

# Set Up and Maintain Manufacturing

Salesforce, Winter '20





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# MANAGE MANUFACTURING ACTIVITIES

Manufacturing Cloud gives you visibility into your business transactions and helps you plan for your sales and operations better. Make your business transactions, profits, and revenue margins more predictable with sales agreements. Keep track of your customers' compliance based on planned and actual revenue and quantity metrics. With account-based forecasting capabilities, you can use your own formulas to calculate forecasts based on orders, opportunities, and sales agreements. You can use forecasts to focus on high-performing products and your account managers know which accounts to target to drive business.

## [Assign Permission Sets to Users](#)

Assign the Manufacturing Cloud Sales Agreements permission set to your users to provide access to sales agreements that integrate with orders, contracts, and more. Assign the Manufacturing Cloud Account Forecasting permission set to your users to provide access to account forecast records so that they can collaborate and track forecast quantities and revenues.

## [Create a Key Account Manager User Profile and Provide Access to Objects](#)

Provide your key account managers access to the required objects by assigning a user profile to them. Depending on how restrictive you want to define the access, you can change the standard object permissions.

## [Set Up Objects for Manufacturing](#)

Set up accounts, contacts, products, and price books before your key account managers can create sales agreements. All sales agreements must be associated to these objects. For account forecasting set up opportunities, and orders also. Forecast is generated for each account based on its associated orders, sales agreements, and opportunities for new and existing products.

## [Considerations for Working with Manufacturing](#)

Review these considerations before you start working with Manufacturing.

## Assign Permission Sets to Users

Assign the Manufacturing Cloud Sales Agreements permission set to your users to provide access to sales agreements that integrate with orders, contracts, and more. Assign the Manufacturing Cloud Account Forecasting permission set to your users to provide access to account forecast records so that they can collaborate and track forecast quantities and revenues.

Before assigning the permission set to your users, make sure Sales Agreements and Account Forecasting are enabled for your org.

1. In Setup, search for *Permission Sets* in the Quick Find box.
2. On the Permission Sets page, click the link **Manufacturing Cloud Sales Agreements**. You can clone the permission set if required.
3. Select **Manage Assignments**.  
You can see the list of all users having the permission set. To add a user, click **Add Assignments**.
4. Repeat the same steps for the permission set Manufacturing Cloud Account Forecasting.

### EDITIONS

Available in: **Enterprise**, **Unlimited**, and **Developer** editions

### USER PERMISSIONS

To assign permission sets

- Customize Application

# Create a Key Account Manager User Profile and Provide Access to Objects

Provide your key account managers access to the required objects by assigning a user profile to them. Depending on how restrictive you want to define the access, you can change the standard object permissions.

If you provide object permissions using a permission set, assign the following permission sets for sales agreements and account forecasting.

- Manufacturing Cloud Sales Agreements
- Manufacturing Cloud Account Forecasting

You can also add permissions with User Profiles.

1. In Setup, enter *Profiles* in the Quick Find box. Under Users, select Profiles.
2. Clone the Standard User profile, and assign it a name.

You can now assign the objects, page layouts, and permissions to the profile.

3. At the page header level, click **Edit** and navigate to the standard object permissions section.
4. Assign create, read, update, delete, and view all permissions to the Sales Agreement and Account Forecast objects.

The Sales Agreement Product and Sales Agreement Product Schedule objects are child objects of the Sales Agreement object. They inherit the same access levels as the parent object.

5. For each object, choose which permissions to assign. You can provide at least read access for all these objects.
  - Accounts
  - Contacts
  - Orders
  - Opportunities
  - Contracts
  - Products
  - Price Books
6. In the General User Permissions section, select **Activate Orders** and **Activate Contracts** if actual quantities for sales agreements are derived automatically from orders and contracts.

Provide create, read, update, delete, and view all permissions in the required combinations for all other objects as required. The permissions control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators.

SEE ALSO:

[User Management](#)

[Permission Set Licenses](#)

## EDITIONS

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

## USER PERMISSIONS

To create users

- Customize Application

## Set Up Objects for Manufacturing

Set up accounts, contacts, products, and price books before your key account managers can create sales agreements. All sales agreements must be associated to these objects. For account forecasting set up opportunities, and orders also. Forecast is generated for each account based on its associated orders, sales agreements, and opportunities for new and existing products.

You can set up the objects in any order. Use the Data Loader to import information in bulk into the application.

For account forecasts, make sure you provide both read and edit permissions to users if you want them to collaborate on forecast adjustments and change growth metrics.

1. In the App Launcher, select **Accounts** from All Items.
2. Click **New** from the Accounts list view.
3. Fill in all the information related to your customer's business account or for a person account if it's enabled for your org. Click **Save**.
4. On the newly created Account's record page, navigate to the Related tab. Click **New** on the Contacts related list. For each account you create, you must create at least one primary contact.
5. In the App Launcher, select Products from All Items.
6. Click **New** from the Products list view.
7. Provide a name and product code.
  - Make sure to mark your products Active if you plan to use them in your sales agreements
  - You must add your products to the standard price book to make it usable for sales agreements. In the Related tab of a product, from the price book list, click **Add Standard Price**. You can also specify a list price for the product.
8. In the App Launcher, select Price Books from All Items.
9. Click **New** from the Price Books list view.
10. Provide a name for your price book.

