Collaborative Forecasts Implementation Guide

Version 1, Spring '18

'18

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COLLABORATIVE FORECASTS IMPLEMENTATION GUIDE

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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 to use 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. This implementation guide was revised for Summer '17.

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 revenue 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. 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, or product families. You can use up to four types of forecasts, depending on your needs.

If You're Migrating from Customizable Forecasting to Collaborative Forecasts

- To enable Collaborative Forecasts, Customizable Forecasting must be disabled. Contact Salesforce for assistance with disabling Customizable Forecasting.
- When you turn off Customizable Forecasting, the Quotas related list no longer appears on User records. The Edit Personal Quota permission (API name: `PermissionsEditOwnQuota`) also no longer appears in the Profile object.
- If you have the original Territory Management feature enabled, disable Customizable Forecasting and original Territory Management before migrating to Collaborative Forecasts. To disable these features, contact Salesforce. You can enable and use Enterprise Territory Management and Collaborative Forecasts at the same time, but the two features aren't integrated to work together.
- When you migrate, the forecast history, overrides, reports, and sharing data from Customizable Forecasting are purged.
- Consider exporting forecasting report data so that you have a backup.
- Monthly forecasts is the default Collaborative Forecasts period. You can change your settings to quarterly. If you use custom fiscal years, your fiscal period is the default. You can also choose your custom quarters.
- The forecast hierarchy is retained. However, to reduce the risk of data loss, consider migrating to Collaborative Forecasts immediately after disabling Customizable Forecasts. After migrating, don't enable Forecasts users again. Validate all hierarchies for accuracy.
- Before migrating, make sure to review What's the difference between Collaborative Forecasts and Customizable Forecasting? to determine whether you can benefit from the latest improvements offered in Collaborative Forecasts.

Before You Begin

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

- Users
- Roles
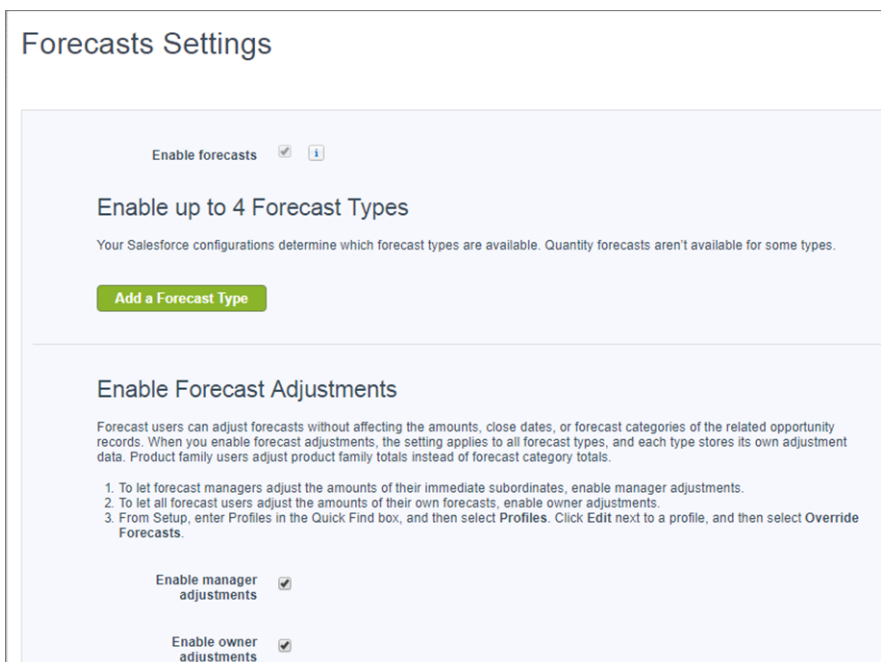- Accounts
- Opportunities
- Profiles

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 to use 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 **Edit** next to your app.
   - If you're using Salesforce Classic, click **+** and then **Customize My Tabs**.

   Move Forecasts from Available Tabs to Selected Tabs, and then save your changes.

