
Collaborative Forecasts Implementation Guide

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COLLABORATIVE FORECASTS IMPLEMENTATION GUIDE

USER PERMISSIONS

To use Collaborative Forecasts:	Allow Forecasting
To access role-based forecasts in Lightning Experience:	View Roles and Role Hierarchy
To enable Collaborative Forecasts users:	Manage Users AND Customize Application
To add forecast types:	Customize Application
To adjust Collaborative Forecasts amounts:	Override Forecasts
To manage quotas of all users in the forecast hierarchy:	Manage Quotas AND View All Forecasts
To see the forecasts of all other users:	View All Forecasts
To create or update custom report types:	Manage Custom Report Types
To delete custom report types:	Modify All Data

Through this series of tutorials, you'll get familiar with the Collaborative Forecasts settings and features. You'll learn to set up Collaborative Forecasts and enable users who need Collaborative Forecasts in their jobs. You'll also step through how to enhance the forecasting experience for your users. When you finish the exercises, you'll have a solid understanding of Collaborative Forecasts.

Using Forecasts to Predict and Plan

Using forecasts, users can predict and plan the sales cycle from pipeline to closed sales, and manage sales expectations. A forecast is an expression of expected sales based on the gross rollup of a set of opportunities. The forecast amounts on the forecasts page are totals and subtotals of the opportunities in the four forecast categories—Pipeline, Best Case, Commit, and Closed. Depending on how Salesforce is set up, these amounts can reflect opportunities from one or multiple forecast categories. On the forecasts page, roll over the  (Salesforce Classic only) next to the column names to see which forecast categories roll up to the totals in each column. In the rollup table on the forecasts page, forecast amounts are organized by forecast rollup, time period, and optionally by product family and territory. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts and adjustments made by forecast users to their own forecast amounts. Users can view their forecast amounts and related opportunities by forecast rollup for one person or for everyone below them in the forecasts hierarchy. For example, they can see the July Best Case forecast for all sales managers reporting to them, all the sales reps reporting to any one of their managers, or just an individual.

Forecasts can be based on opportunities, opportunity splits, product families, or territories. You can use up to four types of forecasts, depending on your needs.

Before You Begin

To benefit the most from the tutorials, create the following Salesforce objects.

- Users
- Roles
- Accounts
- Opportunities
- Profiles

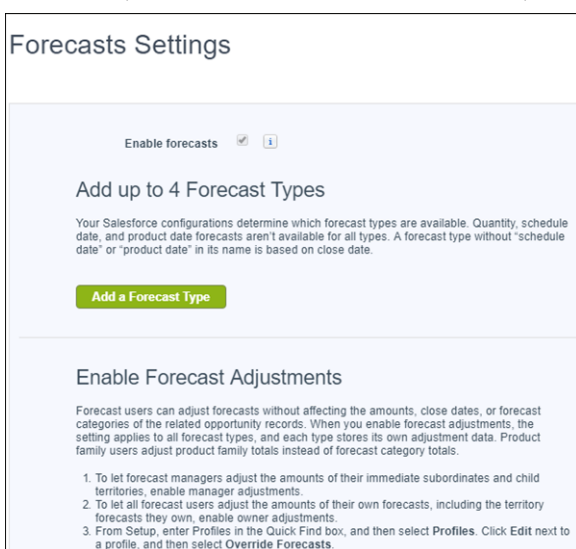
TUTORIAL #1: SET UP COLLABORATIVE FORECASTS

This tutorial takes you through enabling Collaborative Forecasts, setting the tab visibility for the profiles that you select, adding forecast types, choosing how to roll up your opportunities to forecast amounts, and setting the default date range.

Step 1: Enable Collaborative Forecasts

Let's begin by making sure that Collaborative Forecasts is enabled.

1. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**. If Collaborative Forecasts isn't enabled, select **Enable forecasts**. When enabled, the Forecasts Settings page looks similar to this page.



If you don't use multiple currencies, you don't see a Forecast Currency section.

Now you're set to go!

Step 2: Add a Forecasts Tab

Set the tab visibility for all profiles that need Collaborative Forecasts, such as sales users and sales managers. You can always go back and make changes. As you add new profiles, you can set tab visibility for them as well.

1. From Setup:
 - If you're using Lightning Experience, enter *App Manager* in the Quick Find box, select **App Manager**, and then click the **Edit** quick action for your Lightning app. Then click **Navigation Items**.
 - If you're using Salesforce Classic, click **+** and then **Customize My Tabs**.
2. Move Forecasts from the Available column to the Selected column, and then save your changes.
3. From Setup, enter *Profiles* in the Quick Find box, and then select **Profiles**.
4. Click the profile that needs access to forecasts.

5. Click **Object Settings** and then **Forecasts**.
6. Click **Edit**.
7. From the Tab Settings dropdown list, select **Default On**, and then save your changes.

Step 3: Decide Which Forecast Types to Use

You can choose up to four types of forecasts.

Forecast Type	Hierarchy	Date Type	What the Rollup Is Based On
Opportunities - Revenue	Role	Close date	The opportunity's Amount and Close Date fields
	Role	Product date	The opportunity products' Total Price and Date fields
	Role	Schedule date	The product schedule's Revenue and Date fields
	Territory	Close date	For each opportunity that's assigned to a territory, the opportunity's Amount and Close Date fields
	Territory	Schedule date	For each opportunity that's assigned to a territory, the product schedule's Revenue and Date fields
Opportunities - Quantity	Role	Close date	The opportunity's Quantity and Close Date fields
	Role	Product date	The opportunity products' Quantity and Date fields
	Role	Schedule date	The product schedule's Quantity and Date fields
	Territory	Close date	For each opportunity that's assigned to a territory, the opportunity's Quantity and Close Date fields
	Territory	Schedule date	For each opportunity that's assigned to a territory, the product schedule's Quantity and Date fields
Product Families - Revenue	Role	Close date	The Close Date field and the sum of the Total Price fields for all opportunity line items in a product family. Forecast amounts are separated by product family.
	Role	Product date	The Date fields and the sum of the Total Price fields for all opportunity line items in a product family. Forecast amounts are separated by product family.
	Role	Schedule date	The product schedule's Date fields and the sum of its Revenue fields for all opportunity line items in a product family. Forecast amounts are separated by product family.
	Territory	Close date	For each opportunity that's assigned to a territory, the Close Date field and the sum of the Total Price

