are available through your Autotask Account Manager.



Workbooks are not supported on Macs. The MS Excel™ version for Macs does not support key Performance Analytics features.

### Ready to set up your new Workbooks?

Go here: "[Get Started with Performance Analytics](#)" on page 3



## Looking for information about a specific workbook?

If you are reading the **User Guide for a specific workbook**, click the link below to open a page in the Autotask Online Help where you can download a PDF User Guide for any workbook type.

[Download a Performance Analytics Workbook User Guide](#)

## Need help from Customer Support?

Find out more here: "Contacting Customer Support" on page 64

## Get Started with Performance Analytics

This section provides general information on the Performance Analytics Workbook requirements and how to configure your workbooks. For details on the tabs in a specific workbook, refer to the individual workbook information.

**If you are reading the Performance Analytics: All Workbooks User Guide**, use the links below to go directly to the individual workbooks.

**If you are reading the User Guide for a specific workbook**, click the link below to open a page in the Autotask Online Help where you can download a PDF User Guide for any workbook type.

[Download a Performance Analytics Workbook User Guide](#)

If you are using a printed copy of the User Guide, enter this URL into a Web browser's address bar to open the Help page: <https://www.autotask.net/help/Content/Reporting/AnalyticWorkbooks/PerformanceAnalyticsWorkbooks.htm>.

### What You Get

When you sign up for Performance Analytics Workbooks, you will receive:

- A Performance Analytics Workbooks file for each workbook you signed up to receive
- Credentials to access the Workbooks Data Cache to download and refresh your data
- A sample PowerPoint presentation with charts that you can link to your service desk workbooks
- A User Guide in PDF format

### Requirements

To use Autotask Performance Analytics workbooks, you need the following:

- Microsoft Excel™ 2010 or later running on a Windows operating system

The MS Excel version for Macs does not support key features of the Performance Analytics workbooks, for example, slicer filters.

- Workbooks Data Cache access credentials



Depending on your Autotask package, there may be a monthly fee to access the Workbooks Data Cache.

- Internet access when downloading and refreshing data.

## Setting Up Your Workbook

When you receive your workbook files and user credentials from Autotask, you must configure each workbook separately.



There are currently several different Analytics Workbooks and workbook versions available. Your workbook may not have all the options described here. If you don't see an item on your Config page, you can move on to the next item.

### To Begin

1. Copy all attachments from the email you received from Autotask to your local drive or network.

The email includes your credentials to access the Workbooks Data Cache: Database Server, Database Name, User ID, and Password.



Be sure to keep a copy of your credentials in a secure location.

2. Open a workbook file in Excel.
3. Click the **Config** worksheet tab.



### Initial Setup and Configuration

Be sure to have the following Workbooks Data Cache credentials ready: Database Server, Database Name, User ID, and Password.

1. On the Config worksheet, click **Setup Workbook**.
2. Enter the credentials you received from Autotask exactly as provided by Autotask: Database Server, Database Name, User ID and Password.

Your connection information is case sensitive.

Use characters as specified by Provisioning. Do not leave empty spaces before, after, or within the specified characters.

If information is entered incorrectly, the setup will fail.





**FOR SALES WORKBOOK V 1.2** - You can store your connection credentials in a wbsetup.txt file. Future workbook updates will reference this file to load your credentials.

Set up the wbsetup.txt file as follows. Be sure to type the credentials exactly as provided by Autotask:



On line 1 of the file type your [Database Server]

On line 2 type your - [Database Name]

On line 3 type your [User ID]

Optionally, on line 4 type the [Password]

Save the files as wbsetup.txt **in the same directory as your Sales Workbook file**. The wbsetup.txt file must reside in the same directory as your workbook.

- Optionally, enter an '**Advanced Where**' clause to selectively limit the amount of data that is downloaded. The number and type of advanced where clauses will vary depending on which workbook you are configuring. You can skip this field now and add an Advanced Where Clause at a later time. Refer to "Add or Update an Advanced Where Clause" on page 17.
- Click **Next Step**. In the next minute or two (subject to connectivity and quantity of data), your workbook will:
  - Connect to your Workbooks Data Cache, download your site configuration and write it to the workbook.
  - Download the data required for the workbook, for example, ticket data for a weekly or daily service workbook.
  - Recalculate and update all workbook charts.
- When the configuration and download are complete, complete the additional Config tab options described below.

## Company Name

Enter your company's name in the **Company Name** field. This name will display on the Home page.



If you are configuring a Client Workbook, this name will also appear on your report covers.

## Time Zone (Service Desk, Client, and Projects workbooks only)

Autotask stores all ticket detail dates in UTC. In order to see ticket create and complete dates in your time zone, you must specify that zone.

- Select the correct **Time Zone** and then click **Update Timezone**. Time zones are sorted by GMT +/- order.

## Autotask Zone, Currency Symbol, and Fiscal Year (Sales workbook v 1.2)

Several Sales workbook tabs, for example, Forecast This Month, provide a list of the opportunities included in the tab data. In the list, you can click the item ID field to open the item's detail record in Autotask. To access the correct records, you must select your **Autotask Zone** here.

Your zone number appears in the base URL of you Autotask application. For example, if you access Autotask at <https://ww3.autotask.net>, your Autotask zone is 3.

## Currency Symbol and Current Fiscal Year (Sales workbook v 1.2 and Financial only)



The **Service Desk** and **Client Workbooks** fiscal year is based on the calendar year. The Config page does not include a Fiscal Year option. If you need to change the fiscal year for a Service Desk or Client workbook, please contact Autotask Customer Support. Refer to "Contacting Customer Support" on page 64.

- To specify the currency symbol that will appear on graphs, metrics and tables, select a currency from the menu. Click Update.
- To specify the beginning date of your current fiscal year, select the month and year from the menus. Click Update.

## Advanced Where Clauses

When you download data from the data cache, that download includes all data specific to your workbook for the current and previous year. You may not want to work with all of your data. Advance Where clauses let you limit the data by specific parameters. You can specify Advanced Where clauses when you complete your initial setup, or you can add the clauses at any time. Once added, the clauses will filter data when you refresh. For more details on Advanced Where Clauses, refer to "Add or Update an Advanced Where Clause" on page 17.

## Save Your Password (Optional)

You can save your Workbooks Data Cache password rather than enter it every time you refresh your data.



Your password will be saved without encryption in Excel. If this is a security problem for you, do not use this feature.

For **each workbook**, do the following.

1. In your Workbook, click the Excel **Data** menu option.
2. Click **Connections**. The Workbook Connections window opens.
3. In the **list of Connections**, click the connection indicated below for the workbook you are configuring:

For the **Service Desk** and **Client** workbooks click "AT\_Ticket\_Detail\_Data".

For the **Sales** workbook click "AT\_Opportunity\_Detail\_Data".





4. Click **Properties**.
5. In the Connection Properties window, click the **Definition** tab.
6. Click the **Save Password** check box and then click **OK**.



When you click Save Password, a security message may open. To proceed and save your password without encryption, click Yes. If you do not want to save your password without encryption, click Cancel. You can then enter your password every time you refresh data.

7. For **Sales Workbooks**, only, return to the list of connections and click "AT\_Opportunity\_Detail\_Closed".

Repeat steps 4 through 6 for the additional Sales related field.

8. For **all workbooks**, return to the **list of connections** and click "AT\_WarehouseUpdate".
9. Repeat steps 4 through 6.
10. Click **Close**.
11. **Save** the workbook.

## Refresh Data and View Your Charts

Once you have completed the initial configuration, you can begin to view your data.

For details on the individual workbooks, refer to [Using the Service Desk Workbooks](#), [Using Client Workbooks](#), ["Using the Sales Workbook"](#) on page 21 , [Using the Financial Workbook](#) or [Using the Projects Workbook](#).

### Refresh Your Data

You can refresh your data daily. You will need a network connection to refresh.

Since the workbooks use only selected data, the data updates quickly.

1. Go to the **Home** tab in your workbook and click **Refresh Data**.
2. If you saved your password, you are done. If not, enter your password.



You will be prompted for the password twice. This is normal. Provide the password both times.

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3. Once the refresh is done, save the file.



The refresh will not include any changes that were made to data items in Autotask Admin that are included in the workbook data, for example, queue names or priorities. To fully update your workbook after you make Administrative changes in Autotask, you must re-configure the workbook from the Config tab. Refer to ["Initial Setup and Configuration"](#) on page 4.

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The Performance Analytics Workbooks are a unique subset of data and are not related to Autotask Report Data Warehouse. Autotask does not support any use of the Workbooks related data tables in a SQL reporting environment .

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For more information on the workbook data, refer to ["About the Workbooks Data Cache"](#) on page 63.

## There's More!

To learn about more options to customize your workbook , refer to ["Take Your Workbook to the Next Level"](#) on page 9.

## Additional Help

If you need information that you cannot find in the Help, or you have experienced a workbook related technical problem, please contact Autotask Customer Support. Refer to ["Contacting Customer Support"](#) on page 64.

## Take Your Workbook to the Next Level

Once your workbook is configured and you're comfortable refreshing the data and working with the tables, you can try some of these features to make your data analysis even easier.

### Before you customize...

**Save a backup of your original workbook.** Even experienced Excel users can accidentally make a change that cannot be corrected. **Autotask will not be responsible** for the results of any changes you make to your original workbook.

## Customize Groups (Optional)

Some workbooks are configured with a specific set of groups. Service Desk workbook groups are based on your Service Desk queues. Sales workbook groups are based on Sales Teams. You can give the groups in either workbook custom names directly in the Config tab worksheet under Step 4 Custom Groups.

The Sales workbook Config tab also allows you to set up groups for smaller subsets on the Forecast tabs. Double click in a field in the Opportunity Stage Name column and enter your name for the custom stage group.

If you want to base your groups on something other than the default configuration, please contact Autotask Customer Support for assistance. Refer to "Contacting Customer Support" on page 64.

## Share Workbook Charts in PowerPoint™ Presentations

You can easily use PowerPoint presentations to share the insights you gain from your workbooks. Simply copy and paste workbook charts into the presentation slides. And, to be sure your data is always current, you can paste the charts as linked objects. Then, before you present, simply refresh your workbook data and then update the links in PowerPoint. Your presentation data is current every time you present, without spending hours updating content.

To get started, you can use the sample presentation you received from Autotask. You can also add additional charts to the sample presentation or to your own presentation.

Refer to "Add Linked Charts to PowerPoint Presentations" on page 19.

## Customize Your Workbooks

The formulas and ranges in your workbook were carefully designed to present key workflow data in a clear and useful display. Experienced Excel users may want to make adjustments to the appearance of the charts and the data presentation. And even inexperienced Excel users can make some simple changes to adapt the workbook to your business needs. Refer to "Customizing Your Data Display" on page 10.

## Customizing Your Data Display

Because Autotask Performance Analytics Workbooks are based on Microsoft Excel, you can make adjustments to the appearance of the charts and the data they contain. This topic and related topics provide basic information to help you make simple changes to your workbooks. Please be sure to read "**Before you customize...**", below.

### Before you customize...

**Save a backup of your original workbook.** Even experienced Excel users can accidentally make a change that cannot be corrected.

**Autotask will not be responsible** for the results of any changes you make to your original workbook file.

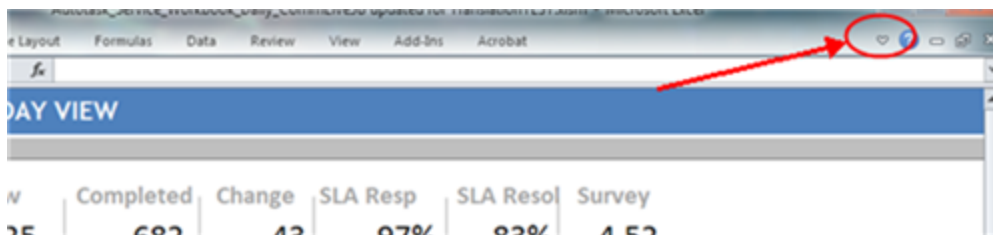
#### One more important note:

The formulas used in your workbook are often complex. We strongly recommend that you do not edit formulas and ranges unless you are an advanced Excel user.

### Displaying and Hiding the Excel Menus and Ribbon

When you first open your Analytics Workbooks, the Excel ribbon that contains the tools needed to edit the worksheets is hidden. Most of the modifications described here require the ribbon.

- To display the ribbon and keep it open until you choose to close it, click the small down arrow icon on the far right of the menu bar.



- To hide the ribbon, click the arrow again.

### Change the Appearance of Your Charts

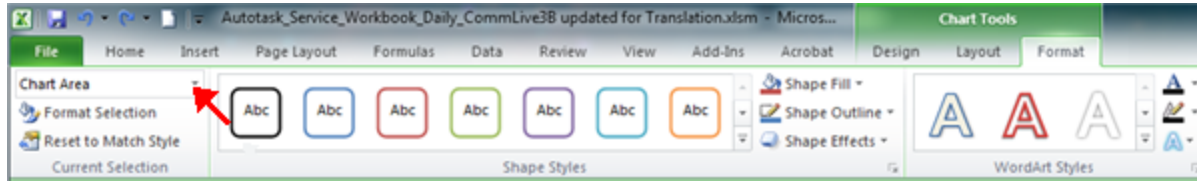
You can make simple changes to chart style, colors, and labels as you would with any Excel spreadsheet. Even with simple format changes, **save a backup of your original workbook.**

### Using the Ribbon Tools

1. Click to select a **chart** or an element in the chart.

The Chart Tools tab appears in the Excel ribbon.

2. Select the **Format**, **Design**, or **Layout** tab.
3. In the **Layout** or **Format** ribbon, in the **Current Selection** area, select the element of the chart you want to format from the menu.



This menu does not appear in the Design ribbon.

4. Make changes as needed.
5. Save.

## Using the Right-click Menu

1. Right click in the chart or on a chart element.
2. Select the formatting option you need, for example, Change Chart Style or Format Chart Area.
3. In the format window that opens, make selections and changes as needed.
4. Save.

For more details on formatting options for Excel spreadsheets, please refer to Microsoft training information: [Microsoft Office: Change the format of Chart Elements 2010](#).

## Changing the Labels and Content for Metrics that Matter

The Service Desk, Sales, Projects and Financial workbooks each provide a collection of key metrics called Metrics that Matter.

### Service Desk Workbooks

In the Service workbooks, the Metrics workbook tab displays a table of 10 key service metrics for the current week or day, the previous week or day, and two previous weeks or days. Each metric displays two sparkline graphs and the final column displays the target set for that metric.

### Sales Workbook

In the Sales workbook, the Metrics that Matter appear only on the FY Current (Fiscal Year Current) tab. Selected metrics also appear at the top of several other tabs.

### Financial Workbook


In the Financial Workbook, the Metrics workbook tab displays up to 14 different key metrics. The workbook ships with 13 metrics selected to give you a quick view of the financial health of your company, including data for a specified month and year to date, indicators to flag metrics that have not met their targets, and sparkline graphs to show a month to month comparison.

## Projects Workbook

Similar to the Service workbooks, the Projects workbook displays 10 key metrics for the current week, the previous week, and two weeks before the current week.

## For All Workbooks

For all workbooks, the Metrics that Matter data is driven by the current year data Analysis tabs (for Service Desk, the **Ticket Analysis** tab; for Sales, the **FY Current** tab; for Financial, the **FinancialsCurrent** tab; and for projects, the **Task Analysis and Projects Analysis** tabs). Each of these tabs can be updated in the same way. The examples here are based on a Service Desk workbook Ticket Analysis tab, but the instructions can be applied to the other Analysis tabs.

 The formulas used in some cells of the data analysis tabs have been carefully constructed and are often used to calculate values in other cells. We do not recommend changing formulas unless you have a high level of experience working with formulas in Excel.

 Make a backup of your workbook before changing data. **Autotask will not be responsible** for the results of any changes you make to your original workbook file.

Service Desk Ticket Analysis									
	Met Target	Week Trend	Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	10-Mar	17-Mar
<b>Metrics That Matter</b>						Avg	Avg		
Opening Backlog			428	300	220	227	177	222	204
Backlog Over 30 days			108	100	96	95	75	64	68
Tickets Created			556	599	589	553	511	479	506
Tickets Completed			534	471	509	488	520	497	536
Added to Backlog			22	128	80	65	(9)	(18)	(30)
% of First Response Met			99%	97%	98%	98%	99%	99%	98%
Avg Elapsed Hours to Respond			1.0	1.3	0.9	1.0	1.0	1.1	1.0
% of Resolution Met			83%	80%	85%	85%	82%	76%	74%
Avg Elapsed Hours to Resolve			6	5	6	6	8	14.8	8.4
Avg Survey Score			4.6	4.7	4.5	4.6	4.5	4.5	4.6

Many of the values in the Ticket Analysis cells, including the values that appear in the Metrics that Matter display, pull their data from other "reference" cells in the worksheet. To edit the content of cells that contain a reference to another cell and maintain their ability to update when your data is refreshed, you must change the cell that is referenced. Do not edit the data itself.

