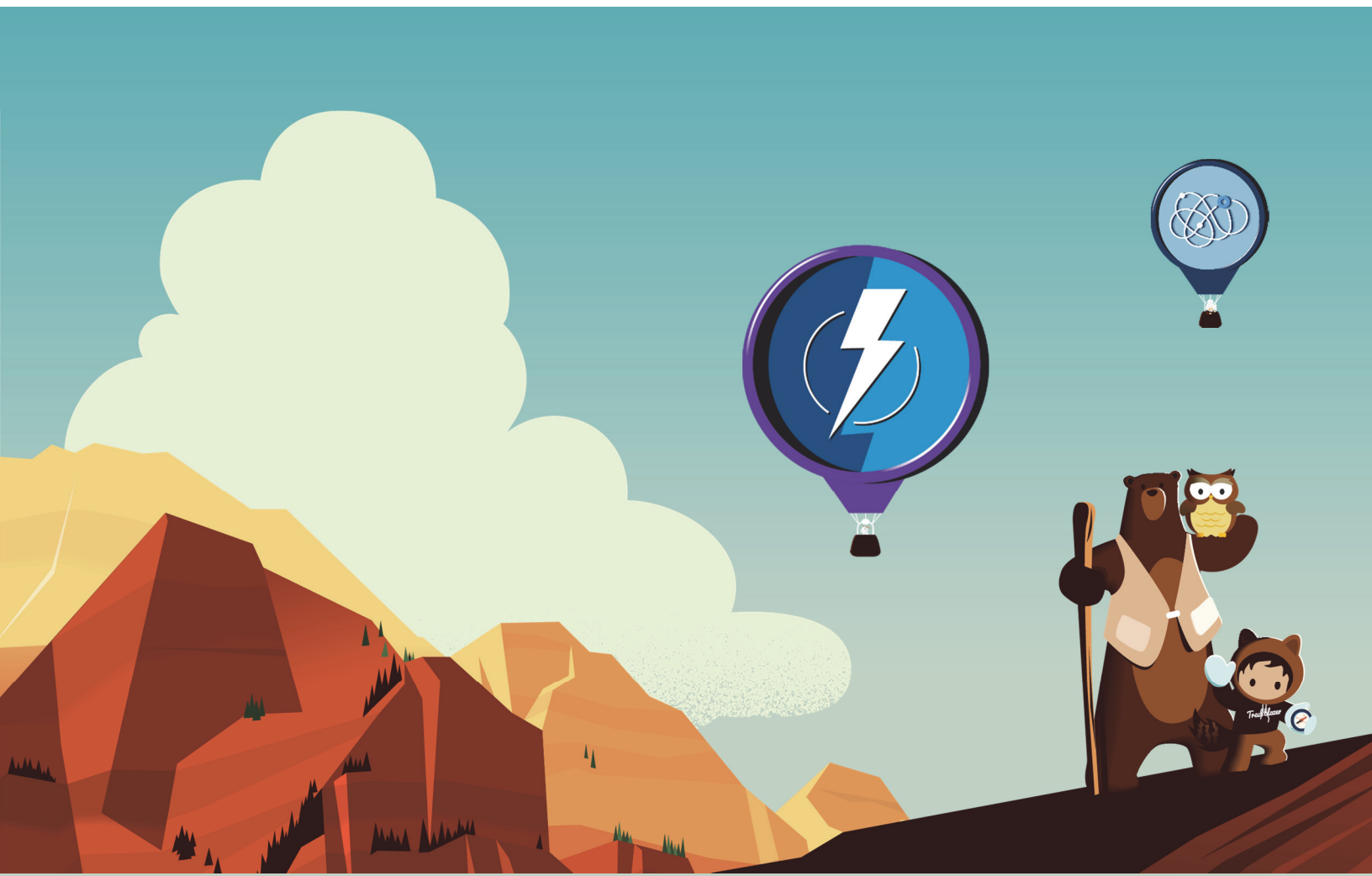




Exercise Guide

SALES CLOUD ADMINISTRATION: PRODUCTS, QUOTES, ORDERS, & COLLABORATIVE FORECASTS

ADM251





1-1: Log In and Update Your Profile

Goal: Log in and update your Chatter profile.

Time: 5 minutes

Instructions:

1. Navigate to the Salesforce login page.
 - A. Open an internet browser.
 - B. Enter `login.salesforce.com` into the browser's address bar.
 - C. Press **Enter**.
2. Log in with your username and password.
 - A. Enter your username and password.

User Name:

Password:
 - B. Click **Log in to Salesforce**.
3. Update your Chatter profile with your name and email.
 - A. Click **Admin User | My Profile**.
 - B. Click the **pencil** icon next to Contact.
 - C. Enter your email information.

