# Sales Cloud Administration:

## Products, Quotes, Orders & Collaborative Forecasts

**Duration**
1 day

**Delivery Format**
Classroom or
Virtual Classroom

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 should take this course?

Sales Cloud Administration: Products, Quotes, Orders, and Collaborative Forecasts is designed for:
• Administrators with at least six months of
  experience using Salesforce; and/or
• Administrators who have completed the Administration
  Essentials for New Admins course

## Certification

Sales Cloud Administration: Products, Quotes, Orders, and Collaborative Forecasts is recommended as preparation for the Sales Cloud Application objectives on the Salesforce.com Certified Advanced Administrator exam.

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## Course Outline

### 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, opportunity splits, and custom fields
- Map opportunity stages to forecast categories.
- Define forecast managers and enable adjustments.
- Add quota data for users
- Build forecast and quota reports