To determine what cell is being referenced, put your cursor in a data field. This applies to label fields as well. For example, in the image below, the value for March 10 is driven by the formula in cell N92.



	Met Target	Week Trend	Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	10-Mar	17-Mar
11	<b>Metrics That Matter</b>								
12	<b>Opening Balance</b>								
13	<b>Backlog Over 30 days</b>								
14	<b>Tickets Opened</b>								
15	<b>Tickets Completed</b>								

### To change a metric:

1. Locate the row that contains the metric that you want to display and check the row number.

For example, to replace Opening Backlog with Opening Backlog for Highest Priority Tickets, locate the heading for your highest Priority (Priorities are specific to your Autotask setup) in column F and check the row number. For example, in the image below, the highest priority is Critical and the row is #25. So the cell to reference is F25.

23	<b>Opening Balances</b>			
24	<b>BY PRIORITY</b>			
25	Critical		0	0
26	High		10	11



Your workbook row and column combinations may differ from the examples.

2. Scroll back up to the Metrics that Matter data.
3. Click the cell for Opening Backlog.
4. Replace the current reference value with = followed by the column letter and row number of the Critical Priority cell. In our example, it would look like this =F25.

As you change the cell references, you should see the update.

5. Update the other fields in that row to display values related to the new heading. You can copy the reference value, for example, =F25, and paste the value into all related cells on the row. The workbook will update the reference value to the correct column letter.

As the values change, you can see the trending sparkline update.

6. Save the changes.

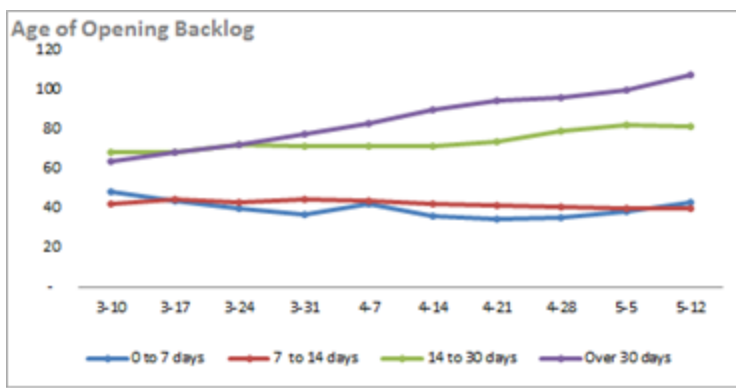
### To add or change the Target value:

You can add a Target value or update the existing value.

1. Locate the Target Value column and click in the cell of the row that you updated. Enter the new Target Value.
2. Click in the Target Type cell (column AC) and select Over, Under, or None, that is, do you want your values to fall under the target value, over the target value, or meet the target value.
3. Save your changes.

## Change the Ranges for Chart Data

Many of the charts in the Service Desk, Sales, and Financial workbooks present data segmented into defined ranges. For example, in the Age of Opening Backlog chart for the Service Desk 10 Week workbook, the default ranges are 0 to 14 days, 14 to 45 days, 45 to 120 days, and over 120 days.

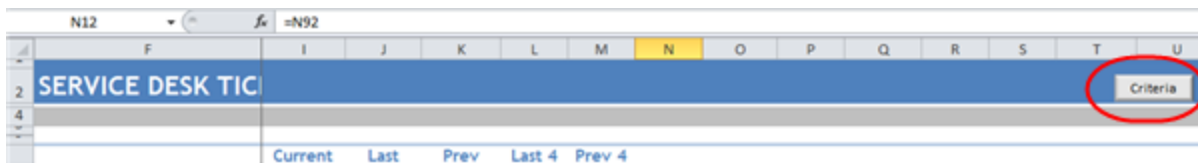


All chart ranges and data are specified on the Data Analysis tabs in each workbook: Service Desk, Ticket Analysis; Sales, CurrentFY and PreviousFY; and FinancialsCurrent and FinancialsPrevious.

The following steps and demonstration video are based on the Service Desk Ticket Analysis. These steps apply to the defined ranges for all workbooks.

View a video: [Performance Dashboards: Configure Your Trending Criteria](http://www.youtube.com/watch?v=5YiGatZ_jEM) http://www.youtube.com/watch?v=5YiGatZ\_jEM

1. Select the **Ticket Analysis** tab.
2. Click the **Criteria** button on the far right of the heading row.



This exposes the criteria values that drive the calculations for each week (or day).

Service Desk Ticket										
Row Id	Criteria1	Criteria2	Criteria3	Category	CurrWeek	PrevWeek	Column	4Week	Prev4Week	Week
				Criteria Start Date -->	N/A	N/A		N/A	N/A	10-Mar 17
				Criteria End Date -->	N/A	N/A		N/A	N/A	16-Mar 23
					Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	10-Mar 17
				<b>Opening Balances</b>				Avg	Avg	
				<b>BY PRIORITY</b>						
26	PriorityA	Critical		Critical	2	2	2	2	3	3
27	Priority2	High		High	50	48	47	46	45	46
28	Priority3	Medium		Medium	153	147	140	139	126	121
29	Priority4	Low		Low	67	63	63	61	57	53

Rows 7 and 8 contain start and end dates that are set automatically when you refresh. Do not change these settings.

Columns C, D, and E contain criteria values that you can change to customize the workbook for your workflow.

Column C (Criteria 1) is the driver for most calculations. In the image above, Column C is set to specify which priorities to display. If you make changes to the criteria, for example, change their order, the Ticket Analysis data will update, along with any charts that display the criteria.

3. Scroll down to the first row that displays range data you want to update, for example, the Age of Backlog data on the Service Desk workbook Ticket Analysis tab. In the image below, that is row 81.



This example uses the Service workbook. The described procedures apply to all workbooks.

Service Desk Ticket										
Row Id	Criteria1	Criteria2	Criteria3	Category	CurrWeek	PrevWeek	Column	4Week	Prev4Week	Week
				Criteria Start Date -->	N/A	N/A		N/A	N/A	
				Criteria End Date -->	N/A	N/A		N/A	N/A	
					Current Week	Last Week	Prev Week			
80				<b>BY AGE OF BACKLOG</b>						
81	Age of Backlog	0	14	0 to 14 days	43	38	36			
82	Age of Backlog	14	45	14 to 45 days	40	40	41			
83	Age of Backlog	45	120	45 to 120 days	82	82	80			
84	Age of Backlog	120	999999	Over 120 days	108	100	96			
85				<b>BY GROUP</b>						
86	GroupA	Americas		Americas	182	173	166			
87	Group	EMEA		EMEA	66	64	63			
88	Group	Australia		Australia	23	22	22			
89	Group	AsiaPAC		AsiaPAC	2	1	2			

Locate the column that contains the range values. In the example, columns D and E contain the range values for the Age of Backlog chart.

4. Change the range values as needed and then update the labels in column F.

You must manually edit the labels in column F to match the new values.

The range values in the charts that use this metric will update automatically.

5. When you have finished, Save.

## Use Criteria to Set Filters on Your Chart Data

The Service workbook charts are automatically populated with all the tickets from the top ten issue types and sub-issues (by ticket count), all queues, and all sources. When Criteria are exposed in the Analysis tabs, you can hide one or more rows to filter tickets by the criteria in that row. For example, if you hide the row that holds the data for a particular queue, tickets from that queue are excluded from the data.

1. If Criteria are not exposed, click the Criteria button.
2. Locate the Queue, Issue Type, or other ticket options you do not want to include in your ticket data.
3. Right-click the row and select Hide.

When the row is hidden the data does not display.

4. To return a hidden row, select the row above and below and then right-click and select Unhide.
5. Save changes.

## Add or Update an Advanced Where Clause

The Advanced Where Clause is an SQL query option that allows you to filter out data that you don't want to include in the workbook analysis. For example:

- The **Service Desk** workbooks will download all the service ticket data for the last 10 weeks or 10 days by default. You may want to limit the download to certain queues, issue types, or other ticket criteria.
- The **Sales** workbook will download all closed opportunities for the current and previous year and all forecasted opportunities within a specified date range. You may want to limit the closed opportunities to specific sales teams or accounts, or change the date range for forecasted opportunities.
- The **Financial** workbook will download all revenue and costs for the current and previous year by default. You may want to restrict the download to certain contract types, contract categories, accounts, work types, etc. In addition, the Financial workbook will download all resource hours for the current and previous year by default. You may want to restrict the download to certain resources, work types, etc.
- The **Projects** workbook will download all Project and Task data for the last 10 weeks by default. You may want to limit the download, for example, to include only client projects or open tasks.

Creating a WHERE clause requires experience in forming SQL queries. If you have the resources to create or edit a WHERE clause, you can do that on the Config worksheet tab.

If you need assistance in creating the WHERE clause, contact Autotask Customer Support. Refer to "Contacting Customer Support" on page 64.



When contacting Customer Support, be sure to provide your Company name, email address, and a description of the types of tickets you want to exclude and include.

### How to Edit or Add the Advanced Where Clause

1. Open your workbook and click the **Config** tab.
2. In the Configuration worksheet, scroll down to **Advanced Where Clause**.

If you already have one or more Where clauses in place, the **Advanced Where Clause** field displays the current clause. You can edit or replace the clause.

3. Click **Update Where Clause**.
4. If you want to edit the current clause, make changes as needed.
5. To add a clause, type the clause into the text box or copy and paste your prepared Where clause into the field.
6. Click **Update Where Clause**.

### Sample Advanced Where Clauses for Service Desk



This information is specific to the **Service Desk** workbook. Do not use these samples in the Sales workbook.



The following sample clauses are taken from the video "[Performance Dashboards: How to exclude data from the service workbook](https://www.youtube.com/watch?v=FCUHehN50K8)". To watch the video, use the link above, or enter this URL in your browser: <http://www.youtube.com/watch?v=FCUHehN50K8>.

Since the intent is to exclude data from the workbook download, all sample clauses use the operator "not in". The item names in parentheses in the sample are taken from a sample workbook. You will need to find the correct names for items in your workbook. You can find that information on the Ticket Analysis tab.



Although you can use the "not in" operator in Where clauses for the Sales workbook, the other data shown in these examples is specific to the Service Desk workbook.

### Filter by Queues

```
wh_queue.queue_name not in ('Recurring', 'Internal')
```

### Filter by Issue Types

```
wh_issue_type.issue_type_name not in ('Sales', 'Admin')
```

### Filter by Sub-issue Type

```
wh_subissue_type.subissue_type_name not in ('Rejected')
```

### Filter by Status

```
wh_task_status.task_status_name not in ('On Hold')
```

### Filter by Source

```
wh_ticket_source.ticket_source_name not in ('Sales Form')
```



## Add Linked Charts to PowerPoint Presentations

You can copy and paste workbook charts into a PowerPoint presentation and link the charts back to the workbook. Then, you can update the linked charts with current data from the workbook. To help you get started, Autotask has provided a sample presentation file, Executive\_Meeting.pptx, which contains charts from the Service Desk Weekly workbook.

This topic describes the following tasks:

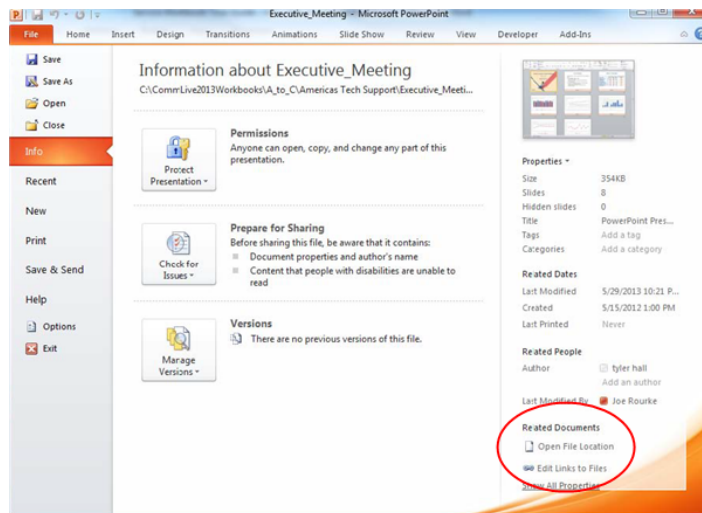
- How to link the charts in the sample presentation to your own workbook.
- How to add additional linked charts to the sample presentation or to your own presentations.
- How to update charts in your presentation.

## Using the Executive\_Meeting PowerPoint File

You can use the sample PowerPoint presentation provided by Autotask as the basis for our own presentation. Your provisioning package included a sample PowerPoint presentation with linked charts and tables from the Service Desk Weekly Analysis workbook. You can use one or more pages from this PowerPoint to create your own presentation and, if you like, add additional charts.

Before you use the presentation, you must update the links for your own directory structure. The presentation links must point to the current location of the workbook.

1. Open the Executive\_Meeting presentation in PowerPoint.
2. Click the File tab, and then click Edit Links to Files, located under Related Documents on the right side of the page.



3. In the Links window, select an individual link and click Change Source.
4. Locate the Service Desk Weekly workbook in its current location in the directory.
5. Double -click to select the workbook file and close the directory window.



6. Repeat steps 3 through 5 for each chart link that you want to update.
7. Close the Links window.



If you move the Workbook or PowerPoint file from its current location, you will need to repeat this process to maintain the links.

## Adding Charts to Any PowerPoint Presentation

1. Save your workbook.
2. In your workbook, find and click on the chart that you want to copy to PowerPoint.
3. From the Home tab, click the copy icon and select Copy.
4. In your PowerPoint presentation, open the slide to which you want to add the chart.
5. From the PowerPoint Home tab, click Paste and select a paste option: click "Use Destination Theme & Link Data" to update the formatting to match the presentation formatting, or click "Keep Source Formatting and Link Data" to maintain the formatting from the spreadsheet.
6. Save the PowerPoint.

## Updating Presentation Data

To **update** the charts in your presentation:

1. Open the PowerPoint.
2. Select the chart to update.
3. Locate Chart Tools on the ribbon and select the Design tab.
4. Click Refresh Data.

## Using the Sales Workbook



Whether you have a dedicated sales team pursuing projects worth tens of thousands of dollars, or just one person who follows up on leads, responds to RFPs, and handles calls from potential customers, the Autotask Performance Analytics Sales workbook can help you take your sales to the next level. You can look at your past and current sales trends, analyze what worked and what didn't, and then look at your sales forecasts and apply your new insights:

- Monitor the big picture: total year to date revenue, current fiscal year comparison to previous fiscal year, revenue growth, and projected revenue.
- Drill down for more detail: actual revenue compared to your business plan, actual revenue compared to forecast revenue, revenue by sales team and by revenue type.

- Explore even deeper to pinpoint key factors associated with the sales results: time of year, revenue source, sales team or even individual resources.

In the Sales Workbook, easy to follow charts present key data about your sales opportunities from the earliest stage to the close. The Fiscal Year worksheet displays, in table form, all data that appears in the charts. You can use the charts to view and compare data and analyze factors that impact your revenue. Then you can use the information to plan sales strategies, focus your resources where needed, motivate your sales people, set goals, and measure your success in meeting those goals.

## Metrics that Matter

Ten key metrics are located at the top of the current Fiscal Year worksheet, under the heading Metrics that Matter. Several of these key metrics also appear at the top of each of the six worksheets that display revenue charts

These metrics provide a quick view of the revenue generated by the sales opportunities that you manage in Autotask. The opportunities and revenue they generate are divided into two categories:

- **One time** revenue is received from a product or service provided once, for example, the sale and installation of hardware, or maintenance or repair work not covered by a service plan.
- **Monthly recurring** revenue is received continually in a set quantity every month to provide ongoing labor or services, for example, routine network monitoring and maintenance, or software licensing and upgrade management.

For additional information on the Metrics that Matter, refer to "Sales Plan and Analysis - Current and Previous Fiscal Year" on page 57.

## Year to Date Sales Trends

Use the 20+ charts on this worksheet to analyze your year to date revenue trends. Gain insight on where your revenue is growing and where it is stagnating. When you specify revenue goals on the Fiscal Year worksheet, you can display those goals on selected charts on the Trends worksheet to quickly compare actual revenue to goals.

Refer to "Year to Date Sales Trends" on page 24.