Forecast Type	Hierarchy	Date Type	What the Rollup Is Based On
			fields for all opportunity line items in a product family. Forecast amounts are separated by product family and then territory.
	Territory	Schedule date	For each opportunity that's assigned to a territory, the product schedule's Date fields and the sum of its Revenue fields for all opportunity line items in a product family. Forecast amounts are separated by product family and then territory.
Product Families - Quantity	Role	Close date	The Close Date field and the sum of the Quantity fields for all opportunity line items in a product family. Forecast quantities are separated by product family.
	Role	Product date	The Date fields and the sum of the Quantity fields for all opportunity line items in a product family. Forecast quantities are separated by product family.
	Role	Schedule date	The product schedule's Date fields and the sum of its Quantity fields for all opportunity line items in a product family. Forecast quantities are separated by product family.
	Territory	Close date	For each opportunity that's assigned to a territory, the Close Date field and the sum of the Quantity fields for all opportunity line items in a product family. Forecast quantities are separated by product family and then territory.
	Territory	Schedule date	For each opportunity that's assigned to a territory, the product schedule's Date fields and the sum of the Quantity fields for all opportunity line items in a product family. Forecast quantities are separated by product family and then territory.
Opportunity Splits - Revenue	Role	Close date	The opportunity Amount field and each sales team member's split percentage. For Opportunity Splits - Revenue forecasts, the split percentages for each opportunity must total 100%. To use opportunity splits forecasts, enable Opportunity Teams, Opportunity Splits, and the Revenue split type.
Overlay Splits - Revenue	Role	Close date	The opportunity Amount field and each overlay sales team member's split percentage. For Overlay Splits - Revenue forecasts, the split percentages don't have to total 100%. To use overlay splits forecasts, enable Opportunity Teams, Opportunity Splits, and the Overlay split type.

Forecast Type	Hierarchy	Date Type	What the Rollup Is Based On
Custom Opportunity Currency Field - Revenue	Role	Close date	The amount in the custom opportunity currency field that you specify. To use custom opportunity currency field forecasts, Opportunity Teams and Opportunity Splits must be enabled. Enable a custom split type for the field, even if you don't intend to split credit for the field amount.
Expected Revenue - Revenue	Role	Close date	The amount in the opportunity Expected Revenue field. To forecast on the Expected Revenue field, enable Opportunity Teams and Opportunity Splits. Enable a custom split type for the field, even if you don't intend to split credit for the field amount.

Opportunities

- To forecast on amounts, choose opportunity revenue forecasts. The amount used depends on the date type you select.
- To forecast on quantities, choose opportunity quantity forecasts. The quantity used depends on the date type you select.

Product Families

If your company groups its products and services into families and wants to forecast based on those families, use a product family forecast. With product families, keep the following in mind.

- If you're using Lightning Experience, you choose product families to forecast on. The more product families you choose, the more rows appear in the forecasts grid. The forecasts grid shows up to 2,000 rows.
- The Amount column appears in the opportunity list on the forecasts page.
- The Forecasted Amount column in the opportunity list on the forecasts page shows the product family totals, not the overall opportunity totals, that roll up into the forecast amounts. If your Salesforce org was created in Summer '18 or later, this column is included in the opportunity list. If your org was created before Summer '18, we recommend that you add this column to the opportunity list.
- You can forecast on revenue, quantity, or both.
- Forecast users can view individual product family forecasts for users they have access to view.
- Use Opportunity Products and Product Families.
- We recommend completing the Product Family field on each product record. Forecasts for products without a Product Family value appear in a forecast row titled Products Not Categorized. (If an opportunity lacks line items, the opportunity amount or quantity also appears in this row.)
- Product family forecast totals aren't available in Salesforce Classic. If users adjust their product family forecasts in Lightning Experience, not every total in the Salesforce Classic forecasts grid reflects the adjustments.
- In Salesforce Classic, a manager's own product family forecasts aren't available, so they can't be adjusted.
- You can set separate product family quotas for each sales rep but not a single quota for each sales rep.

Opportunity Splits

If your sales team uses team selling and opportunity splits, use an opportunity splits revenue forecast. With opportunity splits, keep the following in mind.

- You can forecast on revenue but not on quantity.
- You must have Team Selling, Opportunity Splits, and the Revenue split type enabled.
- In Salesforce Classic, an opportunity that contains only a single 100% revenue split shows “--” for the split percentage in the opportunity list.

Overlay Splits

Use overlay splits to track revenue from sales team members who help close opportunities but aren’t directly responsible for them.

- The overlay splits on a specific opportunity don’t have to total 100%.
- You can forecast on revenue but not on quantity.
- You must have Team Selling, Opportunity Splits, and the Overlay split type enabled.

Custom Opportunity Currency Fields

If you use custom currency fields on opportunities, you can forecast on the amounts in those fields.

- Because the field must be a custom currency field, you can forecast on revenue but not quantity.
- You can forecast on the custom field regardless of whether it includes opportunity splits.
- Regardless of whether the field uses splits, you must have Team Selling, Opportunity Splits, and a custom split type enabled for the field.

Expected Revenue

If the value of the Amount field and the actual revenue brought in by the opportunity often differ, the Expected Revenue field on opportunities is useful. If your sales team anticipates this difference, consider using the Expected Revenue field and forecasting on it.

- You can forecast on revenue but not quantity.
- You can forecast on the Expected Revenue field regardless of whether you use opportunity splits with it.
- Regardless of whether you use splits with the Expected Revenue field, you must enable Team Selling, Opportunity Splits, and a custom split type for it.

Territories


If you use Enterprise Territory Management, you can enable territory forecasts. Territory forecasts are available in Lightning Experience for your active territory model and for most forecast types. When territory forecasts are enabled, the forecasts page shows the user the following.