Email: `(your personal email)`
 - D. Click the **About** tab and enter your name information.

First Name: `(your first name)`

Last Name: `(your last name)`
 - E. Click **Save All**.



1-2: Add a Service Package Product

Goal: Add a service package product and set the price.

Time: 5 minutes

Instructions:

1. Add Service Packages to the Product Family picklist.
 - A. Click **Setup | Customize | Products | Fields**.
 - B. Click the **Product Family** field label.
 - C. In the Product Family Picklist Values section, click **New**.
 - D. In the box, enter `Service Packages`.
 - E. Click **Save**.

2. Add an AW CompuCare product.
 - A. Click the **Products** tab.
 - B. In the Recent Products section, Click **New**.
 - C. Enter the product information.

Product Name: AW CompuCare
Product Code: SP01
Product Currency: USD – U.S. Dollar
Product AW CompuCare service package
Description:
Product Family: Service Packages
Active: **Select**

- D. Click **Save & Add Price**.

3. Set the standard price for each currency.
 - A. Enter the standard price.

Currency	Standard Price
USD - U.S. Dollar	450
GBP - British Pound	275
EUR - Euro	350
JPY - Japanese Yen	450000
SGD - Singapore Dollar	575

- B. Click **Save**.

4. View the standard price book to see the AW CompuCare entries.
 - A. Click the **Products** tab.
 - B. Verify that the Price Books View is set to **Standard Price Book**, and click **Go!**
 - C. View the price book entries for the AW CompuCare product.



1-3: Add a Printer Product

Goal: Add a WiFi-enabled printer product and set the price.

Time: 10 minutes

Instructions:

1. Add Printers to the Product Family picklist.
 - A. Click **Setup | Customize | Products | Fields**.
 - B. Click the **Product Family** field label.
 - C. In the Product Family Picklist Values section, click **New**.
 - D. In the box, enter `Printers`.
 - E. Click **Save**.
2. Add a WiFi checkbox on the Product object.
 - A. Click **Setup | Customize | Products | Fields**.
 - B. In the Product Custom Fields & Relationships section, click **New**.
 - C. Select **Checkbox** and click **Next**.
 - D. Enter the details.

Field Label:	WiFi
Default Value:	Unchecked
Description:	WiFi-enabled
 - E. Click **Next**.
 - F. Leave the field-level security as is and click **Next**.
 - G. Add the field to the page layouts and click **Save**.
3. Add a Cyclone printer product that has WiFi enabled.
 - A. Click the **Products** tab.
 - B. In the Recent Products section, click **New**.
 - C. Enter the product information.

Product Name:	Cyclone
Product Code:	CY01
Product Currency:	USD – U.S. Dollar
WiFi:	Select
Product	Cyclone printer with WiFi
Description:	
Product Family:	Printers
Active:	Select
 - D. Click **Save & Add Price**.



4. Set the standard price for each currency.

A. Enter the standard price.

Currency	Standard Price
USD - U.S. Dollar	2500
GBP - British Pound	1450
EUR - Euro	1900
JPY - Japanese Yen	250000
SGD - Singapore Dollar	3200

B. Click **Save**.

5. Edit the All Products list view to include the WiFi field.

A. Click the **Products** tab.

B. In the Product Views section, click **Edit**.

C. Add **WiFi** to the Selected Fields to Display list.

D. Click **Save**.

6. Edit all laptop products to enable the WiFi checkbox.

A. Select the checkbox for these products:

Lightning 2

Lightning 5

B. Double click the **WiFi** checkbox for Lightning 2.

C. In the Edit WiFi popup box, select **All 2 selected records**.

D. Click **Save**.



1-4: Add a Nonprofit Custom Price Book

Goal: Add a custom price book for nonprofit customers in the US and the UK.

Time: 5 minutes

Instructions:

1. Create a custom price book called Nonprofit.

- A. Click the **Price Books** tab.
- B. Click **New** and enter the product information.

Price Book Name: Nonprofit
Description: Price book for nonprofit customers
Active: **Select**

- C. Click **Save**.

2. Add products at the nonprofit list prices.

- A. In the Products section, click **Add**.
- B. Select the checkbox for these products:

Bolt (USD)
Bolt (GBP)
Bolt S (USD)
Lightning 2 (USD)
Lightning 2 (GBP)

- C. Click **Select** and enter the nonprofit list price.

Currency	Standard Price
Bolt (USD)	1260
Bolt (GBP)	765
Bolt S (USD)	1440
Lightning 2 (USD)	1600
Lightning 2 (GBP)	1000

- D. Click **Save**.



