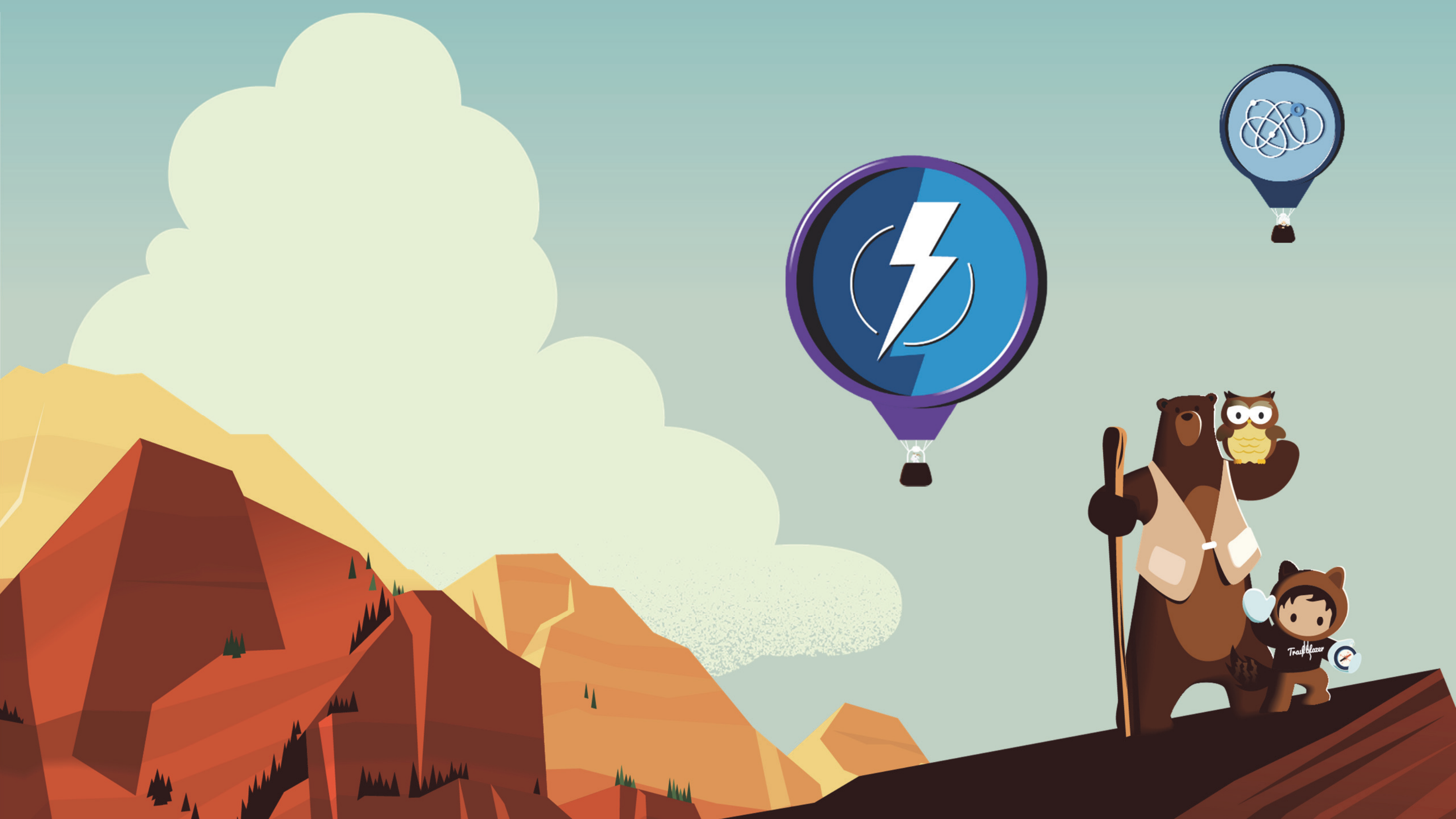
salesforce

Student Guide

Sales Cloud Administration: Products, Quotes, Orders, and Collaborative Forecasts

ADM251



AGENDA

ADM251 Sales Cloud Administration: Products, Quotes, Orders, and Collaborative Forecasts

15 minutes	**Introductions**
180 minutes	**Set Up Products, Price Books, Quotes, and Orders**

Your Turn 1-1 (5 min): Log In and Update Your Profile

- Creating and Customizing Products
  Watch Me 1-2 (5 min): Add a Service Package Product
  Your Turn 1-3 (10 min): Add a Printer Product
- Creating and Customizing Custom Price Books
  Watch Me 1-4 (5 min): Add a Nonprofit Custom Price Book
  Your Turn 1-5 (10 min): Add an Enterprise Custom Price Book
- Adding Products to Opportunities
  Watch Me 1-6 (5 min): Add Products to a Nonprofit Opportunity
  Your Turn 1-7 (5 min): Add Products to an Enterprise Opportunity
- Controlling Access to Products and Price Books
  Your Turn 1-8 (10 min): Control Access to Products and Price Books
- Creating Quotes
  Your Turn 1-9 (5 min): Create Multiple Quotes
- Creating Orders
  Your Turn 1-10 (5 min): Create an Order with Products
- Integrating Salesforce with Other Systems

Agenda subject to change.

AGENDA

ADM251 Sales Cloud Administration: Products, Quotes, Orders, and Collaborative Forecasts

180 minutes	**Set Up Collaborative Forecasts**

Set Up Collaborative Forecasts (180 minutes)

- Enabling Forecasts for Users
  Your Turn 2-1 (5 min): Enable Forecasts for Users
- Forecasting by Opportunities
  Watch Me 2-2 (5 min): Add a Forecast Type for Opportunities (Quantity)
  Your Turn 2-3 (5 min): Add a Forecast Type for Opportunities (Revenue)
  Your Turn 2-4 (10 min): View the Impact of Changing the Forecast Settings
- Mapping Opportunity Stages to Forecast Categories
  Your Turn 2-5 (5 min): Map Opportunity Stages to Forecast Categories
  Your Turn 2-6 (5 min): View the Impact of Mapping Opportunity Stages to Forecast Categories
- Defining Forecast Managers and Enabling Adjustments
  Your Turn 2-7 (5 min): Define Forecast Managers and Enable Adjustments
  Watch Me 2-8 (10 min): View the Impact of Defining Forecast Managers and Enabling Adjustments
- Adding Quota Data
  Watch Me 2-9 (10 min): Add Quota Data for APAC Sales Reps
  Your Turn 2-10 (5 min): Add Quota Data the VP of Global Sales
- Forecasting by Product Family
  Your Turn 2-11 (5 min): Add a Forecast Type for Product Families (Revenue)
- Forecasting by Opportunity Splits
  Your Turn 2-12 (5 min): Add a Forecast Type for Margin
- Building Reports
  Your Turn 2-13 (10 min): Build a Forecast Amount Report

15 minutes **Wrap Up**

Agenda subject to change.

Sales Cloud Administration: Products, Quotes, Orders, and Collaborative Forecasts

(Enterprise, Performance, and Unlimited Editions)

Copyright

Forward Looking Statements

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Safe harbor statement under the Private Securities Litigation Reform Act of 1995:

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Further information on these and other factors that could affect the financial results of salesforce.com, inc. is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings we make with the Securities and Exchange Commission from time to time, including our most recent Form 10-K. These documents are available on the SEC Filings section of the Investor Information section of our website at www.salesforce.com/investor.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make their purchase decisions based upon features that are currently available.

Introductions

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Logistics

- Class etiquette and participation
- Breaks

Courseware and Agenda

- Agenda for this class
- Layout of the manual and exercises

Your Fellow Students

- Your name
- Goals for your time in this class

Course Overview

5

UNIT 1:

Set Up Products, Price Books, Quotes, and Orders

UNIT 2:

Set Up Collaborative Forecasts

UNIT 3:

Q & A

1-1: Login to Salesforce

6

5 min

Goal:
Login to your training org.

Tasks:
1. Navigate to the Salesforce login page.
2. Log in with your username and password.
   - **URL:** `login.salesforce.com`
   - **Username:** `admin@aw####.com`
   - **Password:** `password1`
3. Change your name and email address in the training org.

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Module 1: Set up Products, Price Books, Quotes, and Orders

Group Discussion

8

1. How does your organization currently track products and manage pricing on sales deals?
2. How does your organization currently manage orders?
3. What are the pain points in your current quoting, product, and order management processes?

Manage Products, Prices, Quotes, and Orders

9

Allison Wheeler
VP Global Sales

"As part of our sales process, we want to track the quantity and prices of the products we sell. We also need to be able to generate quotes and track orders from customers."

To accomplish this, you need to be able to:

- Describe the capabilities of products, price books, quotes, and orders.
- Describe the relationships between opportunities, products, price books, quotes, contracts, and orders.
- Create and customize products and price books.
- Add products to opportunities.
- Create and edit quotes.
- Add products to orders.

Module Agenda

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- **Creating and Customizing Products**
- Creating and Customizing Custom Price Books
- Adding Products to Opportunities
- Controlling Access to Products and Price Books
- Creating Quotes
- Creating Orders
- Integrating Salesforce with Other Systems

Products and Price Books

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Products: The individual items or services you sell.

Price Book: The list of products and their associated prices.

Price book entry: A product and its price.

Price Book

Name	Code	Price
Product A	PAX2	$10
Product B	PBX3	$29
Product C	PCX4	$30
Product D	PDX5	$10
Product E	PEX6	$200
Product F	PF7	$25
Product G	PG8	$400
Product H	PH9	$40

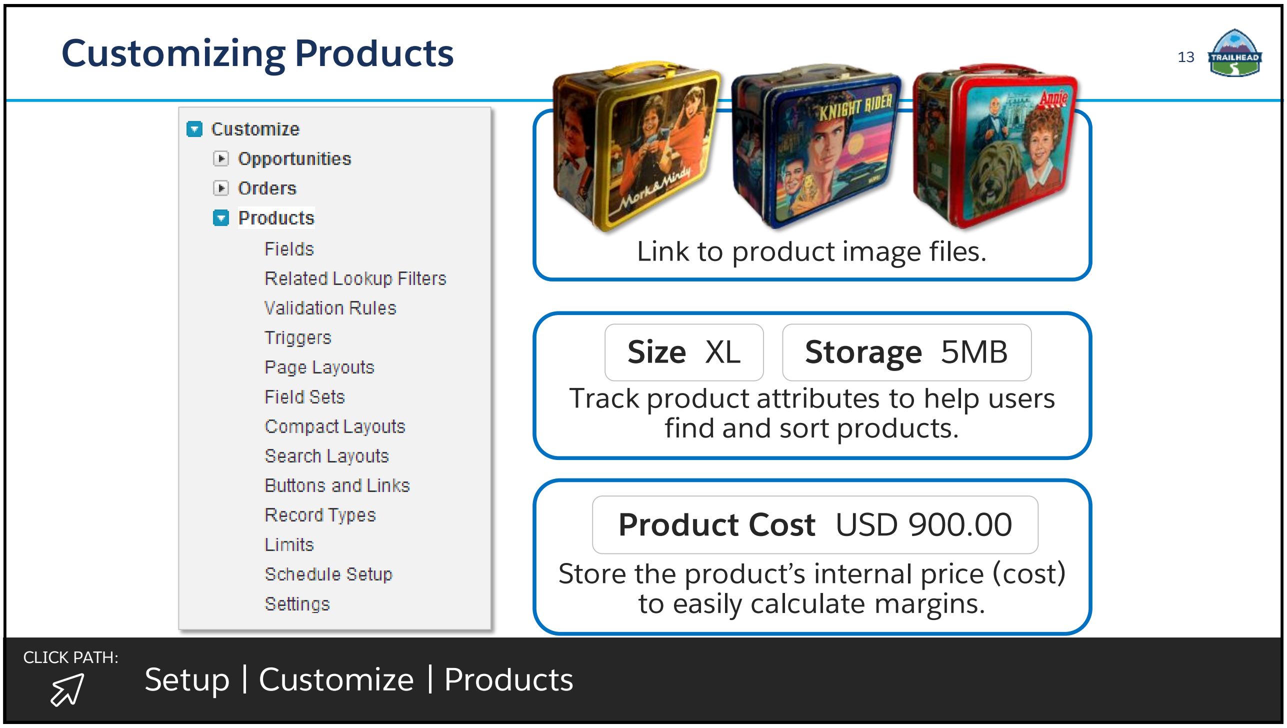
Product Families

Products can be categorized into product families.