## Year Over Year Sales Trends (version 1.2)

Use this worksheet to compare your revenue and cost trends with data from the previous year. You can look at monthly and one-time revenue, total revenue, and total cost on a month to month and quarterly basis for the current and previous fiscal year. Monthly and one-time revenue is presented by month, average revenue per opportunity, and average amount of time to close an opportunity in a given month.

Refer to "Trending - Year Over Year (version 1.2)" on page 32.

## Closed Last Month and Closed This Month

Use these two worksheets, Closed This Month and Closed Last Month, to follow sales by group. The default groups are sales teams. You can also view the sales results of the top five sales representatives. These two worksheets include the same charts but the data is specific to the time frame indicated by the worksheet names, "This Month" (opportunities closed to date in the current month) and "Last Month" (opportunities closed during the previous month).



Refer to "Opportunities Closed Last Month and Closed This Month" on page 39.



For information on modifying groups, refer to "Take Your Workbook to the Next Level" on page 9.

## Forecast this Month

Use this worksheet to see the potential revenue from opportunities expected to close in the current calendar month. Four monthly recurring revenue charts and four one-time revenue charts display data by expected close date, team, top five sales representatives, and stage.

Refer to "Revenue Forecast for the Current Calendar Month" on page 47.

## Explore Closed Opportunities

Use this worksheet to drill into revenue data from closed opportunities. Six Slicer controls allow you to quickly filter the closed opportunities by year, month, team (group), sales representative, distribution of monthly recurring revenue amount, and distribution of one-time revenue amount. Eleven charts and two tables display data by different criteria including total revenue, revenue type, sales representatives, or the age of the opportunity at close. Below the chart, an additional table displays all the opportunities included in the filtered results.

Refer to "Explore Closed Opportunities" on page 42.

## Forecasting

Use this worksheet to find and follow data on revenue forecasts. Eight Slicer controls allow you to quickly filter your forecast data by projected close date (both past and future), team (group), sales representative, monthly recurring or one-time revenue amount, probability, stage, and activity. Fifteen charts and two tables display data by different criteria including Group, Probability, Resources, and Opportunities by Create Date. Below the charts, an additional table displays all the opportunities included in the filtered results.

Refer to "Explore Revenue Forecasting" on page 50.

## Fiscal Year (Current and Previous)

The Fiscal Year tabs contain all the closed opportunity data that appears in charts on the other worksheets. On these tabs, you can also change the labels on groups (Sales Teams or custom groups) and set monthly revenue goals.

Refer to "Sales Plan and Analysis - Current and Previous Fiscal Year" on page 57.

## Year to Date Sales Trends

On the Trends worksheet you can quickly assess trends in year to date revenue and compare actual revenue to your revenue goals. Twenty-two charts break out the data by both monthly recurring and one time revenue, and by up to five types of fees. Six charts added in version 1.2 break out total revenue, costs, and gross margin data.

### About the Overall Metrics

Six critical metrics for year to date revenue appear in large type at the top of this page: Monthly (that is, monthly recurring revenue), One-Time (one-time revenue), Monthly Average, One-Time Average, Monthly Days to Close, and One-time Days to Close.



**Days to close** equals the average number of days required to close the opportunities included in the revenue totals.

### Using the Charts

The twenty-eight charts on this worksheet are divided into groups:

- **Monthly Revenue Trends and One-Time Revenue Trends**

The charts in these two groups, six Monthly Revenue charts and six One-Time Revenue charts, are the same; they just display data for different revenue types.

- **Total Revenue and Cost Trends** version 1.2 only

The six charts in this group include 2 gross margin charts. All six charts in this group have Plan Lines.

- **Opportunity Advanced Field Trends** (Type of Fee)

The Advance Fields for most workbooks are populated with Fee Types. The charts include both a basic revenue chart and a cumulative revenue chart for each fee type (up to five).

The **examples** for Monthly and One-time Revenue and Opportunity Advanced Field (Fee Type) use data for January through April only. Selected charts include a Revenue Plan line.

Examples for Total Revenue and Cost Trends include a full year of data.



In your workbook, hover over any point in a chart to see details for that point.

### Revenue Plan Line: Setting or Editing Values

Several charts on this worksheet feature a Revenue Plan line based on your own revenue goals. To use the revenue plan lines, you must first enter your monthly revenue goals into the current Fiscal Year worksheet (Fiscal Year tab). In selected charts, the values you enter on that worksheet appear as a revenue plan line. You can then compare your goals to actual revenue.




 Before you edit the workbook, always **save a backup copy**.

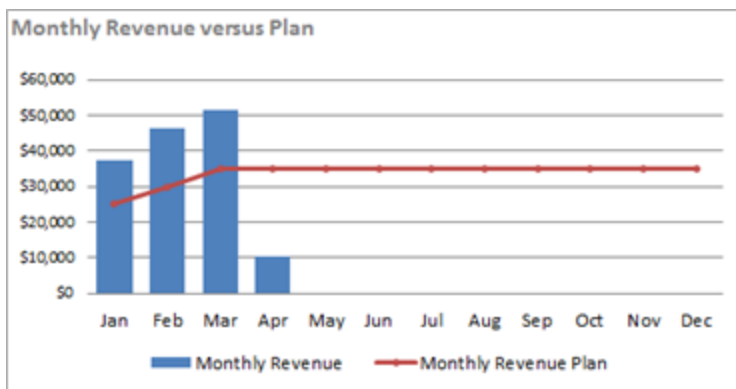
For detailed instructions, refer to "Sales Plan and Analysis - Current and Previous Fiscal Year " on page 57.

## Monthly (MRR) and One Time Revenue Trends

The six Monthly and six One Time revenue charts on the Trends worksheet are identical except for the type of data they display. The descriptions of the six charts below apply to both the monthly (MRR) and one time charts. The images used in the examples are Monthly (MRR).

 In your workbook, it is possible that the amounts displayed on the Y axis will differ from the examples below. The charts in your workbook reflect the totals and distribution from your own data. In most cases, the Y axis values differ between the monthly and one-time charts.

### Revenue versus Plan



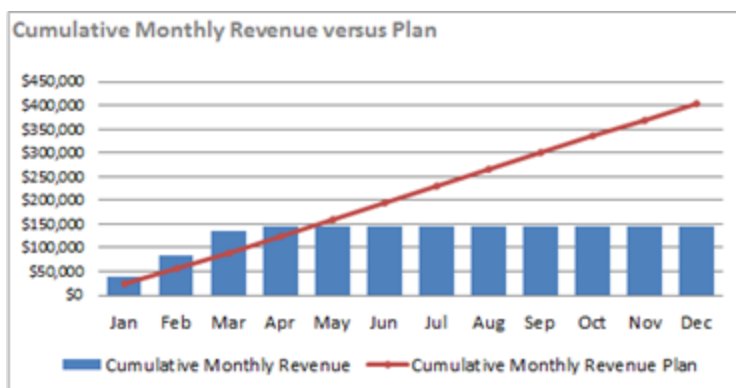
Y Axis = Amount of revenue  
 X Axis = Months  
 Line = Monthly Revenue goals  
 Columns = Actual revenue generated each month.

The worksheet also includes a One Time revenue chart.

View the amount of revenue, for the specified type, that is generated each month. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Insights: Is your revenue growing? Are you meeting your goals - always, sometimes, or never? Do your sales reflect seasonal trends or some other outside influence? If you're meeting your goals, what are you doing right and can you achieve even more?

### Cumulative Revenue versus Plan



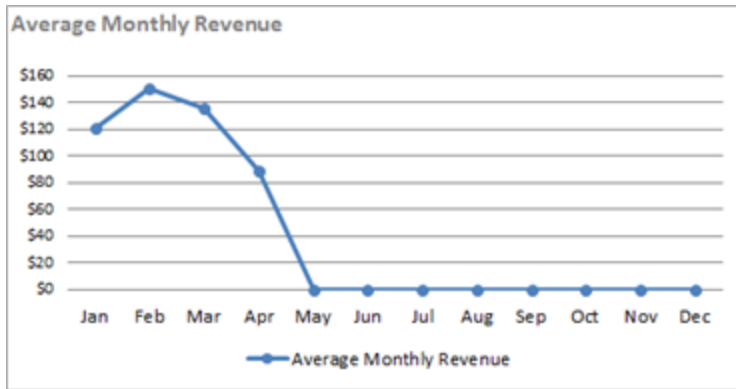
Y Axis = Cumulative amount of revenue  
 X Axis = Months  
 Line = Monthly Revenue Plan  
 Columns = Actual revenue generated year to date.

The worksheet also includes a One Time cumulative revenue chart.

View the cumulative revenue over time. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Insights: It's easy to see that this year got off to a great start! But, if the monthly totals fluctuate and you don't always meet the monthly goal, you can see if cumulative goals are being met or if you're in a long term downward trend.

## Average Monthly Revenue (Average Revenue per Opportunity by Month)



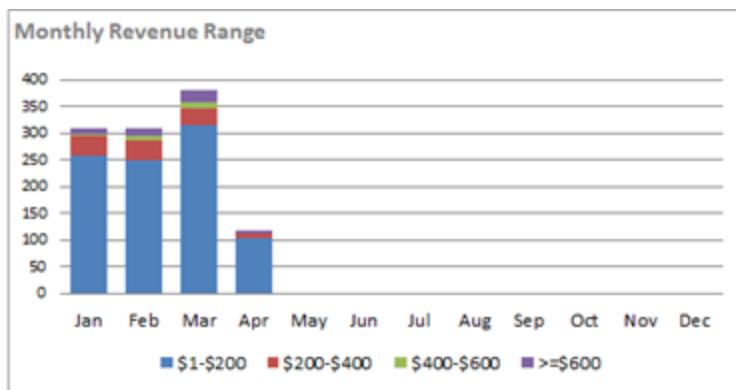
Y Axis = Amount of Revenue  
 X Axis = Months  
 Line = Average revenue per opportunity closed

The worksheet also includes a One Time average revenue chart.

View the average revenue generated for opportunities closed each month (that is, total revenue from opportunities closed during a month, divided by total count of opportunities closed in that month.)

Insights: This chart shows a drop in *average* revenue per opportunity in March, but the Revenue versus Plan chart showed an increase in revenue in March. That means more opportunities closed but at a lower return per opportunity. If this becomes a trend, it could impact your business. Does the increased overhead for closing and supporting more deals have any significant effect on net profit? Or does this mean more customers that are likely to want more services?


## Monthly Revenue Range (Distribution of Revenue for Opportunities Closed)



Y Axis = Number of opportunities closed  
 X Axis = Months  
 Columns - number of deals closed that generated the amount of revenue indicated by color in the chart legend

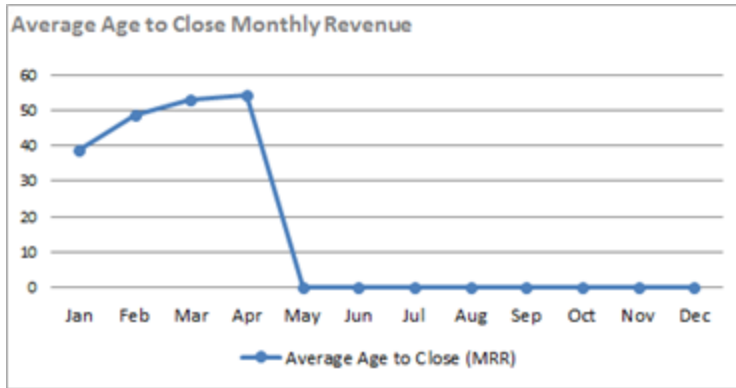
The worksheet also includes a One Time Revenue Range chart.

View how many closed opportunities generated revenue within the specified amounts. In the example, 257 of the opportunities closed in January generated revenue between \$1 and \$200.

 In your workbook, hover over the column to see the exact number of opportunities.

Insights: If most of your revenue is generated by smaller deals, you might want to explore why. For example, is that driven by the market, or are you generating leads that generate less revenue? Is your sales team missing opportunities to up-sell?

## Average Age to Close Monthly Revenue (Revenue by Average Age of Opportunities at Close)



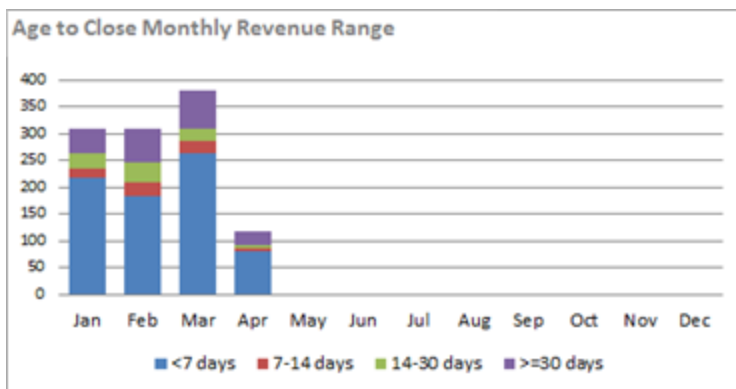
Y Axis = Number of days to close  
 X Axis = Months  
 Line = Average age (in days) of opportunities when closed.

The worksheet also includes a One Time revenue chart.

View the average number of days it took to close the opportunities that were closed each month.

Insights: Are there seasonal trends for age to close? If your deals continue to age through the year, which ones should you push harder to close and which ones are not likely to close?

## Age to Close Monthly Revenue Range (Distribution of Opportunities by Age at Close)



Y Axis = Number of monthly revenue opportunities closed  
 X Axis = Months  
 Columns - The number of opportunities closed within the number of days indicated by color in the chart legend

The worksheet also includes a One Time chart.

For opportunities that closed during the month indicated, view how many opportunities fell within each time range for days to close.

Insights: Are you closing most of your opportunities in a reasonable amount of time, or is it taking over thirty days for most of your deals to close? If most of your revenue is coming from older opportunities, you might want to dig deeper. Are the older opportunities larger and more complex projects that take longer to close? Or are some sales teams taking longer to close opportunities?

## Total Revenue and Cost Trends versus Plan (version 1.2 only)

The six charts in this section let you view your total revenue and your total costs from both monthly and one time opportunities closed during the specified time. If you enter your revenue Plan figures in the Current FY tab, you can compare actual revenue and cost against your plan.



These six charts were added in version 1.2 of the sales workbook. The images in this section were taken from a different Sales workbook than the other images in this topic so the data described here does not correspond to the other charts.

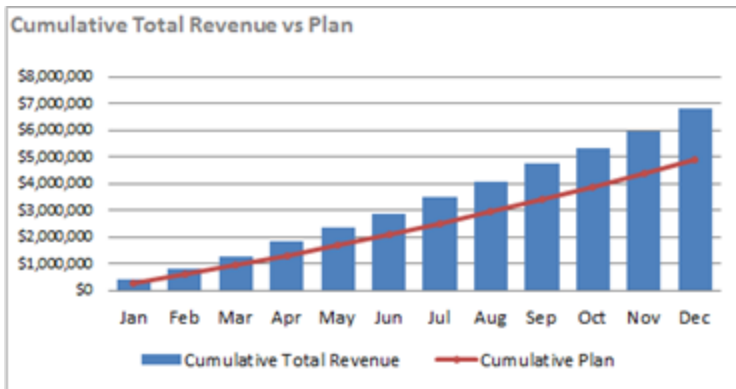
### Total Revenue (Opportunity) versus Plan



Y Axis = Amount of revenue  
X Axis = Months  
Line = Revenue Plan goals  
Columns = Actual revenue generated each month.

View the combined monthly and one-time revenue amount from opportunities closed each month. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

### Cumulative Total Revenue versus Plan



Y Axis = Cumulative amount of revenue  
X Axis = Months  
Line = Revenue Plan  
Columns = Actual revenue generated year to date.

View the cumulative revenue generated from closed monthly and one-time opportunities closed during the specified time. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

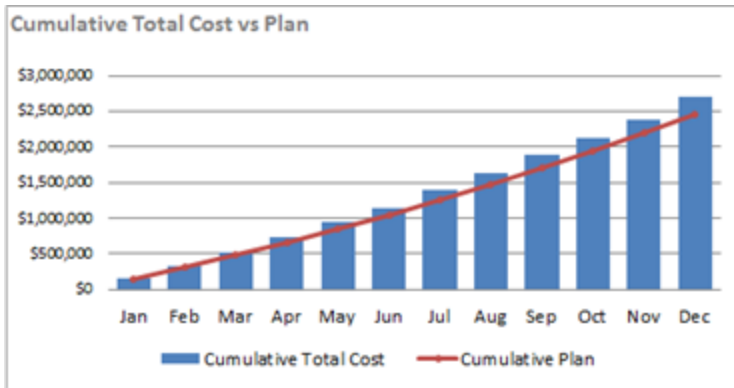
### Total Cost (Opportunity) versus Plan



Y Axis = Cost amount  
X Axis = Months  
Line = Planned Costs  
Columns = Total cost generated by monthly and one-time opportunities closed.