1-5: Add an Enterprise Custom Price Book

Goal: Track market regions on price books and add a custom price book for enterprise customers in APAC.

Time: 10 minutes

Instructions:

1. Create a picklist on the Price Book object to track the region: AMER, APAC, EMEA.

- A. Click **Setup | Customize | Price Books | Fields**.
- B. In the Price Book Custom Fields & Relationships section, click **New**.
- C. Select **Picklist** and click **Next**.
- D. Enter the details.
- E. Field Label: **Region**
- F. Under **Values**, select **Enter values, with each value separated by a new line**.
- G. *Picklist Values:* AMER
APAC
EMEA
Description: Price book region
- H. Click **Next**. Leave the field-level security as is and click **Next**.
- I. Add the field to the page layouts and click **Save**.

2. Create a custom price book called Enterprise – APAC, and set the region to APAC.

- A. Click the **Price Books** tab.
- B. Click **New** and enter the product information.
Price Book: Enterprise - APAC
Description: Price book for enterprise customers in APAC
Region: APAC
Active: **Select**
- C. Click **Save**.

3. Add products at the enterprise list prices.

- A. In the Products section, click **Add**.
- B. Select the checkbox for these products:

Lightning 2 (SGD)	Lightning 2 (JPY)	Lightning 5 (SGD)	Lightning 5 (JPY)
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- C. Click **Select** and enter the enterprise list price.

Currency	Standard Price
Lightning 2 (SGD)	1900
Lightning 2 (JPY)	145000
Lightning 5 (SGD)	2400
Lightning 5 (JPY)	195000

- D. Click **Save**.



1-6: Add Products to a Nonprofit Opportunity

Goal: Add products to an opportunity for a nonprofit account.

Time: 5 minutes

Instructions:

1. Add products to the Environmental Control Agency – Desktops opportunity using the Nonprofit price book.
 - A. Click the **Accounts** tab.
 - B. Verify that the View is set to **All Accounts**, and click **Go!**
 - C. Click the **Environmental Control Agency** account name.
 - D. From the Opportunities related list, click the **Environmental Control Agency – Desktops** opportunity name.
 - E. Click **Edit** and change the Amount field to 40,000.00.
 - F. Click **Save**.
 - G. From the Products related list, click **Add Product**.
 - H. Set the Price Book to **Nonprofit**.
 - I. Click **Save**.
 - J. Select the checkbox for these products:

Bolt

Bolt S

- K. Click **Select** and enter the product quantity.

Product	Quantity
Bolt	5
Bolt S	7

- L. Click **Save**.
- M. Click **Edit** and try to change the Amount field.
- N. Click **Cancel**.



1-7: Add Products to an Enterprise Opportunity

Goal: Add products to an opportunity for an enterprise account in Asia.

Time: 5 minutes

Instructions:

1. Add products to the Rochir – Laptops opportunity using the Enterprise – APAC price book.
 - A. Click the **Accounts** tab.
 - B. Verify that the View is set to **All Accounts**, and click **Go!**
 - C. Click the **Rochir** account name.
 - D. From the Opportunities related list, click the **Rochir – Laptops** opportunity name.
 - E. From the Products related list, click **Add Product**.
 - F. Set the Price Book to **Enterprise – APAC**.
 - G. Click **Save**.
 - H. Select the checkbox for these products:

Lightning 2

Lightning 5

- I. Click **Select** and enter the product quantity.

Product	Quantity
Lightning 2	10
Lightning 5	20

- J. Click **Save**.



1-8: Control Access to Products and Price Books

Goal: Prevent users from adding products from specific price books to opportunities.

Time: 10 minutes

Instructions:

1. Change the organization-wide default setting for the Price Books object to View Only.
 - A. Click **Setup | Security Controls | Sharing Settings**.
 - B. Click **Edit**.
 - C. Set Price Book to **View Only**.
 - D. Click **Save**.
2. Share the Enterprise – APAC price book with Roles and Subordinates of the APAC Sales Director with Use access.
 - A. Click the **Price Books** tab.
 - B. Click the **Enterprise – APAC** price book.
 - C. Click **Sharing**.
 - D. Click **Add**.
 - E. Enter the sharing information.

