Team Selling Implementation Guide

Salesforce, Spring '23

@salesforcedocs
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CONTENTS

TEAM SELLING AND OPPORTUNITY SPLITS

Accurately capture who works on deals and show how much each person contributes to them, and track and report on team members' performance.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Team selling available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Opportunity splits available in: **Performance** and **Developer** Editions and in **Enterprise** and **Unlimited** Editions with the Sales Cloud

Closing deals often requires participation from multiple sales reps. Sales reps are often the customer point of contact for a deal, but others, such as associate sales reps and sales managers, also work on deals. Collectively, these people make up a sales team, with each member responsible for a portion of the work required to close the deal.

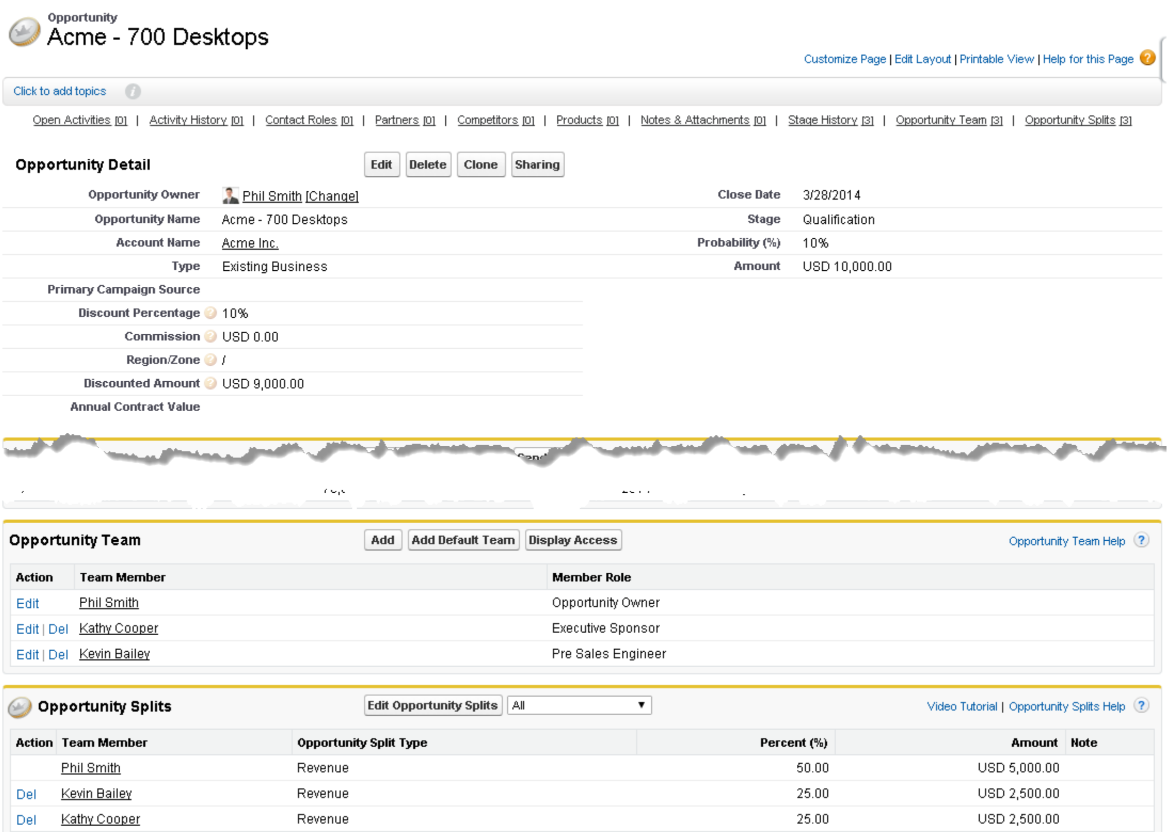
However, with multiple people working on the same sales, the team risks creating duplicate opportunities for tracking each of their contributions to the deal's progress. Duplicate opportunities can skew reporting and obscure the actual progress on the opportunities. Two features can help your business capture who works on each deal, so that your team can avoid creating duplicate opportunities.

