

Bring Predictability to Your Manufacturing Business

Salesforce, Winter '20



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GET STARTED WITH MANUFACTURING

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.

[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.

[Track Your Account's Health with Forecasts](#)

Get accurate forecasts for your accounts for new and existing products. If a product is tracked through any of your associated orders, opportunities, and sales agreements, forecast is calculated for it. Based on the unique formulas your admin creates, you can view quantity and revenue forecast numbers all consolidated in the Forecast tab of your account's record. During each adjustment period, you can also recalculate forecasts based on the most current account and market growth metrics. Your peers and executives can collaboratively edit the forecast numbers to share insights. You can focus on high-performing products, discover possibilities of sale for new products, and also plan your sales and operations for the upcoming month or quarter.

[Get Actionable Insights from Your Data with Einstein Analytics for Manufacturing](#)

Einstein Analytics for Manufacturing dashboards visualize all aspects of your business to help you stay on top of sales agreements, orders, and contracts.

[Considerations for Working with Manufacturing](#)

Review these considerations before you start working with Manufacturing.

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.

[Create a Sales Agreement](#)

Create a sales agreement to get a consolidated view of products, schedules, and associated metrics for business transactions.

[Add Products to a Sales Agreement](#)

You can add products to a sales agreement when it is in a draft state. If a sales agreement doesn't contain at least one product, it can't be approved. You can't add products after approval. After approval, you can't add new products.

[Approve a Sales Agreement](#)

After creating a sales agreement, you must first approve a sales agreement before its start date. The sales agreement isn't activated on its start date if it is not approved.

[Activate a Sales Agreement](#)

An approved sales agreement activates automatically on its start date. If a sales agreement is not approved by the start date, it is not picked up by the daily automated process for activation.

[Create Direct Orders for Actuals Calculation](#)

Create orders from the related list of a sales agreement record if the actual quantities are calculated automatically from direct orders.. A daily automated process derives the product quantity fulfilled in each active order, and updates the quantity in the sales agreement.

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

Create contracts and orders from the related list of a sales agreement record if the Actuals Calculation Mode is Automatically from orders through contracts. A daily automated process derives the product quantity fulfilled in each active order, and updates the actual quantity in the sales agreement.

[Recalculate Actuals from Agreement Terms](#)

Actuals are calculated and updated for sales agreements through a daily automated process. Additionally, you can recalculate actuals from the Agreement Terms tab of an active sales agreement with a single click.

[Cancel a Sales Agreement](#)

You can cancel an approved or active sales agreement. On cancellation, no further edits can be made.

[Expire a Sales Agreement](#)

An active sales agreement automatically expires on its end date.

[Renew a Sales Agreement](#)

Renew a sales agreement directly from its record to create another sales agreement with the same attributes and products.

Create a Sales Agreement

Create a sales agreement to get a consolidated view of products, schedules, and associated metrics for business transactions.

1. In the App Launcher, select **Sales Agreements** from All Items and click **New**. You can also select the Manufacturing app from the App Launcher and select Sales Agreements from the tabset.
2. The current user is the default owner. You can always change the owner to another existing user in your org.
3. Provide a unique name to the sales agreement.
4. Search for an existing account or create an account.
5. Select an existing price book from the picklist. Based on your selection of price book, the products filter when you add products to your sales agreement.
6. Select a contact associated to the account.
7. Provide a description to add context for the sales agreement.
8. A sales agreement is always created in a draft state. If your admin customized the status picklist values, you can select the status corresponding to the Draft status code.
9. Start Date is the date on which the sales agreement activates. After a sales agreement has been approved, it automatically activates when it reaches this start date.
10. Select the schedule frequency type for schedules in a sales agreement.
 - One-Time: The sales agreement consists of one schedule, and activates on the start date and expires on the end date.

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement

- **Monthly:** The sales agreement consists of monthly schedules. The first schedule starts from the start date you selected, and the last schedule ends on the end date you selected. The number of months depends on the schedule count.
 - **Quarterly:** The sales agreement consists of quarterly schedules. The first schedule starts from the start date you selected, and the last schedule ends on the end date you selected. The number of quarters depends on the schedule count.
 - **Yearly:** The sales agreement consists of yearly schedules. The first schedule starts from the start date you selected, and the last schedule ends on the end date you defined. The number of years depends on the schedule count.
- 11.** For schedule count, enter the number of schedules for which you want the sales agreement to be active. Enter 1 as the schedule count if the schedule frequency is one-time. You can create a maximum of 18 schedules.
 - 12.** Enter an end date on which the sales agreement expires. An end date is only required for a one-time sales agreement. For all other schedule frequency types, irrespective of the date you enter, when you save your changes, the application calculates the end date based on the start date, schedule frequency, and schedule count you selected.
 - 13.** The Actuals Calculation Mode field defaults to the selection made by your admin in Setup. You can change the calculation mode if you have edit access on this field and only when the sales agreement is in a draft state.
 - **Manually using API upload:** When the sales agreement activates, the actual quantities for products aren't automatically recalculated and refreshed. You can upload changed values in bulk using API upload. The daily process recalculates sales agreement actual quantities at regular intervals based on the latest uploaded data available.
 - **Automatically from direct orders:** When the sales agreement activates, the actual quantities for products are automatically recalculated based on all orders that reference this particular sales agreement.
 - **Automatically from orders through contracts:** When the sales agreement activates, the actual quantities for products are automatically recalculated based on all orders that reference the contracts that are associated with this particular sales agreement.