2. From Setup, enter `Profiles` in the Quick Find box, and then select **Profiles**.

3. Select the profile that needs access to forecasts.

4. Click **Object Settings** and then **Forecasts**.

5. Click **Edit**.

6. 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	What the Rollup Is Based On
Opportunities - Revenue	The opportunity `Amount` field.
Opportunities - Quantity	The opportunity `Quantity` field.
Product Families - Revenue	The opportunity `Amount` field. Forecast amounts are separated by product family. To use a Product Family forecast, use Opportunity Products and Product Families.
Product Families - Quantity	The opportunity `Quantity` field. Forecast amounts are separated by product family. To use a Product Family forecast, use Opportunity Products and Product Families.
Opportunity Splits - Revenue	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	The opportunity `Amount` field and each overlay sales team member's split percentage. For Overlay Splits - Revenue forecasts, the split percentages don't need to total 100%. To use overlay splits forecasts, enable Opportunity Teams, Opportunity Splits, and the Overlay split type.
Custom Opportunity Currency Field - Revenue	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	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 the `Amount` field of opportunities, use an opportunity revenue forecast.
- To forecast on the `Quantity` field of opportunities, use an opportunity quantity forecast.

Product Families

If your company groups its products and services into families and needs 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.
- 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.

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 and you selected product family forecasts, choose product families to forecast on.
7. 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. 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 `Amount` or `Quantity` to the pane.
8. Click **OK**, and then save your changes.
9. 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
	Commit	Commit
	Closed	Closed
Cumulative	Open Pipeline	• Pipeline • Best Case • Commit
	Best Case Forecast	• Best Case • Commit • Closed
	Commit Forecast	• 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 need to 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	• $50 • $50	• $50 • $50 • $50	• $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
	$50	$150	$300	$450
Opportunities	Closed	Commit	Best Case	Pipeline
	$50	• $50 • $50	• $50 • $50 • $50	• $50 • $50 • $50 • $50

📝 **Note:** You can't use Forecast Historical Trending with Cumulative Forecast Rollups.

To choose Cumulative Forecast Rollups:

1. From Setup, enter `Forecasts Settings` in the `Quick Find` box, 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 12 months or eight 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.

⚠ **Warning:** If you migrated from Customizable Forecasting to Collaborative Forecasts, don't enable users again. Your forecasts hierarchy is also retained, but we recommend that you validate all hierarchies to ensure that they're accurate.

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.

When you enable users for Collaborative Forecasts, they're added to your forecasts hierarchy. To learn how to enable users on the Forecasts Hierarchy page, go to Tutorial #2, Step 2.

📝 **Note:** Users need the View Roles and Role Hierarchy permission to access the forecasts page 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 it 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 Collaborative 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 forecasts hierarchy is generated based on your role hierarchy and specifies which users are forecast managers. 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 forecasts hierarchy within their respective roles. If you haven't enabled forecasting for users, you can add them to the hierarchy now.

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 **Add** and **Remove** to move users between the Available Users list and the Enabled Users list. 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, his name appears in Enabled Users.

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

5. Save your changes.

Although the Sales Manager role might report 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 forecasts hierarchy. You must enable a user in the 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.

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:

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.

Whomever you designated as the forecast manager can now view and adjust the forecasts of people who report to the manager in the forecasts hierarchy. The manager can also jump to another user's forecasts by entering the user's name. 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 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 forecasts hierarchy.

If Anne adds opportunities in her portal, Gordon sees those opportunities in his forecast. Because Gordon is Anne's forecast manager, 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 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**.

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 need 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 the info bubble ⓘ (in Salesforce Classic only) listing the categories that it includes now shows your new name.
7. To change the name back to Commit, go back 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**.

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 need 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, Noah Larkin's original commit forecast of $0 was adjusted by his manager to $100,000, which is reflected in the manager's totals for the month and the three-month period.

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 their subordinates' forecast amounts, under Enable Forecast Adjustments, select **Enable manager adjustments**.

   - To let forecast managers and sales reps adjust their own forecast amounts, 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 **Edit**.

7. Select **Override Forecasts**, and then save your changes.

Step 3: Set Up Your Collaborative Forecasts Currency

If you don't use multiple currencies, jump ahead to .

