Salesforce Forecasting: Concepts, Setup, and Reporting Tips

CHEATSHEET

Stop wasting time on manual sales rollups. Enable native Collaborative Forecasting in Sales Cloud.

Sales forecast spreadsheets are stale by Friday afternoon. If your Salesforce role hierarchy is broken, your collaborative pipeline reports are completely wrong. Let's fix it.

1 The 3 Pillars of Salesforce Forecasting

Before altering your configuration, understand how Salesforce structures and aggregates your opportunity pipeline data.

- Forecast Type: Defines what is measured (Opportunity Revenue, Product Families, or Splits).
- Forecast Category: Maps opportunities to pipeline stages (Pipeline, Best Case, Commit, Closed).
- Forecast Hierarchy: Rolling totals that map directly to your active Salesforce Role Hierarchy.

2 Step 1: Enable & Configure Date Ranges

Get Collaborative Forecasting running inside Setup in less than 5 minutes.

- Navigate to Setup -> Forecasts Settings.
- Toggle 'Enable Forecasts' to ON.
- Select the Forecast Date (Opportunity Close Date is standard, or use a custom Commit Date).
- Define your Forecast Range (typically 3 to 6 months rolling).

3 Step 2: Align Your Forecasting Hierarchy

Your forecast rollup is only as accurate as your underlying Role Hierarchy.

- Navigate to Setup -> Forecasts Hierarchy.
- Salesforce automatically pulls structure from your existing active Role Hierarchy.
- Enable each specific role that needs to submit or view pipeline numbers.
- Ensure managers are assigned to roll up opportunities from subordinate roles.