- Forecast rollups based on the territories assigned to each opportunity
- Forecasts for the territories that the user is assigned to
- Territory forecasts that have been shared to the user
- The opportunities included in territory forecasts, regardless of whether the opportunity owner is assigned to the territory


Territory forecasts are based on your territory hierarchy, not your user role hierarchy, as other forecast types are. Users switch from role-based forecasts to territory-based forecasts by selecting a territory forecast type, listed under Forecast Type in Display Settings.

Territory forecast amounts are based on standard fields on the standard Opportunity object. An opportunity is rolled up into one territory forecast only.

Step 4: Enable Forecast Types

 **Note:** Opportunity split details in the opportunity list on the forecasts page aren't available in Lightning Experience.

1. [Review the details](#) of each forecast type.
2. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
3. Do one of the following.
 - If you don't have forecast types enabled, click **Add a Forecast Type**.
 - If you have at least one forecast type enabled, click **Add another forecast type**.
4. From the Forecast Type menu, choose the data source to use for the forecast.
5. Choose the forecast measurement to use: revenue or quantity. To use both, add a separate forecast type for each.
6. If you're using Lightning Experience, for most forecast types, [choose from the available forecast date types](#).
7. If you're using Lightning Experience and you selected product family forecasts, choose product families to forecast on.
8. Choose the columns that you want to display in the related opportunities list on the forecasts page for the forecast type. If your forecast data source is opportunities or product families, the Amount field appears by default. If your data source is opportunity splits, the Forecasted Amount and Split % fields appear by default. If your data source is product families, and your Salesforce org was created in Summer '18 or later, Forecasted Amount is included in the opportunity list. You can change the selected fields for each forecast type even after it has been enabled. Depending on whether your forecast type uses the revenue or quantity measurement, consider adding Forecasted Amount, Amount, or Quantity to the pane.
9. Click **OK**, and then save your changes.
10. Repeat this procedure for each forecast type that you want to add.

 **Warning:** If you disable a forecast type, all related quota and adjustment information is purged.

Step 5: Choose Individual or Cumulative Forecast Rollups

Choose between these methods of rolling up opportunities into forecasts for your sales teams.

- Individual forecast category rollups combine the opportunities from each individual forecast category into separate forecast amounts for each category.
- Cumulative forecast rollups combine opportunities from multiple forecast categories into cumulative forecast amounts.

The default rollup setting is individual forecast category rollups. If you choose cumulative forecast rollups, the way opportunities roll up to forecast amounts is different. The column names on the forecasts page are also different.

Category Rollup Method	Column Name on the Forecasts Page	Opportunities That Roll Up to It
Individual	Pipeline	Pipeline
	Best Case	Best Case

Category Rollup Method	Column Name on the Forecasts Page	Opportunities That Roll Up to It
Cumulative	Commit	Commit
	Closed	Closed
	Open Pipeline	<ul style="list-style-type: none"> Pipeline Best Case Commit
	Best Case Forecast	<ul style="list-style-type: none"> Best Case Commit Closed
	Commit Forecast	<ul style="list-style-type: none"> Commit Closed
	Closed Only	Closed

Advantages of Cumulative Forecast Rollups

With individual forecast category rollups, each total and subtotal represents opportunities from only one of the individual forecast categories. This type of rollup means that if forecast users want to know the total that they're going to bring for the month or quarter, they add the Best Case, Commit, and Closed forecast amounts together.

Example: Individual Forecast Rollup				
Forecast amounts	Closed	Commit	Best Case	Pipeline
	\$50	\$100	\$150	\$200
Opportunities	Closed	Commit	Best Case	Pipeline
	\$50	<ul style="list-style-type: none"> \$50 \$50 	<ul style="list-style-type: none"> \$50 \$50 \$50 	<ul style="list-style-type: none"> \$50 \$50 \$50 \$50

With Cumulative Forecast Rollups, the forecast columns show cumulative amounts from the opportunities in the named forecast category and subsequent categories in your sales funnel. This view makes it easier for sales team members to see the total numbers that they're likely to bring in without combining the category totals themselves.

For example, this table shows the cumulative forecast rollup amounts when there are four Pipeline, three Best Case, two Commit, and one Closed opportunity, each worth \$50.

Example: Cumulative Forecast Rollup				
Forecast amounts	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline

Example: Cumulative Forecast Rollup				
	\$50	\$150	\$300	\$450
Opportunities	Closed	Commit	Best Case	Pipeline
	\$50	<ul style="list-style-type: none"> \$50 \$50 	<ul style="list-style-type: none"> \$50 \$50 \$50 	<ul style="list-style-type: none"> \$50 \$50 \$50 \$50

To choose Cumulative Forecast Rollups:

1. From Setup, enter *Forecasts Settings* in the Quick Find box, and then select **Forecasts Settings**.
2. Select **Enable cumulative forecast rollups**, and then save your changes.

Step 6: Define Your Default Collaborative Forecasts Date Range

The date range that you select here is used as the default for the forecasts grid on the forecasts page. The forecasts grid shows forecast amounts for individual months or quarters and a range of months or quarters, depending on your settings. For example, if it's November and you select **Current month** for your beginning month and **6 months** for number of periods displayed, your users see forecast data for November to April. They can also see forecast amounts for individual months in the range and the total for six months.

Typically, the default date range that you select coincides with your sales cycle. The maximum date range is 15 months, 15 fiscal periods, or 8 quarters.

1. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
2. Under Configure the Default Forecast Display, select a beginning period and the number of periods to show. Let's select **Current month** and **6 months**.
3. Save your changes.

Users can use this default, or they can set a different date range display for their own forecasts. After users change their individual forecast date range displays, Salesforce admins can't override them. However, when changing the *period* display from monthly to quarterly or quarterly to monthly, the change is reflected in all users' forecasts.



Warning: If you change the time period from monthly to quarterly or quarterly to monthly, or you change the standard fiscal year, all adjustments and quotas are purged. If you enable custom fiscal years, creating the first custom fiscal year deletes any quotas and adjustments in the corresponding and subsequent standard fiscal years. These changes trigger a forecast recalculation that can take significant time, depending on the quantity of your data.

For example, a new vice president named Gordon joins your company. The date range shown on Gordon's forecasts page is the default setting of six months, beginning with the current month. He can use this default, but perhaps he prefers to view a four-month range. If so, from the forecasts page, he can:

1. Click the gear in the upper right (in Lightning Experience) and select **Set Forecast Range**, or click **Change** (in Salesforce Classic).
2. Select a beginning and ending period.
3. Save the changes.