In the Related tab of the price book record, click **Add** in the Products related list and add the products you've created. Creating multiple price books allow you to have varied standard prices for the same products. Click **Save**.
11. In the App Launcher, select Opportunities from All Items.
12. Click **New** from the Opportunities list view.
13. Associate it to an account and provide a Close Date.
14. In the App Launcher, select Orders from All Items.
15. Click **New** from the Orders list view.
16. Associate it to an account and a contract, if required.

SEE ALSO:

[Object Permissions](#)

### EDITIONS

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

### USER PERMISSIONS

To modify products

- Create, Edit permission on Products and Price Books

# Considerations for Working with Manufacturing

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Review these considerations before you start working with Manufacturing.

## Overall Considerations

- Account forecasts are only supported for standard fiscal year, and not for custom fiscal year.
- Multi-currency is not supported for sales agreements and account forecasts.

## Considerations for Account Forecasting

- After you generate forecast for an account, we recommend you do not move past orders, opportunities, and sales agreements to future periods. On recalculation or roll over of the forecast, the product quantity is reflected twice in the past as well as the future period. For example, you have an opportunity in July with a product quantity of 10, and you change the date to September. On recalculation, the quantity is reflected in both the past and future periods.
- You may experience a delay in generation and display of forecast if the number of display periods is more than 8. After multiple manual adjustments are made on a single page of account forecast, the saving of values and recalculation may take some time.
- Don't change forecast generation and display settings while account regeneration is in progress. Forecasts are regenerated when you change the generation and display settings. The regeneration process can be time-consuming if your org has a large number of accounts. Before you make any changes, be sure to check your in-app notifications for any in-progress forecast regenerations.

## Considerations for Sales Agreements

- A sales agreement can have a maximum of 200 products and 18 schedules.
- You may experience a delay in display of agreement terms if the number of products is more than 150, and the number of schedules is more than 12.

### EDITIONS

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



# TRACK SALES COMPLIANCE WITH SALES AGREEMENTS

Bring predictability to your business transactions, profitability, and revenue margins with sales agreements. Use sales agreements to negotiate purchase and sale of products over a continued period of time.

A sales agreement provides you insight into products, prices, discounts, and quantities. With an integrated sales experience, you can also track your planned and actual quantities and revenues with real time updates from orders and contracts.

## EDITIONS

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

### [Enable Sales Agreements](#)

Improve sales experience for your key account managers. Enable sales agreements for your company so that key account managers can use them to negotiate business transactions.

### [Configure Your Sales Agreements](#)

There are certain choices you must make to define how sales agreements are configured for your org. You can make your selections on the Sales Agreements page in Setup.

### [Improve Partner Collaboration with Communities](#)

Create a responsive portal where your partners can access knowledge articles, collaborate on sales agreements, and manage leads to improve sales.

## Enable Sales Agreements

Improve sales experience for your key account managers. Enable sales agreements for your company so that key account managers can use them to negotiate business transactions.

1. From Setup, enter *Sales Agreements* in the Quick Find box.
2. In Feature Settings, under Manufacturing, select **Sales Agreements**.
3. Enable **Sales Agreements**.

## EDITIONS

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

## USER PERMISSIONS

To enable sales agreements

- Customize Application

## Configure Your Sales Agreements

There are certain choices you must make to define how sales agreements are configured for your org. You can make your selections on the Sales Agreements page in Setup.

### [Configure the Actuals Calculation Mode for Sales Agreements](#)

Configure how actual quantities of products are calculated and derived for your sales agreements. You can choose to automate the process by deriving values from orders and contracts, or you can choose to manually update the values.

### Configure Sales Agreement Approvals

Enable the Approval Process toggle on the Sales Agreement page in Setup to restrict the approval of sales agreements to predefined processes. A key account manager can't self-approve a sales agreement in this case.

### Create Custom Metrics for Sales Agreement Products and Schedules

Track performance indicators better with custom metrics. Create custom fields for the Sales Agreement Product and Sales Agreement Product Schedule objects, and define a unique mapping. The Sales Agreement Product Schedule metric can be added to Agreement Terms. You can create custom fields for the Sales Agreement Product and Sales Agreement Product Schedule objects and define a unique mapping. This mapping creates a custom metric that you can add to the Agreement Terms. Use this metric to track performance indicators such as territory-based revenue, inventory level, and average price.

### Map Custom Metrics for Sales Agreement Products and Schedules

Associate custom fields for Sales Agreement Products and Schedules in settings. Make each mapping unique.

### Select Metrics to Display in Agreement Terms

Select the metrics you want your key account managers to view on the Agreement Terms tab of a sales agreement for each product.

### Configure Email Addresses for Notifications

There are some automated processes that run daily at 1:00 AM of your timezone. In case these automated processes fail, a notification is sent to users. You can select whom to notify in such scenarios.

## Configure the Actuals Calculation Mode for Sales Agreements

Configure how actual quantities of products are calculated and derived for your sales agreements. You can choose to automate the process by deriving values from orders and contracts, or you can choose to manually update the values.

When a sales agreement is active, product quantities must be updated for every schedule. Updates can happen automatically if orders are associated with the sales agreement. The quantities are updated in the sales agreement as, and when, effective orders are fulfilled. You can view them in the Agreement Terms tab. Actual quantities can also be updated in bulk by importing manually through an API call. This configuration helps you define how actuals are calculated for sales agreements in your Salesforce org.