Product families help you organize products by type and analyze product sales.

Price Book

Name	Code	Price	Product Family
Product A	PAX2	$10	Laptop
Product B	PBX3	$29	Laptop
Product C	PCX4	$30	Laptop
Product D	PDX5	$10	Desktop
Product E	PEX6	$200	Desktop
Product F	PF7	$25	Desktop
Product G	PG8	$400	Desktop
Product H	PH9	$40	Printer


Customizing Products
13
TRAILHEAD
Customize
Opportunities
Orders
Products
Fields
Related Lookup Filters
Validation Rules
Triggers
Page Layouts
Field Sets
Compact Layouts
Search Layouts
Buttons and Links
Record Types
Limits
Schedule Setup
Settings
KNIGHT RIDER
Annie
Link to product image files.
Size XL
Storage 5MB
Track product attributes to help users find and sort products.
Product Cost USD 900.00
Store the product's internal price (cost) to easily calculate margins.
CLICK PATH:
Setup | Customize | Products

1-2: Add a Service Package Product

14

5 min

Goal:

Add a service package product and set the price.

Tasks:

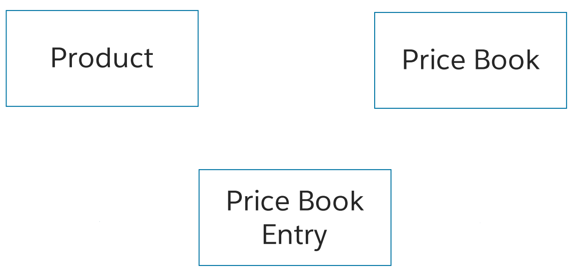
1. Add Service Packages to the Product Family picklist.
2. Add an AW CompuCare product.
3. Set the standard price for each currency:
4. View the standard price book to see the AW CompuCare entries.

Currency	Standard Price
USD	450
GBP	275
EUR	350
JPY	450,000
SGD	575

How Do Products and Price Books Relate to Each Other?

15

Use Schema Builder to determine how these objects relate to each other.



CLICK PATH:

Setup | Schema Builder

1-3: Add a Printer Product

16

10 min

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

Tasks:

1. Add Printers to the Product Family picklist.
2. Create a Wi-Fi checkbox on the Product object.
3. Add a Cyclone printer product that has Wi-Fi enabled.
4. Set the standard price for each currency:
5. Edit the All Products list view to include the Wi-Fi field.
6. Edit all laptop products to enable the Wi-Fi checkbox.

Currency	Standard Price
USD	2500
GBP	1450
EUR	1900
JPY	250,000
SGD	3200

Module Agenda

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- Creating and Customizing Products
- **Creating and Customizing Custom Price Books**
- Adding Products to Opportunities
- Controlling Access to Products and Price Books
- Creating Quotes
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Standard and Custom Price Books

ALL products at their standard prices

Standard Price Book

Name	$
Product A	$10
Product B	$20
Product C	$30
Product D	$10
Product E	$20
Product F	$25
Product G	$40
Product H	$40

Custom Price Book 1

Product A	$12.00
Product B	$20.00
Product C	$30.00
Product D	$12.00

Subset of products at custom list prices

Custom Price Book 2

Product D	$15.99
Product E	$25.99
Product F	$35.99
Product G	$45.99

Subset of products at custom list prices

Working with Multiple Currencies

19

A price book can contain prices for a product in many different currencies.

Price Book

Name	$	€	£
Product A	$10	€10	£10
Product B	$20	€20	£20
Product C	$30	€30	£30
Product D	$10	€10	£10
Product E	$20	€20	£20
Product F	$25	€25	£25
Product G	$40	€40	£40
Product H	$40	€40	£40

1-4: Add a Nonprofit Custom Price Book

20

10 min

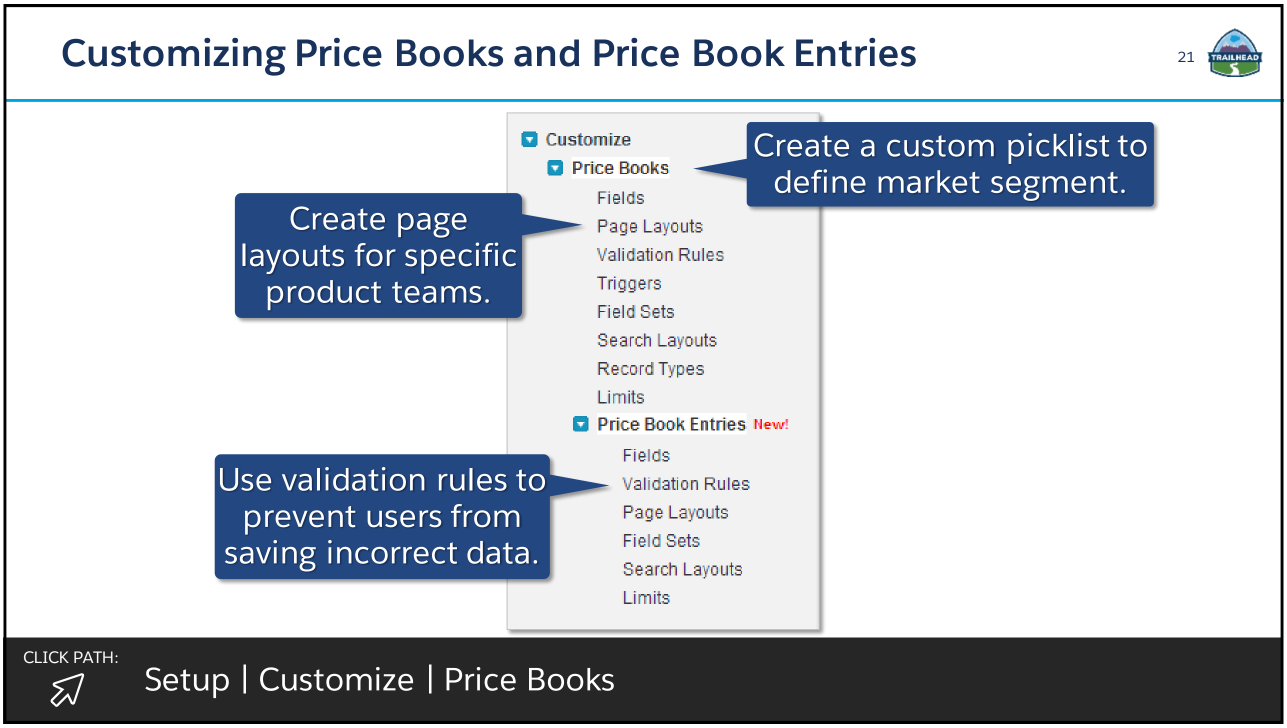
Goal:

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

Tasks:

1. Create a custom price book called Nonprofit.
2. Add products at the nonprofit list prices.

Product Name	List Price
Bolt	USD 1260
Bolt	GBP 765
Bolt S	USD 1440
Lightning 2	USD 1600
Lightning 2	GBP 1000


Customizing Price Books and Price Book Entries
21
TRAILHEAD
Customize
Price Books
Fields
Page Layouts
Validation Rules
Triggers
Field Sets
Search Layouts
Record Types
Limits
Price Book Entries New!
Fields
Validation Rules
Page Layouts
Field Sets
Search Layouts
Limits
Create a custom picklist to define market segment.
Create page layouts for specific product teams.
Use validation rules to prevent users from saving incorrect data.
CLICK PATH:
Setup | Customize | Price Books

1-5: Add an Enterprise Custom Price Book

22

10 min

Goal:

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

Tasks:

1. Create a picklist on the Price Book object to track the region: AMER, APAC, EMEA.
2. Create a custom price book called Enterprise – APAC, and set the region to APAC.
3. Add products at the enterprise list prices.

Product Name	List Price
Lightning 2	SGD 1900
Lightning 2	JPY 145,000
Lightning 5	SGD 2400
Lightning 5	JPY 195,000

Using Schedules on Products

23

Schedules can be set on products to define payment and delivery cycles.

Quantity:
Customers pay all at once, but receive the product in increments.

Magazine subscriptions billed annually but delivered monthly.

Revenue:
Customers make payments over time, but receive the product all at once.

Payments on a car or a custom product purchase.

Quantity + Revenue:
Customers make payments over time and receive products incrementally.

Wine of the month club.

CLICK PATH:
Customize | Products | Schedule Setup

Module Agenda

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- Creating and Customizing Products
- Creating and Customizing Custom Price Books
- **Adding Products to Opportunities**
- Controlling Access to Products and Price Books
- Creating Quotes
- Creating Orders
- Integrating Salesforce with Other Systems

Adding Products to Opportunities

25

When products are added to an opportunity, they become Opportunity Products.