Before we move on, go back to the Forecasts Settings page. If you don't want to use the current month and six months for your default range, choose a different range. Remember to save any changes!

TUTORIAL #2: SET UP YOUR COLLABORATIVE FORECASTS USERS

Now that your users can see the forecasts page and you've selected a forecast date range, you're ready to set up your users. Setup takes only a few minutes.

Step 1: Enable Collaborative Forecasts Users

Let's enable the individual users within each profile who need forecasting ability. Why? By enabling individual users, you retain granular control over access, even if you have different groups using the same profile. For example, let's say you have an Accounts Payable clerk and a sales manager assigned to the Standard User profile. You probably want to give forecasting ability only to the sales manager.

You can enable users on the All Users page or the Forecasts Hierarchy page.

To enable Collaborative Forecasts on the All Users page:

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.
2. For each user that you want to enable, click **Edit**.
3. Under General Information, select **Allow Forecasting**.
4. Save your changes.



Note: Users need the View Roles and Role Hierarchy permission to access role-based forecasts in Lightning Experience. This permission is assigned to all forecast users by default. The View Roles and Role Hierarchy permission is enabled for all Standard user types (full CRM license with user type S) and standard and custom profiles. You can also enable the permission for Power Customer Success (type C) and Power Portal User (type P) users. In addition, enabling the following user permissions automatically enables View Roles and Role Hierarchy.

- View Setup and Configuration
- View All Forecasts
- Override Forecasts
- Delegated External Portal User

Step 2: Learn About and Set Up Your Role-Based Forecasts Hierarchy

The forecasts hierarchy is a nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The role-based forecasts hierarchy is generated based on your user role hierarchy and specifies which users are forecast managers in the role-based forecasts hierarchy. For example, let's say that you've enabled Collaborative Forecasts for the following users.

- One user in the Vice President, Sales role
- Two users in the Sales Manager role, both reporting to the Vice President, Sales

The users are in the role-based forecasts hierarchy within their respective roles. If you haven't enabled forecasting for users, you can add them to the role-based forecasts hierarchy now. If you've enabled territory forecasts, they're based on your territory hierarchy, and you [assign forecast managers to territories](#) in the territory hierarchy.

1. From Setup, enter *Forecasts Hierarchy* in the Quick Find box, then select **Forecasts Hierarchy**.

2. To see the available roles, click **Expand All**.
3. Click **Enable Users**, and then move users between the Available Users and Enabled Users lists. If you previously enabled a user from Setup by entering `users` in the Quick Find box, selecting **Users**, and then editing a user page to allow forecasting, the name appears in the Enabled Users list. For example, if you previously enabled a user named Gordon, the name appears in Enabled Users.

Forecasts Users [Help for this Page](#)

Vice President, Sales

Users enabled for Forecasts appear in the Enabled Users list. To enable available users, add them to the Enabled Users list. To disable users, remove them.

Available Users
--None--

Add
Remove

Enabled Users
Gordon Johnson

Telco

- Chief Financial Officer
 - Accounting Clerk
 - Vice President, Sales**
 - Sales Manager
 - Sales Representative

Save Cancel

4. Before moving on, enable two or three users. This page shows two users in the Sales Manager role.

Forecasts Users [Help for this Page](#)

Sales Manager

Users enabled for Forecasts appear in the Enabled Users list. To enable available users, add them to the Enabled Users list. To disable users, remove them.

Available Users
--None--

Add
Remove

Enabled Users
Karen Smyth
Renee Moreau

Telco

- Chief Financial Officer
 - Accounting Clerk
 - Vice President, Sales
 - Sales Manager**
 - Sales Representative

Save Cancel

5. Save your changes.

Although the Sales Manager role reports to the Vice President, Sales in the role hierarchy, the users in the Sales Manager role don't automatically report to the Vice President, Sales in the role-based forecasts hierarchy. Enable a user in the role-based forecasts hierarchy to act as the forecast manager to be able to view subordinates' forecasts. Only one person at each level in the forecasts hierarchy can be the manager. Let's enable a forecast manager next.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy Show in tree view

[Collapse All](#) [Expand All](#)

- Telco
 - [Add Role](#)
 - Chief Financial Officer [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Accounting Clerk [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Vice President, Sales [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Sales Manager [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Sales Representative [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

Assign users to roles.

Forecasts Hierarchy

The forecast hierarchy determines how forecasts roll up within the organization, and who can view and adjust them. It's automatically generated based on your role hierarchy, but you may need to add or edit managers, sales reps, or other users.

[Collapse All](#) [Expand All](#)

- Telco
 - Chief Financial Officer [Assign Manager](#) | [Enable Users](#)
 - Vice President, Sales [Assign Manager](#) | [Enable Users](#)
 - Sales Manager [Assign Manager](#) | [Enable Users](#)
 - Sales Representative [Enable Users](#)

Add users to the Forecasts hierarchy based on roles.

In the earlier example, we enabled a user named Gordon, who's in the Vice President, Sales role and has people who report to him. However, he's not a forecast manager, so Gordon can't view the forecasts of his subordinates or make adjustments.

To enable a forecast manager in the role-based forecasts hierarchy:

1. From Setup, enter *Forecasts Hierarchy* in the Quick Find box, then select **Forecasts Hierarchy**.
2. To select a forecast manager for each manager role in the hierarchy, click **Edit Manager** next to the role, and then select a name from the Forecast Manager dropdown list.
3. Save your changes.

Forecasts Hierarchy

The forecast hierarchy determines how forecasts roll up within the organization, and who can view and adjust them. It's automatically generated based on your role hierarchy, but you may need to add or edit managers, sales reps, or other users.

[Collapse All](#) [Expand All](#)

- Telco
 - Chief Financial Officer [Assign Manager](#) | [Enable Users](#)
 - Accounting Clerk [Enable Users](#)
 - Vice President, Sales [Gordon Johnson](#) | [Edit Manager](#) | [Enable Users](#)
 - Sales Manager [Assign Manager](#) | [Enable Users](#)
 - Sales Representative [Enable Users](#)

Whoever you designated as the forecast manager can now view and adjust the forecasts of people who report to the manager in the role-based forecasts hierarchy. The manager can also jump to another user's forecasts. To assign the Forecast Manager role to someone else, click **Edit Manager**.