Add Products to a Sales Agreement

You can add products to a sales agreement when it is in a draft state. If a sales agreement doesn't contain at least one product, it can't be approved. You can't add products after approval. After approval, you can't add new products.

- 1.** On a sales agreement's record page, you can manage products two ways.
 - Click the dropdown on the Sales Agreement Products card. Click **Add Products** for new products, or **Edit Products** to change an existing products.
 - In the Related tab of a sales agreement, click **Add Products** on the Products related list.

You can add a maximum of 200 products to a sales agreement.

- 2.** The list price is defaulted from the price book you associate with the sales agreement.
- 3.** Enter the sales price as the price per unit of the product at which you want to sell it to your customer. If you change the sales price for a specific schedule from Agreement Terms, it changes only for that schedule.
- 4.** Initial total quantity is equally distributed across all the schedules when you save your changes. If you change the planned quantity for a specific schedule in Agreement Terms, it changes only for that schedule.
- 5.** Enter the discount you want to offer on the sales price of the product. If you change the discount for a specific schedule in Agreement Terms, it changes only for that schedule.
- 6.** Save your changes.

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement

Sales Agreement Product Metrics

When you add products to a sales agreement, you define some metrics while some auto-calculate based on orders and contracts. You can view all quantity and revenue metrics for the products across all schedules in the Agreement Terms tab of a sales agreement.

Sales Agreement Product Metrics

When you add products to a sales agreement, you define some metrics while some auto-calculate based on orders and contracts. You can view all quantity and revenue metrics for the products across all schedules in the Agreement Terms tab of a sales agreement.

EDITIONS

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

List Price

The price per unit of the product as specified in the price book you selected while creating the sales agreement.

Sales Price

The price per unit of the product at which you want to sell it to your customer. If you change the sales price for a specific schedule in Agreement Terms, it only changes for that schedule.

Initial Total Quantity

The total quantity of the product that you initially plan on selling across the sales agreement term. This quantity is equally distributed across all the schedules when you save your changes. If you change the planned quantity for a specific schedule in Agreement Terms, it only changes for that schedule.

Discount Percentage

The discount you want to offer on the sales price of the product. If you change the discount for a specific schedule in Agreement Terms, it only changes for that schedule.

Total Planned Quantity

The summary value auto-calculated by adding the planned quantities of the product across all schedules at a given time. When you create the product, this value is the same as the initial total quantity. It dynamically changes based on the schedule-level changes in planned quantities.

Total Actual Quantity

The summary value auto-calculated by adding the actual quantities of the product across all schedules at a given time. It dynamically changes based on the schedule-level changes in actual quantities. Actual quantities can be either manually updated through API update, or are derived from orders based on the configuration. Before a sales agreement is active, the actual quantity of a product is zero.

Total Forecasted Quantity

The summary value auto-calculated by adding the forecasted quantities of the product across all schedules at a given time. When you create the product, this value is the same as the initial total quantity. You can change it on the Agreement Terms tab. It dynamically changes based on the schedule-level changes in forecasted quantities.

Total Planned Amount

The summary value auto-calculated by adding the planned amount of the product across all schedules at a given time. It dynamically changes based on the schedule-level changes in planned amounts.

For a particular schedule, here's how the planned amount is calculated: $\{(Planned\ Quantity\ for\ the\ Schedule * Sales\ Price\ for\ the\ schedule) \times (1 - Discount / 100)\}$

Total Actual Amount

The summary value auto-calculated by adding the actual amount of the product across all schedules at a given time. It dynamically changes based on the schedule-level changes in actual amounts. Actual amounts can be either manually updated through API update, or are derived from orders based on the configuration. Before a sales agreement is active, the actual amount of a product is zero.

Total Forecasted Amount

The summary value auto-calculated by adding the forecasted amount of the product across all schedules at a given time. When you create the product, this value is zero. You can change it on the Agreement Terms tab. It dynamically changes based on the schedule-level changes in forecasted amounts.