Search:	Roles and Subordinates
Share With:	Roles and Subordinates: APAC Sales Director
Price Book Access:	Use
 - F. Click **Save**.
3. Log in as Jin Chang, an APAC Sales Rep, and verify that he can view price books and add products from the Enterprise – APAC price book to an opportunity.
 - A. Click **Setup | Manage Users | Users**.
 - B. Click **Login** next to Chang, Jin.
 - C. Click the **Price Books** tab.
 - D. Verify that the View is set to **All**, and click **Go!**
 - E. Click the **Enterprise – APAC** price book and view the products.
 - F. Click the **Accounts** tab.
 - G. Verify that the View is set to **All Accounts**, and click **Go!**
 - H. Click the **Nizu – APAC** account name.
 - I. From the Opportunities related list, click the **Nizu APAC – Laptops** opportunity name.
 - J. From the Products related list, click **Add Product**.
 - K. Select the checkbox for this product:

Lightning 2



L. Click **Select** and enter the product quantity.

Product	Quantity
Lightning 2	25

M. Click **Save**.

N. Click **Jin Chang | Logout**.

4. Log in as Anna Bressan, a US Sales Rep, and verify that she can view price books but not add products from any price book to an opportunity.

A. Click **Setup | Manage Users | Users**.

B. Click **Login** next to Bressan, Anna.

C. Click the **Price Books** tab.

D. Verify that the View is set to **All**, and click **Go!**

E. Click the **Enterprise – APAC** price book and view the products.

F. Click the **Accounts** tab.

G. Verify that the View is set to **All Accounts**, and click **Go!**

H. Click the **Nizu – APAC** account name.

I. From the Opportunities related list, click the **Nizu APAC – Laptops** opportunity name.

J. From the Products (Enterprise – APAC) related list, click **Add Product** and verify that you cannot add products to the opportunity.

K. Click **Anna Bressan | Logout**.



1-9: Create Multiple Quotes

Goal: Create multiple quotes and sync one of the quotes to an opportunity.

Time: 5 minutes

Instructions:

1. Create a quote and sync it to the Rochir – Laptops opportunity.

- A. Click the **Opportunities** tab.
- B. Verify that the View is set to **All Opportunities**, and click **Go!**
- C. In the Recent Opportunities list, click **Rochir – Laptops**.

What is the opportunity amount?

- D. From the Quotes related list, click **New Quote**.
- E. Set Quote Name to Quote 1 and click **Save**.

What is the total price of the quote?

- F. Click **Start Sync**.
- G. Read the pop-up message, click **Sync**, then click **Done**.

2. Create a second quote and edit the quote line items.

- A. From the Opportunity Name field, click **Rochir – Laptops** to return to the opportunity.
- B. From the Quotes related list, click **New Quote**.
- C. Set Quote Name to Quote 2 and click **Save**.
- D. From the Quote Line Items (Enterprise – APAC) related list, click **Edit All**.
- E. For the Lightning 5 product, change Quantity to 30.
- F. For the Lightning 5 product, set Discount to 10.
- G. Click **Save**.

What is the total price of the quote?

3. Sync the second quote to the opportunity.

- A. Click **Start Sync**.
- B. Read the pop-up message and click **Continue**.
- C. Read the pop-up message and click **Sync**, then click **Done**.
- D. From the Opportunity Name field, click **Rochir – Laptops** to return to the opportunity.

What is the opportunity amount?

4. Generate a PDF of the quote.

- A. From the Quotes related list, click **Quote 2**.
- B. Click **Create PDF**.
- C. View the document and click **Save to Quote**.



1-10: Create an Order with Products

Goal: Create an order with products.

Time: 5 minutes

Instructions:

1. Create an order.

- A. Click the **Accounts** tab.
- B. In the Recent Accounts list, click **Rochir**.
- C. Hover over the **Contracts** related list to confirm that there is an activated contract associated to this account.
- D. From the Orders related list, click **New Order**.
- E. Enter the order information.

Contract Number:	00000106
Order Start Date:	Enter the last day of next month.

F. Click **Save**.

2. Add products to the order from the Enterprise – APAC price book and activate the order.

- A. From the Order Products related list, click **Add Product**.
- B. Set the Price Book to **Enterprise – APAC**.
- C. Click **Save**.
- D. Select the checkbox for these products:

Lightning 2

Lightning 5

E. Click **Select** and enter the product quantity.

Product	Quantity
Lightning 2	10
Lightning 5	20

- F. Click **Save**.
- G. Click **Activate**.
- H. Click **OK**.



2-1: Enable Forecasts for Users

Goal: Allow all users in the sales organization to forecast.

Time: 5 minutes

Instructions:

1. Enable forecasting for the VP of Global Sales and all US Sales users.
 - A. Click **Setup | Manage Users | Users**.
 - B. Click **Edit** next to Bressan, Anna.
 - C. Select the **Allow Forecasting** checkbox.
 - D. Click **Save**.
 - E. Repeat these steps for Kathy Cooper, Frank Roberts, Allison Wheeler, and Matt Wilson.
2. Make the Forecasts tab visible for the Sales User and Executive User profiles.
 - A. Click **Setup | Manage Users | Profiles**.
 - B. Click **Sales User | Object Settings | Forecasts**.
 - C. Click **Edit**.
 - D. Set the Tab Settings to **Default On**.
 - E. Click **Save**.
 - F. Repeat these steps for the Executive User profile.