Step 3: Learn How Partner Portal Users Can Add Collaborative Forecasts Opportunities

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce. Opportunities that a partner portal user creates can roll up to the forecast of the account owner. The account owner must be the person's forecast manager in the role-based forecasts hierarchy. For example:

- Gordon Johnson owns a partner account called Acme.
- Gordon has an Acme contact named Anne Smith.
- Anne is a partner portal user.
- Anne reports to Gordon in the role-based forecasts hierarchy.

If Anne adds opportunities in her portal, Gordon sees those opportunities in his forecast. Because Gordon is Anne's forecast manager in the role-based forecasts hierarchy, he can adjust forecast amounts based on her opportunities and see how she's tracking against her quota.

When working with partner portal users:

1. From Setup, enter *users* in the Quick Find box, select **Users**, and then select the partner portal contact that you created.
2. Make sure that the **Active** and **Allow Forecasting** options are selected.
3. Enable the partner portal user in the role-based forecasts hierarchy.





TUTORIAL #3: GET THE MOST FROM COLLABORATIVE FORECASTS


If you completed the first two tutorials, your users can begin using Collaborative Forecasts. To help users get the most from the forecasting information that they see, learn how to customize forecast categories, enable adjustments and quotas, set a forecast currency, and create forecasting custom report types.

Step 1: Customize Forecast Categories

When you enable Collaborative Forecasts, five categories are available. A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted, and Closed. You can customize the forecast category names. You can give the categories names that reflect your business process.








1. From the management settings for opportunities, go to Fields.
2. Click **Forecast Category**.

Action	Values	API Name	Status Category	Chart Colors
Edit Deactivate	Omitted	Omitted	Omitted	Assigned dynamically
Edit Deactivate	Pipeline	Pipeline	Pipeline	
Edit Deactivate	Best Case	Best Case	Best Case	
Edit Deactivate	Commit	Commit	Commit	
Edit Deactivate	Closed	Closed	Closed	

3. Click **Edit** for any value that you want to edit in the Forecasts Category Picklist Values. Let's select **Commit**.
4. Enter a new category name even if you don't have to. You can change it again later.
5. Save your changes.
6. Look at the top of the forecasts page. If you chose to use individual forecast category rollups in Setup, you can see that the Commit column name has your new name. If you chose cumulative forecast rollups, the name doesn't change. But in Salesforce Classic, the info bubble  listing the categories that it includes now shows your new name.
7. To change the name back to Commit, go to Setup and repeat the steps, replacing the new category name with Commit.

If you chose individual forecast category rollups in Setup, new forecast category names appear on opportunity records and the forecasts page. Forecast categories map to opportunity stage values. An opportunity stage value is the current stage of an opportunity, such as Prospect or Proposal. Opportunity stage values correlate with forecast category values to determine how the opportunity contributes to a forecast. Not sure what the mappings are? That's OK. We'll check them right now.

1. Let's go back to where we were. From the management settings for opportunities, go to Fields.
2. Click **Stage**.

Action	Stage Name	API Name	Type	Probability	Forecast Category	Chart Colors
Edit Del Deactivate	Qualification	Qualification	Open	20%	Pipeline	
Edit Del Deactivate	Needs Analysis	Needs Analysis	Open	35%	Best Case	
Edit Del Deactivate	Proposal/Quote	Proposal/Quote	Open	75%	Best Case	
Edit Del Deactivate	Negotiation	Negotiation	Open	90%	Commit	
Edit Del Deactivate	Closed Won	Closed Won	Closed/Won	100%	Closed	
Edit Del Deactivate	Closed Lost	Closed Lost	Closed/Lost	0%	Omitted	
Edit Del Deactivate	OpenY	OpenY	Open	45%	Pipeline	Assigned dynamically
Edit Del Deactivate	Prospecting	Prospecting	Open	20%	Pipeline	

3. Scroll down to Opportunity Stages Picklist Values. Look at the row for each stage name to see which forecast category it's mapped to.
4. To change a mapping, click **Edit**.
5. In the Forecast Category dropdown list, select the category that you want mapped to that stage.
6. Click **Save**.

What if you want to change the opportunity stage picklist values? You can do that, too.

1. From the management settings for opportunities, go to Fields.
2. Click **Stage**.
3. Under Opportunity Stages Picklist Values, click **New**.
4. Create an opportunity stage, and then click **Save**.
5. Under Opportunity Stages Picklist Values, click **Replace**.
6. Enter the name of the opportunity stage that you want changed.
7. From the dropdown list, select the new opportunity stage value.
8. Click **Replace**.
9. Click **Finished**.

Step 2: Enable Adjustments

Now let's make it possible for your forecast users to adjust forecasts. But first, what's an adjustment?

An adjustment shows forecast managers' or sales reps' judgment about the final amount that they expect a forecast's opportunities to bring in at the close of the forecast period. Some forecast managers have to adjust their own or a subordinate's forecast. For example, they know that some employees tend to be too optimistic or too conservative when assigning amounts to opportunities. Sales reps can also adjust their own forecasts if they think that opportunity amounts are understated or overstated. Forecast managers can adjust forecasts that include only gross opportunity amounts and forecasts that have adjustments made by someone else in their opportunity team. An adjustment doesn't change the underlying gross rollup amount—it just adds a layer of detail. If multiple types of forecasts are enabled, each forecast type maintains separate adjustments.

When forecasts are enabled in Setup, managers, sales reps, or both can adjust forecast amounts in each forecast. However, adjustments made in the opportunity-revenue-based forecast don't appear as adjustments in any other forecast type. So if you adjust an amount in the opportunity-revenue forecast from \$100,000 to \$90,000 and then switch your forecast view, you don't see an equivalent adjustment value in the opportunity-quantity forecast. If you change the forecast view back to the opportunity-revenue forecast, you see your adjustment of \$90,000.