Approve a Sales Agreement

After creating a sales agreement, you must first approve a sales agreement before its start date. The sales agreement isn't activated on its start date if it is not approved.

To be approved, a sales agreement must have at least one product associated with it.

A sales agreement can be approved either through an approval process or manually based on the configuration of Approval Process option on the Sales Agreements page in Setup. If Approval Process is enabled, you can't self-approve a sales agreement. You can only submit for approval through the predefined approval process set up by your admin.

1. To self-approve a sales agreement:
 - a. On a sales agreement record, go to the Details tab.
 - b. In the Status pick list, select any of the statuses mapped to the Approved status code. Click **Save**.
2. To request approval of a sales agreement through a predefined process:
 - a. On a sales agreement record, go to the Quick Actions on the header.
 - b. Select **Submit for Approval**. Provide a justification if necessary.

If you modify the values in an under revision state of an active sales agreement, reapprove the changes to activate.

- If there's a predefined approval process, the process is automatically triggered when you make your changes. If your changes are approved, the status of a sales agreement automatically changes from under revision to activated.
- If a predefined process is not set up, you can self-approve your changes and the status automatically changes to an activated state.

SEE ALSO:

[Configure Sales Agreement Approvals](#)

EDITIONS

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

USER PERMISSIONS

To approve sales agreement

- Read, Edit permissions on Sales Agreement

Activate a Sales Agreement

An approved sales agreement activates automatically on its start date. If a sales agreement is not approved by the start date, it is not picked up by the daily automated process for activation.

Approved sales agreements activate on the start date after the daily process runs at 1:00 AM.

After a sales agreement is activated, you can't add or edit products. You can change the following in the Agreement Terms tab:

- Actual quantities per product per schedule, if the actuals calculation mode is manual.
- Forecasted quantities and amounts per product per schedule.

If the activation process fails, you can manually change the status to active.

1. In a sales agreement's record, go to the Details tab.
2. Select a status corresponding to the Active status code from the Status picklist. Click **Save**.
 - If the Actuals Calculation Mode is automatic, the actual quantities of an active sales agreement are updated daily based on the quantities fulfilled on orders.
 - If the Actuals Calculation Mode is manual, you can import bulk changes through API.



Note: Actual quantities of a sales agreement are calculated based on the calculation mode at activation. Any change to the actuals calculation mode during the active period isn't considered by the automated process.

[Make Revisions to an Active Sales Agreement](#)

Revise an active sales agreement and maintain a single version of your edits. The status is automatically changed to under revision when you make changes. After all edits are approved, the sales agreement is automatically updated and reactivated.

Make Revisions to an Active Sales Agreement

Revise an active sales agreement and maintain a single version of your edits. The status is automatically changed to under revision when you make changes. After all edits are approved, the sales agreement is automatically updated and reactivated.

Due to external and internal factors if you expect changes in planned quantity, planned amount, discount and sales price, you can edit values for future schedules. A single version of the sales agreement is maintained and you can compare the current and proposed values.

1. On an active sales agreement record, click **Agreement Terms**.
2. Click the **Edit** icon on any cell which you want to modify. You can make multiple edits in the grid. Once done, click **Save** at the bottom of the grid.
3. The status automatically changes to an under revision state. Click the **Change Since Last Activation** icon on any cell where you edited the value. In the popover, you can view the value in the active version, and the margin of change in value. For example, you change the Planned Quantity for July schedule from 400 to 560. The cell shows 560, and the popover shows Value in Active Version as 400, and Change as +160.
4. At the Agreement Terms header, you can switch views between All Products and Products with Edits. In the Products with Edits view, you can view only the products you are modifying.
5. If you can self-approve the sales agreement, change the status to approved when the changes are final. If there is a predefined approval process set up, click **Submit for Approval**.

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement


On approval, the status automatically changes to active and the values are updated in Agreement Terms. On rejection, the status automatically changes to active but the proposed values are not retained.


Create Direct Orders for Actuals Calculation

Create orders from the related list of a sales agreement record if the actual quantities are calculated automatically from direct orders.. A daily automated process derives the product quantity fulfilled in each active order, and updates the quantity in the sales agreement.


1. In a sales agreement's record, go to the Related tab.
2. Click **New** in the Orders related list.
3. Create an order with the following criteria:
 - a. Select the account associated with the sales agreement.
 - b. Select the price book associated with the sales agreement.
 - c. Enter a start date on or after the start date, and before the end date of the sales agreement.
The start date of an order is the effective date that serves as the primary condition based on which actual quantities are picked up for calculation. All actual quantities are computed from this effective date.
 - d. Enter an end date on or after the start date, and before the end date of the sales agreement.
 - e. Select status as Draft.
4. Click **Save**.
5. In the Related tab of the order, click **Add** in the Products related list.