View the cost associated with all opportunities closed each month. Compare the actual costs (columns) to the expected costs set in the revenue plan (line).

## Cumulative Total Cost versus Plan



Y Axis = Cumulative cost amount  
 X Axis = Months  
 Line = Planned costs  
 Columns = Actual costs generated year to date.

View cumulative total of the cost of opportunities closed each month. Compare the actual costs (columns) to the goals set in the revenue plan (line).

Insights: The cost to revenue values may vary month to month, but the cumulative totals let you see at a glance whether you are keeping your costs in line.

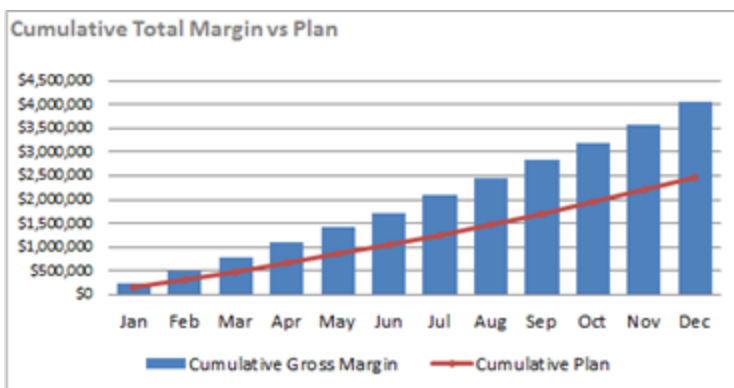
## Total Gross Margin (Opportunity) versus Plan



Y Axis = Gross Margin (Total Revenue from Closed Opportunities minus Total Cost of closed Opportunities)  
 X Axis = Months  
 Line = Revenue Plan goals for gross margin  
 Columns = Calculated gross margin for each month.

View the calculated gross margin for all opportunities closed each month. Compare the actual gross margin (columns) to the goals set in the revenue plan (line).

## Cumulative Gross Margin versus Plan




Y Axis = Cumulative gross margin  
 X Axis = Months  
 Line = Cumulative plan for gross margin  
 Columns = Cumulative gross margin by month.

View cumulative gross margin for opportunities closed each month. Compare the actual cumulative gross margin (columns) to the goals set in the revenue plan (line).

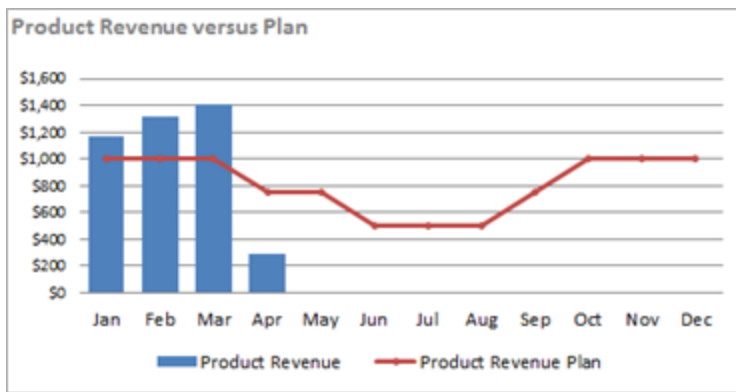
## Opportunity Advanced Field Trends

There are up to ten charts in this section, depending on how many Advanced Field types your company has set up. Autotask allows up to five advanced fields. Most workbooks use the Advanced Fields to display revenue from Fee Types. The examples below display revenue from Fee Types. You can work with Autotask to use the Advanced Fields for different revenue sources.

For each Advanced Field, there are two charts, Revenue versus Plan and Cumulative Revenue versus Plan. Each of the charts in this section can include a Revenue Plan line.

 There are only two sample charts displayed in this section. In your workbook, the same two chart types are used for each Advanced Field configured for your workbook.

### [Advanced Field] Revenue versus Plan

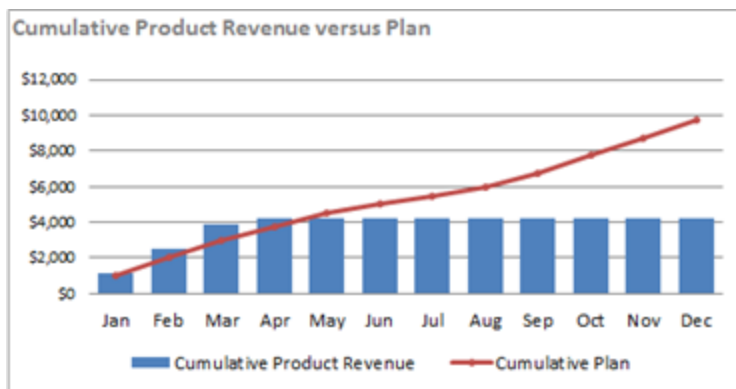


Y Axis = Amount of revenue  
 X Axis = Months  
 Line = Monthly Revenue Plan for the fee type  
 Columns = Actual revenue generated by indicated fee type for each month.

View the revenue generated each month by the source represented by the Advanced Field. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Insights: See how much revenue your company generates from the different fee sources represented by the Advanced Fields. Are you meeting or exceeding your revenue goals for this revenue source?

### Cumulative [Advanced Field] Revenue versus Plan



Y Axis = Cumulative amount of revenue  
 X Axis = Months  
 Line = Cumulative Monthly Revenue Plan for the specified source, calculated from the Fee Type monthly revenue plan data.  
 Columns = Actual revenue generated year to date.

View the cumulative revenue generated by the specified Fee Type by month over the year. Compare the actual revenue (columns) to the goals set in the revenue plan (line).





Insights: Is your cumulative revenue from this fee type meeting you expectations? How does it compare to the other types of fees? If this fee type is falling behind, is this a new or long term trend? Does it reflect the current market? Or do you need to rethink your marketing strategy? Maybe your sales team just needs more information to present to the prospects.

## Trending - Year Over Year (version 1.2)

On this tab, added with version 1.2, you can compare revenue and cost trends in the current fiscal year with the same trends from the previous fiscal year. Of course, new users will need to be patient.

### About the Overall Metrics

Six critical metrics for year to date revenue appear in large type at the top of this page: Monthly (that is, monthly recurring revenue), One-Time (one-time revenue), Monthly Average, One-Time Average, Monthly Days to Close, and One-time Days to Close.



**Days to close** equals the average number of days required to close the opportunities included in the revenue totals.

### Using the Charts

The nineteen charts on this worksheet are divided into three groups: Monthly (recurring) Revenue (MRR) Trends, One-Time Revenue Trends, and Total Revenue and Cost Trends. The five Monthly and five One-Time Revenue charts are the same, they just display data for the two different revenue types.

Six Total Revenue and Cost Trend charts display total revenue, cost, and gross margin data for closed opportunities by month. The remaining three charts in this group display quarterly data.

**All examples** below present data for January through April only.



In your workbook, hover over any point in a chart to see details for that point.

### Previous Fiscal Year Data Lines

The line representing the previous fiscal year pulls data from the Previous FY tab. You can go directly to the tab to view previous year information in one large spreadsheet.

Refer to "Sales Plan and Analysis - Current and Previous Fiscal Year" on page 57.

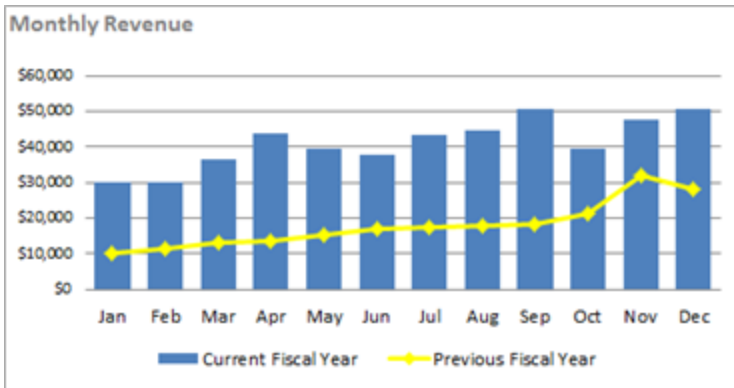
### Monthly (MRR) and One Time Revenue Trends

The five Monthly and five One Time revenue charts on the Trends worksheet are identical except for the type of data they display. The descriptions of the five charts below apply to both the monthly (MRR) and one time charts. The images used in the examples are Monthly (MRR).



In your workbook, it is possible that the amounts displayed on the Y axis will differ from the examples below. The charts in your workbook reflect the totals and distribution from your own data. In most cases, the Y axis values differ between the monthly and one-time charts.

## Revenue



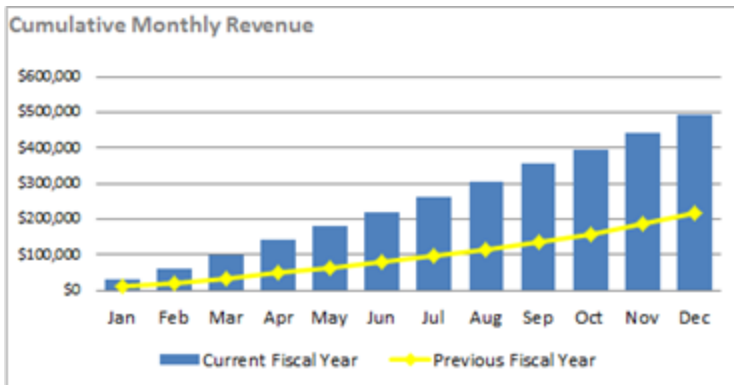
Y Axis = Amount of revenue  
 X Axis = Months  
 Line = Previous fiscal Year Revenue  
 Columns = Revenue generated each month for current fiscal year.

The worksheet also includes a One-time Revenue chart.

View the amount of revenue, for the specified type, that is generated each month during the current fiscal year. Compare this year's revenue (columns) to the revenue generated for the same month in the previous year.

Insights: Is your revenue growing? Are you exceeding your revenue from the last fiscal year? If not, are you dealing with economic trends beyond you control? Or, do you need to make some changes to maintain strong growth for your company.

## Cumulative Revenue



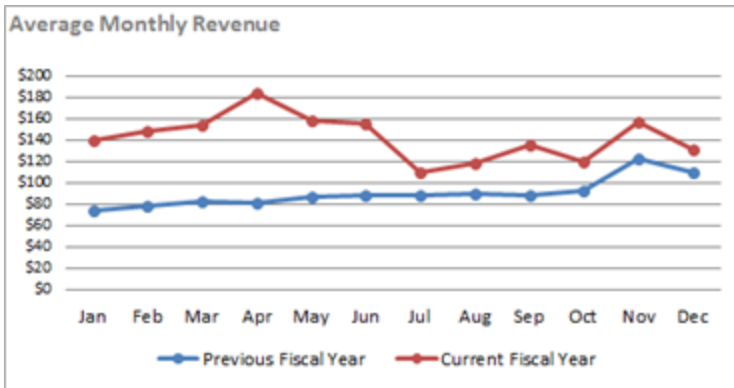
Y Axis = Cumulative amount of revenue  
 X Axis = Months  
 Line = Previous fiscal year cumulative revenue  
 Columns = Revenue generated this year to date.

The worksheet also includes a Cumulative One Time Revenue chart.

View the cumulative revenue over time. Compare the current year's cumulative revenue (columns) to the previous year's (line).

Insights: In this chart you can see how cumulative revenue at this point in the year compares to the previous year cumulative revenue. Overall, are you pulling ahead of last year or lagging behind? What can you do to pull ahead even further?

## Average Monthly Revenue (Average Revenue per Opportunity by Month)



Y Axis = Amount of Revenue

X Axis = Months

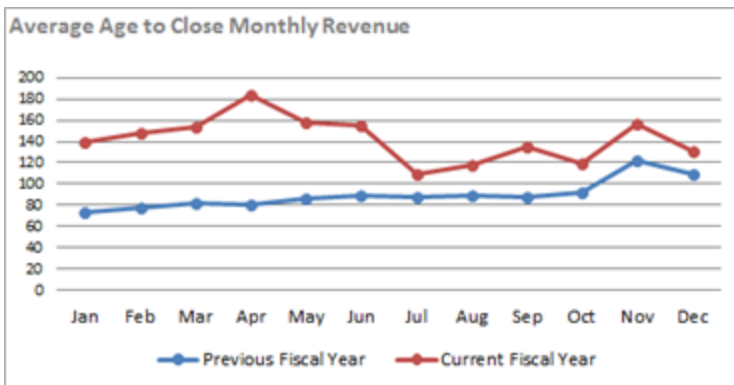
Lines = Average revenue per opportunity closed. One line for current year and one line for previous year. Check the legend on your chart to see which color is which.

The worksheet also includes an Average One Time Revenue chart.

View the average revenue generated per opportunity closed each month (that is, total revenue from opportunities closed during a month, divided by total count of opportunities closed in that month.) Compare to the average revenue generated per opportunity in the previous year.

Insights: What is the average revenue per opportunity closed each month this year compared to the previous year. Ideally, your opportunities should be generating more revenue per opportunity. If your revenue is growing but your revenue per opportunity is decreasing, your sales team is closing more, smaller deals. Does the increased overhead for closing and supporting more deals have any significant effect on net profit? Or does this mean more customers that over time may buy more services?

## Average Age to Close Revenue (Revenue by Average Age of Opportunities at Close)



Y Axis = Number of days to close

X Axis = Months

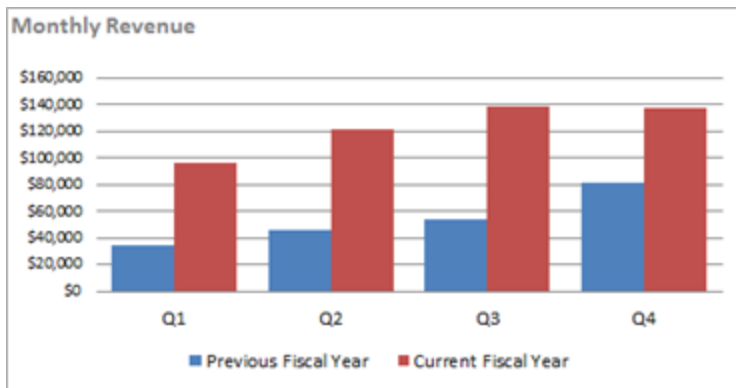
Line = Average age (in days) of opportunities when closed.

The worksheet also includes a One Time revenue chart.

View the average number of days it took to close the opportunities that were closed each month.

Insights: Are there seasonal trends for age to close? If your deals continue to age through the year, which ones should you push harder to close and which ones are not likely to close?

## Quarterly Revenue



Y Axis = Revenue

X Axis = Fiscal year quarters

Columns - The revenue from Opportunities of the specified type (monthly or one-time) that were closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

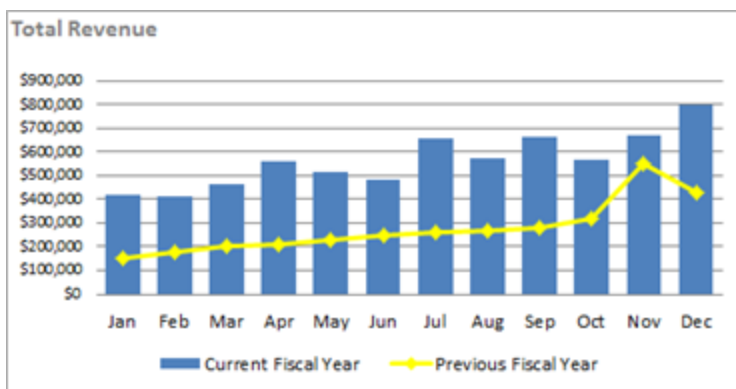
The worksheet also includes a One Time Revenue by quarters chart.

View total revenue generated by opportunities closed during each quarter. Compare current and previous year quarterly revenue.

## Total Revenue and Cost Trends (for Monthly and One-time Opportunities closed)

The 9 charts in this section display your total sales revenue (monthly and one time opportunities closed), total opportunity costs, and gross margin for both the current and previous fiscal years. Six of the charts display data by month and three display data by quarters.

