# Collaborative Forecasts Implementation Guide

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@salesforcedocs

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# COLLABORATIVE FORECASTS IMPLEMENTATION GUIDE

This series of tutorials teaches you about Collaborative Forecasts settings and features. You learn how to set up Collaborative Forecasts and enable users who need it for their jobs. The tutorial also steps you through how to enhance the forecasting experience for your users.

**Important:** For orgs created in Winter '24 or later, Collaborative Forecasts is automatically enabled with a set of defaults configured for you. In orgs created before Winter '24, you can manually enable Collaborative Forecasts and the same set of defaults are configured. Use this guide to read about how to change settings and configure advanced features to meet your exact business needs.

## Using Forecasts to Project and Plan

A forecast expresses expected sales based on the gross rollup of a set of opportunities. Using Collaborative Forecasts, sales teams can project and plan their sales cycles from pipeline to closed sales so that they can manage expectations.

The forecasts on the forecasts page are totals and subtotals of the opportunities in the standard forecast categories: Pipeline, Best Case, Commit, and Closed. You can show a Most Likely category in Lightning Experience, rename single category rollups, and rename cumulative category rollups. Depending on how Salesforce is set up, these forecasts can reflect opportunities from one or multiple forecast categories.

In the forecasts grid, forecasts are organized by forecast rollup, time period, and optionally by product family and territory. Forecasts can include adjustments made by forecast managers to their immediate subordinates' forecasts and adjustments made by users to their own forecasts.

Users can view their forecasts and related opportunities for one person or for everyone below them in the forecasts hierarchy. For example, users can see the July Best Case forecast for all sales managers reporting to them, all sales reps reporting to any of their managers, or one rep.

You can base forecasts on the Opportunity, Opportunity Product, Opportunity Split, and Line Item Schedule objects. Up to four forecast types can be active at a time.

## Before You Begin

To benefit the most from the tutorials, make sure that you set up the following.

- Accounts
- Opportunities
- Profiles
- Roles
- Users

To ensure that you have access to the settings described in this guide, ensure that you have the following permissions assigned.

| User Permissions Needed | |
|---|---|
| To use Collaborative Forecasts: | View All Forecasts |
| | OR |

| User Permissions Needed | |
|---|---|
| | Allow Forecasting<br>OR<br>Delegated forecast manager status |
| To access role-based forecasts in Lightning Experience: | View Roles and Role Hierarchy |
| To enable Collaborative Forecasts users: | Manage Users<br>AND<br>Customize Application |
| To create and manage forecast types: | Customize Application |
| To adjust forecasts: | Override Forecasts |
| To manage quotas of all users in the forecast hierarchy: | Manage Quotas<br>AND<br>View All Forecasts |
| To see the forecasts of all other users: | View All Forecasts |
| To create or update custom report types: | Manage Custom Report Types |
| To delete custom report types: | Modify All Data |

Depending on how you forecast, make sure you also set up the following.

- An active territory model
- Custom fields (number or currency type) on the Opportunity, Opportunity Product, Opportunity Split, and Line Item Schedule objects
- Opportunity splits
- Product families
- Product schedules

# TUTORIAL #1: SET UP COLLABORATIVE FORECASTS

This tutorial takes you through turning on Collaborative Forecasts, setting the tab visibility for the profiles who need it, activating a forecast type, choosing how to roll up your opportunities to forecasts, and defining a default date range.

For a comprehensive explanation about the pieces that make up a sales forecast and how they fit together, plus best practices, see Sales Forecasting in Trailhead.

## Step 1: Turn On Collaborative Forecasts

Before you start, make sure you're working in Lightning Experience.

1. From Setup, in the Quick Find box, enter `Forecasts Settings`, and then select **Forecasts Settings**.
2. If Collaborative Forecasts isn't enabled, enable it.

   These defaults are set for you. You can adjust these settings to meet your business requirements.

| Option | Description |
| --- | --- |
| **Forecast Type** | A forecast type with the following parameters is created for you.<br>Object: Opportunity<br>Measure: Amount<br>Date: Close date<br>Hierarchy: User<br>Role Filters: None<br>Custom Columns: Gap to Quota, Pipeline Coverage<br>You can modify the opportunity list, select the columns to show in the forecast summary, apply filters, and modify the custom columns for that type. Or, create your own types to meet your business needs.<br>If your org existed before Winter '24, make sure that the default type is activated as part of your settings review. |
| **Adjustments** | Manager Adjustments |
| **Forecast Rollups** | Cumulative Category Rollups |
| **Currency** | Org Currency |
| **Date Range** | Forecast Period: Monthly<br>Starting On: Current Month<br>Extending for: 1 month |
| **Show Quotas** | Selected<br>The forecasts page includes a quota column, attainment percentages, and progress bars. Be sure to enter your quota data in the Forecasts Quota page in setup. |

# Step 2: Add a Forecasts Tab

Set the tab visibility for the profiles that need Collaborative Forecasts, such as sales users and sales managers. You can always come back and make changes. As you add profiles, set tab visibility for them as well.

1. To add the Forecasts Tab to a Lightning App, from Setup, in Lightning Experience, in the Quick Find box, enter `App Manager`, select **App Manager**, and then click the **Edit** quick action for your Lightning app. Then click **Navigation Items**.

   In Salesforce Classic, click **+** and then **Customize My Tabs**.

2. Move Forecasts from the Available column to the Selected column.
3. Save your changes.

You can also add the Forecasts tab by setting it to Default On in each user profile.

# Step 3: Decide Which Forecast Types to Use

You can have up to four forecast types active at a time. Review the options for creating forecast types. Depending on how Salesforce is set up, not every option is available.

Tip: A default forecast type is defined for you based on the Opportunity object. The default type measures on the Amount field, by close date, and is based on the user role hierarchy. You can modify the opportunity list, select the columns to show in the forecast summary, apply filters, and modify the custom columns for that type. Or, create your own types to meet your business needs.

| Object | Measure | Group | Date Type | Hierarchy |
|---|---|---|---|---|
| Opportunity | • Amount (revenue)<br>• Quantity<br>• Custom currency (revenue) or number (quantity) | Custom picklist | • Close date<br>• Custom date | • Territory<br>• User role |
| Opportunity Product<br>(Used for product family grouping and required for product date forecasts) | • Total price (revenue)<br>• Quantity<br>• Custom currency (revenue) or number (quantity) | • Custom picklist<br>• Product family | • Close date<br>• Custom date<br>• Product date* | • Territory*<br>• User role |
| Opportunity Split<br>(Required for opportunity splits forecasts) | • Amount (used with revenue, overlay, and custom currency split types)<br>• Custom currency (revenue) | N/A | • Close date<br>• Custom date | • User role |

| Object | Measure | Group | Date Type | Hierarchy |
|---|---|---|---|---|
| Opportunity Product Split**<br>(Required for opportunity product splits forecasts) | • Amount (used with revenue, overlay, and custom currency split types)<br>• Custom currency (revenue) | Product Family | • Close date<br>• Custom date | • User role |
| Line Item Schedule<br>(Used for product family grouping and required for schedule date forecasts) | • Revenue<br>• Quantity<br>• Custom currency (revenue) or number (quantity) | Product family | • Schedule date | • Territory<br>• User role |

*When forecasting by Opportunity Product (total price or quantity) for territory hierarchy, the Opportunity Product Date isn't supported. Opportunity Close Date is supported.

**Supported by product family only.

## Product Families

If your company groups its products and services into families and wants to forecast based on those families, keep these considerations in mind.

