




# USING CUSTOMIZABLE FORECASTS

## Setting Your Quota

- Users with the “Edit Personal Quota” permission can set their forecast quota for any quarter, month, or product family and change their quota at any time. Changes you make to your quota are immediately available on your forecast.
- If you do not have the “Edit Personal Quota” permission, your administrator can set your quota. But regardless of your user permissions, administrators can always edit any quota and users can always edit the quotas of users that report directly to them.

 **Tip:** Go to your personal information page in your personal settings. In the Quotas related list, select a forecast period and click **Edit**.

## Viewing Forecasts


Here’s a quick review of forecasting terms.

### Forecast Sharing

- If enabled by your administrator and set up in the forecast hierarchy, you can manually share your forecast with another user.
- Click **Sharing** on the forecast home page to share your own forecast data.

| Term                    | Description  |
|-------------------------|--|
| <b>Direct Report</b>    | A person who reports to you in the role hierarchy.   |
| <b>Subordinate</b>      | All of your direct reports including their direct reports.   |
| <b>Forecast History</b> | An audit trail of your forecast submissions. Use the Forecast History report to get a quick view of this data. |

- Users can view their own forecasts by clicking the Forecasts tab. Initially, your name appears in the title bar and above the Find a Forecast label in the user interface. Users with the appropriate permissions can click the magnifying glass icon and select another user or role to view that person’s forecast.
- When viewing any forecast, you can control the forecast period at the top of the page. Select a **Range Start** and **Range Length** to view forecasts for the selected period. Forecast details for opportunities that closed more than two years before you implemented customizable forecasting or more than 10 years in the future are not available.
- If you have subordinates, forecast information for your direct reports displays below your forecast. The **Choose a view** option allows you to change the way forecast information is displayed for your direct reports. Use this option to group forecast data by subordinate or forecast period.
- When grouping by subordinate, click **View** next to any name to view the forecast of that user.
- When grouping by period, click on a subordinate’s name to view the forecast of that user.
- Click any amount to see opportunities and forecast overrides that make up that amount.

 **Tip:**

- Your forecasts always list the forecasts of your direct reports.
- Click the name of a direct report or click **View** to view his or her forecast.

## Understanding Forecast Categories

Each of your opportunities has a `Stage` picklist value that automatically maps to a `Forecast Category` value. When you change the stage of an opportunity, the forecast category of that opportunity is automatically set. The forecast category determines what column in your forecast will include the opportunity amount and if the amount contributes to your forecast at all.

The following table summarizes the forecast categories.

| Category         | Description  |
|------------------|--|
| <b>Omitted</b>   | The amount does not contribute to your forecast.   |
| <b>Pipeline</b>  | Open opportunities in the beginning stages of the sales process.                               |
| <b>Best Case</b> | Likely to commit. These amounts are also reflected in the "Pipeline" category.                 |
| <b>Commit</b>    | Almost closed. These amounts are also reflected in "Best Case" and "Pipeline" categories.      |
| <b>Closed</b>    | Closed and won deals. These amounts are also reflected in "Commit" and "Best Case" categories. |

For example, if the `Forecast Category` is "Omitted," that opportunity amount will not contribute to your forecast. If the `Forecast Category` is "Commit," that opportunity amount is listed in the **Commit** value of your forecast.






A forecast category might not map to a single opportunity `Stage` picklist value. In some cases, several opportunity stages map to the same forecast category. For example, the "Prospecting," "Qualification," and "Needs Analysis" opportunity stages may map to the "Pipeline" forecast category.

- Consult your administrator about how your opportunity stages map to forecast categories.
- Review the forecast categories in the sidebar before you begin using customizable forecasts.

## Overriding Forecasts

To make your forecast a more realistic representation of your forecasted sales, you may want to override an amount of an opportunity in your forecast. All users can override opportunity forecasts, but only users with the "Override Forecasts" permission can override their own forecasts as well as those of their direct reports on the forecast.


The following table explains the override status icons.

| Icon  | Description   |
|---|---|
|  | Opportunity has been updated since an override.                             |
|  | A subordinate of yours has overridden the forecast.                         |
|  | A person who reports directly to you has overridden the forecast.           |
|  | You have overridden the forecast.   |
|  | The forecast data is not up-to-date. Refresh your browser in a few minutes. |


- **Override Opportunities**

- To override an individual opportunity in a forecast, click **Opportunities** on the lower section on the Forecasts tab to view a list of forecast-related opportunities. Then click **Edit** to modify a specific opportunity. When available, select an “Override” checkbox to make changes to the associated field. If the opportunity has products, check the appropriate **Change Category** box to change the forecast for that product. The opportunity is now marked with the appropriate icon indicating its status.

- **Override Your Forecast**

- To override your entire forecast, click **Forecasts** on the lower section of the Forecasts tab. For each amount you want to override, click the corresponding edit icon (  ). In the pop-up window, select the option you want included in your forecast and click **Save**. The forecast amount is now marked with an icon indicating its status. Similar icons display for users who report to you and indicate if a direct report or subordinate further down the role hierarchy overrode the amount. Click **Forecast Summary** to return to your forecast.

- **Override Forecasts of Direct Reports**

- To override the forecasts of your direct reports click **Forecasts** on the lower section of the Forecasts tab. For each subordinate’s forecast you wish to override, click the corresponding edit icon (  ). Choose one of the override options:

- **John Doe’s forecast override** - Use this option to accept the forecast override that your direct report has made.
- **John Doe’s forecast without overrides** - Use this option to ignore the immediate override but include an override made by someone further down the chain.
- **John Doe’s forecast without any overrides** - Use this option to ignore all forecast-level overrides but include opportunity-level overrides; if you have provided them, your own opportunity forecasts are used in this calculation. Choose this option if you want forecast amounts to be based on opportunity amounts including overrides made at the opportunity level.
- **My override of John Doe’s forecast** - Use this option to enter an amount to replace the current amount in your forecast. Your manager will see this amount in your forecast but your subordinates will not.

## Submitting Forecasts

Your forecast data is always available to users above you in the role hierarchy, including your manager and his or her managers. But submitting your forecast makes a snapshot of your forecast data available in your forecast history and in forecast reports.

To submit a forecast, click **Submit** on the forecast summary page and confirm the submission.

## Manually Sharing Forecasts

Your administrator defines your organization’s forecasting hierarchy, which determines which users can view the forecast data. However, your administrator can manually extend sharing privileges for forecast data, and you may be able to manually extend sharing privileges for your own forecast data as well. Manual forecast sharing can only increase access to forecast data; it cannot restrict access for users who already have access. To manually share a forecast, you must be an administrator or a forecast manager who has been given access to share your forecast data.

- If your organization uses manual forecast sharing, on the Forecast home page, click **Sharing** to view the forecast sharing settings or to share the forecast with other users.
- Manual sharing extends to the opportunity data that makes up the forecast. If a user has permission to override forecast data, then the user also has permission to override the opportunity forecast data.