You can add products only when an order is in draft status. We recommend you add only those products that are also part of the associated sales agreement. Adding products that aren't part of the sales agreement can cause inconsistency in calculations. When an order is complete, that is ready to be shipped or provisioned, activate the order. You can edit product quantities when the order is active.

 **Note:** The sales agreement must be active before you activate an order.

 **Example:** The daily automated process picks up all active orders that reach their effective date. For each product present in both the active order and the active sales agreement, the order quantity is added to the actual quantity in the sales agreement. If there is any active reduction order, the order quantity is deducted from the actual quantity in the sales agreement.

The quantity is updated in the schedule in which the order is fulfilled.

 **Note:** Make sure that the sales agreement product schedules are named correctly. If a monthly sales agreement starts from 15 July, the first schedule is from 15 July to 15 August, but the schedule column name is July by default. So, if an order is fulfilled on 5 August, the quantity is updated in the July schedule. You can customize schedule names through the API.

The process also considers the Last Actuals Calculation Date. If the last actuals calculation date is 4 May, and the current date is 19 May, the automated process for today only recalculates actual quantities for any order changes after 4 May.

EDITIONS

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

USER PERMISSIONS

To create orders

- Activate Orders

To create orders

- Read, Edit access on Orders

SEE ALSO:

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

Create Orders Through Contracts for Actuals Calculation


Create contracts and orders from the related list of a sales agreement record if the Actuals Calculation Mode is Automatically from orders through contracts. A daily automated process derives the product quantity fulfilled in each active order, and updates the actual quantity in the sales agreement.


To create orders through contracts, the Contract field on the Order entity must be mandatory. If Contract is an optional field, contact your admin for help.

To create orders, you must have read and edit access on orders. You must also have the Activate Orders and Activate Contracts permissions assigned.

1. In a sales agreement's record, go to the Related tab.
2. Click **New** in the Contracts related list.
3. Create a contract with the following criteria:
 - a. The account of the contract and the sales agreement must be the same.
 - b. The sales agreement must be in an active state before you activate the contract. So, you must select an active sales agreement while creating a contract.
 - c. The contract's start date must be on or after the start date of the associated sales agreement, and before the end date of the sales agreement.
The start date of all orders you associate to this contract must be after the contract's start date. The start date of each order is the effective date that serves as the primary condition based on which actual quantities are picked up for calculation. All actuals are computed from this effective date.
 - d. The contract's end date must be on or before the end date of the associated sales agreement.
 - e. The Contract Term must be within the sales agreement term.
 - f. Select status as Draft.
4. Click **Save**.

Now, you can create orders referencing this contract ID from the Orders related list on the sales agreement record.

 **Example:** The daily automated process picks up all active orders which have reached their effective date. For each product present in both the active order and the active sales agreement, the order quantity is added to the actual quantity in the sales agreement. If there is any active reduction order, the order quantity is deducted from the actual quantity in the sales agreement. The quantity is updated in the schedule in which the order is fulfilled.

 **Note:** Make sure the sales agreement product schedules are named correctly. If a monthly sales agreement starts from 15 July, the first schedule is from 15 July to 15 August, but the schedule column name is July by default. So, if an order is fulfilled on 5 August, the quantity is updated in the July schedule. You can customize schedule names through the API.

The process also considers the Last Actuals Calculation Date. If the last actuals calculation date is 4 May, and the current date is 19 May, the automated process for today only recalculates actual quantities for any order changes after 4th May.

EDITIONS

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

USER PERMISSIONS

To create orders

- Activate Orders permission

SEE ALSO:

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

Recalculate Actuals from Agreement Terms

Actuals are calculated and updated for sales agreements through a daily automated process. Additionally, you can recalculate actuals from the Agreement Terms tab of an active sales agreement with a single click.

If Actuals Calculation Mode for your sales agreements is manual, you can click **Recalculate Actuals** after you upload the updated actual quantities through the API.

1. Open a sales agreement record and navigate to the Agreement Terms tab.
2. Click **Recalculate Actuals**.
3. You can choose to recalculate actuals either for all past and current schedules or only for the current schedule. Click **OK**.

The recalculation process derives product quantities from all associated orders that are fulfilled from the last recalculation date and updates the sales agreement.

You receive an in-app notification when the process is complete. Refresh Agreement Terms to view the latest values.

SEE ALSO:

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

Cancel a Sales Agreement

You can cancel an approved or active sales agreement. On cancellation, no further edits can be made.

You can't cancel a sales agreement in any of the following states: draft, under revision, and expired.

1. In a sales agreement's record, go to Quick Actions on the header.
2. Select **Cancel** from the dropdown menu. Click **Yes** to confirm your action.