### Total Revenue (Monthly and One-time Opportunities closed)



Y Axis = Amount of revenue

X Axis = Months

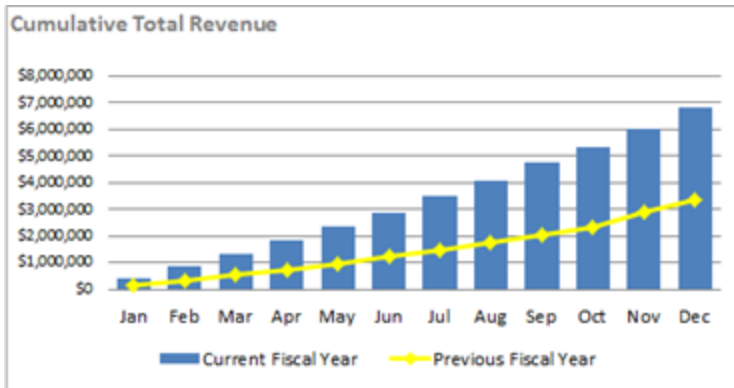
Line = Previous fiscal year revenue

Columns = Current fiscal year revenue generated each month.

View the total amount of revenue that is generated by monthly and one-time opportunities that are closed each month. Compare the current year's revenue (columns) to the previous year's revenue (line).

**Insights:** This chart and the following "Total" charts let you see how your company is doing with overall sale this year, and how this year compares to last year. Are sales better overall this year? If you have a dip or plateau, does it mimic results for the same time last year? Or is this year very different - if so, why?

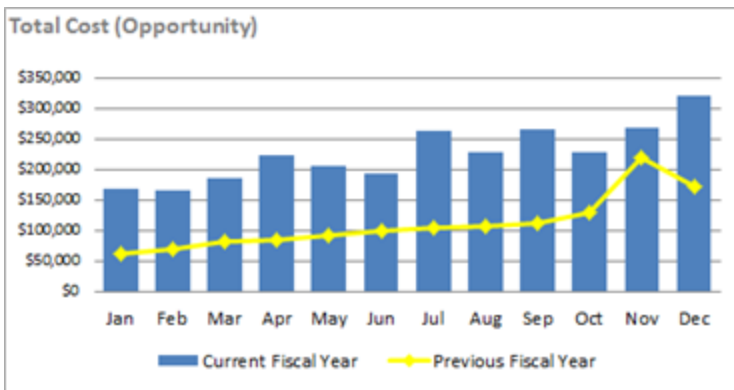
## Cumulative Total Revenue (Monthly and One-time Opportunities closed)



Y Axis = Cumulative amount of revenue  
 X Axis = Months  
 Line = Previous fiscal year revenue  
 Columns = Total revenue generated year to date.

View the cumulative revenue for the current fiscal year over time. Compare the current year's revenue (columns) to the previous year's revenue (line).

## Total Cost (Monthly and One-time Opportunities closed)

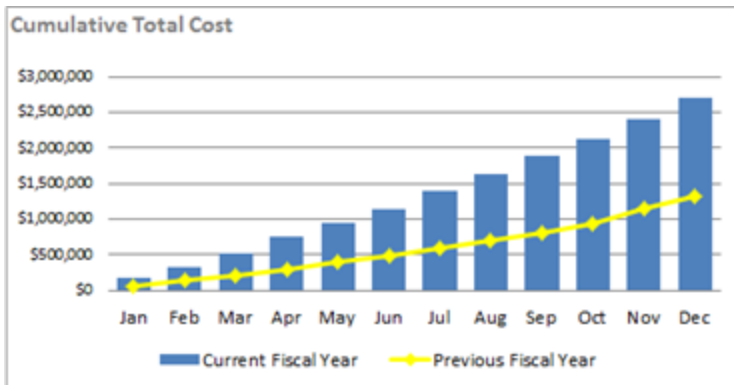


Y Axis = Costs amount  
 X Axis = Months  
 Line = Previous fiscal year opportunity costs  
 Columns = Total costs incurred each month in the current fiscal year.

View the how much your combined one-time and monthly opportunities cost you each month. Compare the current year's costs (columns) to the previous year's costs (line).

Insights: It is critical to monitor your overall costs. Costs will likely rise from one year to the next as revenue increases. If the increase in the current year is much larger than the previous year, you need to pinpoint the source of the increased costs.

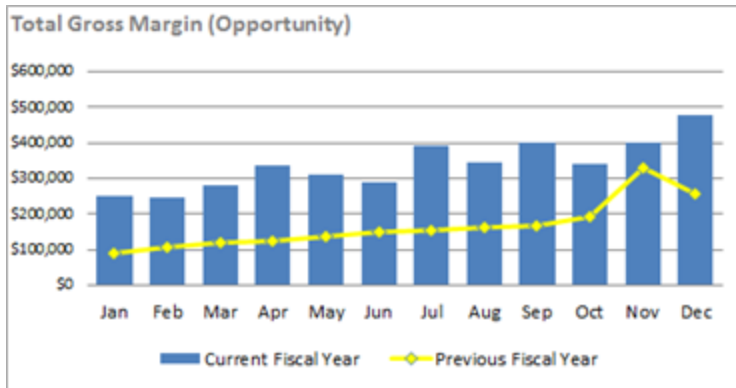
## Cumulative Total Cost (Monthly and One-time Opportunities closed)



Y Axis = Cumulative cost amount  
 X Axis = Months  
 Line = Previous fiscal year opportunity costs  
 Columns = Total opportunity costs generated year to date in the current fiscal year.

View cumulative total opportunity costs over time. Compare the current fiscal year's costs (columns) to the previous year's costs (line).

## Total Gross Margin (Monthly and One-time Opportunities closed)

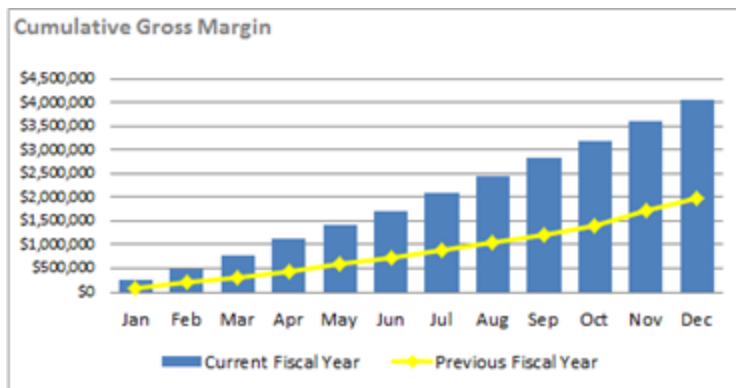


Y Axis = Gross Margin Amount (Total Revenue from Closed Opportunities minus Total Cost of closed Opportunities)  
 X Axis = Months  
 Line = Previous fiscal year's gross margin amounts  
 Columns = Current fiscal year's gross margin for each month.

View the calculated gross margin for each month in the current fiscal year. Compare the current year's gross margin (columns) to the previous year's gross margin (line).

**Insights:** Your total gross margin displays the relationship between your revenue and costs. If your gross margin is holding steady, you are maintaining a positive cost to revenue relationship.

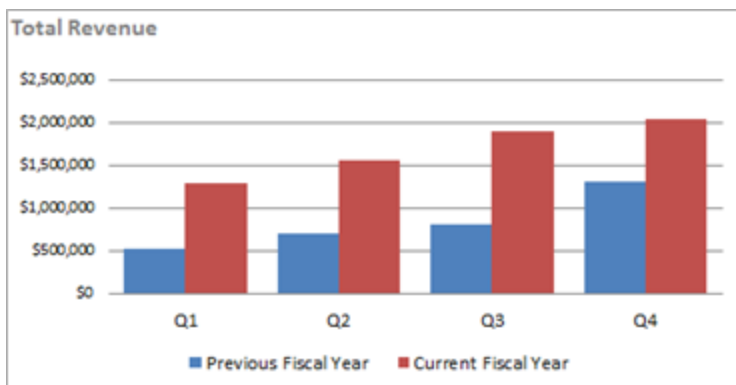
## Cumulative Gross Margin (Monthly and One-time Opportunities closed)



Y Axis = Cumulative gross margin (Total Revenue from Closed Opportunities minus Total Cost of closed Opportunities) amount  
 X Axis = Months  
 Line = Cumulative total gross margin for the previous fiscal year  
 Columns = Current fiscal year's cumulative gross margin each month.

View the cumulative gross margin from opportunities closed over time. Compare the current cumulative gross margin (columns) to the previous years gross margins (line).

## Total Revenue (Monthly and One-time Opportunities closed) by fiscal quarter



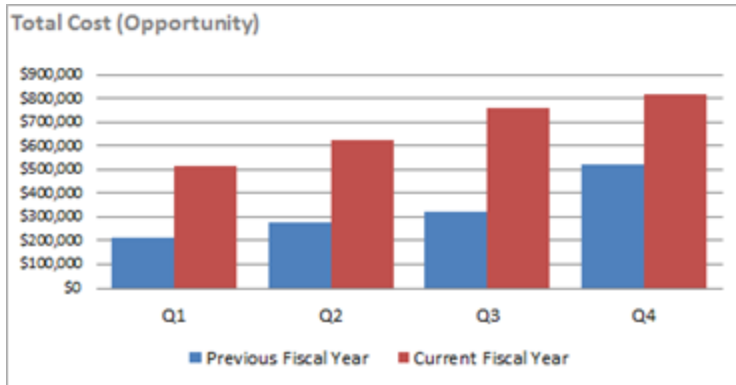
Y Axis = Revenue  
 X Axis = Fiscal year quarters  
 Columns - The total revenue from all Opportunities closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

View total revenue generated by opportunities closed during each quarter. Compare current and previous year quarterly revenue.



Insights: Another way to compare your revenue, costs, and gross margin from one year to the next, the quarterly columns give you an overview of each quarter, and what the trends are for the year. The revenue chart looks the way you want it to look - steady growth and an increase in revenue from the previous year.

### Total Cost (Monthly and One-time Opportunities closed) by fiscal quarter

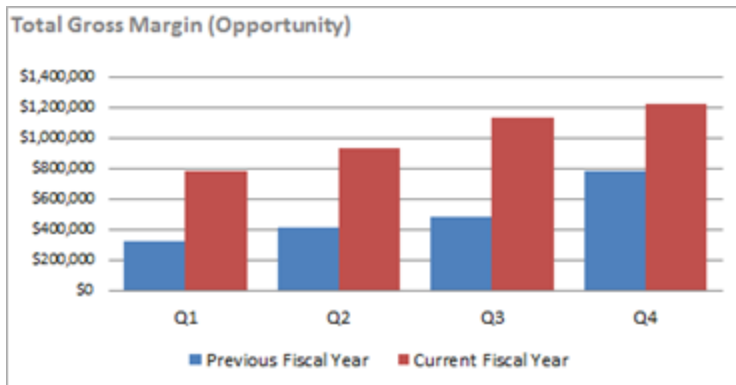


Y Axis = Costs amount  
 X Axis = Fiscal year quarters  
 Columns - The total costs associated with all Opportunities closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

View total costs associated with opportunities closed during each quarter. Compare current and previous year quarterly opportunity costs.

Insights: This chart shows rising costs, and higher costs than the previous year. But the increase is steady, and appears to be in proportion to the rise in revenue. The gross margin figures will bring the cost and revenue data together.

### Total Gross Margin (Monthly and One-time Opportunities closed) by fiscal quarter



Y Axis = Gross margin amount  
 X Axis = Fiscal year quarters  
 Columns - The total gross margin for all Opportunities closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

View the total gross margin for all opportunities closed during each quarter. Compare current and previous year quarterly opportunity gross margin amounts.

## Opportunities Closed Last Month and Closed This Month

From these two worksheets, Opportunities Closed This Month and Opportunities Closed Last Month, you can quickly assess and compare the performance of your sales teams during the previous and current calendar month.

### Insights

If you can find ways to help all your teams do their best, everyone benefits. If one team consistently shows different results, you can explore why. If one team consistently generates more revenue from month to month, what can the other teams learn from them? If one team is not keeping up, what can they do to improve their results? You can use the Closed Opportunities and Forecast opportunities worksheets to dig deeper. Does one team do best with a certain type of opportunity or customer? Do all teams have a good balance of opportunities at all stages in their pipeline?

### About the Overall Metrics

Three key metrics are displayed in large type at the top of the page: Monthly (total monthly recurring revenue from opportunities closed during the month), One Time (total one time revenue from opportunities closed during the month) and Deals (total number of opportunities closed during the month).



For the worksheet "Closed This Month", the revenue is based on opportunities closed up to the current date.

### Using the Charts

The six charts on each worksheet are divided into two sections: Monthly Recurring Revenue (MRR), and One Time revenue. Each section contains three charts.

Two of the three charts in each section break out the data by group. The examples below show the default groups, sales teams. You can change the group names on the Config tab or work with Autotask to change which groups are presented. Refer to "Take Your Workbook to the Next Level" on page 9.

The third chart displays the revenue generated by up to 5 top sales representatives for the month.

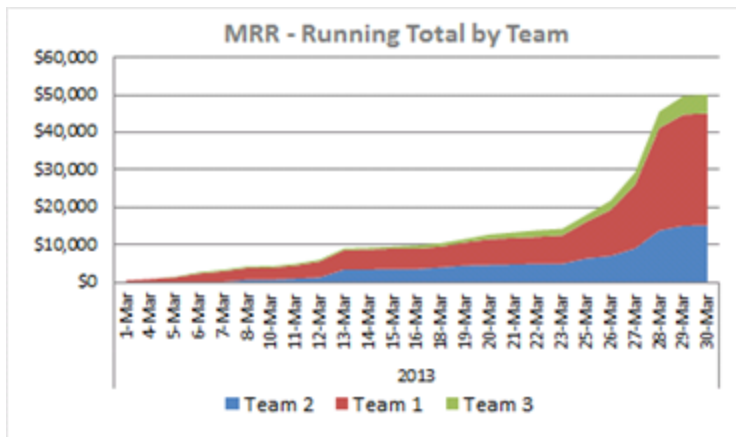


In your workbook, hover over any point in a chart to see details for that point.



In the following examples, when a chart has both a Monthly and a One-Time revenue version, the images use the monthly (MRR) version. The X and Y axis will represent the same data but for both revenue types but, in most cases, the Y axis tick-marks will have different values.

## Revenue - Running Total by Team

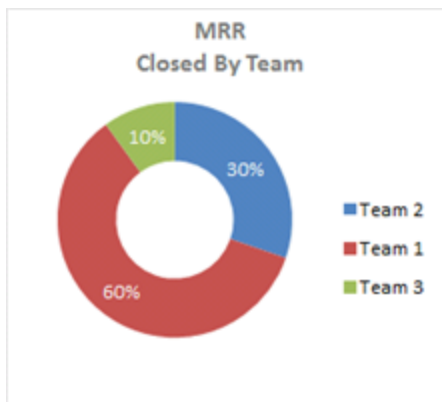


Y Axis = Amount of revenue  
 X Axis = Days of the month  
 Lines = Revenue generated by team as indicated:  
 Blue (bottom line in image) Team 2, Red (midline in image) Team 1, Green (top line in image) Team 3

The worksheet also includes a One-Time Running Totals chart.

View the cumulative revenue generated by each team during the month. Compare the total amount generated per team.

## Revenue - Percent of Total Closed by Team



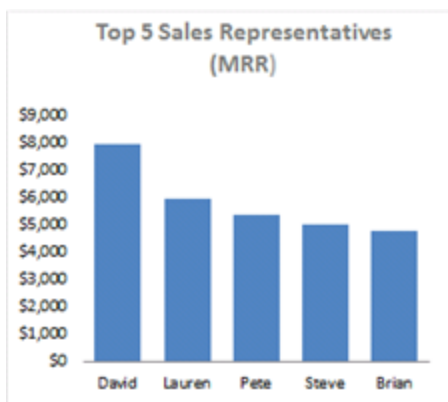
Each sector represents the percentage of total revenue generated by one team as indicated in the legend:  
 Blue - Team 2, Red - Team 1, Green - Team 3

The worksheet also includes a One-Time Closed by Team chart.

Compare the percentage of revenue closed by each team.

Place your cursor on a sector to see the amount of revenue generated.

## Revenue Totals for Top 5 Sales Representatives



Y Axis = Amount of revenue  
 X Axis = Sales representatives

View the total revenue generated by each of the 5 sales representatives with the greatest total sales for the indicated revenue type for the month.

Each worksheet, Closed Last Month and Closed This Month, include 2 charts for the top 5 sales representatives, one for Monthly Recurring and one for One-time revenue.



## List of Closed Deals

Below the charts there is a list of all opportunities closed during the month; that is, the previous calendar month or the current calendar month depending on which worksheet is open. To locate specific opportunities, you can sort the list by the Close Date, Opportunity ID, Opportunity Name, Sales Person, or Revenue.

To view the opportunity details in Autotask, double-click the Opportunity ID. If you are not logged into Autotask, enter your login credentials when prompted. Autotask security level permissions apply.