- If you're using Lightning Experience, you choose the product families to forecast on. The more product families you choose, the more rows appear in the forecasts grid. The forecasts grid shows up to 2,000 rows.
- The Forecasted Amount column in the opportunity list on the forecasts page shows the product family totals, not the overall opportunity totals that roll up into the forecast amounts. We recommend that you add this column to the opportunity list.
- Forecast users can view individual product family forecasts for users they have access to view.
- We recommend completing the Product Family field on each product record. Forecasts for products without a Product Family value appear in a forecast row titled Products Not Categorized. If an opportunity lacks products, the opportunity amount or quantity also appears in this row.
- Product family forecast totals aren't available in Salesforce Classic. If users adjust their product family forecasts in Lightning Experience, not every total in the Salesforce Classic forecasts grid reflects the adjustments.
- In Salesforce Classic, a manager's own product family forecasts aren't available, so they can't be adjusted.
- You can set separate product family quotas for each sales rep but not a single quota for each sales rep.

## Forecast Groups with Custom Picklists

You can group forecasts into segments other than product families that make sense for your business. For example, define forecasts to group by industry or business unit. Keep these considerations in mind.

- Forecast groups are available for forecast types based on the Opportunity and Opportunity Product objects.
- Custom, single-selection picklist fields on the Opportunity, Opportunity Product, or Product objects are available as forecast groups. Make your group and group value selections as you define the forecast type.

- We recommend completing the picklist field on each opportunity record. To include items that don't have a value selected for the picklist, select **Not Categorized** when you select the group values for the forecast type.
- If a picklist selected as a forecast group in a forecast type is deactivated, forecasts continue to include opportunities that have a value selected for the picklist.
- Forecast groups using custom picklists aren't available in Salesforce Classic or in the Salesforce mobile app.

## Opportunity Revenue Splits

If your sales team uses team selling and opportunity splits, use an opportunity splits revenue forecast. Keep these considerations in mind.

- You must have team selling, opportunity splits, and the revenue split type enabled.
- In Salesforce Classic, an opportunity that contains only a single 100% revenue split shows "--" for the split percentage in the opportunity list.

## Opportunity Product Splits

If your sales team uses team selling and opportunity product splits, use an opportunity product splits revenue forecast. Keep these considerations in mind.

- You must have team selling and opportunity product splits enabled.
- Forecasts for opportunity product splits are available with product families only. To forecast on opportunity product splits without product families, use the opportunity split object instead.

## Overlay Splits

Use overlay splits to track revenue from sales team members who help close opportunities but aren't directly responsible for them.

- You must have team selling, opportunity splits, and the overlay split type enabled.
- The overlay splits on a specific opportunity aren't required to total 100%.

## Custom Dates

If you have custom fields based on the Date type on the Opportunity object, you can forecast using those dates for forecasts based on the Opportunity, Opportunity Product, and Opportunity Splits objects.

## Custom Measures

If you have custom currency or number fields on the Opportunity, Opportunity Product, Opportunity Split, or Line Item Schedule object, you can forecast on the values in those fields.

- To forecast on revenue, use a custom currency field.
- To forecast on quantity, use a custom number field.

## Expected Revenue

If the value of the Amount field and the actual revenue brought in by the opportunity often differ, the Expected Revenue field on opportunities is useful. If your sales team anticipates this difference, consider using the Expected Revenue field and forecasting on it.

- You can forecast on revenue but not quantity.

- You can forecast on the Expected Revenue field regardless of whether you use opportunity splits with it.
- Regardless of whether you use splits with the Expected Revenue field, you must enable team selling, opportunity splits, and a custom split type for it.

## Territories

If you use Enterprise Territory Management, you can enable territory forecasts. Territory forecasts are available in Lightning Experience and the Salesforce mobile app for your active territory model only. When territory forecasts are enabled, the forecasts page shows the following.

- Forecast rollups based on the territories assigned to each opportunity
- Forecasts for the territories that the user is assigned to
- Territory forecasts shared to the user
- The opportunities included in territory forecasts, regardless of whether the opportunity owner is assigned to the territory

Territory forecasts are based on your territory hierarchy, not your user role hierarchy, as other forecast types are. Users switch from role-based forecasts to territory-based forecasts by selecting a territory forecast type, listed under Forecast Type in Display Settings.

Territory forecasts are based on fields on the standard Opportunity object. An opportunity is rolled up into one territory forecast only.

# Step 4: Activate a Forecast Type

Now that you have an understanding of what a forecast type is, let's create and activate one, and select columns to show in the opportunity list.

Forecast types start with selecting the object you want to forecast on. Before creating a forecast type, make sure that you're working in Lightning Experience and that Collaborative Forecasts is turned on. Also make sure that the object you want to use in the forecast type is set up correctly. Check your field-level security settings, and make sure that the opportunity Amount and Quantity fields, and any fields you want to forecast on are visible.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Available Forecasts Types section, click **Create a Forecast Type** and follow the onscreen setup flow to define and save the forecast type.
3. To complete the setup flow, click **Done**.

   The new forecast type appears in the list of available types on the Forecasts Settings page. Your new type has an inactive status.
4. To make the new forecast type available on the forecasts page, return to the Forecasts Settings page and select **Activate** from the quick actions for the forecasts type.

   You can have up to four active forecast types at one time. If you require more active forecast types, contact Salesforce Customer Support. To edit an active forecast, such as changing the custom columns, or choosing the columns to display, select the action you need from the quick actions list for the active forecast. Filter definitions aren't editable after activating or reactivating a forecast type.

If you select to group by product family, return to Forecasts Settings and select the families to use in the Manage Product Family Groupings section.

Warning: Deactivating a forecast type deletes the related forecasting data If the forecast type is reactivated, the filter definitions aren't editable.

# Step 5: Choose a Forecast Rollup Method

The rollup method determines how opportunities are rolled into forecast totals.

Choose between two methods of rolling up opportunities into forecasts.

- Single forecast category rollups combine the opportunities within each forecast category into separate forecasts for each category.
- Cumulative forecast rollups combine opportunities from multiple forecast categories into cumulative forecast categories. This setting is the default.

Note: The examples in this topic use the four forecast categories that are enabled by default. You can show a Most Likely category in Lightning Experience, rename single category rollups, and rename cumulative rollups. When added, Most Likely appears in the forecasts grid between Commit and Best Case.

| Rollup Method | Column Name on the Forecasts Page | Opportunities That Roll Up to It |
|---|---|---|
| **Single Category** | Pipeline | Pipeline |
| | Best Case* | Best Case |
| | Commit* | Commit |
| | Closed | Closed |
| **Cumulative** | Open Pipeline | • Pipeline<br>• Best Case<br>• Commit |
| | Best Case Forecast | • Best Case<br>• Commit<br>• Closed |
| | Commit Forecast | • Commit<br>• Closed |
| | Closed Only | Closed |

### Advantages of Cumulative Forecast Rollups

With single category rollups, each total and subtotal represents opportunities from only one of the forecast categories. With this type of rollup, if forecast users want to see the total that they're going to bring for the month or quarter, they add the Best Case, Commit, and Closed forecasts together.

| Example: Single Category Rollups | | | | |
|---|---|---|---|---|
| **Forecast amounts** | Closed | Commit | Best Case | Pipeline |
| | $50 | $100 | $150 | $200 |
| **Opportunities** | Closed | Commit | Best Case | Pipeline |

| Example: Single Category Rollups | | | | |
|---|---|---|---|---|
| | $50 | • $50<br>• $50 | • $50<br>• $50<br>• $50 | • $50<br>• $50<br>• $50<br>• $50 |

With cumulative rollups, the forecast columns show cumulative amounts from the opportunities in the named forecast category and subsequent categories in your sales pipeline. This view makes it easy for sales team members to see the total numbers that they're likely to bring in without combining the category totals themselves.