For active sales agreements with Actuals Calculation Mode as automatic, all actual quantities are recalculated when you cancel the sales agreement. You receive an in-app notification when the recalculation is complete. If the process fails, you can click **Recalculate Actuals** on the Agreement Terms tab to initiate the process.

Expire a Sales Agreement

An active sales agreement automatically expires on its end date.

The status of the sales agreement updates to expired on the start date after the daily system job runs at 1:00 AM.

After a sales agreement expires you can't edit any values.

If the expiration process fails, you can change the status manually to expired.

1. In a sales agreement's record, go to the Details tab.
2. Select a status corresponding to the Expired status code from the Status picklist. Click **Save**.

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement

Renew a Sales Agreement

Renew a sales agreement directly from its record to create another sales agreement with the same attributes and products.

You can renew a sales agreement when it is active, under revision, or expired. You can renew a sales agreement starting 60 days before its expiration. The start date of the agreement can be any date after the expiration of the current sales agreement.

When you renew a sales agreement, all products along with their initial planned quantities are copied into the new sales agreement.

1. Click the dropdown on a sales agreement's header and click **Renew**.
2. Enter a name for the renewed sales agreement.
3. If you are renewing a One-Time sales agreement, select the start and end dates for the renewed sales agreement. If you are renewing a Monthly, Quarterly, or Yearly sales agreement, select the start date for the renewed sales agreement.
4. Save your changes.
5. In the Details tab, navigate to the Renewal Information section.
6. You can view the links of the Renewed-From Sales Agreement and the Renewed-To Sales Agreement for any sales agreement record.

EDITIONS

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

USER PERMISSIONS

To modify sales agreement

- Read, Edit permissions on Sales Agreement

Track Your Account's Health with Forecasts

Get accurate forecasts for your accounts for new and existing products. If a product is tracked through any of your associated orders, opportunities, and sales agreements, forecast is calculated for it. Based on the unique formulas your admin creates, you can view quantity and revenue forecast numbers all consolidated in the Forecast tab of your account's record. During each adjustment period, you can also recalculate forecasts based on the most current account and market growth metrics. Your peers and executives can collaboratively edit the forecast numbers to share insights. You can focus on high-performing products, discover possibilities of sale for new products, and also plan your sales and operations for the upcoming month or quarter.

[Generate Forecasts for the First Time](#)

When Account Forecasting is enabled in your org, to generate forecasts for your account, provide growth metrics to generate forecasts.

[Switch Metrics View in Account Forecasts](#)

In Account Forecasts, you can view the different quantity and revenue metrics in separate views.

[Recalculate Forecast in a Single Click](#)

Recalculate forecasts for your account in a single click. During the adjustment period of your company, you can recalculate forecasts to view the latest values after multiple users edit the values.

[Track Adjustments to Forecasts](#)

During the adjustment period, multiple users can collaborate on your forecasts to make adjustments. It's critical for you to track the edits for each cell and reset the value whenever required.

Generate Forecasts for the First Time

When Account Forecasting is enabled in your org, to generate forecasts for your account, provide growth metrics to generate forecasts.

Before you generate forecast, make sure you have at least one of the following associated with your account:

- Orders
- Opportunities
- Sales Agreements

In case there are no related objects, the forecast values will display zero because there won't be any products to generate forecast for.

In an ever-changing business, you want to forecast on the basis of the most current values for account and market growth. So, when you generate forecasts for the first time, you can provide the account growth percentage and market growth percentage for the upcoming month or quarter.

1. On an account's record, click the **Forecast** tab.
2. Enter a percentage value at which you expect your account to grow for the upcoming period. The duration of the period depends on whether the forecast frequency is monthly or quarterly.
3. Enter a percentage value at which you expect the market for your products to grow for the upcoming period. The duration of the period depends on whether the forecast frequency is monthly or quarterly.
4. Click **Generate Forecast**.

Depending on the volume of data to be generated, you may have to wait for some time before you see the forecasts for the first time. An in-app notification is sent to you when the forecast is ready. Refresh the page to view the results on the Forecast tab.

SEE ALSO:

[Configure Your Account Forecasts](#)

Switch Metrics View in Account Forecasts

In Account Forecasts, you can view the different quantity and revenue metrics in separate views.

To switch the metrics view, click the view name.

EDITIONS

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

USER PERMISSIONS

To generate forecast

- Owner of the account record, read and edit permissions.