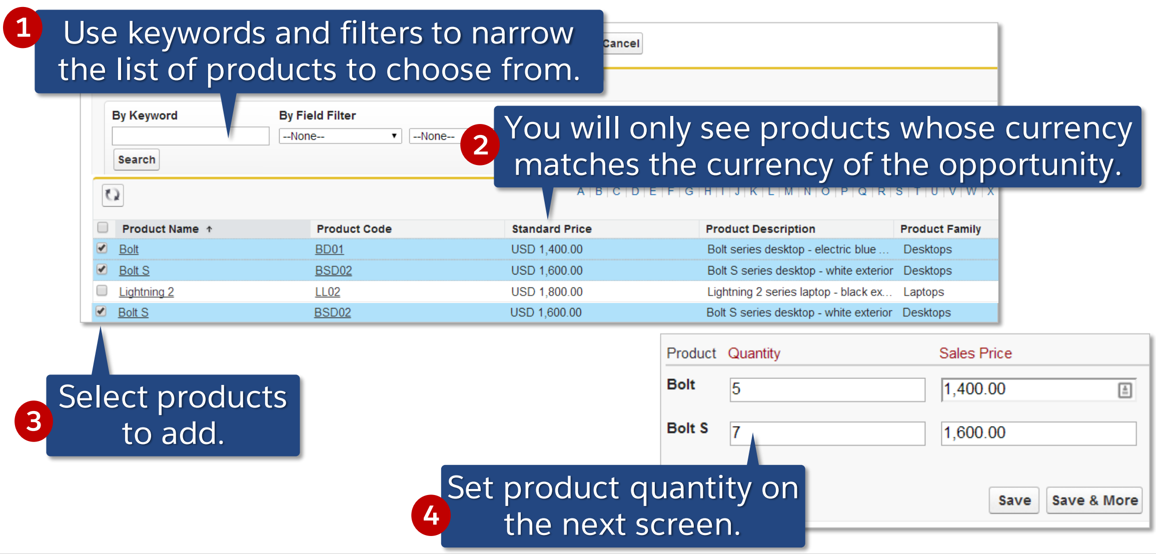
From an Opportunity:

NOTE: An opportunity can be associated with many products, but they must come from the same price book.

Selecting Products to Add to an Opportunity

26

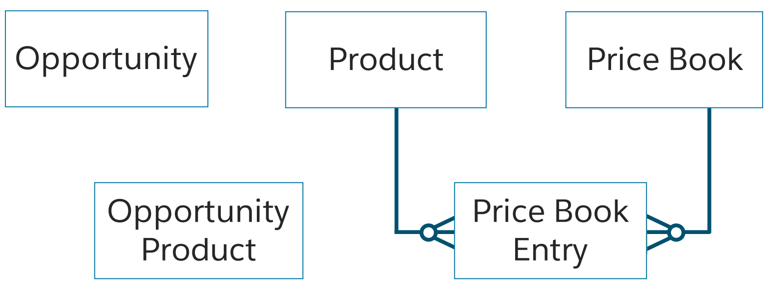
After you have selected a price book, choose the products to add to the opportunity.



How Do Opportunities Relate to Products and Price Books?

27

Use Schema Builder to determine how these objects relate to each other.



CLICK PATH:

Setup | Schema Builder

1-6: Add Products to a Nonprofit Opportunity

28

5 min

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

Tasks:

1. Add products to the Environmental Control Agency - Desktops opportunity using the Nonprofit price book.

Product	Quantity
Bolt	5
Bolt S	7

1-7: Add Products to an Enterprise Opportunity

5 min

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

Tasks:

1. Add products to the Rochir - Laptops opportunity using the Enterprise – APAC price book.

Product	Quantity
Lightning 2	10
Lightning 5	20

Module Agenda

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- Creating and Customizing Products
- Creating and Customizing Custom Price Books
- Adding Products to Opportunities
- **Controlling Access to Products and Price Books**
- Creating Quotes
- Creating Orders
- Integrating Salesforce with Other Systems

Organization-Wide Default Settings for Price Books

31

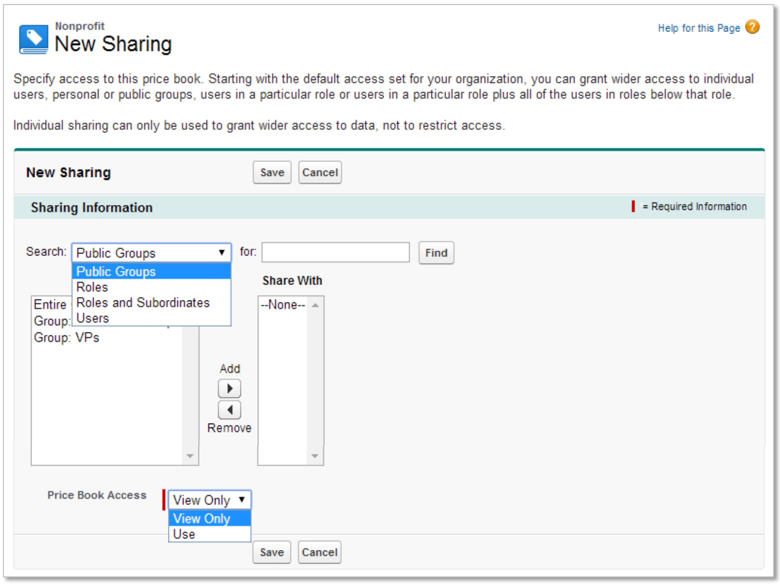
Organization-wide default settings control access to price books for the entire organization.

Setting	Description
Use	All users can view all price books. Users can add products from a price book to an opportunity.
View Only	All users can view and report on price books. Users cannot add products from a price book to an opportunity.
No Access	Users cannot view price books. Users cannot add products from a price book to an opportunity.

Giving Access to Price Books

32

If the organization-wide default is set to View Only or No Access, you can share each price book with public groups, roles, roles and subordinates, and users.



Setting Permissions

Object permissions can be set for Price Books and Products. The "Edit" permission on Price Books gives access to **all Price Books**.

Product Object Permissions | Edit | Delete | Create New View

New Profile

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

Action	Profile Name ↑	Product: Read	Product: Create	Product: Edit	Product: Delete
Del | Clone	Sales Operations	✓	✓	✓	✓
Del | Clone	Sales User	✓			

Price Book Object Permissions | Edit | Delete | Create New View

New Profile

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

Action	Profile Name ↑	Price Book: Read	Price Book: Create	Price Book: Edit	Price Book: Delete
Del | Clone	Sales Operations	✓	✓	✓	✓
Del | Clone	Sales User	✓			

NOTE: The "Edit Opportunity Product Sales Price" app permission allows users to change the sales price on opportunity products.

1-8: Control Access to Products and Price Books

34

10 min

Goal:

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

Tasks:

1. Change the organization-wide default setting for the Price Books object to View Only.
2. Share the Enterprise - APAC price book with Roles and Subordinates of the APAC Sales Director with Use access.
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.
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.

Module Agenda

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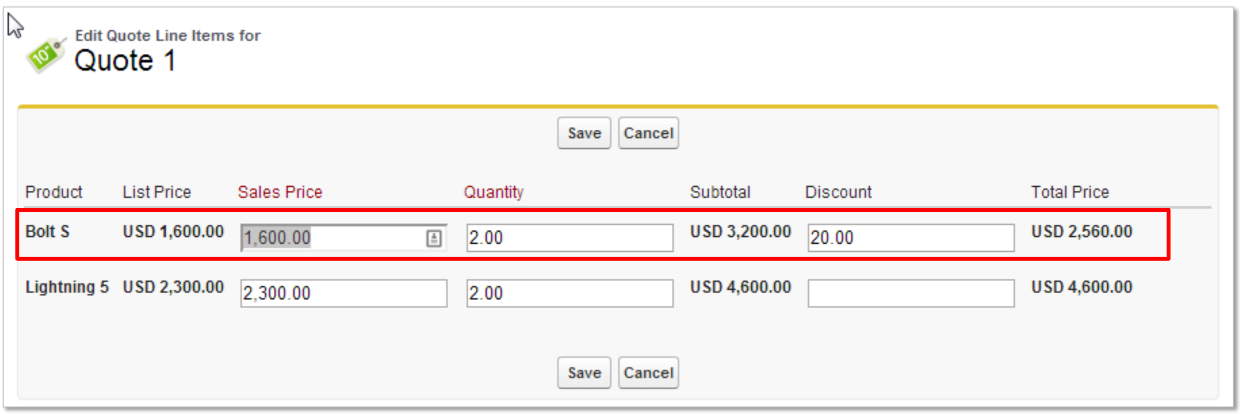
- Creating and Customizing Products
- Creating and Customizing Custom Price Books
- Adding Products to Opportunities
- Controlling Access to Products and Price Books
- **Creating Quotes**
- Creating Orders
- Integrating Salesforce with Other Systems


Creating a Quote
36
Opportunity
+
Opportunity Products
=
Quote
When a quote is created, products on an opportunity will be added to the quote.
From the quote, products can be added, edited, and given discounts on a per-item basis.
Taxes and shipping costs are added to the total.
NOTE:
A quote is created from an opportunity and its products to show proposed prices for products and services.

Editing Quote Line Items

37

You can edit quote line items to apply discounts to individual products.




Syncing a Quote to Its Opportunity
38
Sync all updates between a quote and the opportunity it was created from.
When you sync a quote to an opportunity for the first time, the products on the quote are copied to the opportunity.
Opportunity
Product A $100
Product B $70
Quote
Product A $100
Product B $70
While synced, any change made to the opportunity will be reflected in the quote, and vice versa.
Opportunity
Product A $100
Product B $70
Quote
Product A $100
Product B $70

Creating Multiple Quotes

39

You can create a set of quotes to show different combinations of products, quantities, and discounts.

Opportunity

Product A $85
Product B $50
Product C $120

Quote 1

Product A $100
Product B $70

Initial quote presented to customer.

Quote 2

Product A $100
Product B $70
Product C $150

Second quote with additional products.

Quote 3

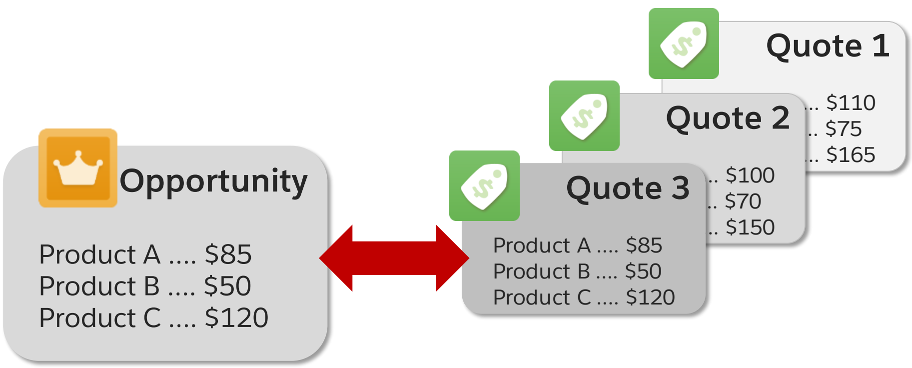
Product A $85
Product B $50
Product C $120

Third quote with negotiated discount applied to products.