2-2: Add a Forecast Type for Opportunities (Quantity)

Goal: Allow users to view the forecast based on opportunity quantity.

Time: 5 minutes

Instructions:

1. Add a forecast type for Opportunities (Quantity) that includes the Region / Zone field in the Opportunities pane.

- A. Click **Setup | Customize | Forecasts | Forecast Settings**.
- B. Click **Add a Forecast Type** and configure the settings.

Forecast Type:	Opportunities
Forecast	Quantity
Measurement:	
Selected Columns:	Opportunity Name Account Name Quantity Close Date Stage Probability (%) Forecast Category Owner Full Name Region / Zone

- C. Click **OK**.

2. Review the default forecast settings.

- A. What are the default forecast settings?

Enable manager adjustments:

Enable owner adjustments:

Enable cumulative forecast rollups:

Forecast Period:

Starting on:

Display:

Forecast Currency:

Show quotas:

- B. Click **Save**.



2-3: Add a Forecast Type for Opportunities (Revenue)

Goal: Allow users to view the forecast based on opportunity revenue.

Time: 5 minutes

Instructions:

1. Add a forecast type for Opportunities (Revenue) that includes the Region / Zone field in the Opportunities pane.

- A. Click **Setup | Customize | Forecasts | Forecast Settings**.
- B. Click **Add a Forecast Type** and configure the settings.

Forecast Type:	Opportunities
Forecast	Revenue
Measurement:	
Selected Columns:	Opportunity Name
	Account Name
	Amount
	Close Date
	Stage
	Probability (%)
	Forecast Category
	Owner Full Name
	Region / Zone

- C. Click **OK**.

2. Configure the forecast settings.

- A. Set the forecast settings.

Enable manager adjustments:	Select
Enable owner adjustments:	Select
Enable cumulative forecast rollups	Deselect
Forecast Period:	Quarterly
Starting On:	Current quarter
Display:	4 quarters
Forecast Currency:	Corporate Currency (U.S. Dollar)
Show Quotas:	Select

- B. Click **Save**.
- C. Select **I understand this action will delete data**.
- D. Click **Change and Delete**.



2-4: View the Impact of Changing the Forecast Settings

Goal: View the impact of the forecast settings on the forecast.

Time: 10 minutes

Instructions:

1. Log in as Karen Adams, an EMEA Sales Rep.
 - A. Click **Setup | Manage Users | Users**.
 - B. Click **Login** next to Adams, Karen.
2. Answer questions about her forecast.
 - A. Click the **Forecasts** tab.
 - Which forecast periods are displayed by default?
 - How can Karen modify the displayed forecast periods?
 - Which currency is displayed by default?
 - How can Karen modify the currency?
 - B. Click on the different values in the forecast table and view the opportunity pane.
 - What happens when you click on a cell in the forecast table?
 - What fields display in the Opportunities pane?
 - Why is the Quota column empty?
 - Why are the Commit and Best Case forecast categories empty?
 - C. Click **Karen Adams | Logout**.



2-5: Map Opportunity Stages to Forecast Categories

Goal: Define which opportunity stages map to each forecast category.

Time: 5 minutes

Instructions:

1. Map opportunity stages to forecast categories.
 - A. Click **Setup | Customize | Opportunities | Fields**.
 - B. Click the **Stage** field label.
 - C. Change the forecast category for each stage based on the table.

Stage	Forecast Category
Initial Contact	Pipeline
Quote Given	Best Case
Prospecting	Pipeline
Qualification	Pipeline
Needs Analysis	Pipeline
Value Proposition	Best Case
Id. Decision Makers	Best Case
Perception Analysis	Best Case
Proposal/Price Quote	Commit
Negotiation/Review	Commit
Closed Won	Closed
Closed Lost	Omitted

- i. Click **Edit** next to the stage name.
- ii. Set **Forecast Category** to the new value.
- iii. Click **Save**.



2-6: View the Impact of Mapping Opportunity Stages to Forecast Categories

Goal: View the impact of mapping opportunity stages to forecast categories on the forecast.

Time: 5 minutes

Instructions:

1. Log in as Karen Adams, an EMEA Sales Rep.
 - A. Click **Setup | Manage Users | Users**.
 - B. Click **Login** next to Adams, Karen.
2. Answer questions about her forecast.
 - A. Click the **Forecasts** tab.

