Team Selling Implementation Guide

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TEAM SELLING AND OPPORTUNITY SPLITS

Accurately capture who works on deals and show how much each person contributes to them, as well as track and report on team members' performance.

Closing deals often requires participation from multiple sales reps. While your sales reps may often be the customer point of contact for the deal, others, like associate sales reps and sales managers, also work on deals. Collectively, these people make up a sales team with each member responsible for a portion of the work required to close the deal.

With multiple people working on the same sales, however, the team risks creating duplicate opportunities for tracking each of their contributions to the deal's progress. Duplicate opportunities can skew reporting and obscure the actual progress on the opportunities. Two features can help your business capture who works on each deal, so that your team can avoid creating duplicate opportunities.

- *Team Selling* lets users create a sales team that includes all the users working on a sale and gives everyone shared access to a single opportunity that has the information they need. The owner of the opportunity determines who gets read or read/write access.

- *Opportunity Splits* lets a team owner divide up the opportunity among the team members, giving responsibility and credit where it's due. The opportunity can be split in terms of revenue, overlay, or a custom split created for your organization.

> 📝 **Note:** You can choose to enable just Team Selling or both features, but you'll have to have Team Selling enabled before you enable Opportunity Splits.

Example of How Team Selling and Opportunity Splits Work Together

Valerie, a sales rep at AW Computing, creates an opportunity to sell 500 laptops to the Acme account. She wants to share this record with other people who will be working on the deal and let everyone track their work in one place.

Opportunity
Acme - 700 Desktops

Customize Page | Edit Layout | Printable View | Help for this Page

Click to add topics

Open Activities [0] | Activity History [0] | Contact Roles [0] | Partners [0] | Competitors [0] | Products [0] | Notes & Attachments [0] | Stage History [3] | Opportunity Team [4] | Opportunity Splits [3]

Opportunity Detail   Edit   Delete   Clone   Sharing

Opportunity Owner	Phil Smith [Change]	Close Date	3/28/2014
Opportunity Name	Acme - 700 Desktops	Stage	Qualification
Account Name	Acme Inc.	Probability (%)	10%
Type	Existing Business	Amount	USD 10,000.00
Primary Campaign Source			
Discount Percentage	10%		
Commission	USD 0.00		
Region/Zone	/		
Discounted Amount	USD 9,000.00		
Annual Contract Value			

Opportunity Team   Add   Add Default Team   Display Access   Opportunity Team Help

Action	Team Member	Member Role
Edit	Phil Smith	Opportunity Owner
Edit | Del	Kathy Cooper	Executive Sponsor
Edit | Del	Kevin Bailey	Pre Sales Engineer

Opportunity Splits   Edit Opportunity Splits   All   Video Tutorial | Opportunity Splits Help

Action	Team Member	Opportunity Split Type	Percent (%)	Amount	Note
	Phil Smith	Revenue	50.00	USD 5,000.00	
Del	Kevin Bailey	Revenue	25.00	USD 2,500.00	
Del	Kathy Cooper	Revenue	25.00	USD 2,500.00	

In the opportunity, she scrolls to Opportunity Team and adds her team members. Valerie chooses each person's role on the team, and indicates whether that person can *read* or *read and edit* the opportunity. She also wants to split the opportunity so that the record shows the percentage of the deal each rep owns. Then, she scrolls to Opportunity Splits and adds a split for each team member with their percentage of the deal. Finally, Valerie wants to see the total revenue amounts from all the split opportunities in her sales pipeline. She goes to the Forecasts tab to view the Revenue Splits forecast (1) and selects Phil Smith's (2) FQ2 Open Pipeline amount (3). She can then see a list of Phil's opportunities for that period, including the Acme - 700 Desktops opportunitiy showing his 50% split (4).

Jump to... | Elliot Smith › Jeff Diamond ›   Forecasts Setup | Video Tutorial | Guided Tour | Help for this Page

Valerie Jones Forecast   Revenue Splits in U.S. Dollar ▾ | Display Options ▾   Refresh