- With *team selling, also known as opportunity teams,* users create a sales team that includes all the users working on a sale and give everyone shared access to a single opportunity with the information they need. The owner of the opportunity determines who gets read and write or read-only access.
- With *opportunity splits*, a team owner divides the opportunity among the team members, giving responsibility and credit where it's due. An opportunity can be split in terms of revenue, overlay, or a custom split.

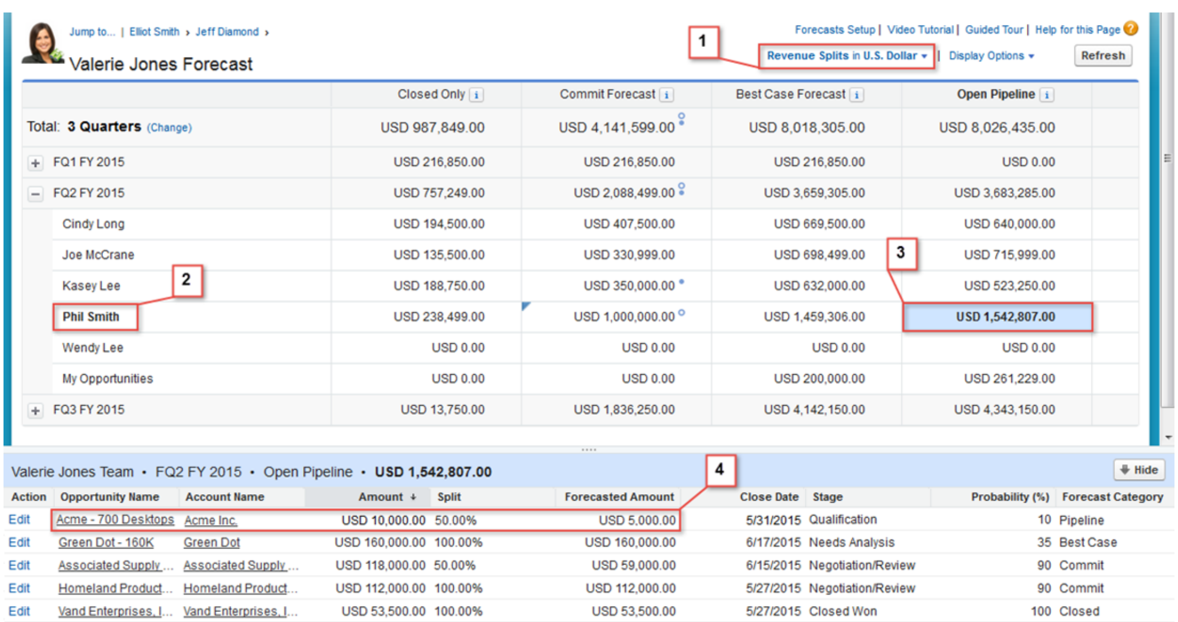
Note: You can choose to enable just team selling or both features, but you have to enable team selling before you enable opportunity splits.

Example of How Team Selling and Opportunity Splits Work Together

Valerie, a sales rep at AW Computing, creates an opportunity to sell 500 laptops to the Acme account. She wants to share this record with other people who are working on the deal and let everyone track their work in one place.



In the opportunity, she scrolls to Opportunity Team and adds her team members. Valerie chooses each person's role on the team, and indicates whether that person can *read* or *read and edit* the opportunity. She also wants to split the opportunity so that the record shows the percentage of the deal each rep owns. Then, she scrolls to Opportunity Splits and adds a split for each team member with their percentage of the deal. Finally, Valerie wants to see the total revenue amounts from all the split opportunities in her sales pipeline. She goes to the Forecasts tab to view the Revenue Splits forecast (1) and selects Phil Smith's (2) FQ2 Open Pipeline amount (3). She can then see a list of Phil's opportunities for that period, including the Acme - 700 Desktops opportunity showing his 50% split (4).



Preview of Setting Up Team Selling and Opportunity Splits

The following sections take you through the steps of setting up team selling and opportunity splits for the way you do business. Here's a preview:

- How to enable team selling
- How to enable opportunity splits and set up split types
- How to enable Collaborative Forecasts for your opportunity splits

SETTING UP TEAMS

A sale is often a team effort, but it can be hard to capture the contributions of everyone who participated. Team selling lets you set up teams for salespeople and set up roles within the team, such as account manager or sales rep.

Facilitate Team Selling by Enabling Opportunity Teams

Help your reps collaborate on deals by enabling opportunity teams.