In the following example, Deborah Leighton's original commit forecast of \$120,275 was adjusted by her manager to \$130,000, which is reflected in the manager's totals for the month and the three-month period.

Months	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline
Total: 3 Months	USD 2,127,323.00	USD 3,247,457.42	USD 6,419,560.42	USD 4,292,237.42
October FY 2017	USD 748,748.00	USD 858,173.00	USD 1,317,618.00	USD 567,868.00
Beverly Shaw	USD 155,000.00	USD 178,700.00	USD 230,388.00	USD 75,388.00
Deborah Leighton	USD 120,275.00	USD 130,000.00	USD 298,975.00	USD 178,700.00
Henry Paul	USD 279,400.00	USD 349,382.00	USD 349,382.00	USD 69,982.00
Marcus Peters	USD 128,146.00	USD 308,946.00	USD 308,946.00	USD 180,800.00
My Opportunities	USD 66,927.00	USD 129,927.00	USD 129,927.00	USD 63,000.00
November FY 2017	USD 696,737.00	USD 1,156,698.00	USD 2,156,698.00	USD 1,469,871.00
December FY 2017	USD 690,838.00	USD 1,371,847.42	USD 2,943,336.42	USD 2,254,488.42

To enable adjustments for your users, let's go back to Setup.

1. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.

2. Make sure that adjustments are enabled.
 - To let forecast managers adjust the forecasts of their immediate subordinates and child territories, under Enable Forecast Adjustments, select **Enable manager adjustments**.
 - To let forecast managers and sales reps adjust the amounts of their own forecasts, including the territory forecasts they own, under Enable Forecast Adjustments, select **Enable owner adjustments**.
3. Save your changes. Now let's enable adjustments for the correct profiles.
4. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
5. Locate the custom profile for which you want adjustments enabled, and then click **Edit**.
6. If you're using the enhanced profile user interface, click **App Permissions**, and then click **Edit**.
7. Select **Override Forecasts**, and save your changes.

Step 3: Set Up Your Collaborative Forecasts Currency

If you don't use multiple currencies, jump ahead to [Tutorial #3, Step 4](#).

Now let's look at the different currency options and what they're used for.

Corporate Currency	The currency in which your corporate headquarters reports revenue. Serves as the basis for all currency conversion rates.
Forecast Currency	Your corporate currency or each forecast owner's personal currency.
Forecast Display Currency	The currency that a user selects in which to show forecasts. The selection must be one of your enabled currencies and is made directly from the forecasts page.
Personal Currency	A user's default currency for reports. Must be one of your active currencies. Forecast and quota amounts can appear in your corporate currency or each forecast owner's personal currency.

When you set up Collaborative Forecasts, you select a forecast currency. Users also select a forecast display currency on the forecasts page. Let's select a forecast currency now.

1. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
2. Next to Forecast Currency, choose a forecast currency option. If you don't have multiple currencies enabled, you don't see these currency options. Choose **Corporate Currency** for now. You get a warning message about adjustments. You don't have any adjustments yet, so click **OK**.
3. Save your changes.
4. Go to the forecasts page. If you have a revenue-based forecast type enabled, you see the currency indicated.
5. To change the currency, select a different currency from the gear (Lightning Experience) or the dropdown list (Salesforce Classic) in the upper right of the forecasts page. Notice that the corporate currency that you selected earlier is indicated with some text. Select a currency other than your corporate currency to show the forecast. For example, if the Indian rupee is enabled, select it, and then save your changes.
6. If you want to continue using the corporate currency as the forecast currency, you're done. To set personal currency as the forecast currency, go back to Setup.

- a. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
- b. Next to Forecast Currency, choose **Forecast Owner's Personal Currency**.

Step 4: Enable Quotas

More than likely, you want to allow users to use quotas. A quota is a monthly or quarterly sales goal that's assigned to a user or territory. A manager's quota equals the amount that the manager and team are expected to generate together. The quota rollup is done manually by users and managers, and revenue or quantity data can be used. If forecast quotas are enabled, quota data appears on the forecasts page.

Let's enable quotas.

1. From Setup, enter *Forecasts Settings* in the Quick Find box, then select **Forecasts Settings**.
2. Under Configure the Default Forecast Display, select **Show quotas**.
3. Save your changes.

After you enable quotas, users can access Display Options on the forecasts page and choose to show or hide quota data.

Step 4.5 (Optional): Manage Quota Data in Setup

1. Make sure that [quotas are enabled](#).
2. From Setup, in the Quick Find box, enter *Quotas*, and then click **Forecasts Quotas**.
3. Select the period, forecast type, and product family of the quotas you want to add or update, and then click **Show Quotas**.
4. Search for and select the users, roles, or territories whose quotas you want to manage, and then click **Edit Selected Rows**. You can also click the pencil icon to edit quota and currency fields.
5. Enter quota amounts or quantities, and then save your changes.

For other methods of managing quota data, see [Manage Quota Data for Collaborative Forecasts via Data Loader or the API](#) in Salesforce Help.

Step 5: Create a Forecasting Custom Report Type and Forecasting Report

To make a forecasting report available to users, create a custom report type. A *report type* defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports display only records that meet the criteria defined in the report type. This table describes the forecasting report types that you can create.

Primary Object	Use to create a report for...
Forecasting Items	<p>Viewing information about forecasting amounts, including adjustment amount information. As a best practice, if you use a forecast type based on revenue, use these default fields in the report type.</p> <ul style="list-style-type: none"> Owner Only Amount—The sum of a person's revenue opportunities, without adjustments. For example, if you own two opportunities, each worth \$10,000, the Owner Only Amount is \$20,000. Amount Without Adjustments—The sum of a person's owned revenue opportunities and the person's subordinates' opportunities, without adjustments. Subordinates include everyone reporting

Primary Object**Use to create a report for...**

up to a person in the forecast hierarchy. This amount is visible only on reports. For example, if the sum of the amount of all opportunities owned by you is \$20,000, and the sum of the amount of your subordinates' opportunities is \$55,000, the Amount Without Adjustments is \$75,000.