For example, this table shows the cumulative forecast rollup amounts when there are four Pipeline, three Best Case, two Commit, and one Closed opportunity, each worth $50.

| Example: Cumulative Rollups | | | | |
|---|---|---|---|---|
| **Forecast amounts** | Closed Only | Commit Forecast | Best Case Forecast | Open Pipeline |
| | $50 | $150 | $300 | $450 |
| **Opportunities** | Closed | Commit | Best Case | Pipeline |
| | $50 | • $50<br>• $50 | • $50<br>• $50<br>• $50 | • $50<br>• $50<br>• $50<br>• $50 |

Warning: Switching from one rollup method to another deletes adjustments for all active forecast types.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Manage Forecast Rollups section, click **Edit**, and select how to organize forecast categories in rollups.
3. Save your changes.

# Step 6: Define a Default Date Range

The default date range is the default forecast period that's shown on the forecasts page when a forecast user first opens it.

The forecasts grid shows forecasts for individual months or quarters and a range of months or quarters, depending on your settings. A one month forecast period is set for you, but you can change the range as needed. For example, if it's November, and you select **Current month** for your beginning month and **6 months** for the number of periods, your users see forecasts for November to April. They can also see forecasts for individual months in the range and the total for 6 months.

Typically, the default date range that you define coincides with your sales cycle. The maximum date range is 15 months, 15 fiscal periods, or 8 quarters.

1. From Setup, in the Quick Find box, enter *Forecasts Settings*, and then select **Forecasts Settings**.
2. In the Choose a Default Date Range section, click **Edit**.

3. Select a period, when to start, and the number of periods to show. We show a preview of your date range.
4. Save your changes.

Users can use this default, or they can set a different date range display for their own forecasts. After users change their individual date range displays, Salesforce admins 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.

Warning: If you change the time period from monthly to quarterly or quarterly to monthly, or you change the standard fiscal year, all adjustments, manager judgments, and quotas are purged. If you enable custom fiscal years, creating the first custom fiscal year deletes any quotas and adjustments in the corresponding and subsequent standard fiscal years. These changes trigger a forecast recalculation that can take significant time, depending on the quantity of your data.

Let's say a new VP joins your company. The date range shown on the VP's forecasts page is the default setting of 6 months, beginning with the current month. If the VP prefers a 4-month range, the VP can do the following, they can select to view that range using the selection options on the forecast page itself.

# TUTORIAL #2: SET UP FORECASTS USERS

Now that your users can see the forecasts page and you selected a forecast date range, you're ready to set up forecasts users.

## Step 1: Give Users Access to Collaborative Forecasts

Let's enable the individual users within each profile that needs forecasting ability. By enabling individual users, you retain granular control over access even if multiple groups use the same profile.

Let's say you have an Accounts Payable clerk and a sales manager assigned to the Standard User profile. You probably want to give forecasting ability to the sales manager but not to the clerk.

You can enable users on the All Users page or the Forecasts Hierarchy page. To enable Collaborative Forecasts on the All Users page:

1. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.
2. For each user that you want to enable, click **Edit**.
3. Under General Information, select **Allow Forecasting**.
4. Save your changes.

Note: Users need the View Roles and Role Hierarchy permission to access role-based forecasts in Lightning Experience. This permission is assigned to all forecast users by default. The View Roles and Role Hierarchy permission is enabled for all Standard user types (full CRM license with user type S) and standard and custom profiles. You can also enable the permission for Power Customer Success (type C) and Power Portal User (type P) users. In addition, enabling the following user permissions automatically enables View Roles and Role Hierarchy.

- View Setup and Configuration
- View All Forecasts
- Override Forecasts
- Delegated External Portal User

## Step 2: Learn About and Set Up Your Role-Based Forecasts Hierarchy

The forecasts hierarchy is a nested, expandable list of forecast users that determines how forecasts roll up within your company and who can view and adjust them. The role-based forecasts hierarchy is generated from your user role hierarchy and specifies which users are forecast managers in the role-based forecasts hierarchy.

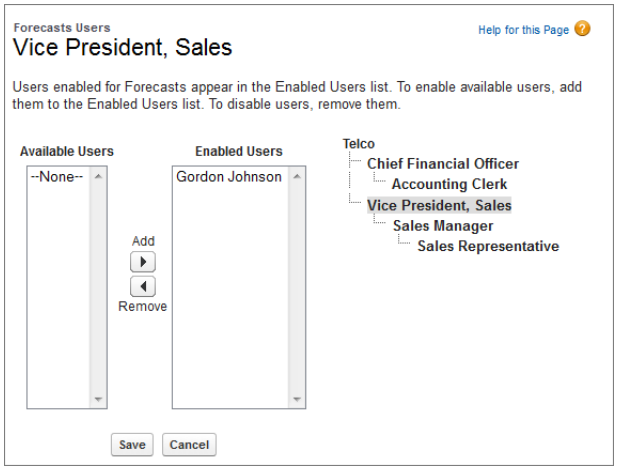
### Add Users to the Forecast Hierarchy

Let's say that you've enabled Collaborative Forecasts for the following users.

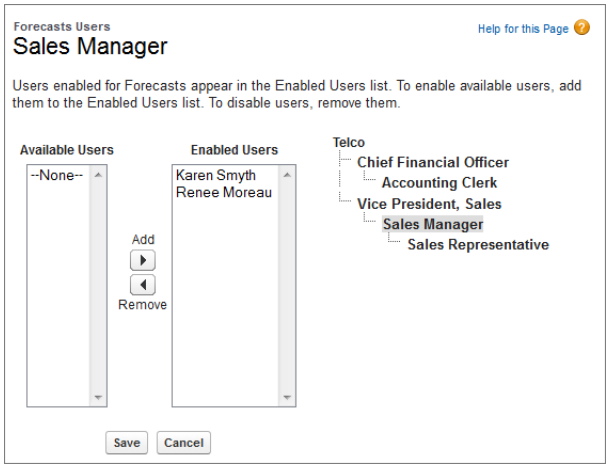
- One user in the Vice President, Sales role
- Two users in the Sales Manager role, both reporting to the Vice President, Sales

The users are in the role-based forecasts hierarchy within their respective roles. If you haven't enabled forecasting for users, you can add them to the role-based forecasts hierarchy now. If you've enabled territory forecasts, they're based on your territory hierarchy, and you assign forecast managers to territories via the territory hierarchy.

1. From Setup, in the Quick Find box, enter *Forecasts Hierarchy*, and then select **Forecasts Hierarchy**.
2. To see the available roles, click **Expand All**.
3. Click **Enable Users**, and then move users between the Available Users and Enabled Users lists. If you enabled a user page to allow forecasting, the user's name appears in the Enabled Users list.