	Closed Only	Commit Forecast	Best Case Forecast	Open Pipeline
Total: **3 Quarters** (Change)	USD 987,849.00	USD 4,141,599.00	USD 8,018,305.00	USD 8,026,435.00
+ FQ1 FY 2015	USD 216,850.00	USD 216,850.00	USD 216,850.00	USD 0.00
− FQ2 FY 2015	USD 757,249.00	USD 2,088,499.00	USD 3,659,305.00	USD 3,683,285.00
Cindy Long	USD 194,500.00	USD 407,500.00	USD 669,500.00	USD 640,000.00
Joe McCrane	USD 135,500.00	USD 330,999.00	USD 698,499.00	USD 715,999.00
Kasey Lee	USD 188,750.00	USD 350,000.00 *	USD 632,000.00	USD 523,250.00
Phil Smith	USD 238,499.00	USD 1,000,000.00 °	USD 1,459,306.00	**USD 1,542,807.00**
Wendy Lee	USD 0.00	USD 0.00	USD 0.00	USD 0.00
My Opportunities	USD 0.00	USD 0.00	USD 200,000.00	USD 261,229.00
+ FQ3 FY 2015	USD 13,750.00	USD 1,836,250.00	USD 4,142,150.00	USD 4,343,150.00

Valerie Jones Team • FQ2 FY 2015 • Open Pipeline • **USD 1,542,807.00**   Hide

Action	Opportunity Name	Account Name	Amount ↓	Split	Forecasted Amount	Close Date	Stage	Probability (%)	Forecast Category
Edit	Acme - 700 Desktops	Acme Inc.	USD 10,000.00	50.00%	USD 5,000.00	5/31/2015	Qualification	10	Pipeline
Edit	Green Dot - 160K	Green Dot	USD 160,000.00	100.00%	USD 160,000.00	6/17/2015	Needs Analysis	35	Best Case
Edit	Associated Supply ...	Associated Supply ...	USD 118,000.00	50.00%	USD 59,000.00	6/15/2015	Negotiation/Review	90	Commit
Edit	Homeland Product...	Homeland Product...	USD 112,000.00	100.00%	USD 112,000.00	5/27/2015	Negotiation/Review	90	Commit
Edit	Vand Enterprises, I...	Vand Enterprises, I...	USD 53,500.00	100.00%	USD 53,500.00	5/27/2015	Closed Won	100	Closed

Preview of Setting Up Team Selling and Opportunity Splits

The following sections take you through the steps of setting up Team Selling and Opportunity Splits so they fit your organization and how you do business. Here's a quick preview of what you'll learn:

- How to enable Team Selling for your organization

- What an opportunity split is and a few specifics to check before you begin

- How to enable Opportunity Splits and split types

- How to enable Collaborative Forecasts for your opportunity splits

SETTING UP TEAMS

A sale is often a team effort, but it can be hard to capture everyone who participated. Team Selling lets you set up teams for sales people as well as set up roles within the team, such as account manager or sales rep.

Enable Team Selling

To make it easy for your sales reps to collaborate on selling opportunities, enable opportunity teams in Salesforce.

1. From Setup, enter `Opportunity Team Settings` in the `Quick Find` box, then select **Opportunity Team Settings**.

2. Define the settings as needed.

3. Save your changes.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable team selling:
- "Customize Application"

Customize Opportunity Team Roles

Every opportunity team member has a role in that opportunity, such as Account Manager or Sales Rep. To track the roles that team members play in your company, customize your opportunity team roles in Salesforce.

⚠ **Warning:**

- Leave the Opportunity Owner unchanged. It's needed for Opportunity Splits.
- Opportunity teams share roles with account teams. If you remove an opportunity team role, that role is no longer listed as an account team role.

1. From Setup, enter `Team Roles` in the `Quick Find` box, then select **Team Roles** under Opportunity Teams.

2. Edit the picklist values for team roles as needed.

3. Save your changes.

4. To update a changed picklist value in all your files, enter `Replace Team Roles` in the `Quick Find` box, then select **Replace Team Role**.

GETTING STARTED WITH OPPORTUNITY SPLITS

Opportunity Splits and split types help your business track the total effort of a sales team and more easily divide commissions based on participation. Before we get those set-up, let's talk more about what Opportunity Splits are and what you should check before you start the enablement process.

Opportunity Splits

Opportunity splitting lets you share revenue from an opportunity with your team members. Team members working on an opportunity can roll their individual sales credits into quota and pipeline reports for the entire team.

▶ Watch a Demo (1:44 minutes)

If your Salesforce admin has enabled Opportunity Splits, and you're the opportunity owner or above the owner in the organization hierarchy, you can add and adjust splits for the opportunity.

- To credit team members who are directly responsible for opportunity revenue, use *revenue* splits, which always total 100% of the opportunity amount.
- To credit supporting team members, use *overlay* splits, which can total any percentage of the opportunity amount, including percentages over 100%.

Your Salesforce org's `Split on Opportunity - Amount` field comes with one revenue split and one overlay split. If custom split types are enabled for your org, your Salesforce admin can create three more split types. Your admin decides which types of splits always total 100%. To have custom split types enabled for your org, ask your admin to contact Salesforce.