What has changed about her forecast?
 - B. Click on a value in the Best Case forecast category.

What displays in the opportunity pane when you click on a Best Case value?
 - C. In the opportunity pane, click **Edit** next to an opportunity in the Perception Analysis stage.
 - D. Change the Stage to **Proposal/Price Quote**.
 - E. Click **Save**.
 - F. Click on the **value** in the Commit forecast category for the same fiscal quarter.

What happens when you change the opportunity stage from Perception Analysis to Proposal/Price Quote?
 - G. Click on a **value** in the Best Case forecast category.
 - H. In the opportunity pane, click **Edit** next to an opportunity in the Value Proposition stage.
 - I. Change Forecast Category to **Commit**.
 - J. Click **Save**.

What happens when you change the forecast category of an opportunity?
 - K. Click **Karen Adams | Logout**.



2-7: Define Forecast Managers and Enable Adjustments

Goal: Allow sales managers to view the forecasts of subordinates and adjust the forecasts of direct reports.

Time: 5 minutes

Instructions:

1. Define all sales managers as forecast managers.
 - A. Click **Setup | Customize | Forecasts | Forecasts Hierarchy**.
 - B. Click **Expand All**.
 - C. Change the forecast manager for each role based on the table.

Role	Forecast Manager
VP of Global Sales/Sales Ops	Allison Wheeler
APAC Sales Director	An Lin
EMEA Sales Director	Jessica Heinz
US Sales Director	Kathy Cooper

- i. Click **Assign Manager** next to the role.
 - ii. Set **Forecast Manager** to the new value.
 - iii. Click **Save**.
2. Create a permission set that has the “Override Forecasts” permission enabled and assign it to Allison Wheeler.
 - A. Click **Setup | Manage Users | Permission Sets**.
 - B. Click **New**.
 - C. Enter the permission set information.

Label:	Adjust Forecasts
Description:	Grant the "Override Forecasts" permission to Allison Wheeler.
User License:	Salesforce

- D. Click **Save**.
 - E. Click **App Permissions**.
 - F. Click **Edit**.
 - G. Select the **Override Forecasts** checkbox.
 - H. Click **Save**.
 - I. Click **Manage Assignments**.
 - J. Click **Add Assignments**.
 - K. Select the checkbox for **Allison Wheeler**.
 - L. Click **Assign**.
 - M. Click **Done**.



3. Enable the "Override Forecast" permission for the Sales User profile.
 - A. Click **Setup | Manage Users | Profiles**.
 - B. Click **Sales User** profile.
 - C. Click **App Permissions**.
 - D. Click **Edit**.
 - E. Select the **Override Forecasts** checkbox.
 - F. Click **Save**.



2-8: View the Impact of Defining Forecast Managers and Enabling Adjustments

Goal: View the impact of defining forecast managers and enabling adjustments on the forecast.

Time: 10 minutes

Instructions:

1. Log in as Kathy Cooper, the US Sales Director.
 - A. Click **Setup | Manage Users | Users**.
 - B. Click **Login** next to Cooper, Kathy.
2. View the forecast for her sales reps, Anna Bressan and Frank Roberts.
 - A. Click the **Forecasts** tab.
 - B. Hover over **Anna Bressan** and click the **Details** link.

What is Anna's Commit forecast for the current fiscal quarter?
 - C. At the top of the page, click the **Jump to...** link.
 - D. In the box, type Frank and select **Frank Roberts**.

What is Frank's Commit forecast for the current fiscal quarter?
3. From Kathy's forecast, increase Frank's Commit forecast for the current fiscal quarter by \$10,000.
 - A. At the top of the page, click the **Kathy Cooper** link.
 - B. Hover over the **Commit** value for Frank Roberts for the current fiscal quarter.
 - C. Click the **pencil** icon to adjust his forecast.
 - D. In the cell, enter a value that is \$10,000 more than the current value.
 - E. Click the **green check** icon.
 - F. Hover over the **circle** icon in the Commit forecast cell for Frank Roberts.

What is the adjusted forecast value?

What is the forecast value without adjustments?
 - G. Click **Kathy Cooper | Logout**.
4. Log in as Allison Wheeler, the VP of Global Sales.
 - A. Click **Setup | Manage Users | Users**.
 - B. Click **Login** next to Wheeler, Allison.
5. View the forecast for Kathy Cooper and Frank Roberts.
 - A. Click the **Forecasts** tab.
 - B. Hover over **Kathy Cooper** and click the **Details** link.

What is Kathy's Commit forecast for the current fiscal quarter?
 - C. Hover over **Frank Roberts** and click the **Details** link.



What is Frank's Commit forecast for the current fiscal quarter?