4. Before moving on, enable two or three users. This page shows two users in the Sales Manager role.

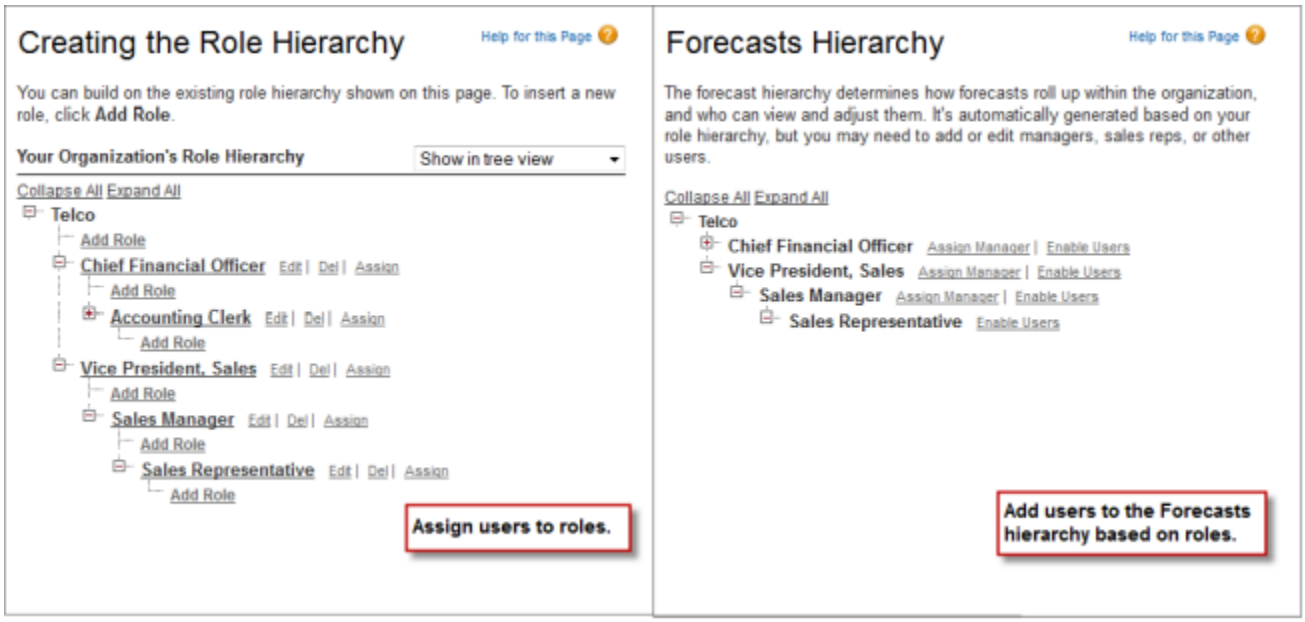



5. Save your changes.

Although the Sales Manager role reports to the Vice President, Sales in the role hierarchy, the users in the Sales Manager role don't automatically report to the Vice President, Sales in the role-based forecasts hierarchy. Enable a user in the role-based forecasts hierarchy to act as the forecast manager to be able to view subordinates' forecasts. Only one person at each level in the forecasts hierarchy can be the manager.

# Identify Forecast Managers

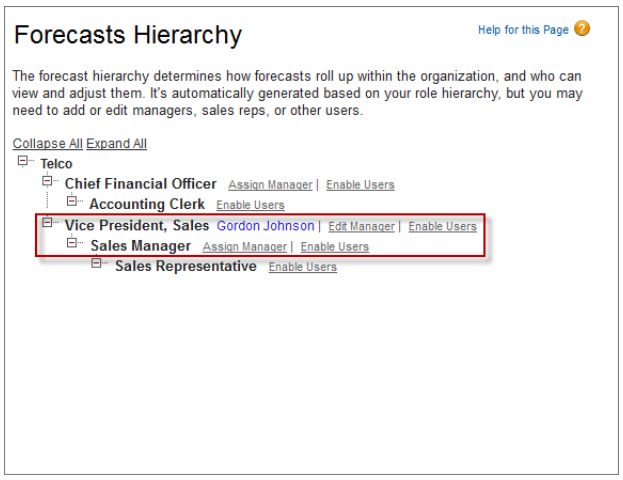
Let's enable a forecast manager next.




In the earlier example, we enabled a user named Gordon, who's in the Vice President, Sales role and has people who report to him. However, he's not a forecast manager, so Gordon can't view the forecasts of his subordinates or make adjustments.

To enable a forecast manager in the role-based forecasts hierarchy:

1. From Setup, in the Quick Find box, enter *Forecasts Hierarchy*, and then select **Forecasts Hierarchy**.
2. To select a forecast manager for each manager role in the hierarchy, click **Edit Manager** next to the role, and then select a name from the Forecast Manager dropdown list.
3. Save your changes.




The person you designated as the forecast manager can now view and adjust the forecasts of people who report to the manager in the role-based forecasts hierarchy. The manager can also jump to another user's forecasts. To assign the Forecast Manager role to someone else, click **Edit Manager**.

# Step 3: Learn How Partner Portal Users Can Add Collaborative Forecasts Opportunities

Partner portal users are external to your Salesforce org but sell your products and services through indirect sales channels. Your partner portal users use a portal to log in to Salesforce.

Opportunities that a partner portal user creates can roll up to the forecast of the account owner. The account owner must be the person's forecast manager in the role-based forecasts hierarchy. For example:

- Gordon Johnson owns a partner account called Acme.
- Gordon has an Acme contact named Anne Smith.
- Anne is a partner portal user.
- Anne reports to Gordon in the role-based forecasts hierarchy.

If Anne adds opportunities in her portal, Gordon sees those opportunities in his forecast. Because Gordon is Anne's forecast manager in the role-based forecasts hierarchy, he can adjust forecast amounts based on her opportunities and see how she's tracking against her quota.

When working with partner portal users, do the following.

1. From Setup, in the Quick Find box, enter *Users*, select **Users**, and then select the partner portal contact that you created.
2. Make sure that the **Active** and **Allow Forecasting** options are selected.
3. Enable the partner portal user in the role-based forecasts hierarchy.

# TUTORIAL #3: GET THE MOST FROM COLLABORATIVE FORECASTS

If you completed the first two tutorials, your users can begin using Collaborative Forecasts. To help users get the most from the forecasting information that they see, learn how to customize forecast category names, enable adjustments and quotas, set a default forecast currency, and create forecasting reports.

## Step 1: Customize Forecast Category Names

When you enable Collaborative Forecasts, five categories are available. A forecast category is the category within the sales cycle to which an opportunity is assigned based on its opportunity stage. The standard forecast categories are Pipeline, Best Case, Commit, Omitted (not included in forecasts), and Closed. Salesforce admins can show a Most Likely category in Lightning Experience, rename single category rollups, and rename cumulative category rollups.

### Rename Forecast Categories

Let's give the categories names that reflect your business practice. In these steps, we change the Commit Forecasts rollup name in cumulative rollups.

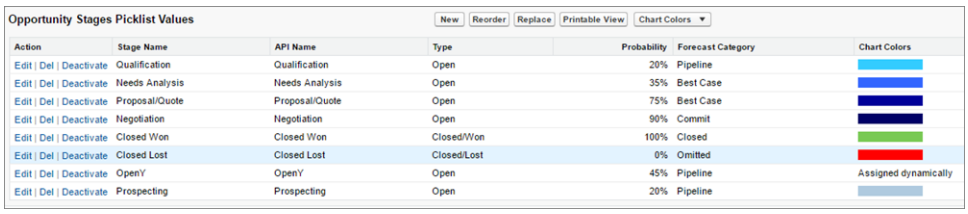
1. From Setup, in the Quick Find box, enter `Forecasts Settings`, and then select **Forecasts Settings**.
2. In the Manage Forecast Rollups section, click **Edit**.
3. Select **Cumulative category rollups**, and then click the rollup name you want to change.
4. Enter a rollup name, and then save your changes.

If you're using single category rollups, change those names in the Forecast Category field in Object Manager. New forecast category names appear on opportunity records and the forecasts page.

### Map Forecast Categories to Opportunity Stages

Forecast categories map to opportunity stage values. An opportunity stage value is the current stage of an opportunity, such as Prospect or Proposal. Opportunity stage values correlate with forecast category values to determine how the opportunity contributes to a forecast. Not sure what the mappings are? That's OK. Let's check them right now.

1. From the object management settings for opportunities, go to Fields.
2. Click **Stage**.




3. Scroll down to Opportunity Stages Picklist Values. Look at the row for each stage name to see which forecast category it maps to.
4. To change a mapping, click **Edit**.

5. In the Forecast Category dropdown list, select the category that you want mapped to that stage.
6. Save your changes.

What if you want to change the opportunity stage picklist values? You can do that, too.