1. In Setup, search for *Sales Agreement* in the Quick Find box.
2. Select one of the options in the Actuals Calculation Mode section on the Sales Agreement settings page.
  - Manually using API upload: If you use an external system to manage your orders and contracts, you can choose this option. Upload your updated quantities in bulk using an API at regular intervals. The application picks up the changes when the daily scheduled job runs at 1:00 PM in the timezone of your org and refreshes the information in sales agreements.
  - Automatically from direct orders: If active orders are associated with sales agreements, the actual quantities in the agreement terms are automatically derived and regularly updated based on which orders apply to a specific schedule. Choose this option if orders aren't associated to contracts.
  - Automatically from orders through contracts: If active orders are associated with sales agreements, the quantities in the agreement terms are automatically derived and regularly updated based on which orders apply to a specific schedule. Choose this option if the orders are associated with contracts.

### EDITIONS

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

### USER PERMISSIONS

To modify actuals calculation mode

- Customize Application

All sales agreements inherit the org-wide option you choose during their creation. At any point, if you change the actuals calculation mode, it applies only to the sales agreements created from that point forward. For existing sales agreements that are active, you can manually change the actuals calculation mode for each sales agreement record, as required.

#### SEE ALSO:

[Create Direct Orders for Actuals Calculation](#)

[Create Orders Through Contracts for Actuals Calculation](#)

## Configure Sales Agreement Approvals

Enable the Approval Process toggle on the Sales Agreement page in Setup to restrict the approval of sales agreements to predefined processes. A key account manager can't self-approve a sales agreement in this case.

A sales agreement can be approved in two ways. Either a key account manager can change the status of a sales agreement from a draft state to an approved state, or they can submit the agreement for approval. If your org has predefined approval processes set up, based on the criteria defined, the sales agreement is sent through a chain of approval and if it is accepted, the status automatically changes to an approved state.

1. In Setup, search for *Sales Agreement* in the Quick Find box.
2. On the Sales Agreement page, navigate to the Approval Process section.
3. Turn on the toggle if you don't want to allow self-approval of sales agreements through manual change of statuses. If the toggle is disabled, both self-approval and approval through predefined processes are allowed.

If the toggle is disabled, make sure you also add the Submit for Approval quick action to the page layout of a sales agreement. See this [topic](#) on page 22 for details.

A sales agreement can be approved only if it has at least one product added to it.

#### SEE ALSO:

[Set Up an Approval Process](#)

#### EDITIONS

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

#### USER PERMISSIONS

To configure approvals

- Customize Application

## Create Custom Metrics for Sales Agreement Products and Schedules

Track performance indicators better with custom metrics. Create custom fields for the Sales Agreement Product and Sales Agreement Product Schedule objects, and define a unique mapping. The Sales Agreement Product Schedule metric can be added to Agreement Terms. You can create custom fields for the Sales Agreement Product and Sales Agreement Product Schedule objects and define a unique mapping. This mapping creates a custom metric that you can add to the Agreement Terms. Use this metric to track performance indicators such as territory-based revenue, inventory level, and average price.

. You can create custom metrics for number, currency, and formula field types.

Create fields for Total Inventory for Sales Agreement Product Schedule, and Inventory Level for Sales Agreement Product. The schedule field displays the summary value of the initial inventory count of a product across schedules. The product field displays the inventory count in each schedule.

For custom metrics, you can edit values for individual schedules any time during a sales agreement's life cycle. You can edit values or import changes in bulk for custom metrics.

#### EDITIONS

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

#### USER PERMISSIONS

To create custom metrics

- Customize Application

1. Add a custom field for Sales Agreement Product Schedule.
  - a. In Object Manager, select Sales Agreement Product Schedule.
  - b. In Fields & Relationships, select **New**.
  - c. Select Data Type as **Number** and click Next.
  - d. Provide Field Label as Inventory Level.
  - e. Provide the required field-level access to the user profile for your key account managers.
  - f. Add the field to the page layout and click **Save**.
2. Add a custom field for Sales Agreement Product.
  - a. In Object Manager, select Sales Agreement Product.
  - b. In Fields & Relationships, select **New**.
  - c. Select Number as **Data Type** and click Next.
  - d. Provide **Field Label** as Total Inventory.
  - e. Provide the required field-level access to the user profile for your key account managers.
  - f. Add the field to the page layout and click **Save**.

SEE ALSO:

[Create Custom Fields](#)

## Map Custom Metrics for Sales Agreement Products and Schedules

Associate custom fields for Sales Agreement Products and Schedules in settings. Make each mapping unique.

You can create a mapping for number, currency, or formula custom fields for sales agreement products and schedules. To add a custom metric for display in Agreement Terms, define a mapping first.

1. In Setup, enter *Sales Agreements* in the Quick Find box.
2. In Feature Settings, under Manufacturing, select **Sales Agreements**.
3. In the Metrics Mapping section, all custom fields are listed under Sales Agreement Product Schedule Metrics. For each row, click the corresponding dropdown for **Sales Agreement Product Metrics**.
4. Select a custom field from the list. If you created a custom field other than number, currency, or formula, the field isn't available. Click **Save**.



**Example:** For the Sales Agreement Product metric Total Inventory, select Inventory Level as the corresponding Sales Agreement Product Schedule metric.

After you define a mapping, add the metric to the Agreement Terms using the Agreement Terms Metrics section of the Sales Agreements page in setup. Use the dual picklist to move the required custom metric from the Available Metrics list to the Selected Metrics list.

SEE ALSO:

[Create Custom Metrics for Sales Agreement Products and Schedules](#)

### EDITIONS

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

### USER PERMISSIONS

### USER PERMISSIONS

To create custom metric mapping

- Customize Application

## Select Metrics to Display in Agreement Terms

Select the metrics you want your key account managers to view on the Agreement Terms tab of a sales agreement for each product.