## Explore Closed Opportunities

In this worksheet you can drill deeper into your sales revenue history. If your other worksheets indicate an unusual trend over a few months, or an anomaly in one month, in this worksheet you can filter to view details about deals closed during those time periods. You can also view results from the same time period in previous years to see how the current results compare. And you can isolate data by team, sales representatives, or the range of revenue amount.

### About the Overall Metrics

The metrics that display in the upper left corner of the worksheet reflect the data from the worksheet after filters are applied. You can quickly see the number of closed deals that meet your search criteria. You can also see the monthly revenue and one-time revenue totals from those deals. For example, if you filter by team 1, you will see the number of deals closed by team 1 and the revenue totals from those deals.

### How to Explore

Review the available charts and tables. The six filters are located across the top of the page: Year, Month (and year), Grouping (Teams), Sales Rep, MRR (Monthly Revenue), and One Time Range. Decide which filters will focus in on the data that will be most useful. Then, apply the filters as described below. Remember that you can apply additional filters on the results, and clear one or more filters at any time.



### Apply Filters

Filters with longer lists of criteria provide a scroll bar to view the entire list.

- Click to select an option in the filter list.  
To select multiple options, Ctrl + click multiple non-adjacent options in the list.  
To select multiple adjacent options, click an option then Shift + click another option to select both options and all items between them.
- To clear filters, click the filter icon next to the filter name.

The metrics at the top of the page and all charts and tables update immediately to reflect the data from opportunities that meet the selected criteria. You can apply additional filters as needed.

## Insights

To take your company to the next level, you need to look at what you have been doing, what is working well and what is just holding steady. For example, larger, one time deals look great on paper and the income can help your company grow. But, have you been bringing in the monthly revenue needed to sustain that growth? And if your monthly revenue is steady, are you bringing in the larger, one time revenue sources needed to invest in growth?

On this worksheet you can explore your closed opportunities for monthly recurring and one time revenue, along with related data. Use the filters to look at the data in different ways. Look for both the positive results and the not so positive results. Drill down to view details. What can you learn from successes and failures that you can apply to newer revenue opportunities? What are successful sales reps doing that other reps should be doing? Does the age of your opportunities impact the net revenue they bring in? Are you generating enough leads of the right type? Are you focusing your resources where they are most productive?

## Using the Tables

Three tables appear on this worksheet. Each displays a list of Opportunities that meet the filter criteria that you applied.



Double-click the Opportunity ID column to open the opportunity detail in Autotask. If you are not logged into Autotask, enter your log in credentials when prompted. Autotask security permissions apply.

## MRR and One-Time Top 10 Tables

These two tables include the top ten opportunities of the specified revenue type that meet the filtering criteria. You can see the opportunity ID, account name, the year and month the opportunity was closed, the sales representative that owns the opportunity, and the revenue amount.

Top 10 MRR Opportunities <small>(Double Click on Opportunity ID to open in Autotask)</small>					
Opp ID	Account	Year	Month	Sale Rep	Monthly
34730502	Masixmo 2	2012	Jul	Pete	\$8,493
35364411	Troy Beer 2	2012	Aug	Pete	\$4,820
34741696	NeutralStar Ea:	2012	Nov	Anthony	\$3,837
35272062	Allegiant Meth	2012	Jul	Pete	\$3,018
35647724	0	0	0	0	\$2,733
33355295	Royal Sports	2012	Jun	Adam	\$2,676
35008838	Quaker Therap	2012	Apr	Anthony	\$2,434
35277782	Mannix Intel Sc	2012	Sep	Matthew	\$2,185
34240681	Sturm Ruger 2	2012	Mar	Pete	\$2,164
35571492	J&L Foods East	2012	Dec	Matthew	\$2,012

You can click the down arrow in any column to specify sort or search by options.

## Closed Opportunities Table

This table is located at the bottom of the worksheet, below all charts. It lists all opportunities that meet the current filtering criteria on the worksheet. If no filters are selected, the table includes all closed opportunities from the years included in the data download.

In addition to providing the same details as the Top 10 tables, this list also displays the amount of revenue earned from each fee type (Adv1 through Adv5).

## Using the Charts

To the left of and below the two "Top 10" tables there are eleven charts. Some charts are similar to charts on other worksheets, except that you can filter to display specific data.

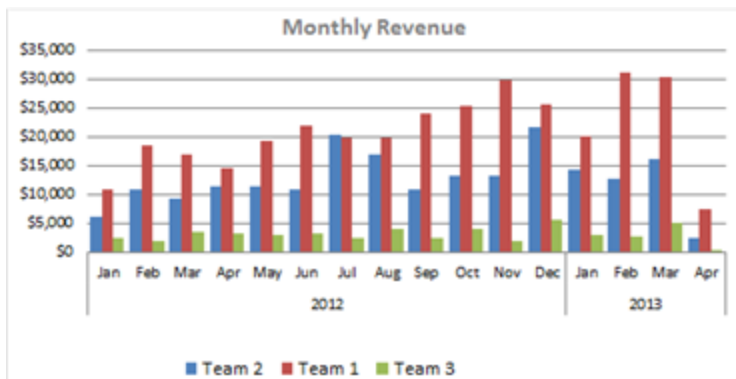


In your workbook, hover over any point in a chart to see details for that point.

## Monthly Revenue and One Time Revenue by Team



In the following examples, when a chart has both a Monthly and a One-Time version, the images use the monthly (MRR) version. The X and Y axis will represent the same data but, in most cases, the Y axis tick-marks will have different values.



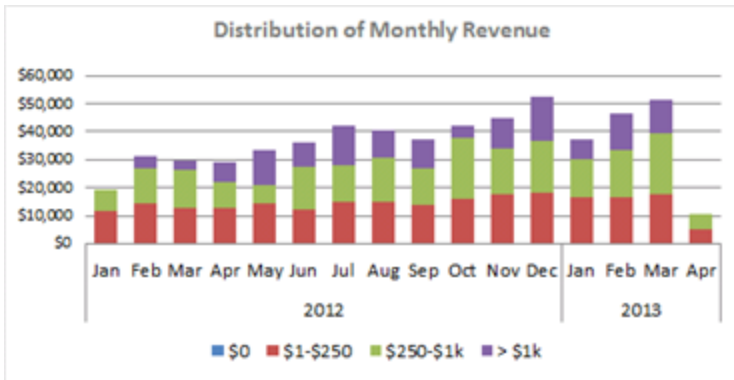
Y Axis = Amount of revenue  
 X Axis = Months  
 Columns = Revenue generated for each month by team (group).  
 Default column colors: As described in the legend below the x axis

The worksheet also includes a One-Time revenue chart.

View the monthly recurring or one time revenue generated by sales teams for each month. Present data for one or more years, individual months, or a range of months. View one team, or compare teams. Filter by individual sales representative to track the revenue they have generated.



## Distribution of Revenue by Opportunity Amount



Y Axis = Amount of revenue

X Axis = Months

Columns = Total revenue generated by closed opportunities whose revenue falls within the specified amounts.

Column Color assignments: As described in the legend below the X axis.

The worksheet also includes a One-Time revenue distribution chart.

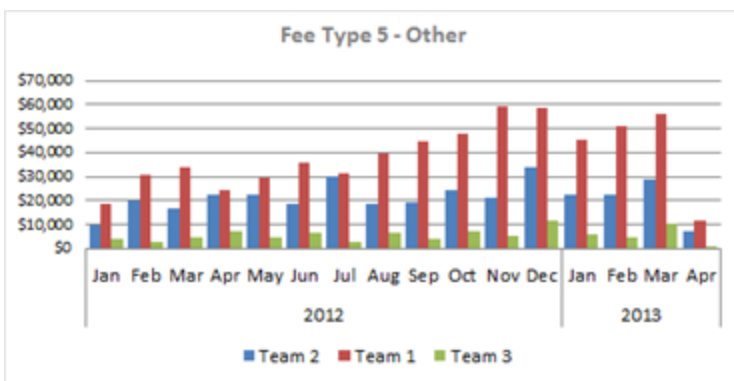
View the monthly recurring or one time revenue generated for each month in the year, individual months, or a range of months. Filter by revenue amounts, or by sales teams to see the size of opportunities closed by the specified team. You can even filter by individual sales representative.

## Revenue by Fee Type and Team

This worksheet can display charts for up to 5 fee types. Each chart is identical except for the fee type displayed. They X axis will vary depending on the filter criteria and the Y axis may vary depending on the fee type.



Fee types are specific to your company. The example chart shows revenue from the fee type "Other". Your company may not have this fee type.



Y Axis = Amount of revenue

X Axis = Months

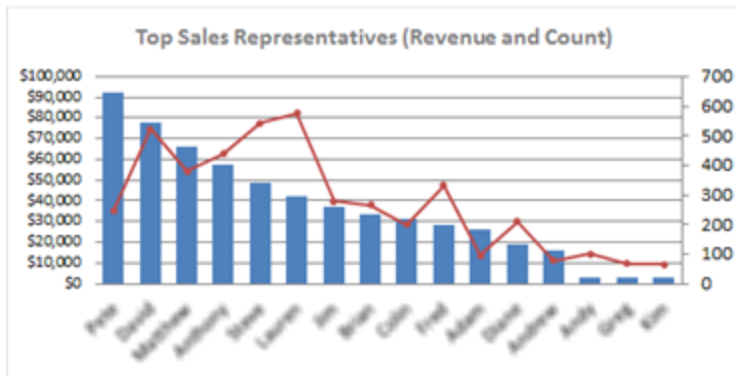
Columns = Revenue generated for each month by team (group)

Column color assignments: As described in the legend below the X axis

View the revenue generated by the specified fee type for each month in the year, individual months, or a range of months.

View revenue amount generated by one team, two, or all teams. Filter each team by selected representatives.

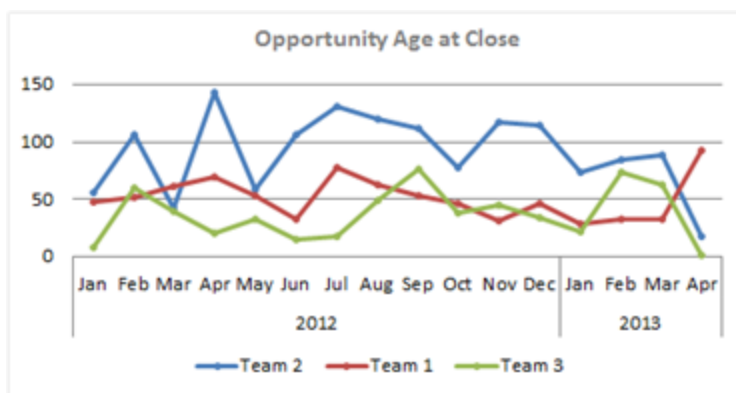
## Top Sales Representatives by Revenue and Number of Opportunities Closed



Y Axis = Amount of revenue  
 X Axis = Sales Representatives  
 Secondary value axis = Number of deals closed  
 Columns = Revenue generated by each sales representative  
 Red line = number of deals closed for each representative

View the revenue generated by each sales representative, ordered by highest to lowest amount. View the number of deals closed by each representative. Filter to view by team, by one or more selected representatives, or by year, month and year, or revenue range.

## Opportunity Age at Close - by Team



Y Axis = Average Age of Opportunities at close  
 X Axis = Months  
 Lines = Average age of opportunities closed by the specified team  
 Line color assignments: As described in the legend below the X axis

View, by team, the average age of opportunities closed in the month indicated. Filter by one team, and then by one member of that team, to see each sales representative's average age to close. Or filter by revenue type to see differences between revenue types.

## Revenue Forecast for the Current Calendar Month

Every new sales opportunity in Autotask requires a projected close date. The revenue estimated for an opportunity is forecast as revenue for the month of the projected close date. From the Forecast this Month worksheet, you can monitor your forecasted recurring monthly and one time revenue for the current calendar month. The charts present the revenue forecast by cumulative total, by team and by top 5 sales representatives, and by stage, with an indicator of average probability of closing at each stage.

### About the Overall Metrics

Three key metrics are displayed in large type at the top of the page: Monthly (total monthly recurring revenue forecast for the month), One Time (total one time revenue forecast for the month) and Opportunities (or deals: the total number of opportunities expected to close during the month).

### Insights

High revenue forecasts are not helpful to your company if only a small percentage of that revenue is realized. With this worksheet you can see not only your revenue forecast for the month, but also current information about the various stages of the opportunities and the probability of close. Sharing this information with the sales team can motivate team members and help them adjust their strategy as needed.

You can also combine the team and individual information with your knowledge of the teams' or sales representatives' history to form more accurate predictions.

### Using the Charts

The eight charts on this worksheet are divided into two sections, Monthly Recurring Revenue (MRR) forecasts and One Time revenue forecasts. There are four charts in each section: Running Total, Revenue by Group (Team), Revenue Forecast by the Top Sales Representatives, and Projected Revenue by Stage (includes probability of close for each stage).

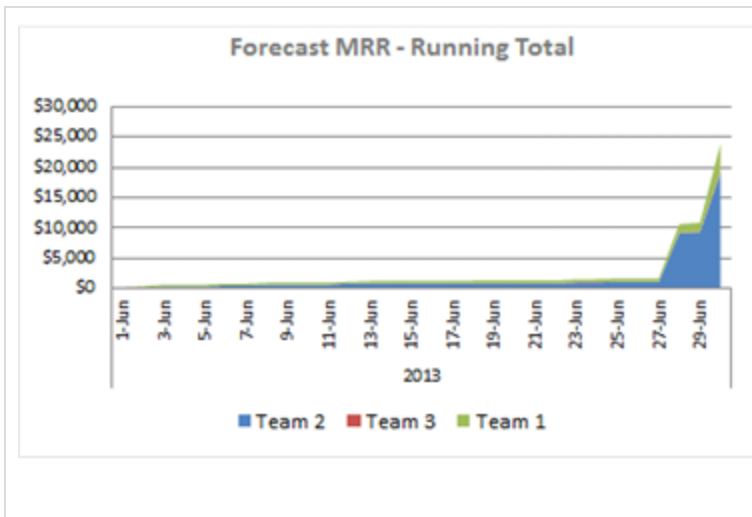


In your workbook, hover over any point in a chart to see details for that point.



In the following examples, when a chart has both a Monthly and a One-Time version, the images use the monthly (MRR) version.


## Forecast Revenue - Running Total



Y Axis = Amount of revenue  
 X Axis = Days of the month in 3 day increments  
 Solid areas = Revenue forecast by team as indicated:  
 Color assignments: As described in the legend below the X axis

The worksheet also includes a One Running Total forecast chart.

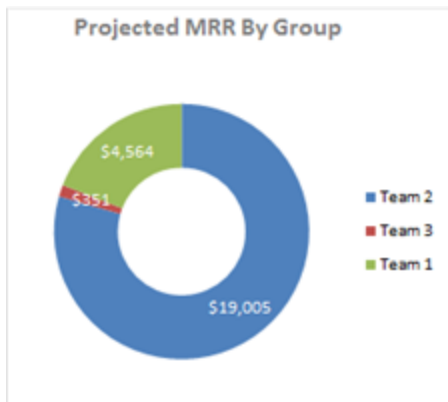
View and compare the revenue forecast from each team during the month.

 In the example shown, forecast revenue for Team 3 was not statistically significant, so no red appears on the chart.

## Projected Revenue by Group



The groups in the example below are the sales workbook default groups, sales teams. You can change the group names or work with Autotask to change the groups. Refer to **"Take Your Workbook to the Next Level"** on page 9.



Each sector represents the amount of the total forecasted revenue projected by one team as indicated:

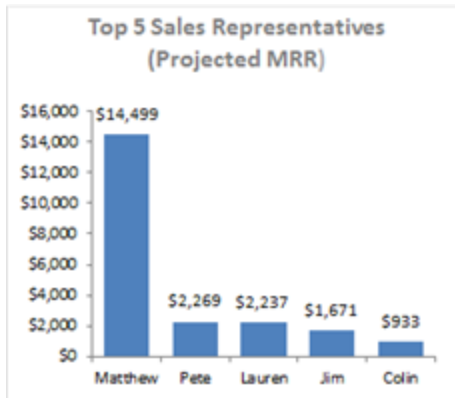
Blue - Team 2, Red - Team 1, Green - Team 3

The actual revenue amount is displayed for each sector.

The worksheet also includes a Projected One-Time Revenue by Group chart.

Compare the total amount forecast by each team. The forecast revenue for Team 2 is much higher than the forecasts from the other teams. But, the Projected Revenue by Stage and Stage Average Probability chart shows a large amount of forecast revenue in stages with a lower probability of closing. How much of Team 2's forecast revenue is in those stages? The Forecasting worksheet (Forecast tab) provides detail information on each team's revenue forecast.