Synchronizing an Opportunity with One Quote

40

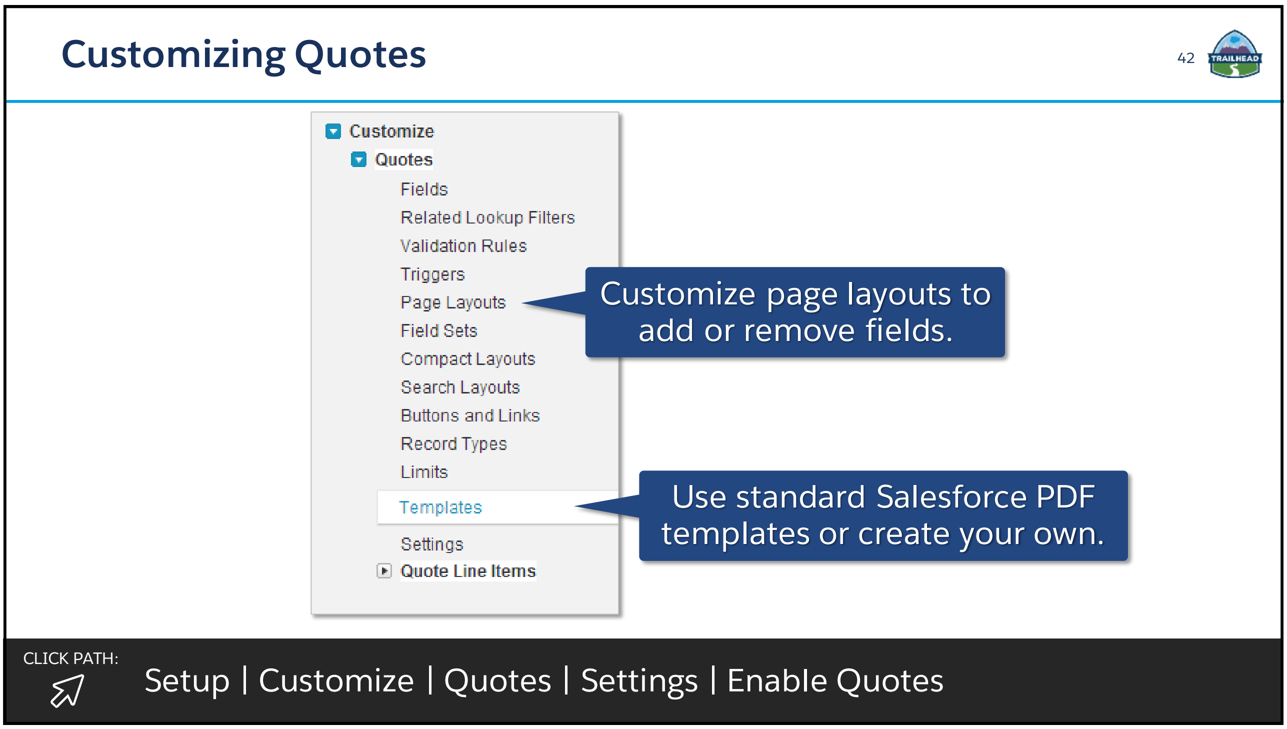
An opportunity can have multiple quotes, but it can only sync with one quote at a time.



Creating PDF and Sharing Quotes

41

When your quote is complete, you can generate a PDF and email it to your customer.


Customizing Quotes
42
Customize
Quotes
Fields
Related Lookup Filters
Validation Rules
Triggers
Page Layouts
Field Sets
Compact Layouts
Search Layouts
Buttons and Links
Record Types
Limits
Templates
Settings
Quote Line Items
Customize page layouts to add or remove fields.
Use standard Salesforce PDF templates or create your own.
CLICK PATH:
Setup | Customize | Quotes | Settings | Enable Quotes

1-9: Create Multiple Quotes

43

5 min

Goal:

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

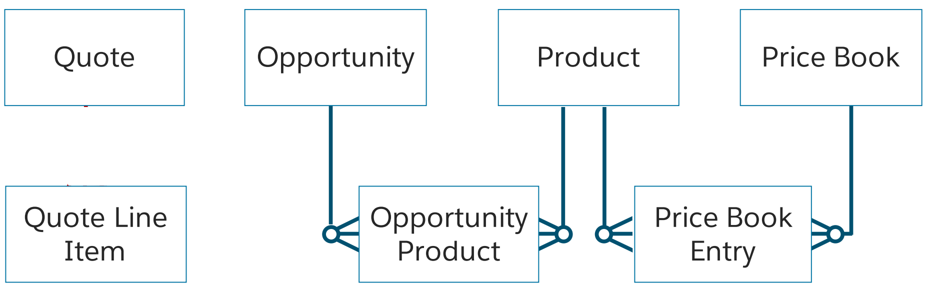
Tasks:

1. Create a quote and sync it to the Rochir - Laptops opportunity.
2. Create a second quote and edit the quote line items.
3. Sync the second quote to the opportunity.
4. Generate a PDF of the quote.

How Do Quotes Relate to Opportunities and Products

44

Use Schema Builder to determine how these objects relate to each other.



CLICK PATH:

Setup | Schema Builder

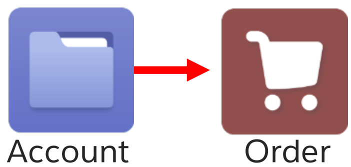
Module Agenda

- Creating and Customizing Products
- Creating and Customizing Custom Price Books
- Adding Products to Opportunities
- Controlling Access to Products and Price Books
- Creating Quotes
- **Creating Orders**
- Integrating Salesforce with Other Systems

Orders and Contracts

DEFINITION: An order is an agreement between a company and a customer to deliver products or services with a known quantity, price, and date.

An order can be associated directly to an account.



DEFINITION: A contract is a written agreement between companies that defines the terms for doing business.

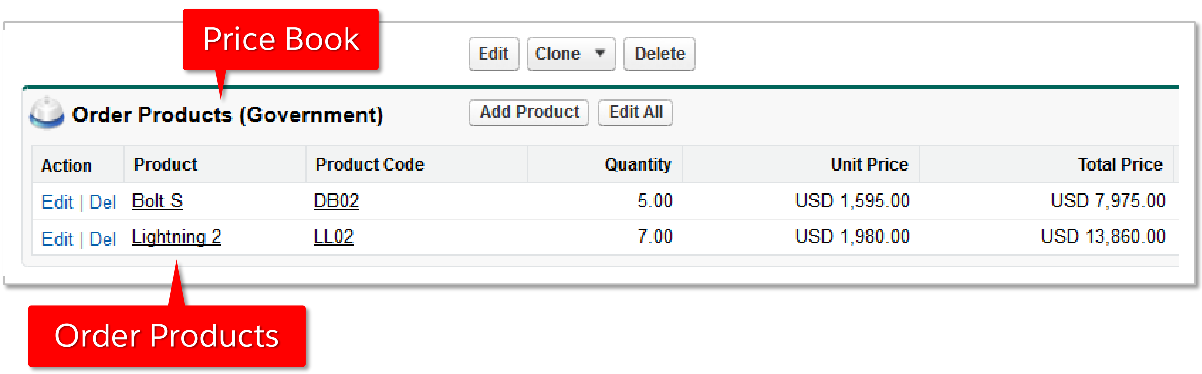
The order can also be associated to a **contract** (which is associated to an account).

Adding Products to an Order

47

An **order product** is a product or service on an order. All order products on an order must be associated with the same price book.

From an Order:

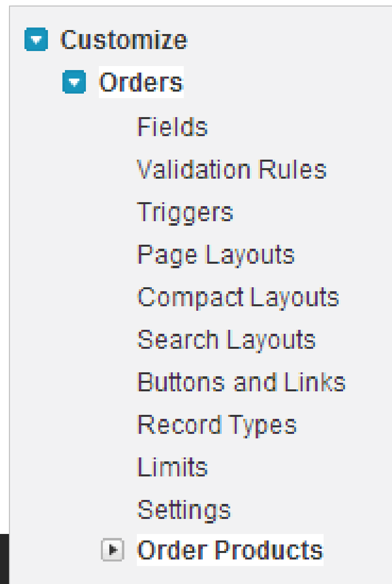


Customizing Orders

48

An administrator can also control access to orders.

- Set the object permissions.
- Enable the "Activate Orders" and "Edit Activated Orders" app permissions.



CLICK PATH:

Setup | Customize | Orders

How Do Orders Relate to Contracts and Accounts?

Account

Contract

Order

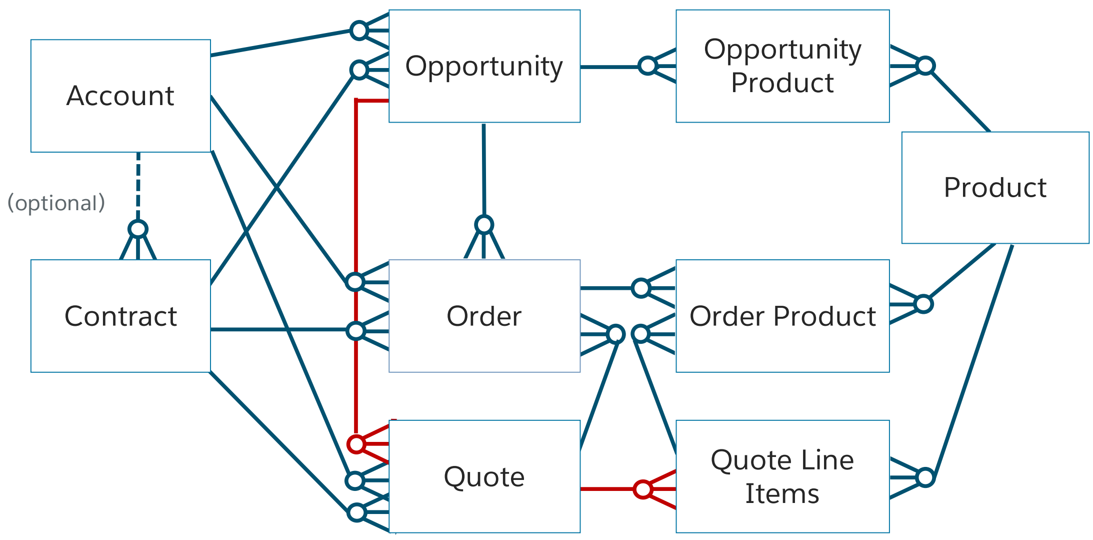
Order Product

CLICK PATH:

Setup | Schema Builder

How Do These Objects Relate to Each Other?

50



1-10: Create an Order with Products

51

5 min

Goal:
Create an order with products.

Tasks:

1. Create an order.

Account	Rochir
Contract	00000106
Start date	The last day of next month.

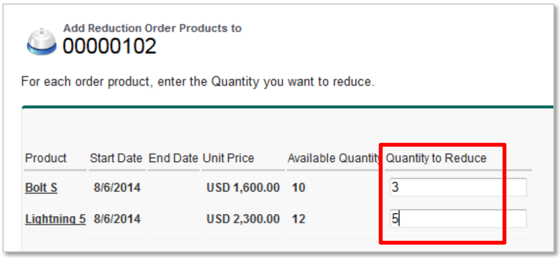
2. Add Products to the order from the Enterprise – APAC price book.