Choose metrics for quantity and revenue to be displayed in the agreement terms for products across all schedules. The standard metrics available for your selection are as follows:

- Planned Amount
- Planned Quantity
- Forecasted Quantity
- Forecasted Amount
- Actual Quantity
- Actual Amount
- Sales Price
- Discount Percentage

You can also select [custom metrics](#) on page 8, if available. You can select a maximum of 10 metrics including standard and custom metrics.

1. In Setup, enter *Sales Agreements* in the Quick Find box.
2. In Feature Settings, under Manufacturing, select **Sales Agreements**.
3. In the Agreement Terms Metrics section, use the dual pick list to move each metric from the Available Metrics list to the Selected Metrics list.

All standard metrics are listed in the Available Metrics list. If you have defined mapping for custom metrics, they are also available in this list.

4. Use the Sort Up and Sort Down arrows to change the sequence of metrics in Agreement Terms.

### EDITIONS

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

### USER PERMISSIONS

To modify metrics

- Customize Application

## Configure Email Addresses for Notifications

There are some automated processes that run daily at 1:00 AM of your timezone. In case these automated processes fail, a notification is sent to users. You can select whom to notify in such scenarios.

An email with details of the failed automated process and suggested next actions is sent to the primary and secondary contacts that you provide. There are three automated daily processes that run.

- Auto-activation of sales agreements that reach their start dates.
- Auto-expiration of sales agreements that reach their end dates.
- Auto-calculation of actual quantities of all active sales agreements based on their associated orders.

1. In Setup, search for *Sales Agreements* in the Quick Find box.
2. In Feature Settings, under Manufacturing, select Sales Agreements.
3. In the Email Notifications section, click **Edit Contacts**.
4. Add the email addresses of a primary contact and a secondary contact if required.
5. Save your changes.

### EDITIONS

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

### USER PERMISSIONS

To modify email addresses

- Customize Application

## Improve Partner Collaboration with Communities

Create a responsive portal where your partners can access knowledge articles, collaborate on sales agreements, and manage leads to improve sales.

Engage with your partners using the Community portal to enhance your sales experience. Your partners can get visibility into sales agreement negotiations, share leads, and work on forwarded opportunities.

### [Create the Manufacturing Partner Template and Add Partner Users](#)

Use the Manufacturing community template to improve collaboration with your partners.

#### EDITIONS


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

## Create the Manufacturing Partner Template and Add Partner Users

Use the Manufacturing community template to improve collaboration with your partners.

1. From Setup, enter *Communities* in the Quick Find box, then select **Communities Settings**.
2. Select **Enable communities**.
3. After you have enabled communities, on the All Communities page, click **New Community**.  
The Community Creation wizard appears with template options to choose from.
4. Select the Manufacturing template. Click **Get Started**.  
You can now create a community and customize it using the Community Builder.
5. From Setup, in Users, select **Profiles**.
6. Clone a partner community user profile and assign permission to the cloned profile on sales agreements, leads, opportunities, products, and orders. You can customize permissions as per your requirement.
7. Select Accounts from the App Launcher, and select an account record for which you want to create a partner user.
8. In the Quick Actions, click **Enable As Partner**.
9. Select Contacts from the App Launcher, and select a contact record whom you want to add as a partner.
10. In the Quick Actions, click **Enable Partner User**.

For all partner users, assign the Manufacturing Sales Agreement permission set and create a sharing set in Community Settings in Setup to decide the level of access for each object.

 **Note:** When a partner logs in to the Community portal, the number of sales agreements on the action card is the number of sales agreements for which they are the contact. But if they click **View All** or navigate to the Sales Agreements tab, the list also shows all sales agreements shared through sharing sets and role hierarchies.

#### EDITIONS

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

#### USER PERMISSIONS

To create community template

- Customize Application

#### SEE ALSO:

[Setting Up a Community](#)

# CREATE ACCOUNT FORECASTS TO ENHANCE YOUR PLANNING

Generate forecasts for your accounts based on orders, opportunities, and sales agreements. Create formulas to calculate your forecasts as per the requirements of your company. Define a recurring adjustment period in alignment with your company's planning period to allow for collaborative edits during that period. After the period is over, the forecasts are locked. Use the locked forecast values to plan inventory and operations for the upcoming schedules. Get insights into comparative sale of products across accounts to prepare for new possibilities of expanding your market.

## [Enable Account Forecasting](#)

Help your account managers track forecast numbers for their accounts. Enable account forecasting for your company so that key account managers can collaborate on forecasts and plan their sales and operations better.

## [Configure Your Account Forecasts](#)

There are certain choices you must make to define how account forecasts are configured for your org. You can make your selections on the Account Forecasting page in Setup.

## Enable Account Forecasting

Help your account managers track forecast numbers for their accounts. Enable account forecasting for your company so that key account managers can collaborate on forecasts and plan their sales and operations better.

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

### USER PERMISSIONS

To enable account forecasting

- Customize Application

1. From Setup, enter *Account Forecasting* in the Quick Find box.
2. In Feature Settings, under Manufacturing, select **Account Forecasting**.
3. Enable **Account Forecasting**.

## Configure Your Account Forecasts

There are certain choices you must make to define how account forecasts are configured for your org. You can make your selections on the Account Forecasting page in Setup.

## [Configure Forecast Generation and Display Settings](#)

Set up the forecast display settings on the Account Forecasting page in Setup. You can define forecast frequency and display duration to generate rolling forecasts. If your forecast period lasts 12 months, as each month ends, forecasts are automatically added for another month. This way, you always forecast 12 months ahead. Forecasts are recalculated at the start of each rolling period for each account.