USER PERMISSIONS

To switch views

- Read, Edit permissions on Account Forecasts

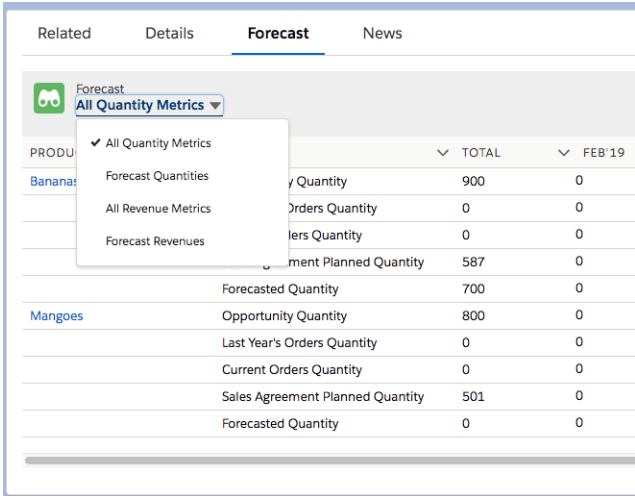


Table 1: Metrics Views

View	Description
All Quantity Metrics	Shows quantity metrics for opportunities, orders, sales agreements, and forecast for all products across all periods.
Forecast Quantities	Shows only the forecast quantities for all products across all periods.
All Revenue Metrics	Shows revenue metrics for opportunities, orders, sales agreements, and forecast for all products.
Forecast Revenues	Shows only the forecast revenues for all products across all periods.

Recalculate Forecast in a Single Click

Recalculate forecasts for your account in a single click. During the adjustment period of your company, you can recalculate forecasts to view the latest values after multiple users edit the values. Forecasts are recalculated when you edit the growth metrics, or when you choose to only recalculate based on existing growth metrics.

1. Open an account’s record and navigate to the Forecast tab.
2. Click **Show Growth** or **Recalculate**.

EDITIONS

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

USER PERMISSIONS

- To recalculate forecast
- Read, Edit permissions on Account Forecasts

		TOTAL	FEB 19	MAR 19	APR 19	MAY 19	JUN 19	JUL 19	AUG 19	SEP 19	OCT 19
Bananas	Opportunity Quantity	900	0	0	0	0	0	0	900	0	0
	Last Year's Orders Quantity	0	0	0	0	0	0	0	0	0	0
	Current Orders Quantity	0	0	0	0	0	0	0	0	0	0
	Sales Agreement Planned Quantity	567	0	0	0	0	0	0	90	99	100
	Forecasted Quantity	700	0	700	0	0	0	0	0	0	0
Mangoes	Opportunity Quantity	800	0	0	0	0	0	0	800	0	0
	Last Year's Orders Quantity	0	0	0	0	0	0	0	0	0	0
	Current Orders Quantity	0	0	0	0	0	0	0	0	0	0
	Sales Agreement Planned Quantity	505	0	0	0	0	0	0	77	85	85
	Forecasted Quantity	0	0	0	0	0	0	0	0	0	0


- If you clicked Show Growth, you can edit the account and market growth percentage values, and click **Apply**. If you clicked Recalculate, the process is immediately triggered with the existing metrics.

The recalculation process derives quantities and revenues from orders, opportunities, and sales agreements, applies the forecast formula, and the updated growth metrics if any, from the last recalculation date and updates the forecast.

You receive an in-app notification when the process is complete. Refresh the record to view the latest values.

Track Adjustments to Forecasts

During the adjustment period, multiple users can collaborate on your forecasts to make adjustments. It's critical for you to track the edits for each cell and reset the value whenever required.

- On an account's record, navigate to the Forecast tab.
- Click  in a cell. The icon is an indicator that the forecast value in that cell is modified. Review the following information in the popover:
 - The last auto-calculated forecast value
 - Last three manual edits, along with the User ID and adjustment note for each edit.
- Click **Reset** if you want to reject the manual edits and accept the auto-calculated forecast value.

SEE ALSO:

[Configure Your Account Forecasts](#)