Your admin can also create custom fields for opportunity splits, allowing you to better track and store information about splits that you create for team members.

✏️ **Note:** Splits can't be rolled up to sales territories. For information about including splits in your forecasts, see Changing Between Revenue and Quantity Forecasts.

Considerations for Enabling Opportunity Splits

Before you enable Opportunity Splits, consider these key points.

General considerations

- You must enable team selling before you can enable Opportunity Splits.
- Enabling Opportunity Splits changes the opportunity records in your Salesforce org. Here's what happens.
  - A script temporarily disables triggers, workflows, and validation rules for opportunity team records, mass reassignment of opportunity team members, and mass transfer of accounts and opportunities.
  - The opportunity owner is included on each opportunity team. Because the Opportunity Owner role is essential for splits, you can't remove it.

  – If you enable split types that total 100%, new opportunity split records include a default entry for the owner. This owner initially receives 100% of the split amount. (These additional records require more data storage. To see how this extra storage requirement affects your Salesforce org, search for "Monitoring Storage Resources" in the Salesforce Help.)

- You can have up to five split types, including inactive split types. To rename, temporarily deactivate, or permanently delete split types, return to the Opportunity Splits setup page, and then click **Edit Split Types**. Deleting split types deletes splits data. You can't delete the default split types.
- If **Let users add members to opportunity teams while editing splits** isn't selected, users must be added to an opportunity team before they can be added to an opportunity split.

Available time
Enabling Opportunity Splits starts a process that sets up splits on every opportunity in your Salesforce org. Depending on the number of opportunity records, this process can take hours. You can still work with Salesforce while the process is ongoing. Automated email notifications keep you up-to-date on the script's status. Consider running the process overnight.

Inactive currencies
If your Salesforce org has inactive currencies that have been active in the past, you probably have opportunity records that use those currencies. Those records are part of the split enablement process, but the currency's inactive status causes the process to fail. To help prevent a failure, or fix a failure that occurs:

- Make the inactive currency active during the splits enablement. (You can make it inactive again after the process is finished.)
- Delete the opportunities with the inactive currency. This solution works best when your Salesforce org has only a few opportunities with an inactive currency and you don't need them for reporting or historical purposes.

Inactive users
Similar to inactive currencies, if your Salesforce org has inactive users that worked with opportunities, you probably have opportunity records still owned by those users. The split enablement process accesses those records, but the users' inactive status causes the process to fail. To help prevent a failure, or fix a failure that occurs:

- Make the inactive users active during the splits enablement. (You can make them inactive again after the process is finished.)
- Delete all opportunities owned by inactive users. This solution works best when your Salesforce org has only a few opportunities owned by inactive users and you don't need them for reporting or historical purposes.

Mass operations in progress
If you're running a mass operation, such as Mass Transfer or Mass Reassign Team Member, enabling Opportunity Splits at the same time can cause the enablement to fail. Make sure that all mass operations are finished before you start to enable Opportunity Splits.

SET UP OPPORTUNITY SPLITS

Now that Team Selling is up and running and you have a basic understanding of Opportunity Splits, let's get the splits and split types set up. We'll enable the features and then you can create custom split types for your business, if needed, and add lines to the Opportunity Splits page layout to help users do more on the page.

Enable Opportunity Splits

Make it easy for your sales reps to collaborate on opportunities and share opportunity revenue with team members.

1. From Setup, enter `Opportunity Splits` in the `Quick Find` box, then select **Settings**.

2. Click **Set up Opportunity Splits**.

3. To better reflect your business process, do any of the following.

   - Rename or deactivate the default revenue and overlay splits, which are based on the `Opportunity - Amount` field.

   - Click **Add a new split type** to split another currency field and specify whether splits on that field must total 100%.

4. Save your changes.

5. Select the page layouts to display the Opportunity Splits related list.

6. To ensure that users with customized page layouts see the related list, select `Add to users' customized related lists`.

7. Save your changes.

8. Click **Let users add members to opportunity teams while editing splits** to enable quicker changes to those teams.

For information about letting sales reps include splits in forecasts, see Enable Forecast Types for Collaborative Forecasts.

Create Custom Opportunity Split Types

To better reflect your business operations, create custom opportunity split types on opportunity currency fields. Create up to three types to use in addition to revenue and overlay splits. Then, specify whether each type always totals 100%.

> 📝 **Note:** You can split most currency fields created on opportunities, including custom currency fields and roll-up summary fields, but not formula currency fields.