[Configure Forecast Adjustment Settings](#)

Align your forecast adjustments with your company's planning period. During the adjustment period, your company can collaborate on forecasts and modify forecast values. Forecast values are locked beyond the adjustment period. You can use them to plan inventory and operations during these periods.

[Select Metrics to Display in Forecast](#)

Select the metrics you want your key account managers to view on the Forecast tab for an account.

[Build Formulas to Calculate Forecast](#)

Use the Formula Builder on the Account Forecasting page in Setup to create formulas for forecast calculations. You can define your own formulas for quantity and revenue based on sales agreements, orders, opportunities, and account metrics.

[Configure Email Addresses for Notifications](#)

Set up contact information to send notifications along with suggested next steps in case automated processes fail.

## Configure Forecast Generation and Display Settings

Set up the forecast display settings on the Account Forecasting page in Setup. You can define forecast frequency and display duration to generate rolling forecasts. If your forecast period lasts 12 months, as each month ends, forecasts are automatically added for another month. This way, you always forecast 12 months ahead. Forecasts are recalculated at the start of each rolling period for each account.

1. In Setup, search for *Account Forecasting* in the Quick Find box.

2. In Feature Settings, under Manufacturing, select Account Forecasting.

3. Define the following:

- a. Forecast Frequency: Select monthly or quarterly.
- b. Start Period: Select the number of periods to go back and generate forecasts. For example, if the current period is August 2019 and you enter the Start Period as 6 periods ago, you generate forecasts starting from February 2019. To start from the current period, enter 0.

If you want to compare quantity and revenue forecasts, it's helpful to generate forecasts for previous periods. Your account managers can gain insights into product performance for past, present, and future periods.

- c. Display Duration: Select the total number of periods to generate forecasts for. For example, if the start period is February 2019 and the display duration is 8 periods, you generate forecasts from February 2019 to September 2019.



**Warning:** The process of generating account forecasts works optimally when the display duration is 8 periods or less. We recommend that you add up to 8 periods. Adding more than 8 periods may result in performance issues.

At the end of each month or quarter, depending on the frequency, the forecast display rolls over and adds another period to the display. For example, with a duration of February 2019 to January 2020, at the end of February 2019 you'll get a forecast for March 2019 to February 2020.



**Warning:** If you modify the forecast display settings, all active forecast records expire, and regenerated records replace them. If regeneration fails, account owners receive a notification.

Before saving your settings, use the Forecast Formula Builder to create formulas for all periods. You can create different formulas to calculate quantity and revenue. If the display duration is 12 months, you can create up to 12 formulas.

## SEE ALSO:

[Build Formulas to Calculate Forecast](#)

## EDITIONS

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

## USER PERMISSIONS

To modify forecast settings

- Customize Application



## Configure Forecast Adjustment Settings

Align your forecast adjustments with your company's planning period. During the adjustment period, your company can collaborate on forecasts and modify forecast values. Forecast values are locked beyond the adjustment period. You can use them to plan inventory and operations during these periods.

1. In Setup, search for *Account Forecasting* in the Quick Find box.

2. In Feature Settings, under Manufacturing, select Account Forecasting.

3. Define the following:

- a. **Adjustment Frequency:** Select the frequency — monthly or quarterly — when forecasts can be manually adjusted.

If your forecast frequency is quarterly, you can't have monthly adjustments.


- b. **Adjustment Period in Days:** Select the number of days in each month or quarter for forecast edits.

Forecasts automatically recalculate for new and existing products at the start of every adjustment period.

- c. **Allow Adjustments:** Select whether you allow adjustments at the start or end of each month or quarter.

At the start or end of each quarter or month, designate forecast adjustment days when users can collaborate and modify forecast values for accounts. The adjustments give peers and executives insights into product performance, market growth, and account growth. At the end of the adjustment period, forecast values are locked, and you can plan your sales and operations for the next quarter. Based on the forecast revenues, your account managers know which accounts to target to drive business. Based on the forecast quantities, you can plan inventory and stock for the upcoming quarter.

 **Note:** Account forecast refreshes automatically at the start of every adjustment period. The process runs once, at 1:00 AM of the organization's timezone.

 **Example:** If you have monthly adjustments for 15 days at the start of the period, account managers can edit forecasts for the first 15 days of each month.

SEE ALSO:

[Track Adjustments to Forecasts](#)

## Select Metrics to Display in Forecast

Select the metrics you want your key account managers to view on the Forecast tab for an account.

Choose metrics for quantity and revenue to be displayed for products across all periods. The metrics available for your selection are as follows:

- Opportunity Quantity
- Opportunity Revenue
- Last Year's Order Quantity
- Last Year's Orders Revenue
- Current Orders Quantity
- Current Orders Revenue
- Sales Agreement Planned Quantity
- Sales Agreement Planned Revenue

### EDITIONS

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

### USER PERMISSIONS

To modify forecast settings

- Customize Application

### EDITIONS

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

### USER PERMISSIONS

To modify metrics

- Customize Application

1. In Setup, enter *Account Forecasting* in the Quick Find box.
2. In Feature Settings, under Manufacturing, select **Account Forecasting**.
3. In the Displayed Forecast Metrics section, use the dual pick list to move each metric from the Available Metrics list to the Selected Metrics list.

The summary metrics for Forecasted Quantity and Forecasted Revenue are automatically added to the Forecast tab display on each account.