EDITIONS

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

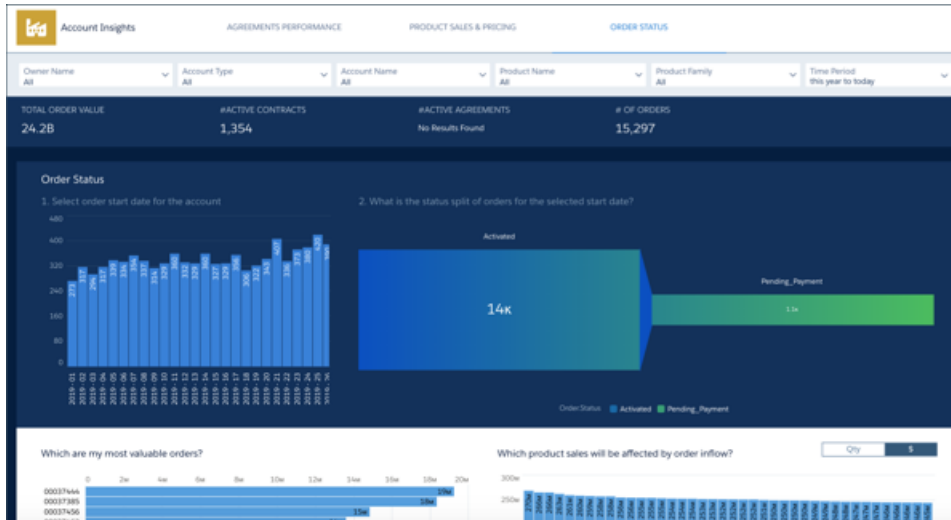
USER PERMISSIONS


To track forecast adjustments

- Read, edit permission on Account Forecasts and Account Forecast Adjustments

Get Actionable Insights from Your Data with Einstein Analytics for Manufacturing

Einstein Analytics for Manufacturing dashboards visualize all aspects of your business to help you stay on top of sales agreements, orders, and contracts.



 **Note:** If the Analytics for Manufacturing app isn't available in your org, direct your administrator to [Deploy Einstein Analytics for Manufacturing](#).

The Analytics for Manufacturing app includes two types of dashboards:

- Dashboards accessed through the app in Analytics Studio.
- Embedded dashboards that deliver insights from within the context of Salesforce objects you work with.

They're designed to answer key questions about your business. Here's general information about the dashboards and the questions they answer.

In-App Dashboards

Open Analytics for Manufacturing to see dashboards accessed through Analytics Studio.

1. From the app picker, select **Analytics Studio** to open the Analytics home page.
2. Under **Browse** in the left column, select **All Items**.
3. Select the **Apps** tab, then click your app to open it. If you can't immediately find it, consult your Salesforce administrator to find out the name they gave it when creating the app.

Now that your app is open, click the **Dashboards** tab to see a list of all the app's dashboards. Find the **Key Account Manager Home** dashboard, and open it. The home dashboard gives account managers at-a-glance insight into top-level metrics. Begin your analysis of manufacturing cloud data in the context of broader business goals. Learn the health of your accounts, which products are doing well, product pricing, agreement compliance rates, and other key performance indicators (KPIs) that impact your business. Follow the links to other dashboards to drill into details.

Accounts Health

Helps you improve the health of your accounts. Opens to the Overview page with charts that show how revenue is doing against plan for all your accounts and how revenue is trending over time. Other pages answer key questions about your accounts.

- **Accounts in Focus.** Which accounts do I need to follow up with for order inflow? Which accounts are performing well and which accounts are at risk of churn?
- **Relationship With my Accounts.** What is the current and planned length of relationship of my accounts? What is the customer lifetime value of my accounts?

Account Insights

View KPIs about each of your accounts. Open the **Account Name** menu and select an account. Then get answers to the following questions about that account from the dashboard's three pages.

- **Agreements Performance**
 - How has the account's revenue grown over time and will it achieve its goal?
 - How is planned revenue trending for the account?
 - How is the account performing against its commitments?
 - What is the missed revenue over time for the account?
- **Product Sales & Pricing**
 - Which products have sold the most to this account and at what price?
 - How is the account performing against product demand goals?
- **Order Status**
 - What is the status of orders for the account?
 - Which orders need attention?

Product Performance

Track your top-selling products and get insights into supply and demand across your product line through the dashboard's two pages.

- **Sales Trend**
 - What are my top selling products and product families?
 - Which products are trending up or down for my accounts?
 - Which accounts contribute most to a product's sales?
 - How has the product mix changed over time for my accounts?
- **Demand Goals**
 - What are the demand realization levels of the products?
 - Which account is contributing most to demand shortfall of a product?

Pricing Insights

The dashboard's two main charts answer key questions to help you determine optimal product pricing.

- **Price Trend**
 - What is the price trend for a product across all accounts?
 - What is the product priced for my account vs all accounts?
- **Price Elasticity**
 - What is the price elasticity for a product across all accounts?

Sales Agreements

Get instant insight into the state of all your sales agreements and identify agreements that need immediate action through the dashboard's two pages.

- **Performance**
 - What are realization and compliance levels of all my agreements?
 - What are my best and worst performing agreements?
 - Where can I expect to encounter demand shortfall?

- When have I experienced the highest demand shortfall this year?

- **Pipeline**

- What does my sales agreement pipeline look-like?
- Which agreements should I focus on to grow my pipeline?
- How have cancellations impacted revenue loss?

Whitespace Analysis

The dashboard's two pages help you uncover opportunities to grow your business by selling new agreements and cross-selling to existing accounts.

- **Accounts Whitespace**

- Which accounts do not have active agreements?
- What are the cross-sell opportunities for those accounts?

- **Product Recommendations**

- What product combinations work best?
- How can I expect the number of products sold to increase through cross-sell opportunities?

