SETTING UP CUSTOMIZABLE FORECASTING

Summary

Customizable forecasts allow you to personalize Salesforce with your organization's process for forecasting sales. To begin, customize the settings described below to control how your opportunities contribute to forecasts.

Before you begin:

After you enable customizable forecasting, your forecasts still depend on how your `Opportunity Stage` picklist values map to `Forecast Categories`. Check these mappings from the object management settings for opportunities. From Setup, enter `Opportunities` in the `Quick Find` box, then select **Fields**.

Action:

From Setup, enter `Fiscal Year` in the `Quick Find` box, then select **Fiscal Year** to set the fiscal year for your organization.

Getting Started

📝 Note: Customizable Forecasting is scheduled for retirement for all customers as of Summer '20. After the feature is retired, users can't access the Customizable Forecasting feature and its underlying data. We encourage you to migrate to Collaborative Forecasts. For more information, see Customizable Forecasting Will Be Retired in the Summer '20 Release. The following information applies to Customizable Forecasting and not Collaborative Forecasts.

Customizable forecasting is a powerful tool for your organization to use when forecasting the value of upcoming deals. Follow these steps to get started using customizable forecasting by incorporating your forecasting process into Salesforce.

- Define your fiscal year
- Set forecast settings such as date, type, default view, and sharing
- Customize your forecast hierarchy
- Enable customizable forecasting
- Set user permissions

Defining Your Fiscal Year

Define your fiscal year using standard fiscal years or custom fiscal years. Standard fiscal years follow the Gregorian calendar, but can start in any month. Custom fiscal years allow you to flexibly define a fiscal year that meets your exact needs. See the online help for more details on fiscal years.

Setting Forecast Data Aggregation, Default View, and Sharing

- `Forecast Revenue` and `Forecast Quantity`—tells Salesforce whether to include revenue or quantity amounts on forecasts. You can choose either one or both.

- `Forecast Period`—tells Salesforce what time periods to use when forecasting. The options available depend on the type of fiscal year you have.

- `Forecast Date`—tells Salesforce what date to use when determining when an opportunity contributes to a particular forecast.

  - If your organization does not use products, Salesforce automatically selects `Opportunity Close Date`. This tells Salesforce to use the close date on an opportunity when applying its amount to the user's forecast.

  - Choose `Product Date` if you want Salesforce to use the date from the products on the opportunity when applying the amount to a user's forecast. When opportunities do not have products or the product date is blank, Salesforce uses the `Opportunity Close Date` instead.

  - Choose `Schedule Date` to have Salesforce use the revenue schedule date when applying the amount to a user's forecast. If a product does not have a revenue schedule, Salesforce uses the `Product Date` instead.

- `Forecast Type`—tells Salesforce how many forecasts your users plan to submit for a period. This is based on whether you are using product families.

  - If your organization does not use products, Salesforce automatically selects `Use Overall Forecast`. This tells Salesforce that your users have one quota and one forecast per period.

  - Choose `Use Product Families` if you have more than one product family, and you want users to submit separate forecasts for each family.

- `Forecast Summary Default View`—When users click the Forecasts tab, they will be able to view all the forecasts in a specified range. Users can change the range displayed but the default remains the same for all users.

- `Forecast Data Sharing`—enables the ability for users to manually extend sharing privileges for forecast data. The sharing settings for each forecast are controlled on the forecast hierarchy.

Customizing Your Forecast Hierarchy

Every user that uses forecasting should be in your forecast hierarchy. A forecast hierarchy is a multilevel structure of users that determines how users' forecasts roll up through the hierarchy. It is based on the role hierarchy for your organization.

- For deals to roll up properly, designate one user in each management role as the forecast manager for that role. All subordinate forecasts roll up to the designated forecast manager.

- If more than one user is assigned to a management role, such as a VP of sales and an executive assistant, select the VP as the forecast manager for that role so that forecasts from subordinates roll up to the VP. The executive assistant can still submit forecasts but forecasts will not roll up through him or her.

- If you have a role in your role hierarchy that should not generate a forecast, do not assign a forecast manager to that role. This indicates that the role is nonforecasting.

- If you have users who are not in sales and do not have a quota, disable forecasting for them. To do this, deselect the `Allow Forecasting` checkbox from Setup by entering *Users* in the `Quick Find` box, then selecting **Users** and choosing **Edit**.

  To disable several users at a time from forecasts, from Setup, enter *Forecasts Hierarchy* in the `Quick Find` box, then select **Forecasts Hierarchy**. Then click the **Enable Users** link next to the role name.

  Disable the appropriate users by selecting their names and clicking **Remove**. Users listed in the Available Users box do not have `Allow Forecasting` checked on their user information page.

- Forecast sharing can be configured using the forecast hierarchy.

Enabling and Disabling Forecasting for Users

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

- Click **Enable** > **Users** next to a role to view a list of forecast-enabled users in that role. To disable forecasting for a user, select the user from the Forecast Enabled Users box and click **Remove** to move the user to the Available Users box. To enable forecasting for a user, select that the user in the Available Users box and click **Add**.

- Click **Assign** > **Manager** next to a management role to assign a single user as the forecast manager. Forecasts for subordinate users roll up to this user. If no users are available, check your role hierarchy or follow the step above to enable forecast users for the selected role.

Enabling Customizable Forecasting

Action:

From Setup, enter *Forecasts Hierarchy* in the `Quick Find` box, then select **Forecasts Hierarchy** and click **Enable Customizable Forecasting** to turn on customizable forecasting for your organization.

You are now ready to deploy customizable forecasting to your organization. To turn off the old Forecasts tab and display the new one, enable customizable forecasting (see sidebar).

After you enable customizable forecasting, users can click the Forecasts tab to view and submit their forecasts. Administrators can also submit forecasts for all users using a Batch Submit option that becomes available once you enable forecasting. From Setup, enter *Batch Submit* in the `Quick Find` box, then select **Batch Submit Forecasts** to submit forecasts for multiple users at once.

Setting User Permissions

Determine which users need the following new permissions:

- "Override Forecasts"—Allows users to override their own forecasts as well as forecasts for users that report directly to them. Salesforce automatically adds this to all standard profiles except Read Only.
- "Edit Personal Quota"—Allows users to change their individual quotas. Salesforce automatically adds this to all standard profiles except Read Only.
- "View All Forecasts"—Allows users to view any forecast regardless of the forecast hierarchy. Any user who has the "View All Data" permission will get this permission. Disable it in your custom profiles where necessary.

For more information on user permissions and settings, see User Permissions and Access.

Regardless of the user permissions, administrators can always edit any quota, and users can always edit the quotas of users that report directly to them.