4. Use the Sort Up and Sort Down arrows to change the sequence of metrics in the Forecast tab.

## Build Formulas to Calculate Forecast

Use the Formula Builder on the Account Forecasting page in Setup to create formulas for forecast calculations. You can define your own formulas for quantity and revenue based on sales agreements, orders, opportunities, and account metrics.

You can create complex and sophisticated formulas in the Formula Builder for your unique requirements. At least one formula for quantity, or revenue is required to cover all periods. If you create formulas for both quantity and revenue for even one period, follow the same pattern for all periods.

1. In Setup, search for *Account Forecasting* in the Quick Find box.
2. In Feature Settings, under Manufacturing, select Account Forecasting.
3. In the Forecast Formula Builder section, click Add Formula.
4. Select Type as Quantity or Revenue.

For a particular period, if you only create a formula of only one type, the formula for the other type is defaulted to zero.

5. To create a formula, use fields, functions, and operators. Pick a field, an operator, and a function in any combination to create a formula in the Compose Formula text box.
6. Enter the start and end period in the Effective Period Range section. For example, if the formula is applicable for the first three periods, enter 1 as the start period, and 3 as the end period.

7. Click **Add Formula**.

### EDITIONS

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

### USER PERMISSIONS

To create formulas

- Customize Application

Based on the forecast display duration, you can create either a single formula for all periods, or multiple formulas for different period ranges. If the forecast display period is 12 months, you can create up to 12 formulas.

SEE ALSO:

[Configure Forecast Generation and Display Settings](#)

## Configure Email Addresses for Notifications

Set up contact information to send notifications along with suggested next steps in case automated processes fail.

In case of any forecast setting modifications, depending on the change, forecast is either automatically regenerated or recalculated for all accounts. An email with details of the failed automated process and suggested next actions is sent to the primary and secondary contacts that you provide. Emails are sent in case any of the following processes fail:

- If forecast formulas are modified, forecast is recalculated for all current and future periods.
  - If forecast display settings are modified, all active forecast records are expired and replaced with new regenerated records..
1. In Setup, search for *Account Forecasting* in the Quick Find box.
  2. In Feature Settings, under Manufacturing, select Account Forecasting.
  3. In the Email Notifications section, add the email addresses of a primary contact and a secondary contact if required..

### EDITIONS

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


### USER PERMISSIONS


To modify email addresses

- Customize Application

# DEPLOY EINSTEIN ANALYTICS FOR MANUFACTURING

Einstein Analytics for Manufacturing lets account managers visualize all aspects of their business to keep them on top of sales agreements, orders, and contracts.

 **Note:** Einstein Analytics for Manufacturing is only for Salesforce Manufacturing Cloud and Health Cloud users. It requires that you have either the Manufacturing Analytics Apps add-on license or Healthcare Analytics Apps add-on license.

 **Tip:** Follow the steps in the order shown to deploy Einstein Analytics for Manufacturing. If you haven't used Einstein Analytics before, learn about it from [Analytics Help](#).

## EDITIONS

Available for an extra charge in Lightning Experience in **Enterprise** and **Unlimited** editions that have Manufacturing Cloud enabled.

1. [Deploy Einstein Analytics for Manufacturing](#)

Before creating an app from the Analytics for Manufacturing template, enable Analytics in your Salesforce org.

2. [Assign Analytics for Manufacturing Administrator Permissions](#)

Enable administrators to create and manage Analytics for Manufacturing app by assigning the relevant permissions.

3. [Assign Analytics for Manufacturing User Permissions](#)

Enable users to view the Analytics for Manufacturing app by assigning the relevant permissions.

4. [Get Your Data Ready to Create the Analytics for Manufacturing App](#)

Data in your org has to meet specific requirements before you can create the Analytics for Manufacturing app.

5. [Set Field-Level Security to Enable Creation of the Analytics for Manufacturing App](#)

Before creating the Analytics for Manufacturing app, make sure the Analytics Integration User has access to all fields used in the app.

6. [Create and Share an App from the Analytics for Manufacturing Template](#)

Follow these steps to create and share an app from the Analytics for Manufacturing template.

7. [Embed Analytics for Manufacturing Dashboards in Lightning Pages](#)

Analytics for Manufacturing includes dashboards intended for embedding and access in Lightning Experience pages.

## Deploy Einstein Analytics for Manufacturing

Before creating an app from the Analytics for Manufacturing template, enable Analytics in your Salesforce org.

 **Note:** If you see a blue **Launch Analytics** button in the upper right corner, Analytics is already enabled and you can skip to Assign Manufacturing Analytics Administrator Permissions.

1. From **Setup**, enter *Getting Started* in the **Quick Find** box, and then select **Getting Started**.

2. Click the green **Enable Analytics** button in the upper right corner.

## Assign Analytics for Manufacturing Administrator Permissions

Enable administrators to create and manage Analytics for Manufacturing app by assigning the relevant permissions.

1. From **Setup**, enter *Users* in the **Quick Find** box, and then select **Users**.

2. Click the user name with the System Administrator profile.

3. Click **Permission Set Assignments**, then click **Edit Assignments**.
4. Select both the **Einstein Analytics Plus Admin** and **Manufacturing Analytics Admin** permission sets.
5. Click **Add**, then click **Save**.
6. Repeat these steps for all users who need to create and manage the Manufacturing Analytics app.

## Assign Analytics for Manufacturing User Permissions

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Enable users to view the Analytics for Manufacturing app by assigning the relevant permissions.