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 quotas, certain forecasting versions, and reports. Must be one of your active currencies. If you use Collaborative Forecasts, your quota amounts appear in your display 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. 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.

To upload quotas for your users, use the Data Loader or the APIs. Both methods require API access to be enabled.

Step 4.5 (Optional): Upload Quota Data

Data Loader provides a simple point-and-click method for adding, inspecting, and editing data in Salesforce. APIs provide more flexibility but require you to write code. To use either method, make sure that API access is enabled. See Data Loader for details.

Add Quotas with Data Loader

Before you upload quotas, consider the version of Data Loader that you're using. For Data Loader v.30 and later, specify the forecast type of each quota that you plan to upload.

1. Query the User object for your users' IDs.

   Use Data Loader to retrieve your users' IDs.

   a. From Setup, enter *Data Loader* in the `Quick Find` box, then select **Data Loader**.

   b. Download and install Data Loader.

   c. Launch Data Loader.

   d. Click **Export**.

   e. Enter your user name and password, and then click **Log in**.

   f. Click **Next**.

   g. Select the User object from the list.

   h. Choose a file name and destination for the exported data.

   i. Click **Next**.

   j. Select the **Id** and **Name** fields.

   k. Click **Finish** and then **Yes**.

   l. Click **View Extraction**.

   m. Click **Open in external program**.

   n. Save the file in the .csv format. Add user names and IDs to your quotas spreadsheet before uploading it.

2. If you're using Data Loader v.30 or later, query the ForecastingType object to get the IDs of your forecast types. If you're not using Data Loader v.30 or later, skip to step 3.

   a. Launch Data Loader.

   b. Click **Export**.

   c. Enter your user name and password, and then click **Log in**.

   d. Click **Next**.

   e. Click **Show all Salesforce objects**.

   f. Select the Forecasting Type object from the list.

   g. Choose a file name and destination for the exported data.

   h. Click **Next**.

   i. Select the **Id** and **DeveloperName** fields.

   j. Click **Finish** and then **Yes**.

   k. Click **View Extraction**.

   l. Click **Open in external program**.

   m. Save the file in the .csv format.

   n. Note the `DeveloperName` and `Id` values for each active forecast type. Not all companies use all forecast types that appear in the results. Review this list if you're not sure which forecast type a specific `DeveloperName` refers to.

   - `OpportunityRevenue` : Opportunities - Revenue
   - `OpportunityQuantity` : Opportunities - Quantity

- • `OpportunitySplitRevenue` : Opportunity Revenue Splits - Revenue
- • `OpportunityOverlayRevenue` : Opportunity Overlay Splits - Revenue
- • `OpportunityLineItemRevenue` : Product Families - Revenue
- • `OpportunityLineItemQuantity` : Product Families - Quantity
- • 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.

 o. Add columns for `DeveloperName` and `Id` to your quota spreadsheet, and then add the name and ID of the forecast type of your quotas to each row. The name is not necessary for uploading quotas, but it helps to know which forecast type you're working with in each row.

3. Prepare your quota spreadsheet for upload.

- • If you're using Data Loader v.30 or later, create a .csv file with columns for User Name, User ID, Forecast Type Name, Forecast Type ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [*yyyy-mm-dd* or *yyyy-mm-ddThh:mm:ss.sssZ*; for example, 2012–03–01T08:00:00.00Z].
- • If you're using Data Loader v.29 or earlier, create a .csv file with columns for User Name, User ID, Quota Amount, Quota Quantity, Currency Code, and forecast period Start Date [*yyyy-mm-dd* or *yyyy-mm-ddThh:mm:ss.sssZ*; for example, 2012–03–01T08:00:00.00Z]. If you use revenue *and* quantity forecasts, specify the quotas for them on separate rows of your .csv file.

You don't need the User Name or Forecast Type Name columns, but including them makes it easy to understand the contents of your .csv file.

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–04–01
Kevin Bailey	00599000000Hofh	OpportunityRevenue	0DbD00000001eQBKAY	250000		USD	2012–05–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–04–01
Kevin Bailey	00599000000Hofh	OpportunityQuantity	0DbD00000001eQAKAY		500		2012–05–01

If your forecast data source is product families, include a Product Family column.

