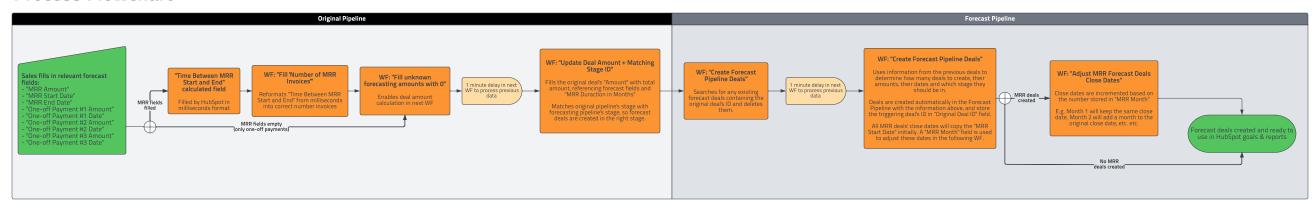# MRR Forecasting Solution Documentation

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This document outlines how deals are generated in the forecasting pipeline, how properties are mapped and why this solution was required.
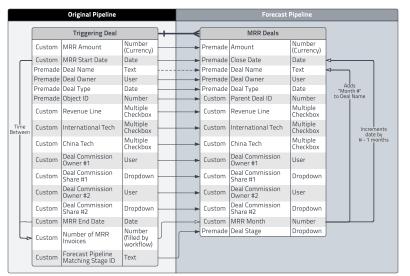
Video explanation available here: https://youtu.be/NDtSVXa9pwk (contains outdated info)
Full guide: https://kristeen.online/solutions/hubspot-mrr-forecasting

Process Flowchart

Entity Relationship Diagram & Property Mapping

MRR Deals

Original Pipeline

Triggering Deal

Custom	MRR Amount	Number (Currency)
Custom	MRR Start Date	Date
Premade	Deal Name	Text
Premade	Deal Owner	User
Premade	Deal Type	Date
Premade	Object ID	Number
Custom	Revenue Line	Multiple Checkbox
Custom	International Tech	Multiple Checkbox
Custom	China Tech	Multiple Checkbox
Custom	Deal Commission Owner #1	User
Custom	Deal Commission Share #1	Dropdown
Custom	Deal Commission Owner #2	User
Custom	Deal Commission Share #2	Dropdown
Custom	MRR End Date	Date
Custom	Number of MRR Invoices	Number (filled by workflow)
Custom	Forecast Pipeline Matching Stage ID	Text

Time Between

Forecast Pipeline

MRR Deals

Premade	Amount	Number (Currency)
Premade	Close Date	Date
Premade	Deal Name	Text
Premade	Deal Owner	User
Premade	Deal Type	Date
Custom	Parent Deal ID	Number
Custom	Revenue Line	Multiple Checkbox
Custom	International Tech	Multiple Checkbox
Custom	China Tech	Multiple Checkbox
Custom	Deal Commission Owner #1	User
Custom	Deal Commission Share #1	Dropdown
Custom	Deal Commission Owner #2	User
Custom	Deal Commission Share #2	Dropdown
Custom	MRR Month	Number
Premade	Deal Stage	Dropdown

Adds "Month #" to Deal Name

Increments date by # - 1 months

One-Off Payments

Original Pipeline

Triggering Deal

Custom	One-Off Payment # Amount	Number (Currency)
Custom	One-off Payment # Due Date	Date
Premade	Deal Name	Text
Premade	Deal Owner	User
Premade	Deal Type	Date
Premade	Object ID	Number
Custom	Revenue Line	Multiple Checkbox
Custom	International Tech	Multiple Checkbox
Custom	China Tech	Multiple Checkbox
Custom	Deal Commission Owner #1	User
Custom	Deal Commission Share #1	Dropdown
Custom	Deal Commission Owner #2	User
Custom	Deal Commission Share #2	Dropdown
Custom	Forecast Pipeline Matching Stage ID	Text

Forecast Pipeline

One-Off Deals

Premade	Amount	Number (Currency)
Premade	Close Date	Date
Premade	Deal Name	Text
Premade	Deal Owner	User
Premade	Deal Type	Date
Custom	Parent Deal ID	Number
Custom	Revenue Line	Multiple Checkbox
Custom	International Tech	Multiple Checkbox
Custom	China Tech	Multiple Checkbox
Custom	Deal Commission Owner #1	User
Custom	Deal Commission Share #1	Dropdown
Custom	Deal Commission Owner #2	User
Custom	Deal Commission Share #2	Dropdown
Premade	Deal Stage	Dropdown