Embedded Dashboards

Analytics for Manufacturing includes dashboards that can be embedded in Lightning Experience pages. They provide detailed insights into product performance, sales agreements, and other aspects of your business. Your Salesforce admin embeds these dashboards in specific Salesforce pages, as described here. After that, go to the specific pages to view the dashboards.

Dashboards Embedded in a Sales Agreement Page

These dashboards can be viewed from Sales Agreement pages in the Manufacturing Cloud.

- **Sales Agreement Product Performance**

- How is the agreement performing?
- How are the products offered in the agreement performing against their planned numbers?
- What are the best prices for the products offered in the agreement?

- **Sales Agreement Revenue Realization**

- What's the probability that the agreement is renewed?
- What are the most important factors contributing to renewal?

Dashboards Embedded in other Manufacturing Cloud Pages

These dashboards can be viewed from the Manufacturing Cloud Home page, or any other page your admin embeds them in.

- **Manufacturing Product Performance**

- What are my best and worst performing products?

- **Manufacturing Home Page**

- What is my current revenue and revenue projection?
- Which of my accounts need attention?
- What accounts can help me get more business?

- **Manufacturing Agreement Performance**

- What are my best and worst performing agreements?
- What agreements are pending approval or need renewal?

[Calculate Key Performance Indicators Using Einstein Analytics](#)

Learn the definitions of key metrics shown in Manufacturing Analytics dashboards.

Calculate Key Performance Indicators Using Einstein Analytics

Learn the definitions of key metrics shown in Manufacturing Analytics dashboards.

This table lists the key metrics and dashboards where they appear.

Metric	Description	Available in Dashboards
Planned Revenue	Revenue planned for an account, agreement, product, or product family in the selected time frame.	<ul style="list-style-type: none"> • Embedded Home Page • Embedded Agreement Performance • Account Insights • Accounts Health • Product Performance • Sales Agreement Insights
Actual Revenue	Revenue generated from an account, agreement, product, or product family in the selected time frame.	
Revenue Realization	Actual revenue as a percentage of planned revenue.	
Compliance	Actual revenue as a percentage of planned revenue to date.	
Actual vs Planned Difference (Revenue)	Difference in revenue generated and planned revenue in the selected time frame.	
Planned Quantity	Planned number of units of a product or product family to be sold to an account in the selected time frame.	<ul style="list-style-type: none"> • Embedded Product Performance • Accounts Insights - Product Sales and Pricing • Product Performance • Sales Agreement Insights
Actual Quantity	Actual number of units of a product or product family sold to an account in the selected time frame.	
Demand Realization (Revenue or Quantity)	Actual demand (quantity or revenue) as a percentage of the planned demand for a product or product family.	

EDITIONS

Available in: **Enterprise** and **Unlimited** Editions

Metric	Description	Available in Dashboards
Actual vs Planned Difference (Quantity)	Difference in units of a product or product family sold and units planned to be sold.	
Pending Approvals	Planned revenue from agreements that are pending approval in the selected time frame.	<ul style="list-style-type: none"> Embedded Home Page - Grow My Business Sales Agreement Insights - Pipeline
Upcoming Renewals	Planned revenue from agreement renewals in the next 60 days.	
Approved	Planned revenue from approved agreements in the selected time frame.	
Under Revision	Planned revenue from agreements that are being revised.	
Outstanding Revenue	Difference between planned revenue and actual revenue for an agreement or agreement schedule.	<ul style="list-style-type: none"> Accounts Health Sales Agreements Insights
Max Price	Maximum price at which the product was sold to an account in the selected time frame.	<ul style="list-style-type: none"> Account Insights - Product Sales and Pricing Pricing Insights
Min Price	Minimum price at which the product was sold to an account in the selected time frame.	
Avg Price	Average price at which the product was sold to an account in the selected time frame.	
Discount (\$ or %)	Discount offered on the list price of the selected product.	
Orders (Revenue)	Revenue generated from orders placed in the selected time frame.	Account Insights - Orders Status
Orders (#)	Number of orders placed in the selected time frame.	
Length of Relationship (To Date)	Duration between today and the start date of the first sales agreement with an account.	Accounts Health - Relationship With my Accounts
Future Length of Relationship (Agreed Upon)	Duration between today and the expiry date of the planned agreement that ends last.	
Total Length of Relationship	Total duration of current and planned relationship based on sales agreements.	
Customer Lifetime Value	Total of revenue generated to date and revenue anticipated from the account. To calculate anticipated revenue, multiply planned revenue with historical	

Metric	Description	Available in Dashboards
	performance of the account (past realization).	
Avg. Customer Lifetime Value	Average of customer lifetime values of all the accounts.	
Active Days	Number of days the agreement is active.	Sales Agreement Insights
Days Remaining	Number of days remaining before the agreement ends.	

Considerations for Working with Manufacturing

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.