

CHEATSHEET

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.

Salesforce Forecasting: Concepts, Setup, and Reporting Tips

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

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.

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).

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.

THAT'S A WRAP

Build Bulletproof Sales Forecasts

Want to configure custom forecast fields, handle adjustments, and build real-time pipeline reports? Head over to our full guide to unlock executive-level forecasting.

→ salesforcelwc.com

5 slides

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