1. In Setup, use the Quick Find box to find **Opportunity Team Settings**.
2. Select **Enable Team Selling**.
3. Select the opportunity page layouts where you want to include the Opportunity Team Member related list. You can also include the related list in page layouts that users have personalized.
4. Save your settings.

EDITIONS

Available in: Lightning Experience, Salesforce Classic (not available in all orgs), and the new Salesforce mobile app

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

USER PERMISSIONS

To enable team selling (opportunity teams):

- Customize Application

Customize Opportunity Team Roles

Every opportunity team member has a role in the opportunity, such as account manager or sales rep. To track the roles that team members fill in your company, customize opportunity team roles.

Warning:

- Leave the role of opportunity owner unchanged. It's required for opportunity splits.
- Opportunity teams share roles with account teams. If you remove an opportunity team role, that role is no longer listed as an account team role.

To edit team roles, first enable opportunity teams.

1. In Setup, use the Quick Find box to find **Team Roles**.
2. Edit the picklist values for team roles to follow your business process.
3. Save your changes.
4. To update a changed picklist value globally, in Setup, use the Quick Find box to find **Replace Team Role**.

EDITIONS

Available in: Lightning Experience and Salesforce Classic (not available in all orgs)

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USER PERMISSIONS

To set up team roles:

- Customize Application

USING OPPORTUNITY SPLITS TO SHARE REVENUE

Sales team members can share revenue from and credit for an opportunity by using opportunity splits. Team members working on an opportunity can roll their individual sales credits into quota and pipeline reports for the entire team. Opportunity splits and split types help your business track the total effort of a sales team and more easily divide commissions based on participation. Now that team selling is up and running and you have a basic understanding of opportunity splits, let's enable the feature and set up splits. If needed, you can create custom split types for your business and add lines to the opportunity splits page layout to allow more splits on opportunities.

Get Ready to Enable Opportunity Splits

EDITIONS

Available in: Lightning Experience and Salesforce Classic (not available in all orgs)

Available in: **Performance** and **Developer** Editions and **Enterprise** and **Unlimited** Editions with the Sales Cloud

USER PERMISSIONS

To enable opportunity splits:
- Modify All Data

Before enabling opportunity splits, check for mass operations in progress, inactive currencies, and inactive and automated process users related to opportunities.

- **Check for mass operations in progress, and make sure that all mass operations are finished.**
  If you enable opportunity splits while you're running a mass operation, such as Mass Transfer or Mass Reassign Team Member, enablement of splits can fail.
- **Resolve inactive currencies.**
  If inactive currencies were active in the past, those currencies are probably still used on some opportunity records. When inactive currency is used on opportunities, the splits enablement process fails. To prevent failure, do one of the following.
  - While splits enablement is in progress, temporarily make inactive currencies active.
  - Delete the opportunities with the inactive currency. This solution works best when you have only a few opportunities with an inactive currency that you don't need for reporting or historical purposes.
- **Handle inactive and automated process users related to opportunities.**
  Opportunities owned by inactive users or users generated during automatic processes such as Apex triggers, workflows, and Marketing Cloud Account Engagement integration block splits enablement. To prevent the process from failing, do one of the following.
  - If you have few inactive users or process users and you don't need their opportunities for reporting or historical purposes, delete all their opportunities.
  - If you have inactive users or process users, temporarily transfer ownership of their opportunities to active users while splits enablement process is in progress.
  - If you have inactive users, temporarily make them active while splits enablement process is in progress.
  - Temporarily allow editing of inactive users while splits enablement process is in progress.
    1. In Setup, use the Quick Find box to find **User Interface**.
    2. Select **Enable "Set Audit Fields upon Record Creation" and "Update Records with Inactive Owners" User Permissions**.
    3. Save your changes.
    4. In profiles or permission sets, select **Update Records with Inactive Owners**.

    Note: Editing inactive users can alter archived data. If you're using this permission to enable opportunity splits, we recommend limiting whom you assign it to and unassigning it after the process is finished.

Enable Opportunity Splits

After meeting prerequisites, enable opportunity splits in Setup.