- **Amount Without Manager Adjustments**—The forecast number as seen by the forecast owner. This amount is the sum of the owner's revenue opportunities and the owner's subordinates' opportunities, including adjustments made by the forecast owner on the owner's or subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy. For example, Anne has an Amount Without Adjustments of \$75,000, made up of \$20,000 of her own opportunities and \$55,000 of opportunities owned by Ben, her subordinate. She adjusts Ben's amount to \$65,000 for a total of \$85,000. If you adjust Anne's number from \$85,000 to \$100,000, you see \$85,000 in Amount Without Manager Adjustments, because Anne sees this amount (and Anne can't see your adjustments because you're her manager). To see the amount that includes your adjustment to \$100,000, look at Forecast Amount.
- **Forecast Amount**—The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments. For example, you're a forecast manager and have another forecast manager reporting to you who has an Amount Without Manager Adjustment totaling \$85,000. If you adjust the forecast to \$100,000, the Forecast Amount is \$100,000.

If you use a forecast type based on quantity, use these default fields in the report type.

- Owner Only Quantity, Quantity Without Adjustments, Quantity Without Manager Adjustments, and Forecast Quantity

Regardless of whether you forecast based on revenue or quantity, add these fields.


- **Has Adjustment**—A checkbox that indicates whether a manager adjustment has been made on a forecast owner's amount.
- **Has Owner Adjustment**—A checkbox that indicates whether a forecast user has adjusted the user's own forecast amount.

If you use cumulative forecast rollups, add this field to your report.

- **ForecastingItemCategory**—This field indicates which rollup each forecast amount is for: Open Pipeline, Best Case Forecast, Commit Forecast, Closed Only, Pipeline, Best Case, Commit, or Closed. If you changed the forecast category names, those changes do not appear in the ForecastingItemCategory values.


Forecasting Items
with Opportunities as
a related object

Viewing opportunity revenue or opportunity quantity forecasts. View opportunity information for specific forecasting line items. For example, you can create a summary report for each of your subordinates that includes the opportunity names and last activity dates for their forecasting items, with adjustment information and final forecast amounts.

-  **Note:** For opportunities with no opportunity products specified, this report type includes two forecasting items: one for the Opportunity-Revenue forecast type and one for the Product Family forecast type. These product family forecasting items roll up into the Products Not Specified row of the Product Family forecast.

Forecasting Items
with Opportunity
Splits as a related object

Viewing opportunity splits or custom field forecasts. View opportunity split or custom field information for specific forecasting line items. For example, you can create a summary report for each of your

Primary Object	Use to create a report for...
	subordinates that includes the opportunity split amounts and percentages for their forecasting items, with adjustment information and final forecast amounts.
Forecasting Items with Opportunity Product as a related object	<p>Viewing product family revenue or product family quantity forecasts. View product family information for specific forecasting line items. For example, you can create a summary report for each of your subordinates that includes the product families and total price for their forecasting items, with adjustment information and final forecast amounts.</p> <p> Note: This report type shows forecasting items for the Product Family Revenue, Product Family Revenue by Territory, and Product Family Quantity forecast types. It includes opportunities with and without opportunity products specified.</p>
Forecasting Quotas	Viewing data about individual or team quotas. As a best practice, include all the default fields in the report type. For example, you can include lookup fields, such as the full name of the owner. When running the report, you can filter by your name to see quotas that you created and their related accounts and owners.
Forecasting Quotas with Forecasting Items as a related object	Viewing quota attainment. For example, you can use Forecasting Quotas and Forecasting Items to create the custom report type. Then, when you create the report, include a team's quotas and forecasted revenue for closed forecasts and create a formula field to display the attained quota percentage.

To compare individual forecast amounts, team forecast amounts, and amounts with adjustments for specific team members, include these fields in the Forecasting Items report type: Owner Only Amount, Amount Without Adjustments, Amount Without Manager Adjustments, and Forecast Amount. The Has Adjustment checkbox indicates whether an adjustment exists. The Has Owner Adjustment option indicates whether the forecast owner adjusted the amount.


For example, Gordon is a forecast manager, and Pam reports to him. Pam has one subordinate. Gordon runs a report based on the Forecasting Item report type and includes the four fields for his entire team. In the image, the orange outline indicates that an adjustment has been made to the amount. For example, in Amount Without Manager Adjustments, Gordon sees the combined amount of Pam's opportunities and her subordinate's opportunities, including adjustments made by Pam to her subordinate's amount.



Creating a forecasting custom report type takes only a few minutes. Let's create a Forecasting Items custom report type and a report, and then publish the report for your users. This report shows the total forecast amounts for all forecast manager's subordinates, grouped by month and forecast rollup.

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types**.
2. Click **New Custom Report Type**.
3. Add the following information.
 - For Primary Object, select **Forecasting Items**.
 - For Report Type Label, enter *Forecasting Items*.
 - Add a description.
4. For Store in Category, select **Forecasts**.
5. Select **Deployed**.
6. Click **Next**, and then click **Save**.

Next we'll create a report based on the Forecasting Items custom report type.

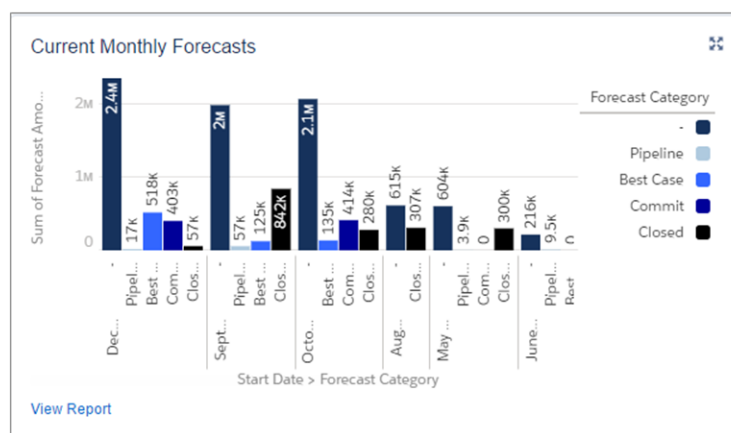
 **Note:** Salesforce offers a Classic report builder and a Lightning report builder. The following steps are for the Lightning report builder. If you're using Salesforce Classic, switch to Lightning Experience to follow these steps.