1. From **Setup**, enter *Users* in the **Quick Find** box, and then select **Users**.
2. Click the name of a user who requires access to Manufacturing Analytics.
3. Click **Permission Set Assignments**, then click **Edit Assignments**.
4. Select both the **Einstein Analytics Plus User** and **Manufacturing Analytics User** permission sets.
5. Click **Add**, then click **Save**.
6. Repeat these steps for all users who need to view the Manufacturing Analytics app.

## Get Your Data Ready to Create the Analytics for Manufacturing App

---

Data in your org has to meet specific requirements before you can create the Analytics for Manufacturing app.

Your org must have at least one record in the following objects to successfully create the app:

- SalesAgreementProductSchedule
- SalesAgreement
- SalesAgreementProduct
- Order
- Contract
- Account

Also, you must use record types in your org.

During app creation, Analytics checks your org's data to be sure it meets minimum requirements. If it doesn't, you see a message describing what to fix.

## Set Field-Level Security to Enable Creation of the Analytics for Manufacturing App

---

Before creating the Analytics for Manufacturing app, make sure the Analytics Integration User has access to all fields used in the app.

If users don't have proper field-level security permissions when they run a dataflow, the dataflow can fail. Here's how to set [Salesforce field-level security](#) to enable the Analytics Integration User to see all fields used in the app.

## Set Lightning Experience Field-Level Security

1. In **Setup**, enter *object* in the **Quick Find** box, and click **Enter**.

2. Select **Object Manager**.
3. Enter the name of the object whose field-level security you need to edit in the **Quick Find** box, and click **Enter**.
4. Select the object you need to edit, then select **Fields & Relationships**.
5. Select the field you need to edit, then select **Set Field-Level Security**.
6. Look for the Analytics Cloud Integration User, check the box(es) for the required fields under **Visible**, and click **Save**.
7. Repeat steps 5 and 6 for all fields you want to use.
8. Refresh your browser cache.

## Set Salesforce Classic Field-Level Security

1. In **Setup**, enter the name of the object whose field-level security you need to edit in the **Quick Find** box and click **Enter**.
2. Click the name of the object.
3. The next window shows all the fields for the object. Go to the one(s) where you need to edit field-level security.
4. Look for the Analytics Cloud Integration User, check the box(es) for the required fields under **Visible**, and click **Save**.
5. Repeat steps 2 through 5 for all objects with fields you want to use.
6. Refresh your browser cache.

You can now create **Analytics for Manufacturing**.

## Create and Share an App from the Analytics for Manufacturing Template

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Follow these steps to create and share an app from the Analytics for Manufacturing template.


1. Navigate to **Analytics Studio**.
2. Click **Create** in the upper right corner, then select **App**.
3. Select **Analytics for Manufacturing**. Then click **Continue** to open the configuration wizard.
4. If you've already created an app, the wizard asks if you want to create a new app or reuse answers you used before. Make your selection, and click **Continue**.
5. The wizard performs a compatibility check of your org's data. If it uncovers any issues, you see error messages with instructions about how to address them. Fix the issues and try app creation again. If it completes successfully, click **Looks good, next**.
6. The wizard asks if you'd like to apply security predicates to data. If you choose **Yes**, data can only be viewed by a record's owner or by someone in a role with permission to view the record. If you answer **No**, all data can be seen by everyone viewing app dashboards.
7. Name your app and click **Create**.

View the status of app creation on the next . The process takes a minute or two. Once it's complete, refresh your browser to see your app.



**Note:** If you see an error saying the Analytics Integration User does not have access to selected fields, see the previous topic to give the Integration User the required access.

Now that you've created the app, share it with users in your organization. You can share it only with users assigned the Einstein Analytics Platform and Manufacturing Analytics admin or user permission sets.

1. Open your app if it's not already open. If you've navigated away from Analytics Studio, go back to it, select **All Items**, find your app, and click it.
2. Click the Share icon  at upper right.
3. In the next screen, use the search field under **Invite others:** to find other users in your org.
4. Select whether you want to make the selected user a Viewer, Editor, or Manager of the app.
5. Click **Add**, then click **Save**.

## Embed Analytics for Manufacturing Dashboards in Lightning Pages

Analytics for Manufacturing includes dashboards intended for embedding and access in Lightning Experience pages.

For general instructions, see [Embed Analytics Dashboards in Lightning Pages](#) in Salesforce Help. Here are examples using dashboards from the Analytics for Healthcare app, including the code for the filter attribute set in Step 4 of [Embed Analytics Dashboards in Lightning Pages](#).

### **Manufacturing Home Page, Manufacturing Agreement Performance, and Manufacturing Product Performance dashboards.**

Embed in any Manufacturing Cloud page. No filter required. Set Component Height to 450.

**Sales Agreement Revenue Realization.** Embed in Sales Agreement page layout. Set the Filter attribute with the following:

```
{'datasets':{'MFG_SalesAgreementProductSchedule':[{ 'fields': 'SalesAgreementProduct.SalesAgreementId' },  
  'filter':{'operator': 'matches', 'values': ['$Id']} ]}}}
```

Set Component Height to 120.

**Sales Agreement Product Performance.** Embed in Sales Agreement page layout. Set the Filter attribute with the following:

```
{'datasets':{'MFG_SalesAgreementProductSchedule':[{ 'fields': 'SalesAgreementProduct.SalesAgreementId' },  
  'filter':{'operator': 'matches', 'values': ['$Id']} ]}}}
```

Set Component Height to 400.

# ADDITIONAL CONFIGURATIONS FOR MANUFACTURING

There are some general choices related to page layouts, field-level permissions, and Chatter that you can configure for sales agreements and account forecasting.