Before enabling opportunity splits, do the following:

1. Follow the steps in Get Ready to Enable Opportunity Splits.
2. In Opportunity Team setup. enable team selling.

Splits Setup Process Duration

Consider enabling opportunity splits at the end of the workday so that the process runs overnight. The process sets up a split on every opportunity, and, depending on the number of opportunity records, it can take several hours. You can still work with Salesforce while the process is ongoing. You receive automated email notifications with updates on the status of the process.

Temporarily Disabled Automation

While splits are being enabled, a script temporarily disables the following: validation rules, Apex triggers, and workflows for opportunity team records; mass reassignment of opportunity team members; and mass transfer of accounts and opportunities.

Required Opportunity Owner Role

If the opportunity owner isn't on the opportunity team, the opportunity owner is added to the team during the splits enablement. The owner is assigned 100% of the split amount. Users can adjust the amount on splits that they create.

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USER PERMISSIONS

To enable opportunity splits:

- Modify All Data

Note: The opportunity owner records added during splits enablement use more data storage.

1. In Setup, use the Quick Find box to find **Opportunity Splits Settings**.
2. To tailor opportunity splits to your business process, do any of the following.
   - Rename or deactivate the default revenue and overlay splits, which are based on the Opportunity - Amount field.
   - To split another currency field and specify whether splits on that field must total 100%, click **+ Add a new split type**.
3. Click **Save**.
4. Select the opportunity page layouts where you want to include the Opportunity Splits related list. You can also include the related list in page layouts that users have personalized.
5. Start splits enablement by clicking **Save**.
   Look for an email notifying you that splits have been enabled.

After splits have been enabled, do the following:

- Help users create splits faster by selecting **Let users add members to opportunity teams while editing splits**. Otherwise, owners must add coworkers to an opportunity team before adding them to a split.
- Depending on how you handled inactive and automatic process users before enabling splits, transfer ownership, deactivate users, or deactivate editing of inactive users.

Customize Opportunity Split Types

Revenue and overlay splits are included on currency fields on opportunities by default. To reflect reps' quotas and optimize support for sales operations, create up to 6 custom opportunity split types in addition to the default revenue and overlay splits. Specify whether each custom type must always total 100%.

Enable custom split types by contacting Salesforce.

Note: Custom opportunity split types are enabled through a background process. You're notified by email when the process is finished. We recommend asking your users not to edit opportunity splits in the meantime.

Split on Opportunity - Amount is the default currency field. You can split any other standard currency field, roll-up summary fields, or custom currency fields, but not formula currency fields.

1. In Setup, use the Quick Find box to find **Opportunity Splits Settings**.
2. Click **Edit Split Types**.
3. Click **+ Add a new split type** and define the settings.
4. Save your changes.

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USER PERMISSIONS

To create custom split types for opportunities:

- Customize Application

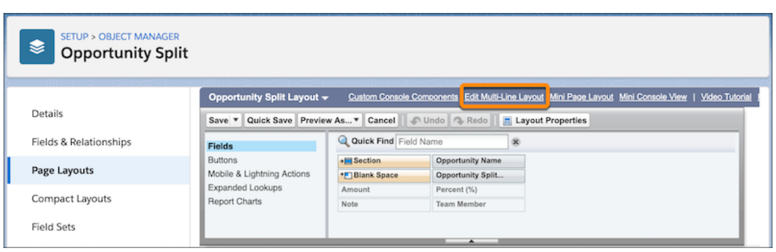
  AND

  Modify All Data

Edit Opportunity Splits Layouts

Choose the fields for sales reps to use when managing opportunity splits.

1. In the Object Manager, use the Quick Find box to find **Opportunity Split**.
2. Click **Page Layouts**, and then click a layout to edit.
3. Open the Multi-Line Layout editor.



4. In the editor, select fields for sales reps to use when managing splits.
   - The opportunity splits multiline layout doesn't support rich text fields or multiselect picklists. Users can edit those fields on each team member's opportunity split detail page.
   - In Lightning Experience, considerations for editing inline in a list view also apply to editing splits in the multiline view.
5. Click **Save**, then click **Done**.

EDITIONS

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USER PERMISSIONS

To edit multiline layouts and page layouts:

- Customize Application

SET UP COLLABORATIVE FORECASTS FOR OPPORTUNITY SPLITS

Now that you have set up Opportunity Splits, you can start forecasting the revenue from those splits. Let's set up forecasts for the split types you created. See Set Up Forecast Types in Collaborative Forecasts.