

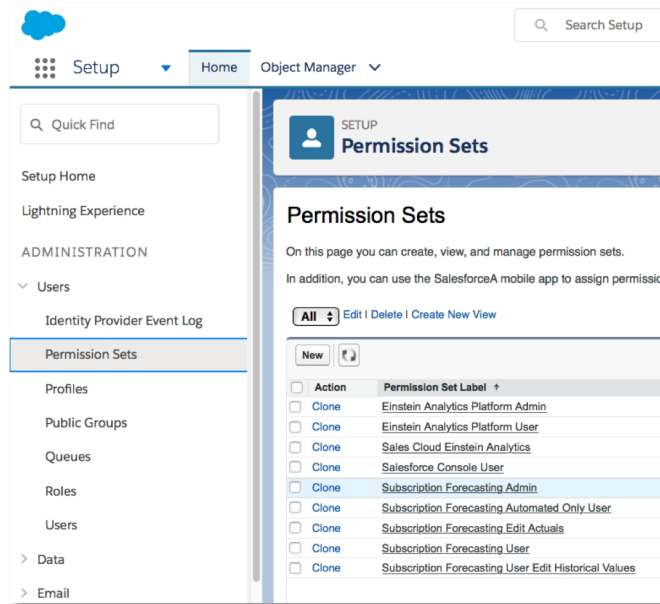


Post Install Steps

- Step 1 - Add permission to your user
- Step 2 - Add Subscription Forecasts tab in Lightning/Classic
- Step 3 - Add button “Add to Subscription Forecast” to Opportunity and/or Order page
- Step 4 - Create basic configuration by pressing a button

1. Add Permission Set to User


- Navigate to Setup-Users-Permission Sets
- Click: Subscription Forecasting Admin
- Click “Manage Assignments” button
 - Select your user
 - “Add Assignment” button
- Save





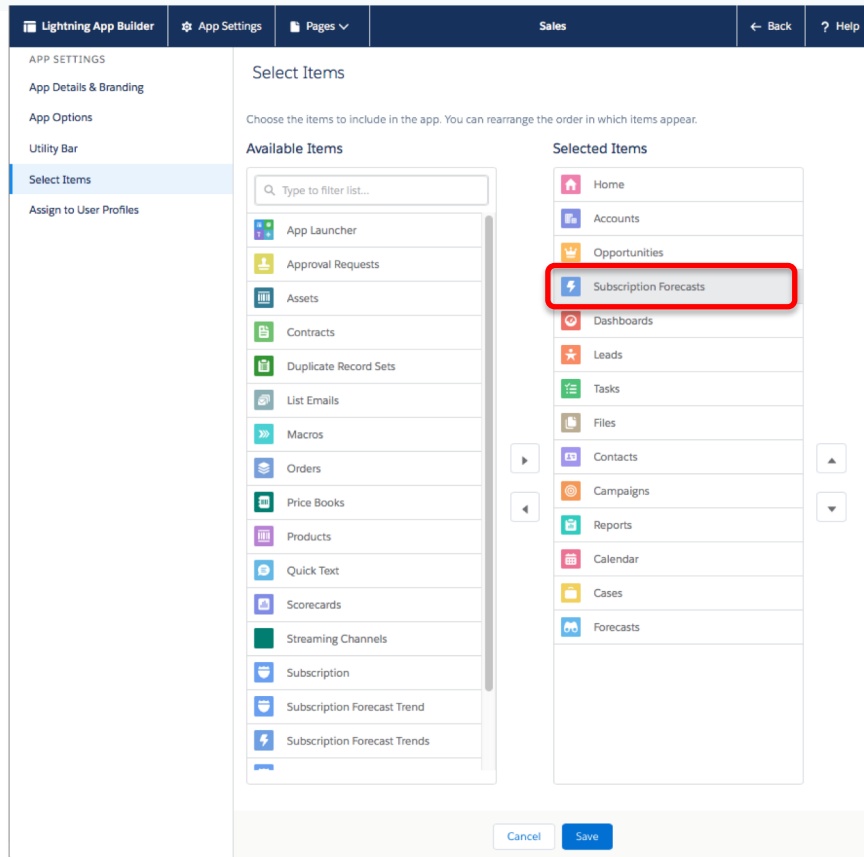
For additional users: first assign a license for the application (Setup-Platform Tools-Apps-Installed Packages: Manage Licenses)



2. Add "Subscription Forecasts" Tab to Lightning Sales App

- Navigate to Setup-Apps-App Manager
- Edit Sales - Lightning Sales
- Select Items
 - Add Subscription Forecasts 
- Position it under “Opportunities”
- Save, Done

NOTE: if you don't see Subscription Forecasts or any of the Lightning tabs  but only the “classic” ones  you have probably not enabled Lightning and configured My Domain. Enable Lightning and My Domain, then re-install our application for the Lightning Tabs to show up. See standard Salesforce help to enable Lightning [here](#), My Domain [here](#).