1. Contact Salesforce to have custom split types enabled for your Salesforce org.

   Changes to opportunity split types are completed by a background process. You're notified by email when the process is finished. We recommend not editing splits on opportunities until changes are complete.

2. From Setup, enter `Opportunity Splits` in the `Quick Find` box, select **Settings**, and then click **Edit Split Types**.

3. Click **+ Add a new split type**.

4. Define the settings as needed.

5. Save your changes.

Considerations for Editing Multi-Line Layouts for Opportunity Splits

Before you customize the fields that Salesforce displays when sales reps edit opportunity splits, consider these key points.

- To edit layouts, you need the "Customize Application" permission.
- You can't add rich text fields or multi-select picklists to the multi-line layout for opportunity splits.
- You edit rich text fields and multi-select picklists on the opportunity split detail page.

SET UP COLLABORATIVE FORECASTS FOR OPPORTUNITY SPLITS

Now that you have set up Opportunity Splits, you can start forecasting the revenue from those splits. Let's set up forecasts for the split types you created. The following sections show you how to enable a specific forecast for a specific type of opportunity split. For information about enabling Collaborative Forecasts for the first time, see the Collaborative Forecasts Implementation Guide

Enable Revenue Splits Forecasts for Sales Managers

Help your sales teams track revenue from opportunities with multiple sales reps when you add Revenue Splits Forecasts to your organization.

Note: This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before you enable Revenue Splits Forecasts, make sure you've enabled:

- Collaborative Forecasts
- Team Selling and Opportunity Splits
- The Revenue opportunity split type

With those features enabled, you're ready to enable Overlay Splits Forecasts.

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

2. If your organization:

   - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
   - Already has at least 1 forecast type enabled, click **Add another forecast type**. You can enable up to 4 forecast types.

3. From the Forecast Type menu, choose **Opportunity Revenue Splits**. Revenue is the only forecast measurement available for overlay splits.

4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the overlay forecast. To make it easy for forecast users to see the split amounts on each opportunity, include the Split column.

5. Click **OK** and then **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Performance**, **Unlimited**, **Enterprise**, and **Developer** Editions

USER PERMISSIONS

To view Forecast Setup:
- "View Setup and Configuration"

To edit Forecast Settings:
- "Customize Application"

Enable Overlay Splits Forecasts for Sales Managers

Help your sales teams track revenue from overlay sales roles when you add Overlay Forecasts to your organization.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

Before you enable Overlay Forecasts, make sure you've enabled:

- Collaborative Forecasts
- Team Selling and Opportunity Splits
- The Overlay opportunity split type

With those features enabled, you're ready to enable Overlay Splits Forecasts.

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

2. If your organization:

   - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
   - Already has at least one forecast type enabled, click **Add another forecast type**. You can enable up to four forecast types.

3. From the Forecast Type menu, choose **Opportunity Overlay Splits**. Revenue is the only forecast measurement available for overlay splits.

4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the overlay forecast. Include the Split column to make it easy for forecast users to see the split amounts on each opportunity.

5. Click **OK** and then **Save**.

Enable Custom Field Forecasts for Sales Managers

To enable a custom field forecast, first enable a custom split type for the field, and then add a forecast for it.

📝 **Note:** This information applies to Collaborative Forecasts and not to Customizable Forecasts.

For each custom opportunity field your sales teams want to forecast on, first enable a custom split type—even if the field doesn't include splits. When a sales rep creates an opportunity, the rep automatically receives a 100% split for any 100% validated custom split type you enable. So even if you don't intend to split the custom field, the forecast rollup always includes 100% of the amount in the custom field.

Before you enable custom field forecasts, make sure you've enabled:

- Collaborative Forecasts
- At least one custom opportunity currency field
- Team Selling and Opportunity Splits
- A custom opportunity split type based on the custom field (For details on enabling split types, see Enable Opportunity Splits on page 8.)

With those features enabled, you're ready to enable a custom field forecast.

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

2. If your organization:
   - Doesn't yet have any forecast types enabled, click **Add a Forecast Type**.
   - Already has at least one forecast type enabled, click **Add Another Forecast Type**. Enable up to four forecast types.

3. From the Forecast Type menu, choose the name of the custom opportunity split type you created based on your custom opportunity field. Revenue is the only forecast measurement available for custom field forecasts.

4. Choose the columns you want to display in the related opportunities list on the Forecast tab for the custom field forecast. Include the Split column to make it easy for forecast users to see the split amounts on each opportunity.

5. Click **OK** and then **Save**.