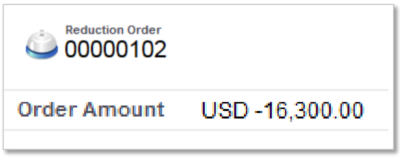
Product	Quantity
Lightning 2	10
Lightning 5	20

Reducing an Order

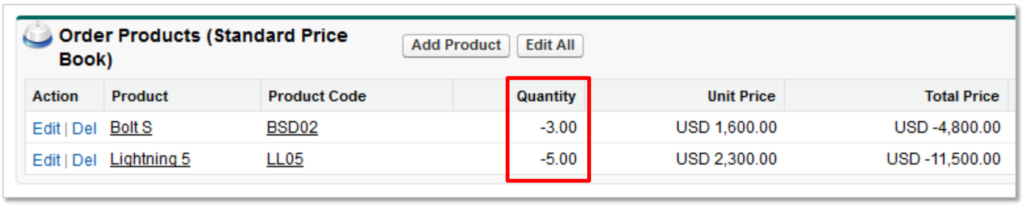
52

Track a customer's request to reduce, return, deactivate, or disable products or services using reduction orders.



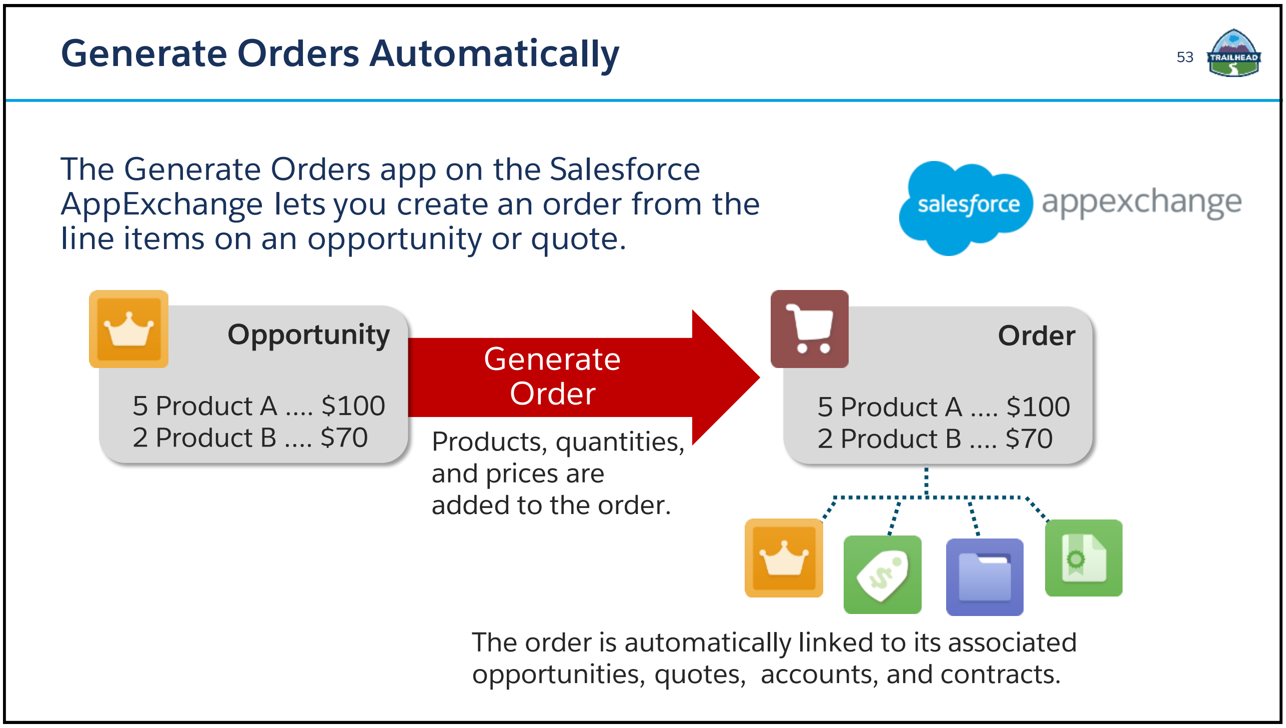


Or create an order with a negative quantity:



Order Products (Standard Price Book) — Add Product | Edit All

Action	Product	Product Code	Quantity	Unit Price	Total Price
Edit | Del	Bolt S	BSD02	-3.00	USD 1,600.00	USD -4,800.00
Edit | Del	Lightning 5	LL05	-5.00	USD 2,300.00	USD -11,500.00


Generate Orders Automatically
53
TRAILHEAD
The Generate Orders app on the Salesforce AppExchange lets you create an order from the line items on an opportunity or quote.
salesforce appexchange
Opportunity
5 Product A $100
2 Product B $70
Generate Order
Products, quantities, and prices are added to the order.
Order
5 Product A $100
2 Product B $70
The order is automatically linked to its associated opportunities, quotes, accounts, and contracts.

Module Agenda

- Creating and Customizing Products
- Creating and Customizing Custom Price Books
- Adding Products to Opportunities
- Controlling Access to Products and Price Books
- Creating Quotes
- Creating Orders
- **Integrating Salesforce with Other Systems**

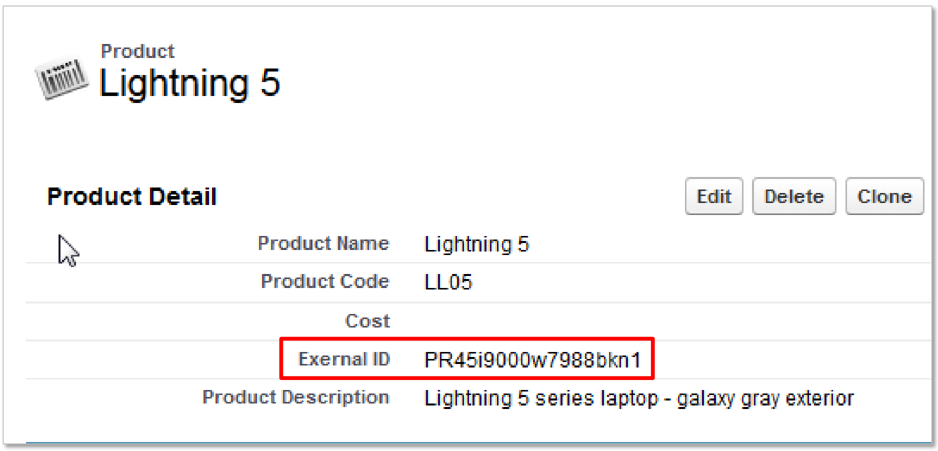
Integrations Discussion

1. In addition to the sales department, who interacts with product and order information?
2. What systems do they rely on?

Linking to External Systems

56

Use a custom field to store the external ID from another system to allow data to map to the correct record during system integrations.



CPQ Applications

57

DEFINITION: **Configure - Price - Quote** refers to the process involved in calculating complex service offerings for customers:

CONFIGURE: Assembly of services and products.

PRICE: Accounts for variables and then determines pricing structure.

QUOTE: Formulates a proposal that outlines cost.

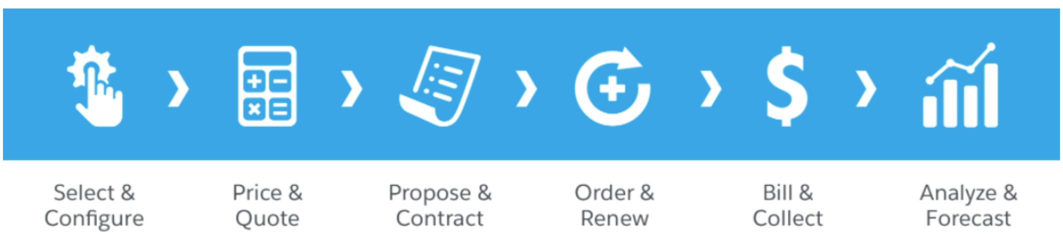
What are the benefits?

- Ensures bundling and discounting rules are applied correctly
- Increases efficiency and reduces errors
- Works together with approval and authorization workflows in Salesforce
- Can be deployed in self-service sales environments and across multiple channels

Salesforce Quote-to-Cash

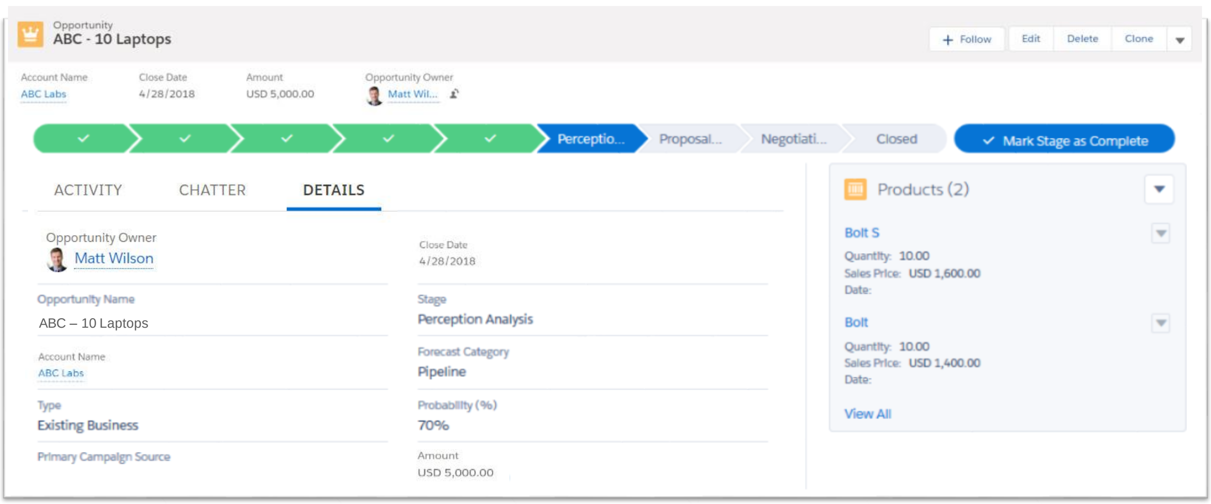
58

- Quote-to-Cash is the complete set of business processes involved in selling, from creating initial offers for prospects to collecting cash.
- Quote-to-Cash begins with CPQ–configuring the offer, developing the appropriate pricing, and creating the quote. It continues on through negotiations, invoicing, payment, and even renewals and renegotiations.
- Quote-to-Cash solutions are built to streamline and automate these processes, offering greater efficiency, more accuracy, and better visibility from initial quote to final payment.



Products and Price Books in the Lightning Experience

59



Knowledge Check

60

1. The sales organization started selling keyboards and mice. They want to track these products in Salesforce as computer accessories. They also want to track the various prices at which the products are sold. How can an administrator accomplish this?
2. What steps must a user take to add a product to an opportunity record?
3. What happens when a user syncs a quote to an opportunity?
4. What object tracks the products, including quantity and price, that the customer has agreed to purchase?
5. The sales organization stores product information in an Enterprise Resource Planning (ERP) system. They want to integrate Salesforce with the ERP system. How can an administrator link the products between these two systems?

61

Module 2: Set Up Collaborative Forecasts

Group Discussion

62

1. How does your sales organization currently track forecasts and quotas?
2. What data does your sales organization use to determine the forecast?
3. How does your sales organization use forecast data to drive business decisions?

Generate Accurate Forecasts

Allison Wheeler
VP Global Sales

"We want to generate accurate forecasts and track quota attainment in Salesforce."