2. Add "Subscription Forecasts" Tab to Classic Sales App

Only relevant if you have users that want to use app in Classic

- Navigate to Setup-Apps-App Manager
- Edit Sales - Classic Sales
- Select and add Tab
 - Subscription Forecasting
- Position it under “Opportunities”
- Save, Done

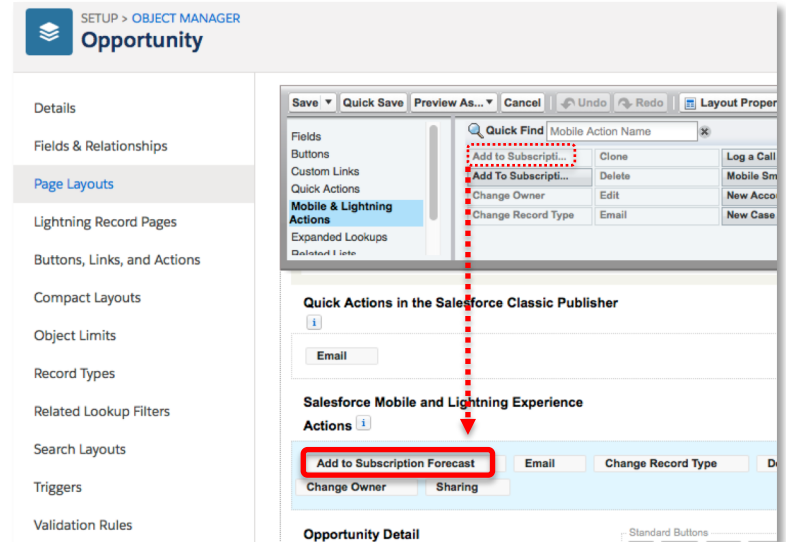
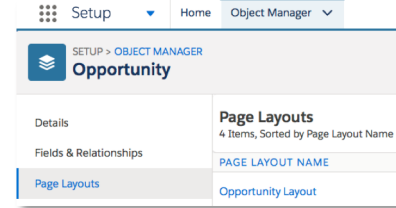
The screenshot shows the Salesforce App Manager interface. On the left, the 'Setup' menu is open, and 'App Manager' is selected under 'Apps'. The main area displays the 'Custom App Edit' page for the 'Sales' app. A yellow message box states: 'This is a standard app. You cannot customize its label or logo.' Below this, the 'Choose the Tabs' section shows two lists: 'Available Tabs' and 'Selected Tabs'. The 'Available Tabs' list includes Documents, Console, Libraries, Content, Subscriptions, Ideas, Scorecards, Files, Data.com, Site.com, D&B Companies, Coaching, Profile Coaching, and Profile Goals. The 'Selected Tabs' list includes Home, Campaigns, Leads, Accounts, Contacts, Opportunities, **Subscription Forecasting** (highlighted with a red box), Dashboards, Contracts, Orders, Cases, Solutions, Products, and Reports. The 'Subscription Forecasting' tab is currently selected in the 'Available Tabs' list.



3. Add "Add To Subscription Forecast" button to Lightning Opportunity / Order page

- Navigate to Setup-Objects and Fields-Object Manager
- Click on "Opportunity" and select Page "Layouts"
- Click on Opportunity Layout
- Click on "Mobile & Lightning Actions"
- Drag and drop "Add to Subscription Forecast" into the Salesforce Mobile Lightning Experience Actions" section
- Save

Same procedure applies for "Order" entity





3. Add "Add To Subscription Forecast" button to Classic Opportunity / Order page

Only relevant if you have users that want to use app in Classic

- Navigate to Setup-Objects and Fields-Object Manager
- Click on "Opportunity" and select Page "Layouts"
- Click on Opportunity Layout
- Click on "Buttons"
- Drag and drop "Add to Subscription Forecast" into the Custom Buttons section
- Save

Same procedure applies for "Order" entity

The screenshot shows the Salesforce Classic interface. At the top, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. Below this, a dropdown menu for 'Opportunity' is open, showing 'Page Layouts' with 4 items. The main content area shows the 'Opportunity' page layout editor. On the left sidebar, 'Page Layouts' is selected. The 'Buttons' section is highlighted, and a 'Quick Find' box shows 'Add To Subscription Forecast' as a search result. A red dotted arrow points from this button to the 'Custom Buttons' section at the bottom of the page layout editor, where the 'Add To Subscription Forecast' button is already present and highlighted with a red box.




4. Create basic configuration

Use “Create basic configuration” button on Setup page to get started

Then refine the configuration to fit your needs


- Manage Forecast Objects
- Manage Algorithms
- Application settings
- Product mappings
- ...

 **Create basic configuration**

[Create basic configuration](#)

Creating an initial setup with Forecast, Forecast Objects and Algorithms

[User Guide](#)



Sales Home Leads Accounts Opportunities Subscription Forecasts Dashboards Tasks Files More

Subiterum MANAGE FORECAST OBJECTS New

DISPLAY ORDER	FORECAST OBJECT	DESCRIPTION	REVENUE TYPE	SEASONAL VARIATION	CODE	ALG
10	Cloud Subscription	Cloud subscription revenue	Recurring	No	SUBS	100
30	Consulting	Consulting revenue	One Time	No	PROFSERV	0
40	Hardware	Hardware devices	One Time	Yes	HARDWARE	0

Demo Forecast Forecast Object Add

FORECAST OBJECT

Cloud Subscription X

Consulting X

Hardware X

Forecast Lines

Forecast Trending

Subscriptions

Manage Forecasts

Manage Forecast Objects

Manage Algorithms

Setup

[User Guide](#)

Post Install and basic config completed