1. From the object management settings for opportunities, go to Fields.
2. Click **Stage**.
3. Under Opportunity Stages Picklist Values, click **New**.
4. Create an opportunity stage, and then save your changes.
5. Under Opportunity Stages Picklist Values, click **Replace**.
6. Enter the name of the opportunity stage that you want changed.
7. From the dropdown list, select the new opportunity stage value.
8. Click **Replace**.
9. Click **Finished**.

# Step 2: Enable Manager Judgments and Adjustments

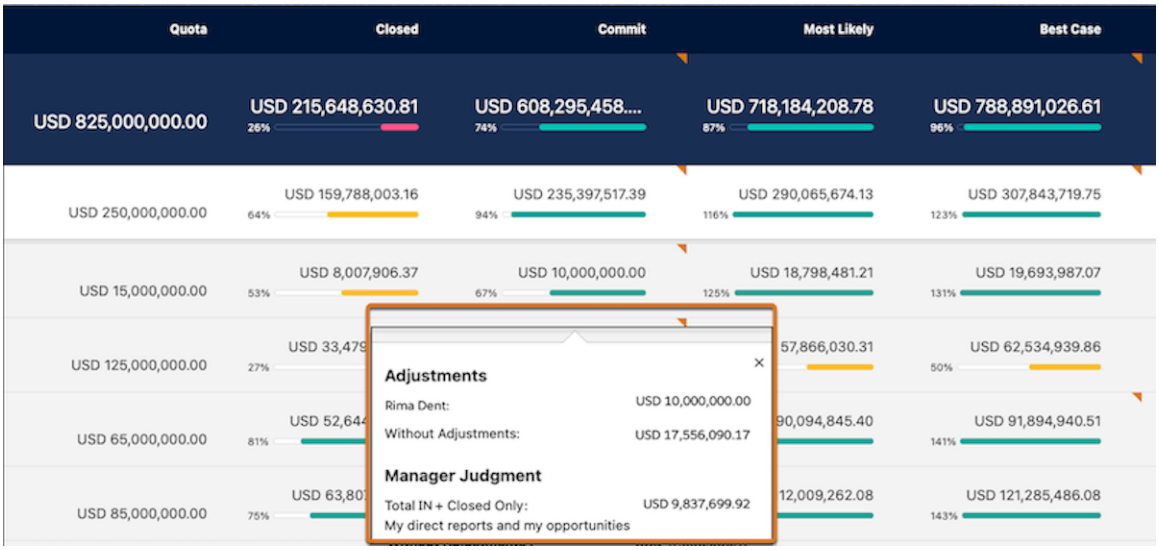
Now let's make it possible for your forecast managers to apply their judgment to opportunities and to adjust their forecasts. But first, what's an adjustment?

An adjustment indicates a judgment about the final figure a forecast's opportunities are expected to bring in at the close of the forecast period. Forecast managers and sales reps can make adjustments. Some forecast managers adjust their own or a subordinate's forecast. For example, they know that certain reps tend to be too optimistic or too conservative when assigning values to opportunities. If sales reps think that forecasts are understated or overstated, they can adjust their own forecasts. Forecast managers can adjust forecasts that don't include adjustments and forecasts that include adjustments made by someone else on their opportunity team. An adjustment doesn't change the underlying gross rollup. It adds a layer of detail. If multiple forecast types are active, each type maintains separate adjustments.

To provide additional clarity about the adjusted amount, forecast managers can apply their judgment about whether a direct subordinate's opportunities are considered in or out of the adjusted forecast total.

When forecasts are enabled, managers, sales reps, or both can adjust forecasts. However, adjustments made in one forecast type don't appear as adjustments in any other forecast type. For example, if you adjust an opportunity revenue forecast from $100,000 to $90,000 and then switch your forecast view to opportunity quantity forecasts, you don't see an equivalent adjustment in the opportunity quantity forecast.

In this example, Deborah Leighton's manager adjusted her original Commit forecast of $120,275 to $130,000. This adjustment is reflected in the manager's totals for the month and the 3-month period.




To enable judgments and adjustments, let's go back to Forecasts Settings.

1. From Setup, in the Quick Find box, enter `Forecasts Settings`, and then select **Forecasts Settings**.
2. In the Enable Adjustments and Judgments section, click **Edit**.
3. Select the options you want to enable and save your changes.
4. To enable adjustments and judgments for the correct profiles, from Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles.**
5. Find the custom profile for which you want adjustments and judgments enabled, and then click **Edit**.
6. If you're using the enhanced profile user interface, click **App Permissions**, and then click **Edit**.
7. Select **Override Forecasts**, and then save your changes.

If you enabled adjustments, select how you would those adjustments to show on the forecasts page. Selecting to show adjustments as columns adds columns for each adjustable forecast category on the forecasts page. For each adjustable forecast category, up to three columns are shown.

- A column with the original forecast value before any adjustments
- If owner adjustments are enabled, a column with the forecast user's direct reports' adjustments
- A column with the forecast user's own adjustments.

If you select to show adjustments as columns on the forecasts page, you can change the default column names to fit your sales model and business practices. For example, rename the My Commit column to Call or Call Number to indicate that it's your best estimate about the forecast. See Group Sales Forecasts to Match Your Business in Salesforce Help for details.

# Step 3: Set Up a Default Collaborative Forecasts Currency

Now let's look at the different currency options and what they're used for.

If you don't use multiple currencies, jump ahead to Tutorial #3, Step 4.

The following currency types exist in Salesforce

| | |
|---|---|
| Corporate currency | The currency in which your corporate headquarters reports revenue. Serves as the basis for all currency conversion rates. |

| | |
|---|---|
| Forecast currency | A company's corporate currency or each forecast owner's personal currency. |
| Forecast display currency | The currency that a user selects in which to show forecasts. Users make the section directly from the forecasts page. The selection must be one of your company's enabled currencies. |
| Personal currency | A user's default currency for reports. This currency must be one of your active currencies. Forecast and quota amounts can appear in your corporate currency or each forecast owner's personal currency. |

When you set up Collaborative Forecasts, you select a default forecast currency, but users can select a forecast display currency on the forecasts page. Let's select a default forecast currency now.

1. From Setup, in the Quick Find box, enter `Forecasts Settings`, and then select **Forecasts Settings**.
2. In the Select a Default Currency section, click **Edit**.
3. Select **Corporate Currency**. You get a warning message about adjustments. You don't have any adjustments yet, so click **OK**.
4. Save your changes.
5. Go to the forecasts page. If you have a revenue-based forecast type enabled, you see the currency indicated.
6. The corporate currency that you selected earlier is shown. Select a currency other than your corporate currency to show the forecast. For example, if the Indian rupee is enabled, select it, and then save your changes.

If you want to continue using the corporate currency as the forecast currency, you're done. To set personal currency as the default, go back to the Forecasts Settings page and change your selection.

# Step 4: Show Quotas

More than likely, you want to allow forecasts users to see quotas and quota attainment information.

A quota is a monthly or quarterly sales goal that's assigned to a user or territory. A manager's quota equals the sales that the manager and team are expected to generate together. The quota rollup is done manually by users and managers. Quotas can use revenue, quantity, or custom measure data. If quotas are enabled, quota data appears on the forecasts page.

Let's enable quotas.

1. From Setup, in the Quick Find box, enter `Forecasts Settings`, and then select **Forecasts Settings**.
2. In the Show Quotas section, click **Show Quotas**
3. Save your changes.

After you enable quotas, users can choose to hide or show the quotas and quota attainment information on the forecasts page.

# Step 4.5 (Optional): Manage Quota Data in Setup

Enter quota details in Salesforce setup.

1. Make sure that quotas are enabled.
2. From Setup, in the Quick Find box, enter `Quotas`, and then click **Forecasts Quotas**.