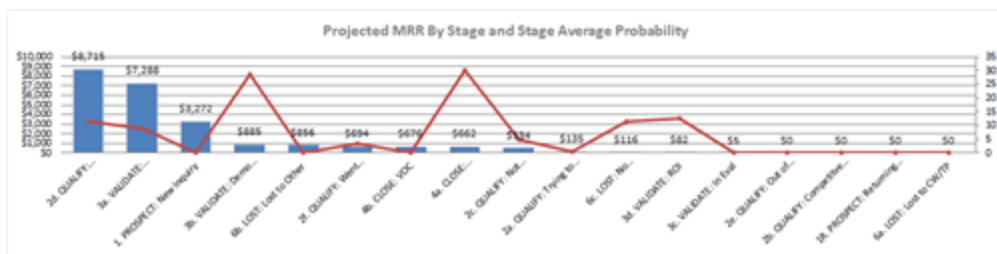
## Revenue Forecast by the Top Sales Representatives (up to 5 representatives included)



Y Axis = Amount of revenue  
 X Axis = Names of Sales Representatives  
 Columns = Revenue forecast by each representative

View and compare the revenue forecast for your sales representatives with the highest amount of revenue forecast. Chart will display up to five representatives.

## Projected Revenue by Stage and Stage Average Probability



Y Axis = Amount of revenue  
 X Axis = Opportunity stages  
 Secondary value axis = average probability that opportunity will close

Columns = Revenue at each stage  
 Red line = for opportunities at this stage, the average probability that the opportunities will close.

View the distribution of forecast revenue by opportunity stage and view the average number of opportunities at this stage that will ultimately close.

## List of Opportunities (Deals) Forecast to Close in the Current Month

This list appears below the charts. It includes all opportunities with a projected close date that falls in the current month. The charts on this worksheet pull their data from these opportunities.

## Explore Revenue Forecasting

In this worksheet you can drill deeper into your sales revenue forecasts. If your other worksheets indicate an unusual trend in revenue forecasts over a few months, or an unusual result in one month, you can use this worksheet to view details about forecast activities from one or more specific months. In addition to viewing data by one or more months, you can also filter by team (group), sales representative, probability, stage, or the distribution of revenue amount for monthly or one-time revenue.

### About the Overall Metrics

Three key metrics appear in large type at the top of the page. These metrics reflect the data from the worksheet after filters are applied. The numbers change each time you apply a new filter set.

**Opportunities** indicates the total number of opportunities (deals) that meet the specified criteria. **Monthly** and **One Time** indicate total forecasted revenue from Monthly Recurring and One Time opportunities.

### How to Explore

Review the available charts and tables. The filters are located across the top of the page: Projected, Grouping (Teams), Sales Person, MRR (Monthly Revenue) Revenue Distribution, and One Time Revenue Distribution, Probability, Stage, and Activity.



Decide which filters will focus in on the data that will be most useful. Then, apply the filters as described below. Remember that you can apply additional filters on the results and clear one or more filters at any time.

### Apply Filters

Filters with longer lists of criteria provide a scroll bar to view the entire list.

- Click to select an option in the filter list.  
To select multiple options, Ctrl + click multiple non-adjacent options in the list.  
To select multiple adjacent options, click an option then Shift + click another option to select both options and all items between them.
- To clear filters, click the filter icon next to the filter name.

The metrics at the top of the page and all charts and tables update immediately to reflect the data from opportunities that meet the selected criteria. You can apply additional filters as needed.

## Insights

In this worksheet, you can learn more about the data that appears in the Forecast This Month worksheet. You can see different types of data, and filter the data not only to show the opportunities forecast to close in the current month, but to isolate types of revenue, teams, and individual representatives.

You can also look at trends in future forecast revenue, and compare future forecasts to this month and to closed opportunities. How is your revenue trending compared to the current month and previous months? If you can see potential problems here, you can take steps to address them.

## Using the Tables

Three tables appear on this worksheet. You can click the down arrow in any column to specify sort or search by options.

### Top 10 Opportunities for MRR and One-Time Revenue

**Top 10 MRR Opportunities** and **Top 10 One-Time Opportunities** display the ten opportunities, for the specified revenue type, that show the highest revenue forecast after filters are applied.

**Top 10 MRR Opportunities**

Opp ID	Account	Year	Month	Sale Rep	Monthly
33066358	M & T Bank	2013	Jun	Jim	\$531
35707280	Open Systems Sc	2013	Jun	Jim	\$313
34878849	Open Systems Sc	2013	Jun	Fred	\$310
35700403	Quaker Therapy I	2013	Jun	Colin	\$250
35407108	Quality Carpets	2013	Jun	Colin	\$212
35387472	Communication :	2013	Jun	Colin	\$203
35569265	Riverbed System	2013	Jun	Colin	\$198
34594443	Hawk Famous Es	2013	Jun	Diane	\$182
33786985	Lumber Tech 2	2013	Jun	Diane	\$181
35761978	J&L Foods	2013	Jun	Diane	\$181

Columns include Opp(Opportunity) ID, Account, Year, Month, Sales Representative, and Monthly (revenue). To open the opportunity detail, locate the opportunity in the table that appears below all the charts. See All Deals, below.

## All Opportunities


A single table located at the bottom of the worksheet displays all opportunities (deals) that meet the search criteria specified for the worksheet. The table content changes as you apply filters. The Opportunities metric at the top of the worksheet indicates the total number of opportunities listed. This table includes the following columns: Opportunity ID, Account, Opportunity Name, Monthly Revenue, One-Time Revenue, Stage, Status, Create Date, Projected Close Date, Probability, Sales Representative, Last Activity, Advanced fields 1 through 5, and Country.


Double-click the ID column to open the opportunity detail in Autotask. If you are not logged into Autotask, enter login credentials when prompted. Autotask security level permissions apply.



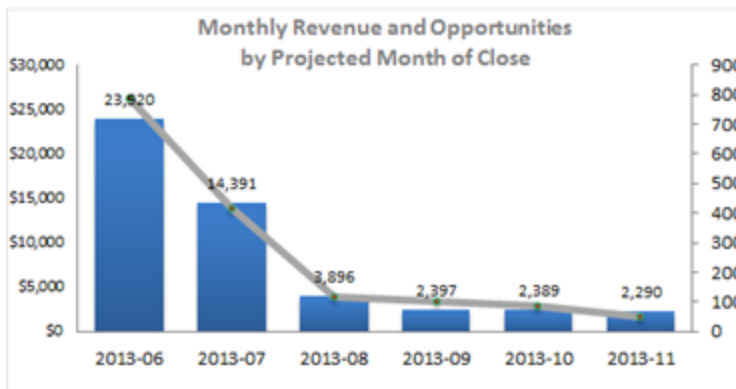
## Using the Charts

The fifteen charts display active deals and forecasted revenue by multiple criteria including month of projected close, group, revenue distribution, probability, stage, and resources. There are five pairs of charts (total of ten charts) where both charts display the same data, but one chart displays the data for Monthly (MRR) opportunities and the other chart displays the data for One Time opportunities.

 In your workbook, hover over any point in a chart to see details for that point.

 In the following examples, when a chart has both a Monthly and a One-Time version, the images use the monthly (MRR) version. The X and Y axis will represent the same data but, in most cases, the Y axis tick-marks will have different values.

### Revenue and Opportunities (Grouped by Projected Month of Close)

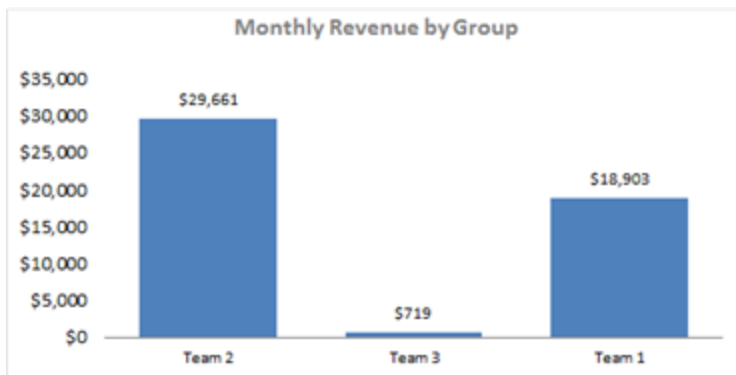


Y Axis = Amount of revenue  
 X Axis = Month and year  
 Columns = Revenue forecast to close in month indicated  
 Gray line = Count of deals (opportunities) forecast to close in month indicated

The worksheet also includes a chart for One Time Opportunities.

For each month displayed along the X axis, view the number of opportunities expected to close (line) and the amount of revenue anticipated from those opportunities (columns).

### Revenue by Group (Team)

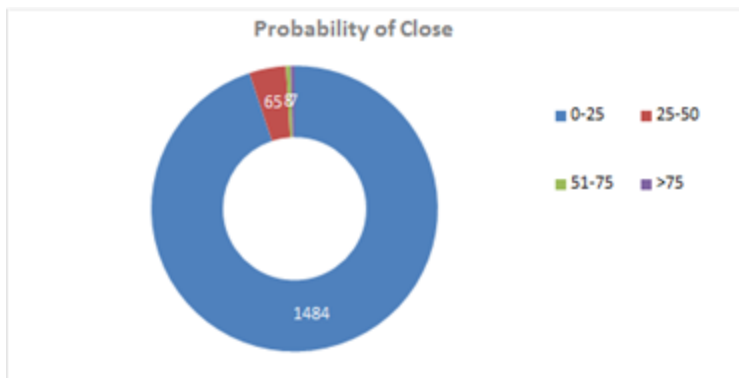


Y Axis = Amount of revenue  
 X Axis = Groups (Teams)  
 Columns = Revenue anticipated from opportunities that meet the filtering criteria

The worksheet also includes a chart for One Time Opportunities.

View the revenue forecasted to close by the specified team (group) for the specified month. Filter by multiple teams to compare forecasts, or filter teams by specified resource.

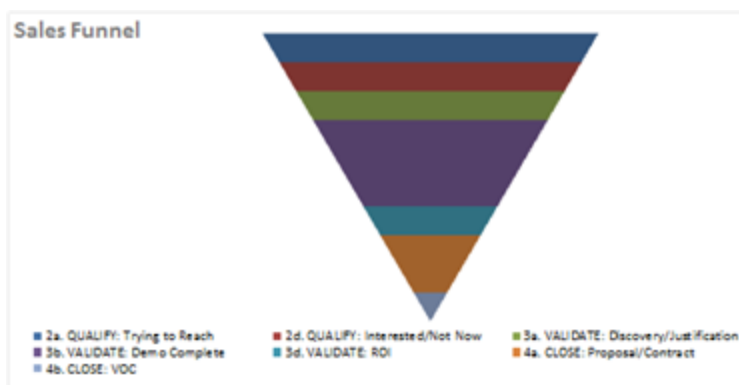
## Probability Distribution



Each sector represents the percentage of the total opportunities in the filtered data that have the specified probability of closing: Blue = probability 0 to 25%, Red = probability 26 to 50%, Green = probability 51 to 75%, Purple = probability > 75%

The number in each sector = the number of opportunities that fall within that probability distribution. Place the cursor in a sector to open a tool tip that indicates the exact percentage.

## Sales Funnel

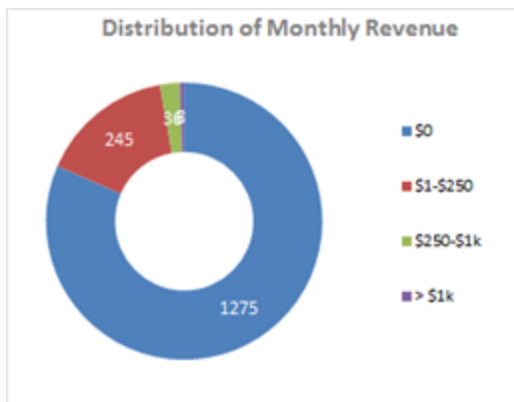


Each color represents an opportunity stage and the number of opportunities in that stage. Stages appear in ascending order; the final stage is at the bottom of the "funnel".

Color assignments are described in the legend below the funnel.

View the distribution of opportunities in your pipeline by stage to see if there is a steady flow of projected opportunities. If all opportunities in the pipeline are at or near close, there will be a downward trend in revenue during the time it takes to open new opportunities and bring them to close. If the opportunities are weighted to the earlier stages, then revenue may dip while those opportunities are being brought to close.

## Revenue Distribution



Each sector represents the number and percentage of opportunities in the filtered data with revenue forecasts that fall within the distribution indicated by color.

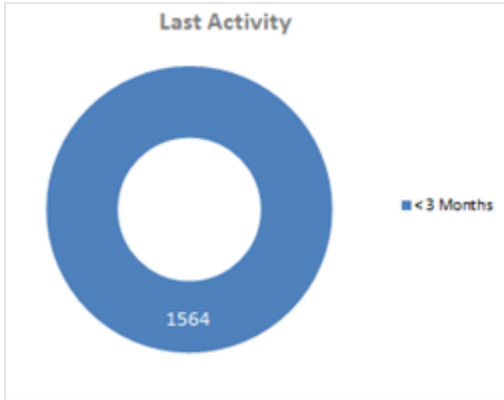
The legend on the right describes the color assignments. The worksheet also includes a chart for One Time revenue.

The amount represented by each color is specific to your company and may vary between the Monthly and One Time revenue charts.

The number value = the number of opportunities in the total sample with forecast revenue that falls within the specified range. You can place your cursor in a sector to see additional details.

Compare the distribution of revenue anticipated from forecast opportunities.

## Last Activity

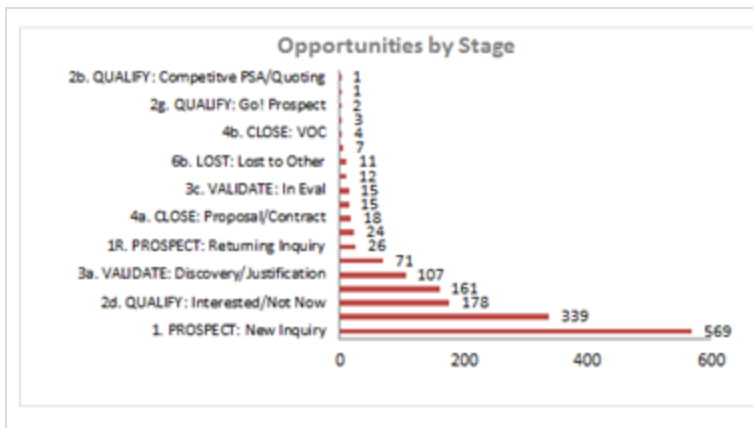


Each sector represents the percentage of the total forecasted revenue where the last activity date falls within the specified timeframe.

The legend on the right describes the color assignments.

View the percentage of opportunities from the filtered data that have experienced activity within the specified timeframe.

## Opportunities by Stage



Y Axis = Opportunity Stages as defined in your Autotask

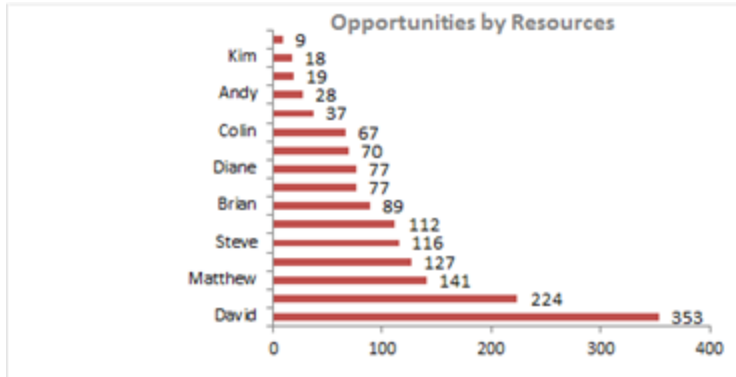
X Axis = Number of Opportunities

Bars = Opportunities from the filtered data that are currently in the stage indicated

The number at the end of the bar indicates the exact count.

View and compare how many opportunities from the filtered data fall into the different stages.

