Forecast Hierarchy

If the CEO is at the top of my forecast hierarchy, how do I get forecasts to roll up to that role?

Assign a single forecast manager to each management role in your forecast hierarchy. On the forecast hierarchy page, the names of forecast managers display in blue.

What happens when a management role has no forecast manager?

Forecasts of subordinates will not roll up through that management role. For example, consider the forecast hierarchy below:

In this example, because Director - East is a nonforecasting role, the forecasts of users in the Manager - New York role do not roll up to the VP.

What happens if I have another user besides Colin Jones the Director - West role?

The forecasts of both users in the Director - West role roll up to the VP. However, the forecasts of users in subordinate roles only roll up to Colin Jones, because he is the forecast manager.

Should I explicitly make the only user in a manager role the forecast manager before enabling customizable forecasting?

No. When you enable customizable forecasting, Salesforce automatically assigns a user as the forecast manager if he or she is the only user in that role. After enabling customizable forecasting, select one user as the forecast manager for roles that have multiple users.

If I create a new manager role with just one user after enabling customizable forecasting, do I have to make that user the forecast manager for that role in my forecast hierarchy?

Yes.

If I have two users in a management role, what is the best way to change the forecasting manager for that role?

If Director - West has two users, Colin Jones and Brandon Williams, and the forecast manager is Colin but you want to change it to Brandon, you should assign Brandon as the forecast manager in the Director - West role. This retains the opportunity forecast overrides created by users above the Director - West role. Do not remove the `Allow Forecasting` option from Colin before making

Brandon the forecast manager for that role, or all users above him in the forecast hierarchy will lose their overrides because the forecast manager is not enabled for forecasting.

Can peers such as opportunity team members or users that share read/write permission on opportunities see opportunity forecasts or forecast rollups of peers?

No. Opportunity sharing and opportunity access does not reveal forecast data. Access to forecast data is determined by the roles of forecast-enabled users and their positions in the forecast hierarchy.

Can peers such as opportunity team members or users that share read/write permission on opportunities see forecast information in reports?

No. Although users may see opportunity data based on your sharing settings, users only see their own forecast data in reports.

What does the Assign Manager link on the forecast hierarchy page do?

Allows you to assign a single user as the forecast manager in that role. Forecasts of users below that user in the forecast hierarchy roll up to this forecast manager.

I want to change a subordinate's role to that of his or her manager. What will happen to the opportunity overrides?

Opportunity overrides created by a forecast manager are lost. Opportunity overrides created by the subordinate remain.

Our reps own opportunities that are overridden by managers above them in the forecast hierarchy. What happens if I remove the role of a rep?

All opportunity overrides are deleted.

Permissions

When is the "Allow Forecasting" setting given to all users?

When Salesforce activates customizable forecasting, all users get the "Allow Forecasting" setting.

What does the "Override Forecasts" permission control?

The "Override Forecasts" permission allows users to make forecast overrides. It does not control opportunity forecast overrides.

If users do not have the "Allow Forecasting" setting, do their opportunities show up in a forecast?

No. Users must have the "Allow Forecasting" setting to use customizable forecasts.

Do opportunities owned by inactive users show up in a forecast?

Yes. Deactivated users, although they can no longer log in to the service, continue to own opportunities and appear in forecasts. Their overrides are frozen and rollup amounts will be kept current.

Is it safe to give the "View All Forecasts" permission to all users?

No. Users with the "View All Forecasts" permission can see all forecast data of any user in your organization. We recommend that you do not give this access to all users.

Quotas

What happens to quotas when fiscal year settings are changed?

- You lose all quotas when changing fiscal year settings.
- Salesforce totals the quotas for the three months that make a quarter when changing from monthly to quarterly.
- You lose all product family quotas when changing forecast period.

What happens to quotas when changing forecast type settings from `Use Overall Forecast` to `Use Product Families`?

Your existing quota settings remain your quotas for the "None" product family. The quotas for other product families will be blank.

If I am a manager and do not have the "Edit Personal Quota" permission, can I set quotas for my subordinates?

Yes. Managers can always set quotas for subordinates regardless of their permissions.

Who can set quotas for a user?

- Your system administrator and any user with the "Manage Users" permission and the `Allow Forecasting` setting can set quotas for any user.
- The user can set his or her quota if she or he has the "Edit Personal Quota" permission.
- Any manager above the user in the forecast hierarchy can set his or her quota.

When I enable customizable forecasting, do my old quotas get transferred?

Yes, if you enable customizable forecasting with "Opportunity Close Date" set for `Forecast Date` and "Use Overall Forecast" set for `Forecast Type`.

Opportunities

When does the Opportunity Forecast related list show up?

Users that have the `Allow Forecasting` setting see the Opportunity Forecasts related list on opportunities they own or opportunities their subordinates own. Note that a system administrator must add this related list to the appropriate page layouts first.

What happens to my overrides when I transfer an opportunity to my manager?

Any overrides that your manager made are deleted. The overrides you made remain.

If I am the opportunity owner, what fields can I change when overriding the opportunity?

`Forecast Category` and `Opportunity Close Date`.

Why is the Forecast Category picklist only available on some opportunity edit pages?

It is only available on opportunities you own.

Product Families

My forecast settings are set to use "Product Date" and "Use Product Families" and I've made forecast overrides while selecting "None" for product family. What happens to my overrides if I change my settings to "Use Overall Forecast"?

Forecast overrides made while selecting "None" for product family remain. Overrides made for a specific product family are deleted.

My forecast settings are set to use "Opportunity Close Date" and "Use Overall Forecast" and I've made forecast overrides. What happens to my overrides if I change my settings to "Use Product Family"?

Forecast overrides remain and are classified in the "None" option for product family.

What happens if I remove a product family?

The opportunity products that belong to that product family display when you choose the "None" family.

Setting Up Customizable Forecasts

What happens to my overrides when I enable customizable forecasts?

Your `Forecast Category` overrides on opportunities are retained.

Can I still create forecasts by clicking New Forecast after I've enabled customizable forecasting?

No. The **New Forecasts** link does not exist after you enable customizable forecasting.

If I enable customizable forecasting, can I disable it and use the original Forecasts tab?

No.

Overrides

I am a manager with direct reports and no others below them. Why don't I have all the options available to me in the forecast override popup?

Options in this popup are only available when they apply. For example, the second option, your direct reports forecast without overrides but including overrides of his or her subordinates, does not apply since your direct reports are at the bottom of the forecast hierarchy.

What happens to my opportunity amount overrides if I change my settings from "Opportunity Close Date" to "Schedule Date"?

Opportunity amount overrides are deleted.

What happens to opportunity overrides if I change the opportunity `Stage` mappings to a different forecast category?

The opportunity category override remains the same.

Reports

What shows up in reports if I have not viewed my forecasts for a period or set a quota for a period?

Reports will contain no data.

Multiple Currencies

What currency is used in the forecast summary view?

It is the currency in your quota. If no quota is set, it uses the user's personal currency.

What happens if I view my forecast but then change my currency?

The currency of the viewed forecast stays the same. Forecasts always display in the currency of the quota.

If my currency conversion rate changes, will forecasts automatically recalculate?

Yes. Forecast data is recalculated using the new conversion rate. However, submitted forecast data is not recalculated since it is a snapshot of the calculations at the time of submission.

Territories

How do my forecasts change if my organization uses territory management?

If territory management is enabled for your organization, the role hierarchy no longer has any impact on forecasts. With territory management, forecasts are based on opportunities in the territory hierarchy. For more information, see "What is Territory Management?" in the Salesforce online help.