1. On the Reports tab, click **New Report**.
2. Select **Forecasts** and then **Forecasting Items**, and then click **Continue**.
3. Create a row grouping. In the Group Rows field, select **Start Date**.
4. Create a column grouping. In the Group Columns field, select **Forecast Category**.

5. Add summarizable fields. Click **Fields**, and then double-click **Forecast Amount**.
 6. If you get a No Results prompt, click **All forecasting items** and **All Time**.
 7. In the Start Date column, click the down arrow, and then select **Group Date By** and then **Calendar Month**.
 8. Add a filter. Click **Filters**, and then in the Add filter field, select **Owner: Full Name > equals** and enter the users to include in your report. Then click **Apply**.
 9. Add a second filter for **Forecasting Type: API Name > equals** and enter the forecast type that you want to report on. It must be one of the forecast types that you added earlier. Your choices include:
 - **LineItemQuantityProductDate** : Product Families - Quantity by product date. Available in API version 47.0 and later.
 - **LineItemQuantityScheduleDate** : Product Families - Quantity by schedule date. Available in API version 47.0 and later.
 - **LineItemRevenueProductDate** : Product Families - Revenue by product date. Available in API version 47.0 and later.
 - **LineItemRevenueScheduleDate** : Product Families - Revenue by schedule date. Available in API version 47.0 and later.
 - **OpportunityLineItemQuantity** : Product Families - Quantity
 - **OpportunityLineItemRevenue** : Product Families - Revenue
 - **OpportunityOverlayRevenue** : Opportunity Overlay Splits - Revenue
 - **OpportunityQuantity** : Opportunities - Quantity
 - **OpportunityQuantityProductDate** : Opportunities - Quantity by product date. Available in API version 43.0 and later.
 - **OpportunityQuantityScheduleDate** : Opportunities - Quantity by schedule date. Available in API version 43.0 and later.
 - **OpportunityRevenue** : Opportunities - Revenue
 - **OpportunityRevenueProductDate** : Opportunities - Revenue by product date. Available in API version 43.0 and later.
 - **OpportunityRevenueScheduleDate** : Opportunities - Revenue by schedule date. Available in API version 43.0 and later.
 - **OpportunitySplitRevenue** : Opportunity Revenue Splits - Revenue
 - **Territory_Model_NameN**: Territories, where *Territory_Model_Name* is the name of your active territory model in the API. *Territory_Model_Name* can be followed by *N*, an auto-generated number that distinguishes between territory forecast types. Available in API version 44.0 and later.
 - **Territory_Model_NameN_ProductFamily**: Deprecated. Territories - Product Families, where *Territory_Model_Name* is the name of your active territory model in the API and can be followed by *N*, an auto-generated number that distinguishes between territory forecast types. Available in API version 45.0 and 46.0. For territory models created in API version 47.0 and later, **Territory_Model_NameN** is used.
 - The name of a custom opportunity split type that has been enabled as a forecast type. Custom split types are based on currency fields, which can contain revenue amounts only.
 10. Click **Apply**.
 11. Click **Save**, and then enter a report name and description. Save the report in Public Reports.
- We'll add a chart next.
1. Click the **Dashboards** tab, and then click **New Dashboard**.
 2. Enter a name and description, select a folder to save the chart in, and then click **Create**.
 3. Click **+Component**, select the report that you just created, and then click **Select**.
 4. Define other properties of the chart so that it reflects the details that you need, and then click **Add**.

Your report and chart now look something like these examples.

REPORT Current Monthly Forecasts						
Total Forecast Amount USD 1,238,178.00						
FORECAST CATEGORY	-	PIPELINE	BEST CASE	COMMIT	CLOSED	Total
START DATE	FORECAST AMOUNT Sum	FORECAST AMOUNT Sum	FORECAST AMOUNT Sum	FORECAST AMOUNT Sum	FORECAST AMOUNT Sum	FORECAST AMOUNT Sum
April 2017	USD 15,194.00	USD 0.00	USD 0.00	USD 0.00	USD 7,597.00	USD 22,791.00
May 2017	USD 603,913.00	USD 3,913.00	USD 0.00	USD 0.00	USD 300,000.00	USD 907,826.00
June 2017	USD 215,703.00	USD 9,488.00	USD 0.00	USD 82,370.00	USD 0.00	USD 307,561.00
Total	USD 834,810.00	USD 13,401.00	USD 0.00	USD 82,370.00	USD 307,597.00	USD 1,238,178.00



Let's create one more report for practice. This time we create a report for sales executives who want to see the quota percentages reached by their sales reps. Let's start by creating the report type.

1. Create a custom report type using Forecasting Quotas as the primary object.
2. Fill in the report type label and other fields, and then click **Next**.
3. Click **Click to relate another object**, and then select **Forecasting Items**.
4. Save your changes.

Next we'll create the report.

1. Begin creating a report using the custom report type that you just created based on Forecasting Quotas and Forecasting Items.
2. Filter by Start Date and select a date range.
3. Create a row grouping for Owner: Full Name and a column grouping for Start Date.
4. Add summarizable fields for Quota Amount and Forecast Amount.
5. Click the down arrow next to Columns, and then select **Add Summary Formula Column**.
6. In the Column Name field, enter *% of Quota Attained*.
7. Click **Switch to Full Editor**.
8. Select **Forecast Amount**, and then click **Insert**.

9. Select the division sign.
10. Select **Quota Amount**, and then click **Insert**.
11. Click **Apply**.
12. Save the report. Enter a report name and description, and choose a folder to save the report in.

Summary

You've done a lot! Let's recap what you've accomplished.

- Enabled Collaborative Forecasts.
- Set the Collaborative Forecasts tab visibility.
- Enabled at least one forecast type.
- Defined your default forecasting date range.
- Enabled Collaborative Forecasts users.
- Gained a better understanding of the difference between role hierarchy and forecasts hierarchy and how they interact.
- Learned about assigned managers in the forecasts hierarchy.

You might have also:

- Customized your forecast categories.
- Enabled adjustments.
- Set up your forecast currency.
- Enabled quotas.
- Created forecasting custom report types.

Keep this implementation guide handy in case you want to refine your setup.