## Opportunities by Resources



Y Axis = Sales representatives

X Axis = Number of Opportunities

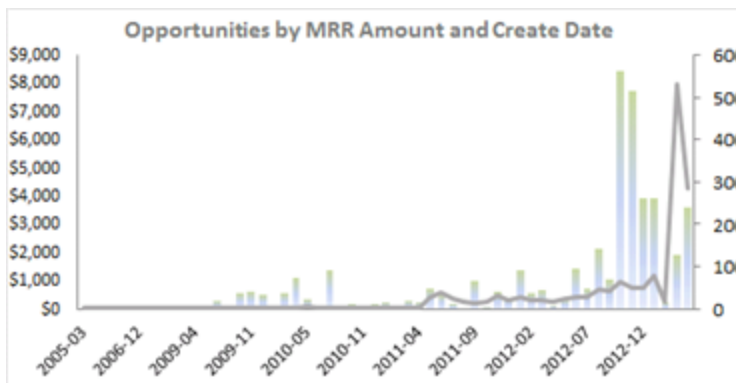
Bars = Opportunities from the filtered data that are owned by the representative indicated

Each bar indicates a sales representative. If there is not enough room to display a name next to each bar, point the cursor at any bar to view the name of the representative associated with that bar.

Each bar indicates a sales representative. If there is not enough room to display a name next to each bar, point the cursor at any bar to view the name of the representative associated with that bar.

View and compare how many forecasted opportunities from the filtered data are owned by each of your sales resources.

## Opportunities by Amount of Revenue and Create Date



Y Axis = Amount of revenue

X Axis = Create Dates

Secondary value axis = number of opportunities

Columns = Anticipated revenue from opportunities created in a specified month

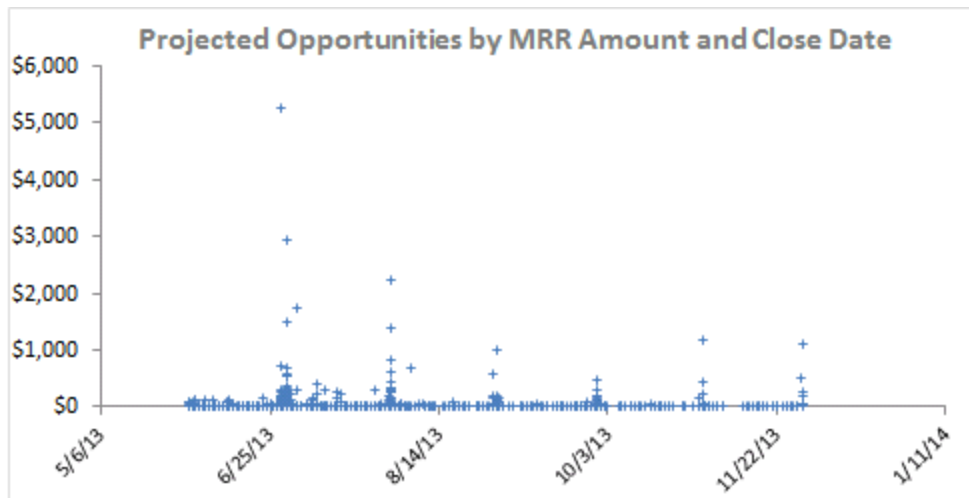
Line = Number of opportunities created on specified date

Each column represents a month. If there is not enough room to display a label for each column, point the cursor at any column to view the date and value.

The worksheet also includes a chart for One Time Opportunities.

View and compare the amount of revenue you expect to realize from opportunities that meet the search criteria. view create dates, and compare the number of opportunities created in the different months indicated on the X axis.

## Projected Opportunities by Amount of Revenue and Close Date



Y Axis = Amount of revenue  
 X Axis = Close Dates  
 Data markers = Opportunities that meet the filter criteria positioned by anticipated revenue amount and projected close date

The worksheet also includes a chart for One Time Opportunities.

View the individual opportunities that meet the filter criteria, as they compare to each other in terms of size (amount of revenue) and projected close date.

## Sales Plan and Analysis - Current and Previous Fiscal Year

 In workbooks earlier than version 1.2, the tabs described here are labeled SalesPlan[yy] and SalesPlan Previous Year.

The final worksheets in the Sales Workbook are the Current FY (Fiscal Year) and Previous FY (Fiscal Year) tabs. On these worksheets you can view the raw numbers for all Opportunities **closed** in the current or previous fiscal year. Data is presented by Year to Date, Quarter, and Month. Sparkline graphs highlight Monthly and Quarterly Trends.

### Metrics that Matter - Current Year Only

SALES ANALYSIS 2013							
Criteria							
Metrics that Matter	Met Plan	Month Trend	QTR Trend	YTD	Q1	Q2	Q3
Opportunities Closed (MRR)				145,441	135,047	10,394	-
Opp Closed (One-Time)				404,513	375,901	28,612	-
Managed Services				79,569	64,527	15,042	-
Compliance				213,777	194,760	19,017	-
Product				4,189	3,903	286	-
Professional Services				17,937	16,569	1,368	-
Other				267,737	247,515	20,222	-
MRR Average				495	406	89	-
One-Time Average				4,439	3,706	734	-
Average Age to Close (MRR)				194	140	54	-
Average Age to Close (One-time)				388	300	87	-


The first lines of data on the Current FY tab bring together 11 essential sales metrics:

- Number of Monthly (MRR) revenue opportunities closed and the number of One-Time revenue opportunities closed
- Total revenue from opportunities closed for each of the five Fee Types

 Fee types are specified in Autotask in the opportunity Advanced fields.

- Average revenue for Monthly (MRR) opportunities closed and average revenue for One-Time opportunities closed
- Average age to close, that is, average count of months required to close opportunities, for both Monthly (MRR) revenue and One-Time revenue opportunities.

These metrics pull this selected data from the worksheet data in order to provide a quick look at these important points.

 Metrics that Matter do not appear on the Previous FY tab.

## Additional Data

The additional data in this worksheet groups revenue from closed opportunities by specific criteria including Fee Type, revenue range for each revenue type, distribution of Age to Close, team (group) for each revenue type, and by resource (sales representative) for each revenue type.

Each row displays the totals for year to date, each quarter, and each month of the year. In addition, each line includes cells where you can enter your sales plan goals. You can set goals for as many or as few rows as you choose. Refer to Sales Plan Data, below.

To the right of the sales Plan columns, the worksheet displays the monthly variance (Var) between your sales plan and actual revenue. Parentheses indicate the amount by which revenue fell below the plan goal.

The sparkline graphs that follow the row labels provide a quick assessment of when monthly goals have been met, and what the overall trend has been by month and by quarter. Sparklines only appear in the Met Plan column when you have entered plan goals.



Many of the cells in this worksheet are automatically calculated using pre-set formulas. Do not edit pre-calculated cells unless you intend to modify a calculation and you know how to work with formulas in Excel.

## Sale Plan and Goals Data

You can set sales goals in the Current F Y tab and then see actual data compared to these goals directly in the worksheet. The Sales Plan data entered here also provides the data for the Plan lines in selected charts.

There are Plan columns for all metrics. You can set goals for whatever metrics you want.



Before you edit the workbook, always save a backup copy.

To provide data for the Plan lines on the **Trending - Year to Date** worksheet, enter monthly revenue goals for One-Time and Monthly (MRR) revenue and for each Fee Type (Advanced Fields). For version 1.2 and higher workbooks, Plan data that you enter in the lines Opp Closed (Total Revenue) and Opp Closed (Total Cost) will appear in the charts under "Total Revenue and Cost Trends versus Plan". Gross margin, which also appears in these charts, is automatically calculated in the Current FY tab based on the Total Revenue and Total Cost data.

## How to...

### Set Plan Goals

1. Save a backup copy of your workbook.
2. In your workbook, click the **Current FY** tab.
3. In the worksheet, scroll **to the right** to find the column labeled **Jan Plan**. It should be column AB, or close to it ( the Sales Plan worksheets can vary slightly between workbooks).

To the right of Jan Plan there is a column for each additional month of the year.





Metrics that Matter	O	N	D	Total	Jan Plan	Feb Plan
Opportunities Closed (MRR)	-	-	-	145,441	30143	
Opp Closed (One-Time)	-	-	-	404,513		
Managed Services	-	-	-	79,569		

4. Scroll **down** to the row for the first set of values you want to enter:

**Opportunities Closed (MRR)** will hold the values for your total monthly recurring revenue goals.

**Opp Closed (One Time)** will hold your one time revenue goals.

The Fee Type rows appear under the row labeled **BY FEE TYPE**. Fee type names are specific to your company.

**Opps Closed (Total Revenue)** will hold the values for your total revenue goals.

**Opps Closed (Total Cost)** will hold the values for your projected total costs for opportunities closed.



**Opp Closed (Gross Margin)** displays the calculated values for gross margin, based on the values you entered for Total Revenue and Total Cost. If you manually enter values in this row, you will remove the formula.

5. Find the **cell** where the **Jan Plan** column intersects with the row to which you want to add plan values, for example, Opportunities Closed (MRR).

6. Click in the cell and enter the value of your **January goal** for the data type indicated by the row label.

7. Move to the next Month Plan column and enter the value for that month. Repeat for **each month**. You can copy and paste where different months have identical values.



You can click the Trend tab at any time to view the Plan Lines on the charts.

8. **Save** the workbook.

9. **Repeat** Steps 3 through 7 for each additional row to which you want to add revenue goal values (refer to Step 3 for the rows that provide data to charts).

## Frequently Asked Questions - FAQs

### 1. Can I save my workbook password so I do not have to enter it every time I refresh my data?

Yes, you can save your password in Excel under Data > Connections. You must save the password for each workbook you use. For instructions on how to save your password, refer to "Save Your Password (Optional)" on page 6.

### 2. How do I password protect my workbooks at the Excel file level?

1. Open your workbook in Excel and click File.
2. Click the Protect Workbook icon to open the menu.
3. Select Encrypt with Password.
4. Follow the instructions to add a password for the file.
5. Save the workbook.

### 3. How do I filter my ticket data to exclude data I do not need, like sales queues or issue types that are not part of my customer related activity?

The service workbooks automatically download data for all of your tickets. If you don't want to include all tickets, you can filter the downloaded data using an Advanced Where clause. You can add the clause on the Config tab.

For details, watch this short video: [How to exclude data from the service workbook](http://www.youtube.com/watch?v=FCUHehN5oK8) <http://www.youtube.com/watch?v=FCUHehN5oK8>

Or refer to "Add or Update an Advanced Where Clause" on page 17.



Just a reminder: Always save a backup copy of your original workbook before you make changes.

### 4. Can I have different versions of the performance workbooks targeted for different teams?

Yes, you can save multiple versions of your workbook.

1. Filter the data as needed using the Advanced Where clause (see question 3) and make any additional changes you want to the workbook charts.
2. Save the workbook file under a different name.

You can save as many "custom" versions as you need.

### 5. How do I change the ranges in my charts (1-7 days, 8-14 days etc.) so I see what I need?

You can change the data ranges and many other parameters in your charts. You can also change the labels. You make these changes once in the Ticket Analysis tab and the changes then update in every page in the workbook (and in any linked charts in PowerPoint presentations).

- In the Ticket Analysis page, click the **Criteria** button on the top right to view customizable options.

For more information, view the following short video - [Performance Dashboards: Configure Your Trending Criteria](http://www.youtube.com/watch?v=5YiGatZ_jEM)  
[http://www.youtube.com/watch?v=5YiGatZ\\_jEM](http://www.youtube.com/watch?v=5YiGatZ_jEM)

Or refer to "Customizing Your Data Display" on page 10.

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 Always make a backup of your workbook before you make changes.

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## 6. Sometimes I see ### marks instead of numbers? Why does that happen and how can I correct it?

This is usually due to display/cell size issues; that is, the number is too large (too many characters) to fit in the cell at the given screen resolution. To correct this, select the content and reduce the font size so all the characters can fit.


## 7. How do I embed a linked chart from my workbook in my PowerPoint presentation?

It's easy to put a chart from workbook into a PowerPoint presentation. If you add the chart as a linked object, you can quickly update your presentation data directly from the workbook.

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 The sample PowerPoint presentation, Executive\_meeting.pptx, sent with your workbook files and credentials, already includes a number of charts from the Weekly Analysis Service workbook.

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1. Select and copy a chart in your workbook (CTRL+C).
2. Click in the PowerPoint slide where you want the chart.
3. In the Home ribbon, click to open the Paste menu and select  (Keep Source Formatting and Link Object).

Refer to "Add Linked Charts to PowerPoint Presentations" on page 19.

## 8. How do I create static reports (PDFs) I can share with customers?

1. Select the view you would like to publish.
2. Under "Save As", select the format PDF.

## 9. How do I change chart types, colors and settings so I can make the charts look the way I want?

1. Save a backup copy of your workbook.
2. Right-click in the chart you wish to modify to display options menu.
3. Select Change Chart type and follow the steps to achieve the desired type and style.

For more details, refer to "Customizing Your Data Display" on page 10.

## 10. How often can I refresh my workbook?



The Workbook data cache is updated once every 24 hours. As such, you can update the workbook once daily and your analysis will be valid for that day. For more information, refer to "About the Workbooks Data Cache" on page 63.




## About the Workbooks Data Cache

When you configure an Autotask workbook, and every time you refresh your data, you access the Dashboard Data Cache. The Data Cache includes a select group of data views that map to one or more tables in your Autotask database.

The views contain only the data used to populate the Performance Dashboard workbooks. Because the workbooks access only a small segment of your database, you can quickly download data to your computer and work locally.

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 The Dashboard Data Cache is a unique set of data views. It is not related to the Autotask Report Data Warehouse. Autotask does not support any use of the Dashboard Data Cache in a SQL reporting environment. If you require full access to a SQL based environment, please contact your Account Manager for information on acquiring access to the Autotask Report Data Warehouse.

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The Dashboard Data Cache is a contract based service. Your Data Cache login credentials allow access to only your company's Autotask data. You cannot share your workbook with other Autotask users.


### Data Refresh Times

You refresh your workbook data directly from the Dashboard Data Cache. Currently, the Data Cache is automatically refreshed daily from a backup of your production database. Refresh time occurs as follows:

- Between 1 AM and 5 AM EDT
- Between 1 AM and 5 AM GMT for customers hosted through our LON Data Center.

To be sure you get the most current data when you refresh, and to avoid potential disruption of your workbook refresh process, do not attempt to refresh during this time.

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 If you must refresh regularly during this time period, please contact your Autotask Account Manager to arrange for a specific Dashboard Data Cache refresh time.

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## Contacting Customer Support

**Autotask does not provide individual training or customization** for Performance Analytics Workbooks.

Before contacting support, please review the information in this PDF document, especially "Get Started with Performance Analytics" on page 3, "Frequently Asked Questions - FAQs" on page 60, and "About the Workbooks Data Cache" on page 63.

If you have difficulty accessing the Workbooks Data cache, or to report a technical problem with your Workbook, please contact [Datto Customer Support](#).

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 When we create a ticket, it will consume one of your annual support incidents. If you do not know the details of your company's Support Package, please contact your Account Manager.

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## Using the Client Portal

Access the [Client Portal](#).

All Autotask customers have access to the Client Portal, where you can create a support ticket. It is also the most effective and convenient way for you to receive updates on the progress of your Support requests.

Requests submitted electronically are queued and handled in the order they are received. Our Support team will provide its initial correspondence on the ticket and via email to the customer contact. We will use this first contact to provide a resolution or to request more details. If additional research is required, your ticket will be annotated, prioritized and routed to our team.


Account Champions are provided with the required Client Portal credentials upon completion of their Implementation. Non-champions can gain access to the portal through their Account Champion. If you are the Account Champion and do not yet have access to the portal, please reach out to our Support team for assistance.

## How many support incidents are you entitled to per year?

The annual number of support incidents Autotask will handle free of charge is spelled out in your Autotask contract. The number of incidents is decremented as you utilize our support services. If we determine that your support incident is related to a bug in the software, your allotment of incidents will not be decremented. Autotask Client Services has the sole discretion of what constitutes a support incident within the scope of Support.

If you have any questions regarding your company's Support Package, service levels, specific training options, or any other service or support needs, please contact your Account Manager.

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 To maximize your support incidents, Autotask recommends that you select a Champion who becomes your internal focus point for use of Autotask products, and can assist in developing proper workflows, your own internal standard operating procedures, and reviewing and raising issues as needed to Autotask Product Support. Typically Autotask will direct our communications regarding updates, release schedules, new education offerings, etc., to Champions as a primary point of contact at your company. Access to the PSA Client Portal is controlled by each customer's Autotask Champion.

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## What are your (the customer's or partner's) responsibilities?

Autotask's obligation to provide Support is contingent upon the customer:



- Using the Autotask resources; Community, Training, and Online Help to research topics and potential resolutions prior to submitting an incident
- Making reasonable efforts to resolve any Incident after obtaining a proposed resolution from Autotask
- Using best efforts to provide Autotask, at the reasonable request of Autotask, with data, information, assistance, and/or materials as necessary
- Eliminating the potential conflict on non-Autotask products interfering with Autotask product operation
- Ensuring that the local operating environment is working correctly and any issue that may be experienced is not caused by a network or facilities failure