Why are these values different?

6. From Allison's forecast, increase Kathy's Commit forecast for the current fiscal quarter by \$50,000.
 - A. At the top of the page, click the **Allison Wheeler** link.
 - B. Hover over the **Commit** value for Kathy Cooper for the current fiscal quarter.
 - C. Click the **pencil** icon to adjust her forecast.
 - D. In the cell, enter a value that is \$50,000 more than the current value.
 - E. Click the **green check** icon.
 - F. Hover over the **circle** icon in the Commit forecast cell for Kathy Cooper.

What values appear in the adjustment summary?

- G. Click **Allison Wheeler | Logout**.
7. Log in as Anna Bressan, a US Sales Rep.
 - A. Click **Setup | Manage Users | Users**.
 - B. Click **Login** next to Bressan, Anna.
8. View Anna's Commit forecast for the current fiscal quarter and increase it by \$10,000.
 - A. Click the **Forecasts** tab.

What is Anna's Commit forecast for the current fiscal quarter?

- B. Hover over the **Commit** value for the current fiscal quarter.
- C. Click the **pencil** icon to adjust her forecast
- D. In the cell, enter a value that is \$10,000 more than the current value.
- E. Click the **green check** icon.
- F. Hover over the **circle** icon in the Commit forecast cell for Anna.

What values appear in the adjustment summary?

- G. Click **Anna Bressan | Logout**.



2-9: Add Quota Data for APAC Sales Reps

Goal: Define revenue quota data for APAC sales reps.

Time: 10 minutes

Instructions:

1. Set the revenue quotas for APAC sales reps for the current and next 3 fiscal quarters.

- A. Click the **Edit Quotas** tab.
- B. Change the quota settings.

Forecast Period Options:	Select “Quarter” radio button
Forecasting Type:	Opportunity Revenue

- C. Set the revenue quotas for the current fiscal quarter.

- i. Enter the quota amount and currency.

Name	Quota (amount)	Currency
Fumiko Suzuki	185000	SGD
Jin Chang	185000	SGD

- ii. Click **Submit**.

- D. Set the revenue quotas for the next fiscal quarter by selecting the “Forecasting period.”

- i. Set the Period start date to the beginning month of the next fiscal quarter.
- ii. Enter the quota amount and currency.

Name	Quota (amount)	Currency
Fumiko Suzuki	185000	SGD
Jin Chang	185000	SGD

- iii. Click **Submit**.

- E. Repeat these steps for the next two fiscal quarters by selecting the “Forecasting Period.”

Current FQ + 2 FQ

Name	Quota (amount)	Currency
Fumiko Suzuki	125000	SGD
Jin Chang	125000	SGD



Current FQ + 3 FQ

Name	Quota (amount)	Currency
Fumiko Suzuki	125000	SGD
Jin Chang	125000	SGD

2. View the quota data and quota attainment from the forecast.
 - A. Click the **Forecasts** tab.
 - B. Click **Jump to...**
 - C. In the box, enter An and select **An Lin**.
 - D. Verify the quota data for Fumiko and Jin for the current and next 3 fiscal quarters. (Ensure that Opportunity Revenue in Singapore Dollar is selected in the top right corner)
 - E. Click **Display Options | Show Quota % Attainment**.
 - F. What is the quota attainment for Fumiko for the Closed forecast category for the current fiscal quarter?

What is the quota attainment for Jin for the Closed forecast category for the current fiscal quarter?



2-10: Add Quota Data for the VP of Global Sales

Goal: Define revenue quota data for the VP of Global Sales.

Time: 5 minutes

Instructions:

1. Set the revenue quotas for the VP of Global Sales for the current and next 3 fiscal quarters.

- A. Click the **Edit Quotas** tab.
- B. Change the quota settings.

Forecast Period: **First day of the current fiscal quarter**

Forecasting Type: **Opportunity Revenue**

- C. Set the revenue quota for the current fiscal quarter.
 - i. Enter the quota amount and currency.

Name	Quota (amount)	Currency
Allison Wheeler	1700000	USD

- ii. Click **Submit**.

- D. Set the revenue quota for the next fiscal quarter.

- i. Set the Period start date to the beginning month of the next fiscal quarter.
 - ii. Enter the quota amount and currency.

Name	Quota (amount)	Currency
Allison Wheeler	1700000	USD

- iii. Click **Submit**.

- E. Repeat these steps for the next two fiscal quarters.