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Product Family	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Hardware	250000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Software	150000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemRevenue	0DbD00000001eQ9KAI	Services	50000		USD	2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD00000001eQ8KAI	Hardware		500		2012–03–01

User Name	User ID	Forecast Type Name (for Data Loader v.30 or later)	Forecast Type ID (for Data Loader v.30 or later)	Product Family	Quota Amount	Quota Quantity	Currency Code	Start Date
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD0000001eQ8KAI	Software		300		2012–03–01
Kevin Bailey	00599000000Hofh	OpportunityLineItemQuantity	0DbD0000001eQ8KAI	Services		100		2012–03–01

4. Use Data Loader to upload your quota information to Salesforce.

   a. Launch Data Loader.

   b. Click **Insert**.

   c. Log in with your user name and password.

   d. Click **Next**.

   e. Click **Show All Salesforce Objects**.

   f. Select the Forecasting Quota object from the list.

   g. Click **Browse**, and then choose the .csv file to upload.

   h. Click **Next**.

   i. Click **OK** in the Data Selection dialog box.

   j. Click **Create or Edit a Map**.

   k. Map columns to fields in the ForecastingQuota object as shown in this table.

Column Headers in CSV File	ForecastingQuota Fields
User ID	QuotaOwnerID
Quota Amount	QuotaAmount
Quota Quantity	QuotaQuantity
Currency Code	CurrencyIsoCode
Start Date	StartDate
Product Family (needed only when the forecast data source is Product Families)	ProductFamily
Forecast Type ID (needed only for Data Loader v.30 or later)	ForecastingTypeID

   l. Click **OK**.

   m. Click **Next**.

   n. Click **Browse**, and then choose the directory where you want to save the log file containing messages about the success or failure of the upload.

   o. Click **Finish**.

   p. Click **Yes** to proceed with the upload.

   q. Click **OK**.

As a best practice, load quota data in the quota owner's personal currency. You can still upload quota data using the API even if `Show Quotas` is disabled. If your Data Loader time zone setting is ahead of quota owners' time zones, the month can be off by one. To avoid this problem, use a date greater than or equal to the third day of each month when inserting quotas.

Uploading Quotas with the API

When uploading quota information with the API, be sure to use the correct API version, depending on the type of quota data that you're working with. If multiple types of forecasts are enabled, each forecast type maintains separate quota information.

When importing...	Use API version...
Revenue quotas for opportunity-based forecasts	25.0 or later
Quantity quotas for opportunity-based forecasts	28.0 or later
Revenue quotas for opportunity splits-based forecasts	29.0 or later
Revenue or quantity quotas for product family-based forecasts	29.0 or later
Quotas in orgs with multiple forecast types enabled	30.0 or later

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	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.
	• 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 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 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.

Primary Object	Use to create a report for...
	• 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 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 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	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. 📝 Note: This report type shows forecasting items only for the Product Family-Revenue and Product Family-Quantity forecast types. It includes opportunities with and without opportunity products specified.
`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

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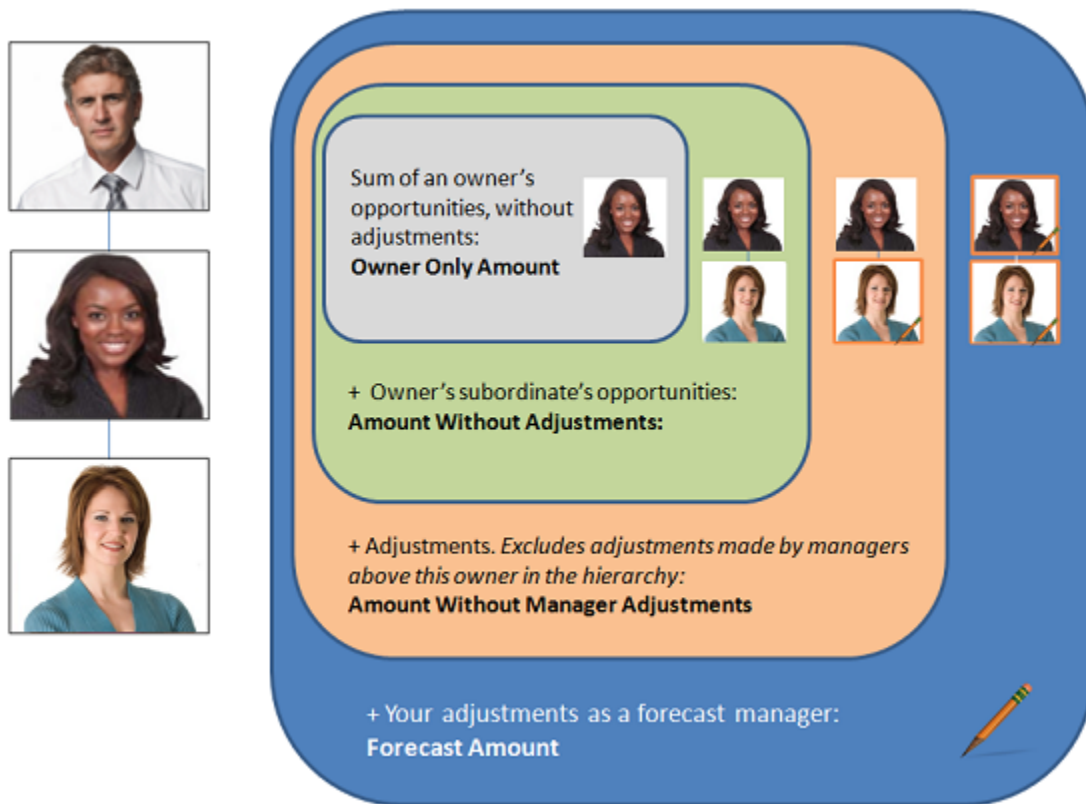
Creating a forecasting custom report type takes only a few minutes. Let's create a Forecasting Items custom report type and a report, and then publish the report for your users. This report shows the total forecast amounts for all forecast manager's subordinates, grouped by month and forecast rollup.

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**.

To create a report based on the Forecasting Items custom report type:

1. On the Reports tab, click **New Report**.

2. Expand Forecasts, and select **Forecasting Items**—the report type that you just created.

3. Click **Create**.

4. In the preview panel, change the format from Tabular to **Matrix**.

5. Create a row grouping.

    a. In the fields pane, drag **Start Date** to the preview panel.

    b. From the field's dropdown list, select **Group Dates By** > **Calendar Month**.
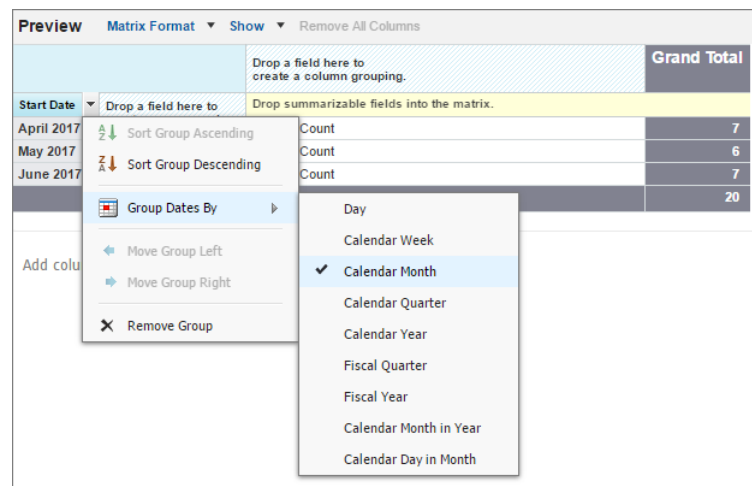
6. Create a column grouping by dragging **Forecast Category** from the fields panel to the preview panel.

7. Add summarizable fields.

    a. In the fields panel, drag **Forecast Amount** to the preview panel.

    b. Select **Sum**.

    c. Click **Apply**.

8. Click **Show**, and then deselect **Record Count**.

9. Create a report filter by updating **Date Field** and selecting **Start Date**.

10. Make a range selection. Because you don't have much data, you can select **All Time**.

11. Add a new filter by clicking **Add**.

12. Select **Owner: Full Name** > **Contains**, enter the users to include in your report, and then click **OK**. Alternatively, you can select **All forecasting items** in the Show dropdown list to see all items for the time period that you specified, including your direct reports. Or you can select **My direct reports' forecasting items** to see all items for the specified period for only your direct reports.

13. Add another filter by clicking **Add**.

14. Select **Forecasting Type: API Name** > **Equals**, and then 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:

- `OpportunityRevenue` : Opportunities - Revenue
- `OpportunityQuantity` : Opportunities - Quantity
- `OpportunitySplitRevenue` : Opportunity Revenue Splits - Revenue
- `OpportunityOverlayRevenue` : Opportunity Overlay Splits - Revenue
- `OpportunityLineItemRevenue` : Product Families - Revenue
- `OpportunityLineItemQuantity` : Product Families - Quantity
- 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.

15. Click **Save**, and then enter a report name and description. Save the report in Unfiled Public Reports.

Optionally, add a chart.

1. If you're still on the report page, click **Close**.

2. On the Dashboards tab, click **Go to Dashboard List**, and then click **New Dashboard**.

3. Click **Data Sources**, select the report that you just created, and drag it to the dashboard.

4. Click **Components**, select the type that you want to use, and drag it to your source report in the dashboard.

5. Edit the title, header, and footer of the chart so that it reflects the details that you need.

Your report and chart now look something like this example.

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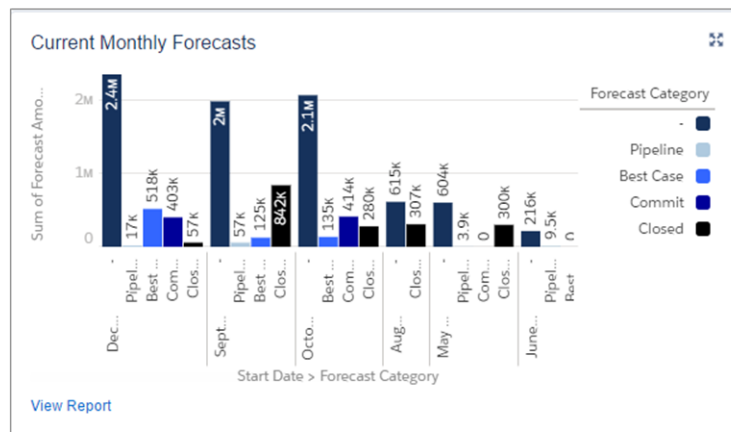
Let's create one more report for practice. This time we create a matrix report for sales executives who want to see the quota percentages reached by their sales reps. Let's start by creating the report type.

1. Create a custom report type using Forecasting Quotas as the primary object.

2. Select **Forecasting Items** as the related object.

3. Fill in the report type label and other fields, and then click **Next**.

4. Click **Click to relate another object**, and then select **Forecasting Items**.

5. Save your changes.

Now we create the matrix report.

1. Create a report using the custom report type that you just created based on Forecasting Quotas and Forecasting Items.

2. In the preview panel, change the format from Tabular to Matrix.

3. Filter by Start Date, and then select your date range.

4. From the Forecasting Items fields, drag **Owner: Full Name** to create a row grouping, and then drag **Start Date** to create a column grouping.

5. From the Forecasting Quotas fields, drag **Quota Amount** to the summarizable fields section. Select **Sum**, and then click **Apply**.

6. From the Forecasting Items fields, drag **Forecast Amount** to the summarizable fields section. Select **Sum**, and then click **Apply**.

7. In Fields, double-click **Add Formula**. In Column Name, enter `% of Quota Attained`. For Format, select **Percent**, and for Decimal Places, select **0**.

8. In the Formula box, click **Summary Fields**, and then select **Forecast Amount** > **Sum**. From Operators, select **/ Divide**. From Summary Fields, select **Quota Amount** > **Sum**.

9. Click **OK**.

10. Click **Save**, and then enter a report name and description. Save the report in Unfiled Public Reports.

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.