

Salesforce - Sales Cloud Administration: Products, Quotes, Orders and Collaborative Forecasts (ADM 251)

Code:	ADM-251
Length:	1 days
URL:	View Online

Sales Cloud Administration: Products, Quotes, Orders, and Collaborative Forecasts is a must for all administrators who need to configure and maintain these features for their organizations. Using real-world scenarios, this course will teach administrators how to set up products, price books, quotes, and orders to streamline their processes. This course will also teach administrators how to configure Collaborative Forecasts to generate accurate forecasts and track quota attainment.

Who Can Benefit

- Administrators with at least six months of experience using
- Salesforce; and/or
- Administrators who have completed the Administration Essentials for
- New Admins course.

Course Details

Set Up Products, Price Books, Quotes, and Orders

- 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 to track products and the various prices at which they are sold.
- Add products to opportunities.
- Generate quotes showing the proposed prices for products and services.
- Sync quotes to opportunities.
- Add products to orders to track customers' requests for products and services.

Set Up Collaborative Forecasts

- Describe the capabilities of Collaborative Forecasts.
- Enable forecasts for users.
- Configure multiple forecast types to forecast based on opportunities, product families, and opportunity splits.
- Map opportunity stages to forecast categories.

- Define forecast managers and enable adjustments.
 - Add quota data for users.
 - Build forecast and quota reports.
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