To accomplish this, you need to:

- Describe the capabilities of Collaborative Forecasts.
- Enable forecasts for users.
- Configure multiple forecast types.
- Map opportunity stages to forecast categories.
- Define forecast managers and enable adjustments.
- Add quota data for users.
- Build reports to track forecast and quota data.

What Makes Up a Forecast?

64

Opportunity Owner	Amount	Quantity	Close Date	Stage	Forecast Category
Matt Wilson	$20,000.00	20	10/17/2017	Prospecting	Pipeline
Matt Wilson	$15,000.00	10	11/28/2017	Id. Decision Makers	Commit
Matt Wilson	$35,000.00	30	12/13/2017	Closed Won	Closed
	$70,000.00	60			
Forecast User	Revenue Forecast	Quantity Forecast	Forecast Period	Forecast Category	

DEFINITION: A forecast is an expression of the expected sales revenue or projected number of units sold based on opportunities in the pipeline.

Collaborative Forecasts Overview

65

NOTE:

Organizations using Communities can include partner-owned opportunities in forecasts.

Module Agenda

- **Enabling Forecasts for Users**
- Forecasting by Opportunities
- Mapping Opportunity Stages to Forecast Categories
- Defining Forecast Managers and Enabling Adjustments
- Adding Quota Data
- Forecasting by Product Family
- Forecasting by Opportunity Splits and Custom Fields
- Building Reports

Enabling Forecasts for Users

67

The Allow Forecasting setting on user records allows users to forecast.

User
Allison Wheeler

Allow Forecasting ✓

Tab Settings on profiles control the visibility of the Forecasts tab.

Profile
Sales User

Profile
Executive User

Forecasts Edit

Tab Settings

Default On

2-1: Enable Forecasts for Users

68

5 min

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

VP Global Sales
Allison Wheeler

US Sales Director
Kathy Cooper

US Sales Reps
Anna Bressan
Frank Roberts
Matt Wilson

Tasks:

1. Enable forecasting for the VP of Global Sales and all US sales users.

   Note: Forecasting has already been enabled for sales users in EMEA and APAC.

2. Make the Forecasts tab visible for the Sales User and Executive User profiles.

Module Agenda

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- Enabling Forecasts for Users
- **Forecasting by Opportunities**
- Mapping Opportunity Stages to Forecast Categories
- Defining Forecast Managers and Enabling Adjustments
- Adding Quota Data
- Forecasting by Product Family
- Forecasting by Opportunity Splits and Custom Fields
- Building Reports

Forecasting by Opportunities

70

DEFINITION: The forecast type determines the type of data and measurement to display in the forecast.

You can add forecast types to display the expected revenue or quantity from opportunities.

Forecast Type = Opportunities (Revenue)

Opportunity Owner Matt Wilson

Amount $20,000.00

Forecast Type = Opportunities (Quantity)

Opportunity Owner Matt Wilson

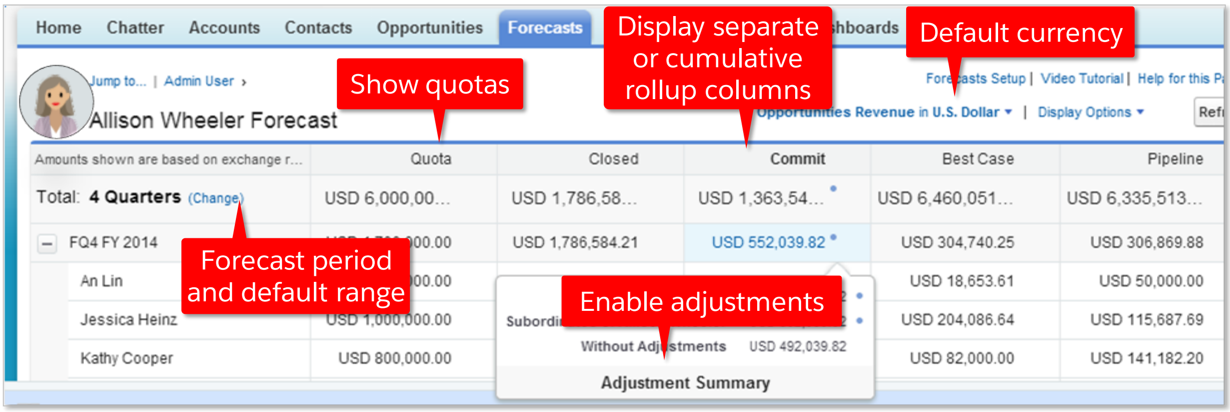
Quantity 20

CLICK PATH: Setup | Customize | Forecasts | Settings

Configuring Forecast Settings

71

Forecast settings allow you to enable forecast adjustments and configure the default forecast display.



CLICK PATH:

Setup | Customize | Forecasts | Settings

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

10 min

Goal:

Allow users to view the forecast based on opportunity quantity.

Tasks:

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

   Note: Forecasts has already been enabled.

2. Review the default forecast settings.

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

73

10 min

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

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

Tasks:

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

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

74

10 min

Goal:

View the impact of the forecast settings on the forecast.

Tasks:

1. Log in as Karen Adams, an EMEA Sales Rep.
2. Answer questions about her forecast.

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?
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?

Module Agenda

- Enabling Forecasts for Users
- Forecasting by Opportunities
- **Mapping Opportunity Stages to Forecast Categories**
- Defining Forecast Managers and Enabling Adjustments
- Adding Quota Data
- Forecasting by Product Family
- Forecasting by Opportunity Splits and Custom Fields
- Building Reports

Mapping Opportunity Stages to Forecast Categories

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Opportunity Stage	Forecast Category
Prospecting Qualification Needs Analysis	Pipeline
Value Proposition Id. Decision Makers Perception Analysis	Best Case

Opportunity Stage	Forecast Category
Proposal/Price Quote Negotiation/Review	Commit
Closed Won	Closed
Closed Lost	Omitted

You need to define which opportunity stages map to each forecast category.

Forecast Categories

DEFINITION: Forecast categories group opportunities together based on opportunity stage.

Closed	Commit	Best Case	Pipeline
$50,000.00	$100,000.00	$70,000.00	$65,000.00

Closed	Commit	Best Case	Pipeline
Closed Won $30,000.00	Proposal/Price Quote $40,000.00	Value Proposition $25,000.00	Prospecting $40,000.00
Closed Won $20,000.00	Negotiation/Review $25,000.00	Id. Decision Makers $15,000.00	Qualification $10,000.00
	Negotiation/Review $35,000.00	Perception Analysis $30,000.00	Needs Analysis $15,000.00

- By default, each category displays the forecast for only the opportunities mapped to it.
- Opportunities in the Omitted forecast category are not included in the forecast.
- Sales reps can manually change the forecast category for an opportunity.

Cumulative Forecast Rollups

You can select the Enable Cumulative Forecast Rollups checkbox to display cumulative rollup columns, which include opportunities in more than one category.

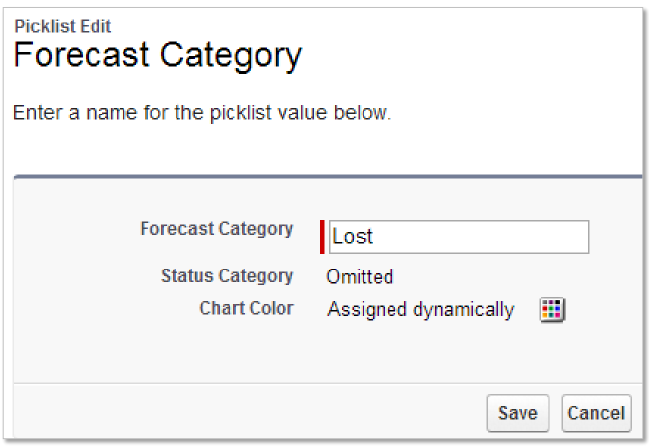
Column name in the Forecasts tab	Opportunities that roll up to it
Open Pipeline	Pipeline + Best Case + Commit
Best Case Forecast	Best Case + Commit + Closed
Commit Forecast	Commit + Closed
Closed Only	Closed

NOTE: Your organization must choose whether you want to display individual forecast categories or cumulative forecast rollups.

Changing Forecast Category Names

79

- The standard forecast categories are Pipeline, Best Case, Commit, Closed, and Omitted.
- You can change the forecast category names for your organization.



2-5: Map Opportunity Stages to Forecast Categories

80

5 min

Goal:

Define which opportunity stages map to each forecast category.

Tasks:

1. Map opportunity stages to forecast categories.

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

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

81

5 min

Goal:

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

Tasks:

1. Log in as Karen Adams, an EMEA Sales Rep.
2. Answer questions about her forecast.

What has changed about her forecast?
What displays in the opportunity pane when you click on a Best Case value?
What happens when you change the opportunity stage from Perception Analysis to Proposal/Price Quote?
What happens when you change the forecast category of an opportunity?

Module Agenda

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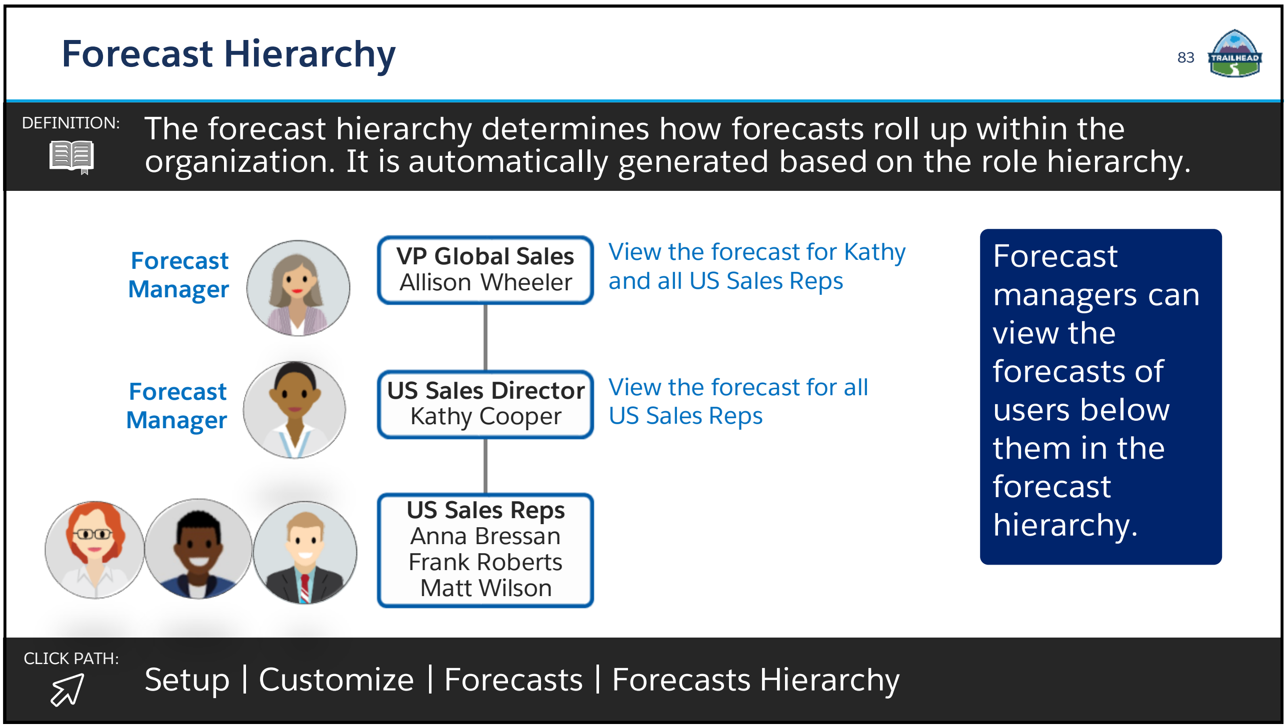
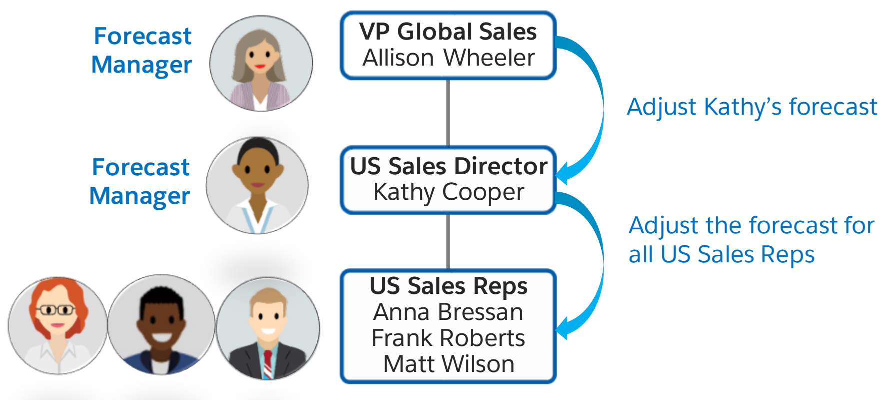
- Enabling Forecasts for Users
- Forecasting by Opportunities
- Mapping Opportunity Stages to Forecast Categories
- **Defining Forecast Managers and Enabling Adjustments**
- Adding Quota Data
- Forecasting by Product Family
- Forecasting by Opportunity Splits and Custom Fields
- Building Reports


Forecast Hierarchy
83
DEFINITION:
The forecast hierarchy determines how forecasts roll up within the organization. It is automatically generated based on the role hierarchy.
Forecast Manager
VP Global Sales
Allison Wheeler
View the forecast for Kathy and all US Sales Reps
Forecast Manager
US Sales Director
Kathy Cooper
View the forecast for all US Sales Reps
US Sales Reps
Anna Bressan
Frank Roberts
Matt Wilson
Forecast managers can view the forecasts of users below them in the forecast hierarchy.
CLICK PATH:
Setup | Customize | Forecasts | Forecasts Hierarchy

Manager Adjustments

DEFINITION: Manager adjustments allow forecast managers to adjust the forecast amounts of their immediate subordinates.



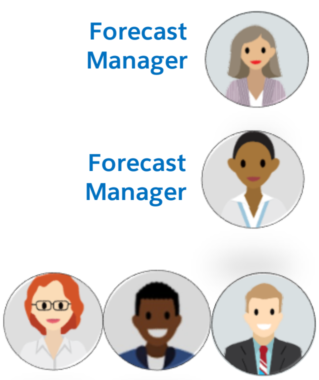
Managers must have the "Override Forecasts" permission to make adjustments.

NOTE: Adjustments don't change the individual opportunity amounts that roll up into the forecast. They just add a layer of detail.

Owner Adjustments

85

DEFINITION: Owner Adjustments allow forecast users to adjust the forecast amounts of their own forecast.



Forecast Manager

VP Global Sales
Allison Wheeler

Allison can adjust her own forecast.

Forecast Manager

US Sales Director
Kathy Cooper

Kathy can adjust her own forecast.

US Sales Reps
Anna Bressan
Frank Roberts
Matt Wilson

Sales reps can adjust their own forecasts.

Users must have the “Override Forecasts” permission to make adjustments.

NOTE: Adjustments don’t change the individual opportunity amounts that roll up into the forecast. They just add a layer of detail.

2-7: Define Forecast Managers and Enable Adjustments

86

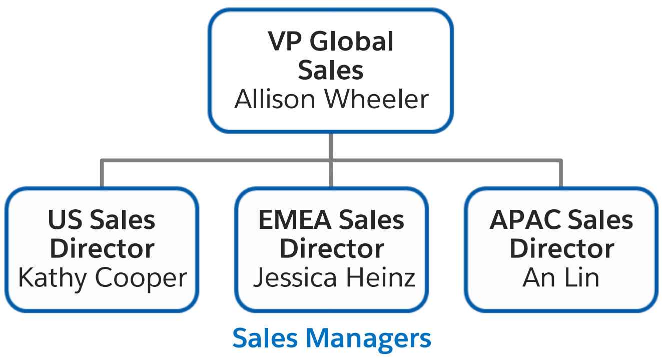
5 min

Goal:

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

Tasks:

1. Define all sales managers as forecast managers.
2. Create a permission set that has the "Override Forecasts" permission enabled and assign it to Allison Wheeler.
3. Enable the "Override Forecasts" permission for the Sales User profile.



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

87

10 min

Goal:

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

Tasks:

1. Log in as Kathy Cooper, the US Sales Director.
2. View the forecast for her sales reps, Anna Bressan and Frank Roberts.
3. From Kathy's forecast, increase Frank's Commit forecast for the current FQ by $10,000.
4. Log in as Allison Wheeler, the VP of Global Sales.
5. View the forecast for Kathy Cooper and Frank Roberts.
6. From Allison's forecast, increase Kathy's Commit forecast for the current FQ by $50,000.
7. Log in as Anna Bressan, a US Sales Rep.
8. View Anna's Commit forecast for the current FQ and increase it by $10,000.

Module Agenda

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- Enabling Forecasts for Users
- Forecasting by Opportunities
- Mapping Opportunity Stages to Forecast Categories
- Defining Forecast Managers and Enabling Adjustments
- **Adding Quota Data**
- Forecasting by Product Family
- Forecasting by Opportunity Splits and Custom Fields
- Building Reports

Quotas

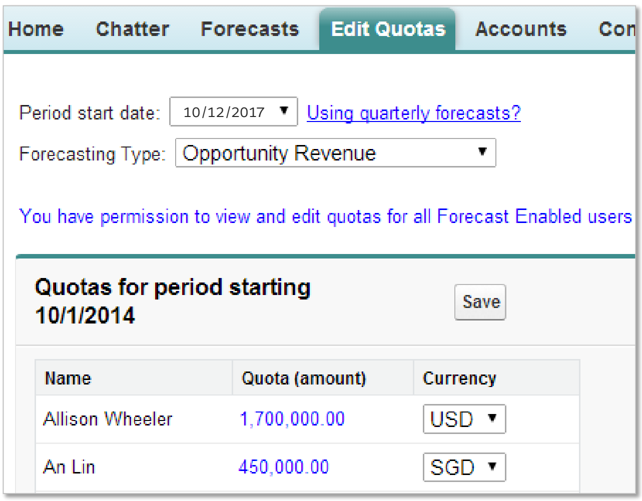
A manager's quota equals the amount the manager and team are expected to generate together.

FQ2	Revenue Quota	Quantity Quota
Kathy Cooper Sales Director	$850,000.00	900
Frank Roberts Sales Rep	$300,000.00	250
Matt Wilson Sales Rep	$250,000.00	300
Anna Bressan Sales Rep	$200,000.00	200

DEFINITION: A quota is the sales goal assigned to a sales user on a monthly or quarterly basis. Users can have both revenue quotas and quantity quotas.

Loading Quota Data

90



The Edit Quotas app on the Salesforce AppExchange provides a graphical user interface for entering quota data.

Users need the “Manage Quotas” permission to edit quota data.

NOTE:
CLICK PATH:

Adjustments don’t change the individual opportunity amounts that roll up into the forecast. They just add a layer of detail.

2-9: Add Quota Data for APAC Sales Reps

91

10 min

Goal:

Define revenue quota data for APAC sales reps.

Tasks:

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

Name	Current FQ	Current FQ + 1 FQ	Current FQ + 2 FQ	Current FQ + 3 FQ
Fumiko Suzuki	SGD 185K	SGD185K	SGD 125K	SGD 125K
Jin Chang	SGD 185K	SGD185K	SGD125K	SGD125K

2. View the quota data and quota attainment from the forecast.

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

92

5 min

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

Tasks:

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

Name	Current FQ	Current FQ + 1 FQ	Current FQ + 2 FQ	Current FQ + 3 FQ
Allison Wheeler	USD 1.7M	USD 1.7M	USD 1.3M	USD 1.3M

2. View the quota data and quota attainment from the forecast.

Module Agenda

- Enabling Forecasts for Users
- Forecasting by Opportunities
- Mapping Opportunity Stages to Forecast Categories
- Defining Forecast Managers and Enabling Adjustments
- Adding Quota Data
- **Forecasting by Product Family**
- Forecasting by Opportunity Splits and Custom Fields
- Building Reports

Forecasting by Product Families

Forecast Type = Product Families (Revenue)

Opportunity Owner Matt Wilson

Product Family	Total Price
Laptops	$9,275.00
Desktops	$3,500.00

Forecast Type = Product Families (Quantity)

Opportunity Owner Matt Wilson

Product Family	Quantity
Laptops	10
Desktops	2

Allows organizations who are using Opportunity Products and Product Families to view the forecast separately for each product family.

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

95

5 min

Goal:

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

Tasks:

1. Add a forecast type for Product Families (Revenue).
2. Verify that the forecast displays the revenue forecast for each product family for Kathy Cooper.

Module Agenda

- Enabling Forecasts for Users
- Forecasting by Opportunities
- Mapping Opportunity Stages to Forecast Categories
- Defining Forecast Managers and Enabling Adjustments
- Adding Quota Data
- Forecasting by Product Family
- **Forecasting by Opportunity Splits and Custom Fields**
- Building Reports

Opportunity Splits

Lets team members share sales credit for an opportunity.

Active	Split Label	Split Field	Totals 100%
✓	Revenue	Opportunity - Amount	✓
✓	Overlay	Opportunity - Amount	
✓	Margin	Opportunity - Margin	✓

- Revenue splits total 100% of the opportunity amount.
- Overlay splits total any percentage of the opportunity amount.
- Custom splits allow the split to be based on a standard or custom currency field on the opportunity.

RESOURCE:

Search Help & Training for **enabling opportunity splits and split types**.

Forecasting by Opportunity Splits

98

Forecast Type = Opportunity Revenue Splits (Revenue)

Opportunity Splits

Team Member	Percent (%)	Amount
Matt Wilson	75.00	$6,000.00
Anna Bressan	25.00	$2,000.00

Opportunity Amount = $8,000.00

Forecast Type = Opportunity Overlay Splits (Revenue)

Opportunity Splits

Team Member	Percent (%)	Amount
Frank Roberts	100.00	$4,000.00
Amy Daniels	25.00	$1,000.00

Opportunity Amount = $4,000.00

Allows organizations who are using Opportunity Splits to reflect the split revenue amounts in the forecast.

Forecasting by Custom Fields

99

Allows organizations to forecast on custom opportunity currency fields.

1. Create a custom opportunity currency field.

Field Label	API Name	Data Type
Margin	Margin__c	Currency(16, 2)

2. Enable opportunity splits and add a custom split type for the custom field.

Active	Split Label	Split Field	Totals 100%
✓	Revenue	Opportunity - Amount	✓
✓	Overlay	Opportunity - Amount	
✓	Margin	Opportunity - Margin	✓

3. Add a forecast type for the custom split type.

Forecast Type: Margin

Depending on the forecast type, you can select the forecast measurement to use.

Forecast Measurement

Revenue ◉ Quantity ○

2-12: Add a Forecast Type for Margin

100

5 min

Goal:

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

Tasks:

1. Add a forecast type for Margin.
2. View the margin forecast for Fumiko Suzuki, an APAC Sales Rep.

Module Agenda

- Enabling Forecasts for Users
- Forecasting by Opportunities
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- Forecasting by Opportunity Splits and Custom Fields
- **Building Reports**

Creating Reports for Collaborative Forecasts

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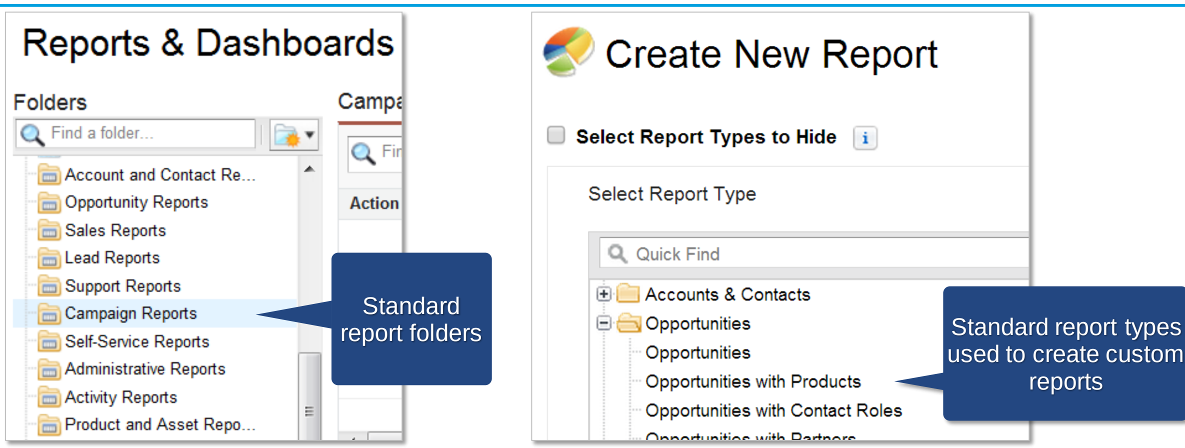
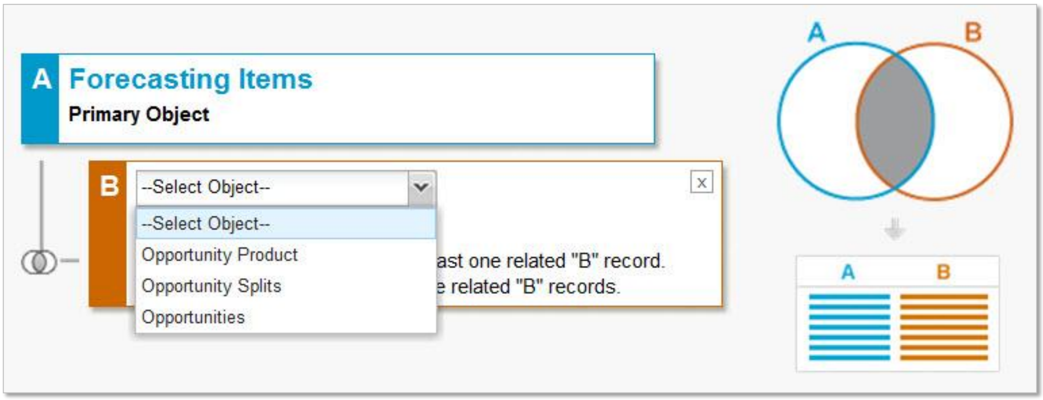


There are no standard reports or standard report types for Collaborative Forecasts. You must create a custom report type to make collaborative forecast reports available to users.

Creating a Custom Report Type for Forecasting Items

103

You can create a custom report type for Forecasting Items and include related Opportunity Products, Opportunity Splits, or Opportunities.



Understanding Forecasting Amounts on Reports

104

There are several forecasting amount fields that can be used on a report.

Forecast for Kathy Cooper

Sales User	Commit Forecast	Kathy's Adjustment
	$1M	$1M
	$1M	**$1.05M**
	$1M	**$1.05M**
My Opportunities	$0	
Total	**$3M**	**$3.1M**

Owner Only Amount
Total opportunity amount for only Kathy.

Forecast Amount
Total opportunity amount for Kathy and her subordinates, including all adjustments.

$3.3M

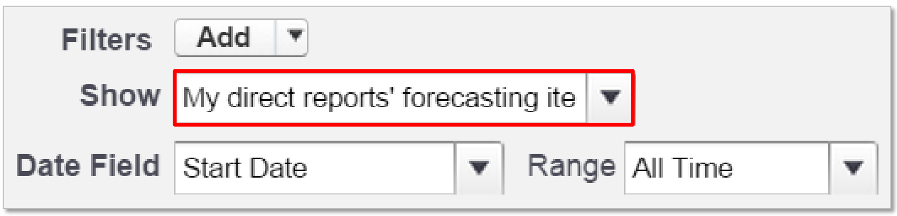
Allison's Adjustment

Amount Without Adjustments
Total opportunity amount for Kathy and her subordinates.

Amount Without Manager Adjustments
Total opportunity amount for Kathy plus adjusted amount of her subordinates.

Filtering Forecast Data

105



Since forecast data rolls up through the forecast hierarchy, you must filter the report to only show the data for direct reports.

2-13: Build a Forecast Amount Report

106

10 minutes

Goal:
Build a report to show the adjusted forecast.

Objects	• Forecasting Items (custom report type)
Scope	• My direct reports' forecasting items • Start Date–Current and Next 3 FQ
Columns	• Forecast Amount, Forecast Category, Start Date
Format	• Matrix
Groupings	• Row grouping–Start Date grouped by Fiscal Quarter • Column grouping–Forecast Category
Summaries	• Sum of Forecast Amount
Filters	• Forecasting Type: API Name equals OpportunityRevenue
Charts	• Vertical bar chart that displays the Forecast Amount by Start Date, stacked by Forecast Category

Creating a Custom Report Type for Forecasting Quotas

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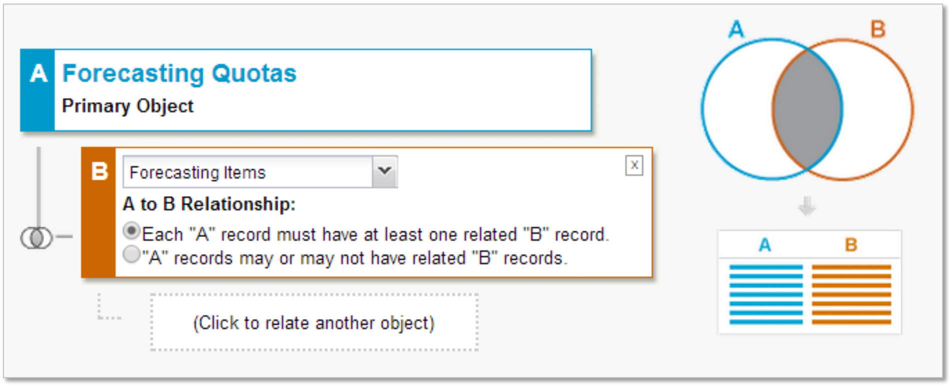
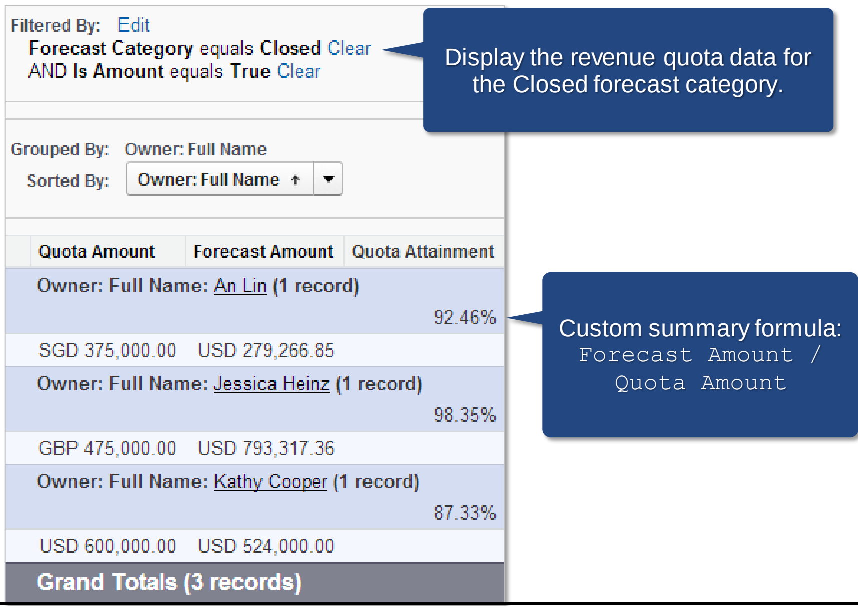


You can create a custom report type for Forecasting Quotas and include related Forecasting Items.

Calculating Quota Attainment

108



Create a custom report using a Forecasting Quotas with or without Forecasting Items custom report type.

Knowledge Check

1. What are the capabilities of Collaborative Forecasts?
2. What types of forecast data can a sales user view from the Forecasts tab?
3. Jessica Heinz is a forecast manager with the “Override Forecasts” permission. What does this allow her to do?
4. How can an administrator configure forecast categories?
5. When creating a forecasting report, what field displays the roll up of actual opportunity amounts for a manager and his or her subordinates?

Q & A

Thanks for Attending!

Your opinion matters, and we want to hear from you. Navigate to our Class Survey to give us your feedback.

What's Next?

LEARN ALL THE SKILLS YOU NEED

Build on your skills with self-paced learning or another expert-led class.
https://sfdc.co/learnsalesforce

EARN SKILL-BASED CREDENTIALS

Get rewarded for the skills you learn and get industry-wide recognition for your expertise.
https://trailhead.salesforce.com/en/super_badges
http://certification.salesforce.com/

CONNECT WITH FELLOW TRAILBLAZERS

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Facebook: /SalesforceTrailhead