3. Select the period, forecast type, and product family (if relevant) or forecast group value of the quotas you want to add or update, and then click **Show Quotas**.
4. Search for and select the users, roles, or territories whose quotas you want to manage, and then click **Edit Selected Rows**. You can also click the pencil icon to edit quota and currency fields.
5. Enter quotas, and then save your changes.

For other methods of managing quota data, see Setting Up Quotas in Salesforce Help.

# Step 5: (Optional) Create Your Own Custom Forecasts Pages

Using Lightning App Builder, create custom forecasts pages for desktop that include all the information your sales leaders require to drive accurate forecasts that support your unique business needs. A default page is in place that contains the forecasts header, summary, and opportunity list to engage with forecast information. Creating custom pages is optional if the default pages don't meet your business needs.

See Lightning App Builder for more information about the builder.

1. Make sure that Collaborative Forecasts is enabled.
2. To navigate to Lightning App Builder, from the forecasts page, select

   Or access Lightning App Builder in Setup. From Setup, in the Quick Find box, enter `App Builder`, and then select **Lightning App Builder**. Click **New**, and then select **Forecasts Page**.
3. Add the Forecasts Header component, which viewers of the page use to select what data shows in other forecast-related parts of the page. We recommend that each forecasts page contains a header.
4. Add the standard and custom components that you want to include on the page.

   For the best experience, we recommend adding the Forecast Summary component to show the actual forecast data for each period and the Forecast Opportunity List component to show the opportunities that contribute to the forecast. If Einstein Forecasting is enabled, Einstein predictions show in a slide-out panel when users select a cell in the Einstein Prediction column on the forecasts page. No additional components are necessary to show Einstein Forecasts predictions.
5. For each component you add to the page, select the component and configure its individual properties.
6. To view and edit the page properties and to add a page description, click the empty area of the canvas and enter the information about your page.
7. Save the page.
8. Activate the page for the org, user profile, or an app.

To activate the page, with the page open in Lightning App Builder, click Activation and select whether to enable the page for your company, an app, or a user profile. The page isn't visible to anyone until it's active.

# Step 6: Create a Forecasting Custom Report Type and Forecasting Report

To make a forecasting report available to users, create a custom report type. A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects. Reports show only those records that meet the criteria defined in the report type. This table describes the forecasting report types that you can create.

| Primary Object | Use to Create a Report for... |
| --- | --- |
| Forecasting Custom Data | Viewing external data that's added to a custom column. We recommend including all the default fields in the report type. |
| Forecasting Custom Data with Forecasting Items as a related object | Viewing the forecast compared to external data that's available in a custom forecast column. For example, create a report that shows how your sales team is performing versus last year's performance. Create a custom field that contains data about last year's total revenue, and select that field in a custom column for your active forecast type. Create the custom report type that uses Forecasting Custom Data as the primary object and uses Forecasting Items as a related object. When you create the report, include the forecast owner, the team's commit value, closed value, and the custom column. |
| Forecasting Items | Viewing information about forecasts, including adjustment information. If you use a forecast type based on revenue, we recommend using these default fields in the report type.<br>• Owner Only Amount—The sum of a person's revenue opportunities, without adjustments. For example, if you own two opportunities, each worth $10,000, the Owner Only Amount is $20,000.<br>• Amount Without Adjustments—The sum of a person's owned revenue opportunities and the person's subordinates' opportunities, without adjustments. Subordinates include everyone reporting up to a person in the forecast hierarchy. This amount is visible only on reports. For example, if the sum of the amount of all opportunities that you own is $20,000, and the sum of the amount of your subordinates' opportunities is $55,000, the Amount Without Adjustments is $75,000.<br>• Amount Without Manager Adjustments—The forecast number as seen by the forecast owner. This amount is the sum of the owner's revenue opportunities and the owner's subordinates' opportunities, including adjustments made by the forecast owner on the owner's or subordinates' forecasts. It doesn't include adjustments made by forecast managers above the owner in the forecast hierarchy. For example, Anne has an Amount Without Adjustments of $75,000, made up of $20,000 of her own opportunities and $55,000 of opportunities owned by Ben, her subordinate. She adjusts Ben's amount to $65,000 for a total of $85,000. If you adjust Anne's number from $85,000 to $100,000, you see $85,000 in Amount Without Manager Adjustments because that's the amount Anne sees. Anne can't see your adjustments because you're her manager. To see the amount that includes your adjustment to $100,000, look at Forecast Amount.<br>• Forecast Amount—The revenue forecast from the forecast manager's perspective and the sum of the owner's and subordinates' opportunities, including all forecast adjustments. For example, you're a forecast manager and have another forecast manager reporting to you who has an Amount Without Manager Adjustment totaling $85,000. If you adjust the forecast to $100,000, the Forecast Amount is $100,000.<br>If you use a forecast type based on quantity, use these default fields in the report type.<br>• Owner Only Quantity, Quantity Without Adjustments, Quantity Without Manager Adjustments, and Forecast Quantity<br>Regardless of whether you forecast based on revenue or quantity, add these fields.<br>• Has Adjustment—A checkbox that indicates whether a manager adjustment was made on an owner's forecast.<br>• Has Owner Adjustment—A checkbox that indicates whether a forecast user has adjusted the user's own forecast.<br>If you use cumulative forecast rollups, add this field to your report.<br>• ForecastingItemCategory—This field indicates which rollup each forecast is for: Open Pipeline, Best Case Forecast, Most Likely Forecast, Commit Forecast, Closed Only, Pipeline, Best Case, Most |

| Primary Object | Use to Create a Report for... |
| --- | --- |
| | Likely, Commit, or Closed. If you changed the forecast category cumulative rollup names, those changes appear in the ForecastingItemCategory values.<br>If you group your forecasts using custom picklists, add these fields in the report type.<br>• Group Value: API Name—The developer name of the custom picklist value that's selected in the forecast type.<br>• Group Value: Translated Name—The translated value of the custom picklist value selected in the forecast type. |
| Forecasting Items with Opportunities as a related object | Viewing opportunity revenue or quantity forecasts. View opportunity information for specific forecasting line items. For example, you can create a summary report for each of your subordinates that includes the opportunity names and last activity dates for their forecasting items and final forecasts. To include forecast adjustments, either use the Forecasting Items report type, or use the Forecasting Item with or without opportunities option.<br>For opportunities with no opportunity products specified, this report type includes two forecasting items: one for the opportunity revenue forecast type and one with product family grouping. These product family forecasting items roll up into the Products Not Specified row of the product family forecast. |
| Forecasting Items with Opportunity Splits as a related object | Viewing opportunity splits or custom split field forecasts. View opportunity split or custom split field information for specific forecasting line items. For example, you can create a summary report for each of your subordinates that includes the opportunity split amounts and percentages for their forecasting items, with adjustment information and final forecast amounts. |
| Forecasting Items with Opportunity Product as a related object | Viewing product family forecasts. View product family information for specific forecasting line items. For example, you can create a summary report for each of your subordinates that includes the product families and total price for their forecasting items, with adjustment information and final forecast amounts.<br>This report type shows forecasting items for product family revenue, product family revenue by territory, and product family quantity forecast types. It includes opportunities with and without opportunity products specified. |
| Forecasting Items with Product Splits: Items with Products No Split and Opportunity Product Splits as related objects | Viewing opportunity product split forecasts that contain items that aren't split. For example, create a summary report for each of your subordinates that shows the opportunities included in a forecast that don't include split amounts or percentages.<br>To see the entire product splits forecasts, create a joined report that includes this report type and these report types.<br>• Forecasting Items as the primary object with Product Splits: Items without Products as a related object<br>• Forecasting Items as the primary object with Product Splits: Items with Product Splits and Opportunity Product Splits as related objects |

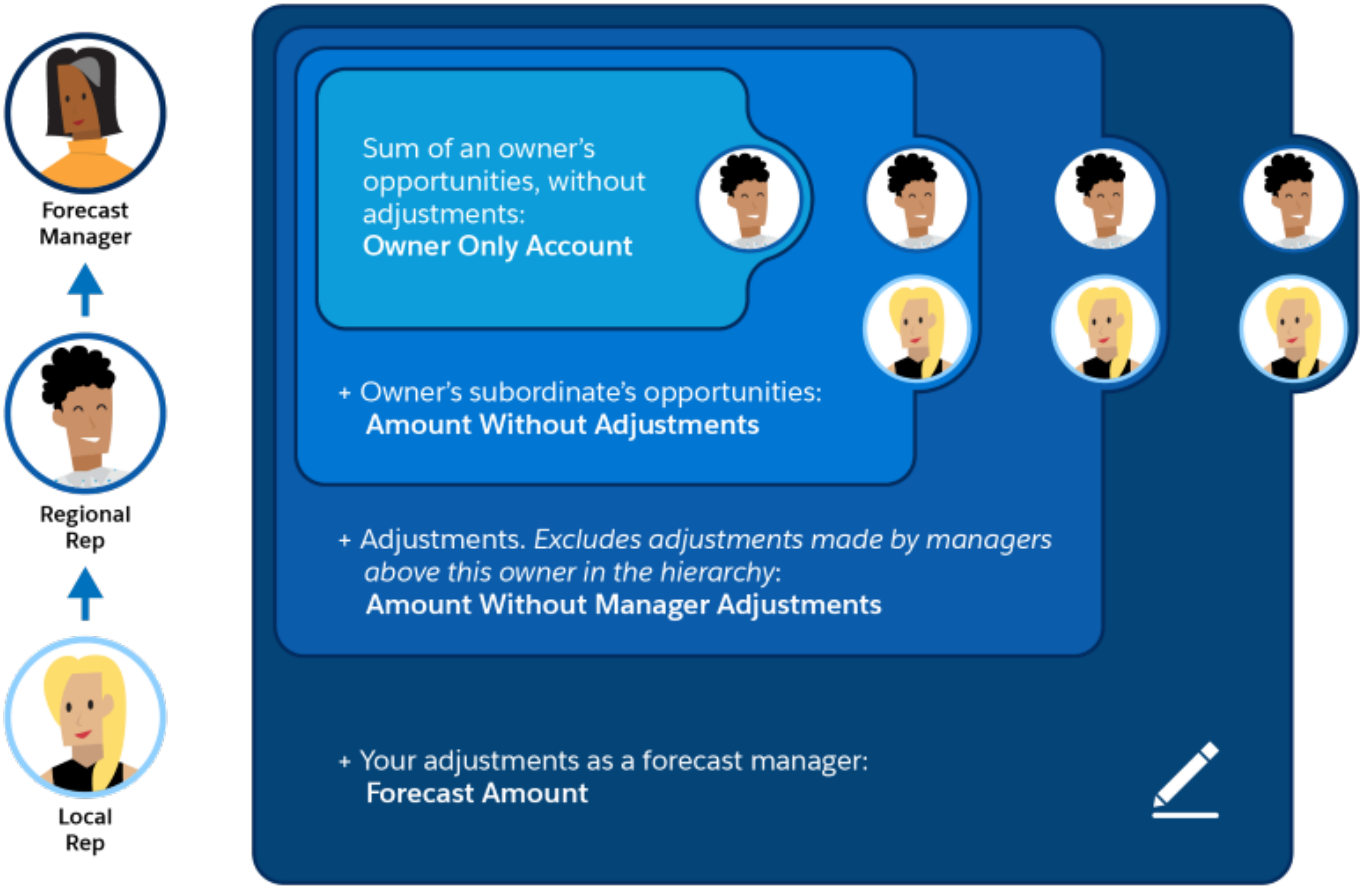
| Primary Object | Use to Create a Report for... |
| --- | --- |
| Forecasting Items with Product Splits: Items with Product Splits and Opportunity Product Splits as related objects | Viewing opportunity product splits forecasts that contain items that are split. For example, create a summary report for each of your subordinates that includes the opportunity product split amounts and percentages for their forecasting items, with adjustment information and final forecast amounts.<br>To see the entire opportunity product splits forecasts, we recommend creating a joined report that includes this report type and these report types.<br>• Forecasting Items as the primary object with Product Splits: Items with Products No Splits and Opportunity Product Splits as a related object<br>• Forecasting Items as the primary object with Product Splits: Items without Products as a related object |
| Forecasting Items with Product Splits: Items without Products as a related object | Viewing opportunity product split forecasts that contain items that don't include a product designation. For example, create a summary report for each of your subordinates that shows the opportunities included in a forecast that aren't grouped with a product.<br>To see the entire product splits forecasts, create a joined report that includes this report type and these report types.<br>• Forecasting Items as the primary object with Product Splits: Items with Products No Splits and Opportunity Product Splits as related objects<br>• Forecasting Items as the primary objects with Product Splits: Items with Product Splits and Opportunity Product Splits as a related object |
| Forecasting Quotas | Viewing data about individual or team quotas. We recommend including all the default fields in the report type. For example, you can include lookup fields, such as the full name of the owner. When running the report, you can filter by your name to see quotas that you created and their related accounts and owners. |
| Forecasting Quotas with Forecasting Items as a related object | Viewing quota attainment. For example, you can use Forecasting Quotas and Forecasting Items to create the custom report type. Then, when you create the report, include a team's quotas and forecast revenue for closed forecasts, and create a formula field to show the attained quota percentage. |

To compare individual forecasts, team forecasts, and forecasts with adjustments for specific team members, include these fields in the Forecasting Items report type: Owner Only Amount, Amount Without Adjustments, Amount Without Manager Adjustments, and Forecast Amount. The Has Adjustment checkbox indicates whether a forecast was adjusted. The Has Owner Adjustment option indicates whether the forecast owner adjusted the forecast.

## Add a Custom Forecast Type

Let's look at an example.

A forecast manager has one subordinate who's a regional rep, and the regional rep has a subordinate who's a local rep. The forecast manager runs a report based on the Forecasting Item report type and includes the four fields for the whole team. In this image, the orange outline indicates that the forecast was adjusted. For example, in Amount Without Manager Adjustments, the forecast manager sees the combined amount of the regional rep's opportunities and the local rep's opportunities, including adjustments that the regional rep made to the local rep's amount.




Let's create a Forecasting Items custom report type and a report and then publish the report for your users. This report shows the total forecasts for all forecast managers' subordinates, grouped by month and forecast rollup.

1. From Setup, in the Quick Find box, enter `Report Types`, and then select **Report Types**.
2. Click **New Custom Report Type**.
3. Add the following information.
   - For Primary Object, select **Forecasting Items**.
   - For Report Type Label, enter `Forecasting Items`.
   - Add a description.
   - For Store in Category, select **Forecasts**.
4. Select **Deployed**.
5. Click **Next**, and then save your changes.

## Build the Report

Now let's create a report based on the Forecasting Items custom report type.

Note: Salesforce offers a Classic report builder and a Lightning report builder. The following steps are for the Lightning report builder. If you're using Salesforce Classic, switch to Lightning Experience to follow these steps.

1. On the Reports tab, click **New Report**.
2. Select **Forecasts** and then **Forecasting Items**, and then click **Continue**.
3. To create a row grouping, in the Group Rows field, select **Start Date**.
4. To create a column grouping, in the Group Columns field, select **Forecast Category**.
5. To add summarizable fields, click **Fields**, and then double-click **Forecast Amount**.

   If you get a No Results prompt, click **All forecasting items** and then **All Time**.
6. In the Start Date column, click the down arrow, and then select **Group Date By** and then **Calendar Month**.
7. To filter the content of the report, click **Filters**, and then in the Add filter field, select **Owner: Full Name** > **equals**, and enter the users to include in your report. Then click **Apply**.

   Add a second filter for **Forecasting Type: API Nameequals**, and enter the forecast type that you want to report on. It must be one of the forecast types that you added earlier.
8. Apply and save your changes, and then enter a report name and description.

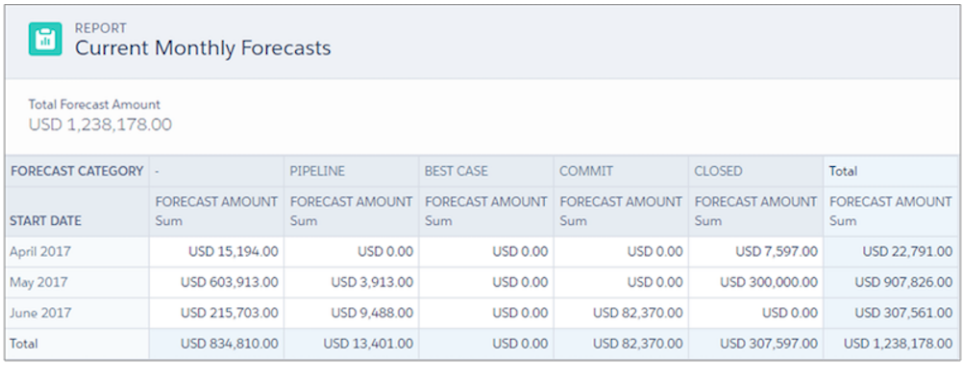
   Save the report in Public Reports.

## Add a Chart Based on the Report

Now let's create a chart.

1. Click the **Dashboards** tab, and then click **New Dashboard**.
2. Enter a name and description, select a folder to save the chart in, and then click **Create**.
3. Click **+Component**, select the report that you created, and then click **Select**.
4. Define other properties of the chart so that it reflects the details that you need, and then click **Add**.

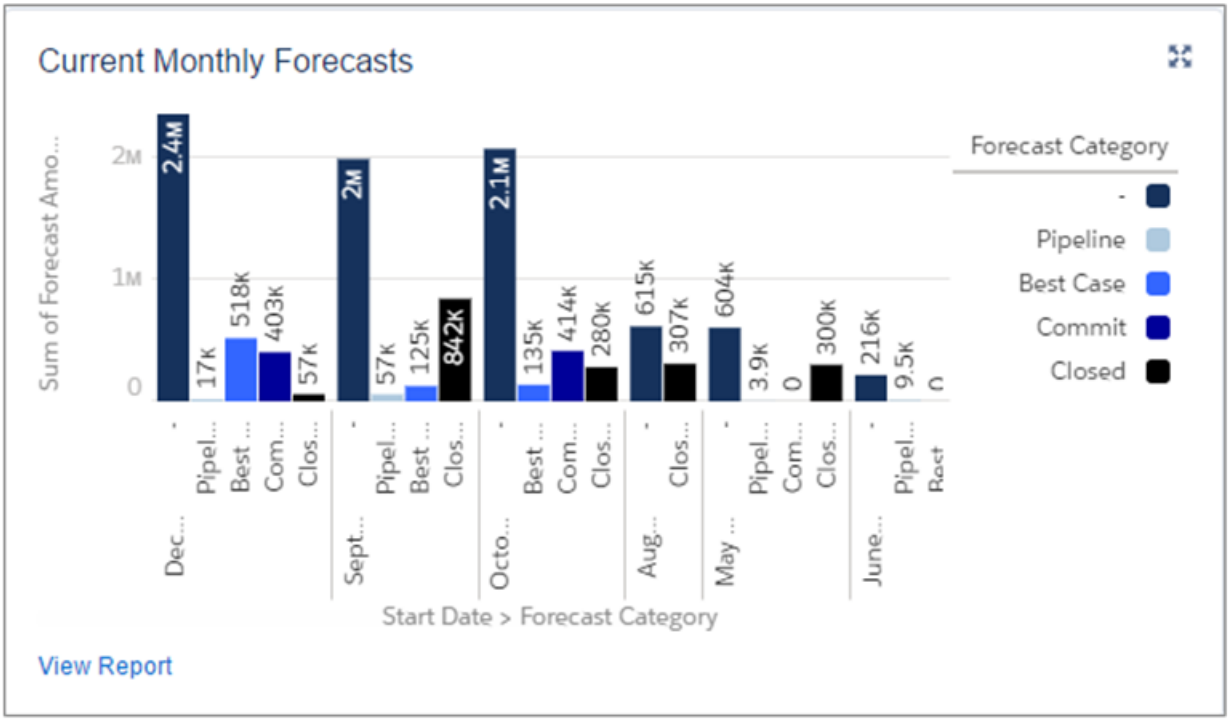
Your report and chart now look something like these examples.



REPORT
Current Monthly Forecasts

Total Forecast Amount
USD 1,238,178.00

| FORECAST CATEGORY | - | PIPELINE | BEST CASE | COMMIT | CLOSED | Total |
|---|---|---|---|---|---|---|
| START DATE | FORECAST AMOUNT Sum | FORECAST AMOUNT Sum | FORECAST AMOUNT Sum | FORECAST AMOUNT Sum | FORECAST AMOUNT Sum | FORECAST AMOUNT Sum |
| April 2017 | USD 15,194.00 | USD 0.00 | USD 0.00 | USD 0.00 | USD 7,597.00 | USD 22,791.00 |
| May 2017 | USD 603,913.00 | USD 3,913.00 | USD 0.00 | USD 0.00 | USD 300,000.00 | USD 907,826.00 |
| June 2017 | USD 215,703.00 | USD 9,488.00 | USD 0.00 | USD 82,370.00 | USD 0.00 | USD 307,561.00 |
| Total | USD 834,810.00 | USD 13,401.00 | USD 0.00 | USD 82,370.00 | USD 307,597.00 | USD 1,238,178.00 |




Let's create one more report for practice. This time we create a report for sales executives who want to see the quota percentages reached by their sales reps. Let's start by creating the report type.

1. Create a custom report type using Forecasting Quotas as the primary object.
2. Fill in the report type label and other fields, and then click **Next**.
3. Click **Click to relate another object**, and then select **Forecasting Items**.
4. Save your changes.

Next, create the report.

1. Begin creating a report using the custom report type that you just created based on Forecasting Quotas and Forecasting Items.
2. Filter by Start Date, and select a date range.
3. Create a row grouping for Owner: Full Name and a column grouping for Start Date.
4. Add summarizable fields for Quota Amount and Forecast Amount.
5. Click the down arrow next to Columns, and then select **Add Summary Formula Column**.
6. In the Column Name field, enter `% of Quota Attained`.
7. Click **Switch to Full Editor**.
8. Select **Forecast Amount**, and then click **Insert**.
9. Select the division sign.
10. Select **Quota Amount**, and then click **Insert**.
11. Click **Apply**.
12. Save the report and enter a report name and description, the folder to save it in.

# Summary

Now let's review what you practiced.

- Turned on Collaborative Forecasts.
- Set the Collaborative Forecasts tab visibility.
- Activated at least one forecast type.
- Defined your default forecasting date range.
- Enabled Collaborative Forecasts users.
- Gained a better understanding of the difference between role hierarchy and forecasts hierarchy and how they interact.
- Learned about assigned managers in the forecasts hierarchy.
- Customized your forecast category names.
- Enabled adjustments.
- Set up a default forecast currency.
- Enabled quotas.
- Created forecasting custom report types.

Keep this implementation guide handy in case you want to refine your setup.