Current FQ + 2

Name	Quota (amount)	Currency
Allison Wheeler	1300000	USD

Current FQ + 3

Name	Quota (amount)	Currency
Allison Wheeler	1300000	USD



2. View the quota data and quota attainment from the forecast.
 - A. Click the **Forecasts** tab.
 - B. Hover over **Allison Wheeler** and click the **Details** link.
 - C. Verify the quota data for Allison Wheeler for the current and next 3 quarters. (Ensure Opportunity Revenue in U.S. Dollars is chosen in the top right-hand corner.)
 - D. Click **Display Options | Show Quota % Attainment**.
 - E. What is the quota attainment for Allison Wheeler for the Closed forecast category for the current fiscal quarter?



2-11: Add a Forecast Type for Product Families (Revenue)

Goal: Allow users to view the revenue forecast separately for each product family.

Time: 5 minutes

Instructions:

1. Add a forecast type for Product Families (Revenue).
 - A. Click **Setup | Customize | Forecasts | Forecast Settings**.
 - B. Click **Add** another forecast type and configure the settings.

Forecast Type:	Product Families
Forecast	Revenue
Measurement:	
Selected Columns:	Opportunity Name
	Account Name
	Amount
	Close Date
	Stage
	Probability (%)
	Forecast Category
	Owner Full Name
 - C. Click **OK**.
 - D. Click **Save**.
2. Verify that the forecast displays the revenue forecast for each product family for Kathy Cooper.
 - A. Click the **Forecasts** tab.
 - B. Click **Opportunity Revenue in U.S. Dollar | Product Family Revenue**.
 - C. Hover over **Allison Wheeler** and click the **Details** link.
 - D. Click the **plus sign** next to Kathy Cooper to view the forecast by product family.



2-12: Add a Forecast Type for Margin

Goal: Allow users to view the forecast based on a custom field.

Time: 5 minutes

Instructions:

1. Add a forecast type for Margin.

- A. Click **Setup | Customize | Forecasts | Forecast Settings**.
- B. Click **Add another forecast type** and configure the settings.

Forecast Type:	Margin
Forecast	Revenue
Measurement:	
Selected Columns:	Opportunity Name
	Account Name
	Forecasted Amount
	Split
	Close Date
	Stage
	Probability (%)
	Forecast Category
	Owner Full Name
	Margin
	Amount

- C. Click **OK**.
- D. Click **Save**.

2. View the margin forecast for Fumiko Suzuki, an APAC Sales Rep.

- A. Click the **Forecasts** tab.
- B. Click **Product Family in U.S. Dollar** and select **Margin**.
- C. Click **Jump to...**
- D. In the box, enter Fum and select **Fumiko Suzuki**.
- E. What is the margin forecast amount for the Closed forecast category for the current fiscal quarter?
- F. In the opportunity pane, view the values of the Forecasted Amount, Margin, and Amount fields.



2-13: Build a Forecast Amount Report

Goal: Build a report to show the adjusted forecast.

Time: 10 minutes

Instructions:

1. Create the forecasting items report.

- A. Click the **Reports** tab.
- B. Click **New Report...**
- C. In the Select Report Type list, double-click **Forecasts**, and then click **Forecasting Items** from the list that appears.
- D. Click **Create**.
- E. Configure the report settings.

Show: **My direct reports' forecasting items**

Date Field: **Start Date**

Range: **Current and Next 3 FQ**
- F. Add a filter to only include the opportunity revenue forecast type.
 - i. Click **Add**.
 - ii. Set the filter to Forecasting Type: API Name **equals** OpportunityRevenue and click **OK**.
- G. Click **Tabular Format | Matrix**.
- H. Drag and drop **Start Date** into Drop a field here to create a row grouping.
- I. In the Preview pane, hover over **Start Date** and click **Group Dates By | Fiscal Quarter**.
- J. Drag and drop **Forecast Category** into Drop a field here to create a column grouping.
- K. In the Preview pane, hover over **Forecast Amount** and click **Summarize this field...**
- L. Select the **Sum** check box and click **Apply**.
- M. Select **Show | Record Count**.

2. Add a vertical bar chart.

- A. Click **Add Chart**.
- B. From the Select Type options, select **Vertical Bar Chart**.
- C. Enter the data on the Chart Data tab.

Y-Axis: **Sum of Forecast Amount**

X-Axis: **Start Date**

Group By: **Forecast Category**
Stacked (middle option)



D. Enter the data on the Formatting tab.

Chart Title: **Forecast by Category**

Legend Position: **Bottom**

Enable Hover: **Select**

E. Click **OK**.

3. Run and save the report.

A. Click **Run Report**.

B. Click **Save As** and enter the report details.

Report Name: **Forecast by Category**

Report Description: **What is the forecast by category?**

Report Folder: **Global Sales Reports**

C. Click **Save & Return to Report**.

Notes: