How to setup Forecasting in Salesforce

Collaborative forecasting is set as default in Salesforce.com. When you set up Collaborative Forecasts, you:

Enable forecast users

From Setup, click Manage Users → Users.

For each user you want to enable, click Edit.

Under General Information, select Allow Forecasting.

Click Save.

Define your role hierarchy

Define your forecast hierarchy – the forecast hierarchy is based on the role hierarchy, but specifies which users are forecast managers.

From Setup, click Customize → Forecasts → Forecast Hierarchy. Click Expand All to see the roles in your organization.

Click Enable Users and click Add and Remove to move users between the Available Users list and the Enabled Users list. If you previously enabled a user from Setup by clicking Manage Users → Users and editing a user page to allow forecasting, the name already appears in the Enabled Users list.

If you need to define a forecast manager for each manager role in the hierarchy, click Edit Manager next to the role, select a manager name from the Forecast Manager drop-down list.

Click Save.

Choose one or more forecast types

From Setup, click Customize → Forecasts → Settings.

If your organization:

Doesn’t yet have any forecast types enabled, click Add a Forecast Type.

Already has forecast type enabled, click Add another forecast type.

From the Forecast Type menu, choose the data source you want to use for the forecast.

Choose the Forecast Measurement you want to use. There are two choises: Revenue or Quantity. If you want use both, add separate forecast types for each one.

Choose fields you want to display in the related opportunities list on the Forecast tab for the forecast type.

If your forecast data source is opportunities or product families, the Amount field appears by default. If your data source is opportunity splits, the Forecasted Amount and Split % fields appear by default. You can change the selected fields for each forecast type even after it has been enabled. Depending on whether your forecast type users the revenue or quantity measurement, consider adding Amount or Quantity to the pane.

Click OK and then Save.

Select the fields that appear in the opportunity pane for each forecast type.

Enable Quotas

From Setup, click Customize → Forecasts → Settings.

Under Quotas, select Show Quotas.

Click Save.

Enable forecasts adjustments for your organization and for specific user profiles to make this functionality available in your organization.

From Setup, click Customize → Forecasts → Settings.

If you want to allow forecast managers to adjust their subordinates’ forecast amounts, under Enable Forecast Adjustments, select Enable Manager Adjustments.

If you want to allow all forecast users to adjust their own forecast amounts, under Enable Forecast Adjustments, select Enable Owner Adjustments

Click Save.

From Setup, click Manage Users → Profiles.

Find a profile for which you want adjustments enabled.

If you’re using the enhanced profile user interface, click App Permissions and click Edit. Select Override Forecasts and click Save.

If your organization has more than one type of forecast enabled, each forecast type maintains its own separate adjustments.

Choose whether to use individual forecast category rollups or enable cumulative forecast rollups. As an administrator, you can choose between two methods of rolling up opportunities into forecasts:

Individual forecast category rollup – it combines the opportunities from individual forecast category into separate forecast amounts for each category.

Cumulative forecast rollup – it combines opportunities from more forecast categories into cumulative forecast amounts.

Define forecast range. The Collaborative Forecasts rollup table displays forecast amounts for individual months or quarters and a range of months or quarters, depending on the organization’s Collaborative Forecasts settings. Default setting is six months or four quarters. The forecast date range for the organization becomes the default for all Collaborative Forecasts users. Users can use this default or they can set a different date range display for their own forecasts. When users change their individual forecast date range displays, administrators can’t override them. However, when changing the period display from monthly to quarterly or quarterly to monthly, the change is reflected in all users’ forecasts.

From Setup, click Customize → Forecasts → Settings.

Under Configure the Default Forecast Display, use the drop-down lists to select a beginning period and the number of periods you want to display. Click Save.

Customize your forecast categories if your organization uses specific terminology. A forecast category is the category within the sales cycle that an opportunity is assigned to based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted and Closed. You can customize forecast category names for your organization.

From Setup, click Customize → Opportunities → Fields.

Click Forecast Category.

Click Edit for any value you want to edit in the Forecasts Category Picklist Values.

Enter a forecast category name. Click Save.

Set a forecast currency if your organization uses multiple currencies. You can select either your organization’s corporate currency or the forecast owner’s personal currency.

Make sure the Forecasts tab is visible to forecasting users.