## [Provide Users Field-Level Permissions on Orders and Contracts](#)

If the actuals calculation mode for sales agreements is automatic, give your users the access to view and edit these objects. Add the sales agreement lookup to the page layouts of Orders and Contracts.

## [Customize Page Layouts for Sales Agreements](#)

A page layout controls the placement and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on an object record page. The page layout also determines which fields are visible, read only, and required.

## [Enable Collaboration Through Chatter](#)

Enable Feed Tracking for your users so that they can get the most out of Chatter to collaborate with their stakeholders on sales agreements.

## Provide Users Field-Level Permissions on Orders and Contracts

If the actuals calculation mode for sales agreements is automatic, give your users the access to view and edit these objects. Add the sales agreement lookup to the page layouts of Orders and Contracts.

Orders and Contracts

To enable your key account managers to view and edit the Sales Agreement lookup on a new Order or Contract record, you must make it visible.

1. From Setup, go to Object Manager.
2. Click the **Order** object. You can follow the same steps for the **Contract** object.
3. In the side panel, select **Fields and Relationships**.
4. For the Lookup type, click **Sales Agreement**.
5. Click **Set Field-Level Security**.
6. For the user profiles that you want to grant edit permission, select Visible. For view-only access, select Read-Only.

## [Provide Users Required Field-Level Permissions](#)

Field-level security settings determine which fields a user sees. The most restrictive field access settings always applies. For example, you can have a field that's required in a page layout but is read-only in the field-level security settings. The field-level security overrides the page layout, so the field remains read-only.

SEE ALSO:

[Field Permissions](#)

### EDITIONS

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

### USER PERMISSIONS

To modify field-level security

- Customize Application



## Provide Users Required Field-Level Permissions

Field-level security settings determine which fields a user sees. The most restrictive field access settings always applies. For example, you can have a field that's required in a page layout but is read-only in the field-level security settings. The field-level security overrides the page layout, so the field remains read-only.

### 1. From Setup, go to Object Manager.

In Object Manager, set up field-level permissions on these objects to provide your key account managers visibility into sales agreements and account forecasts.

- Sales Agreement
- Sales Agreement Product
- Sales Agreement Product Schedule
- Account
- Account Forecast
- Opportunity
- Account Forecast Adjustment
- Account Forecast Period Metric
- Account Product Forecast
- Order
- Account Product Period Forecast

#### a. For the Sales Agreement object, you can choose to provide visible access on the following fields:

- Contact: Especially if you are using Communities to collaborate on your sales agreements
- Total Agreement Amount: You may not want to make this visible to users of all profiles.

 **Note:** We recommend that you provide read-only access to the Actuals Calculation Mode field.

#### b. For sales agreement product, if a user doesn't have at least read-only, visible access on any of these fields, they won't be able to see the corresponding data in the Agreement Terms tab. If they have read-only access but not visible access, they can't edit the values in the Agreement Terms tab.

- Initial Planned Quantity
- Total Planned Quantity
- Total Actual Quantity
- Total Forecasted Quantity
- Sales Price
- Total Planned Amount
- Discount Percentage
- Total Forecasted Amount
- Total Actual Amount

#### c. For sales agreement product schedule, if a user doesn't have at least read-only, visible access on any of these fields, they won't be able to see the corresponding data in the Agreement Terms tab. If they have read-only access but not visible access, they can't edit the values in the Agreement Terms tab.

- Planned Quantity

### EDITIONS

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

### USER PERMISSIONS

To modify field-level security

- Customize Application

- Planned Quantity
  - Actual Quantity
  - Forecasted Quantity
  - Sales Price
  - Planned Amount
  - Discount Percentage
  - Forecasted Amount
  - Actual Amount
- d. For account forecast adjustment, make sure to provide at least visible access to your users on Adjusted By and Adjusted Comments fields so that they can collaborate on forecast adjustments during the planning period.
  - e. For account forecast period metric, allow your account owners to edit the Account Growth Percentage and Market Growth Percentage fields.

## Customize Page Layouts for Sales Agreements

A page layout controls the placement and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on an object record page. The page layout also determines which fields are visible, read only, and required.

1. From Setup, select Object Manager.
2. Click Sales Agreement from the list of objects.
3. Select Page Layouts from the side panel and click **New**.
4. Provide a name and select the check box for **Feed-Based Layout** if you want a separate tab for Chatter. Click **Save**.
5. Drag and drop the following into the page layout:
  - In the Buttons section, add the Submit for Approval button to view it as a header-level quick action of the sales agreement record.
  - In the Related List section, add the Sales Agreement Products and the Sales Agreement History related lists, if required.
6. To allow complete visibility to your key account managers, add the Sales Agreement related list to the page layout of the following objects:
  - Account
  - Order
  - Contract

### EDITIONS

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

### USER PERMISSIONS

To modify page layouts

- Customize Application

## Enable Collaboration Through Chatter

Enable Feed Tracking for your users so that they can get the most out of Chatter to collaborate with their stakeholders on sales agreements.

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

### USER PERMISSIONS

To enable feed-tracking

- Customize Application

1. In Setup, enter *Feed Tracking* in the Quick Find box.
2. Select Feed Tracking under Chatter in Feature Settings.
3. Select Sales Agreement from the list of objects in the side panel.
4. Select the check box **Enable Feed Tracking** and click **Save**.
5. You can also select the fields for which users can see feed updates when those fields are changed on records they follow.
6. Select the check box **All Related Objects** to enable field tracking for related objects of a sales agreement such as accounts, products, orders, and contracts.

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