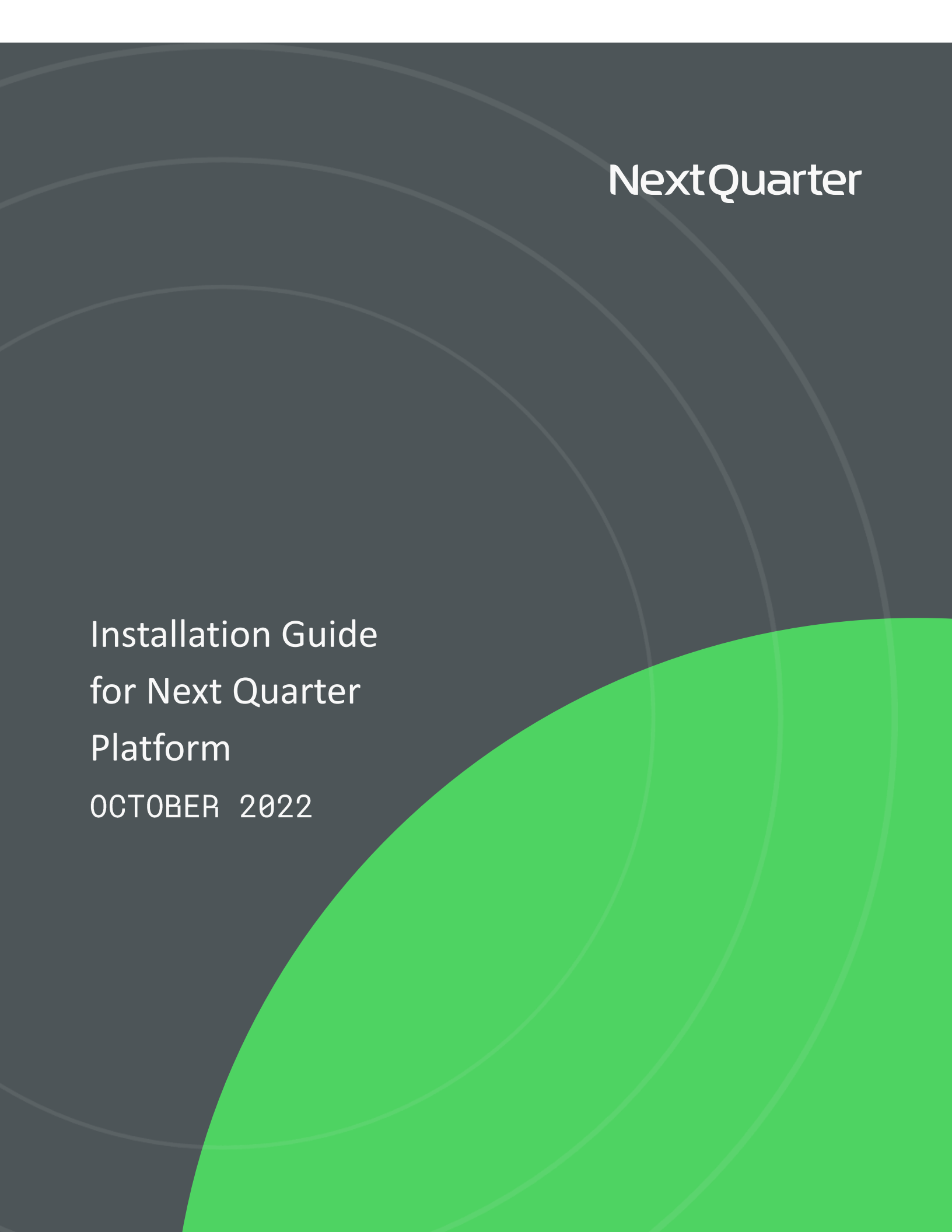




NextQuarter

Installation Guide
for Next Quarter
Platform

OCTOBER 2022

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1.Introduction

This document will help you install and configure the Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0 effectively and efficiently.

2. Prerequisite

Before you download the Next Quarter Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0, the user must –

1. Navigate to the AppExchange listing page (*[AI-based Sales Forecasting, Key Account Management & Sales Methodology - ForecastEra Inc - AppExchange](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EodItUAI)* ([salesforce.com](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EodItUAI))<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EodItUAI> for the Next Quarter Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0.
2. Have Admin access to the Salesforce org (Production or Sandbox).
3. Have Admin access to install the Sales Forecasting, Sales Methodology, and Account Planning Suite 1.0.

3. Installation Steps

Once you have logged in to Salesforce, go to the AppExchange listing for the suite and click on **Get It Now** (outlined in red) to begin the installation.

AppExchange Home Solutions by Type Product Collections Industry Collections Consultants Learn Latest Collections

Search AppExchange

ONE App for Revenue Intelligence
By ForecastEra Inc
One App for Sales Methodology, Sales Forecasting & Account Planning
★★★★★ 5 Average Rating (1 Review)

Starting at \$100 USD/user/month
Discounts are available for nonprofits
[Pricing Details](#)

Get It Now Test Drive More

Categories
Forecasting & Territory Management

Supported Features
Lightning Ready No Limits
Professional & Up
[More Details](#)

One app for sales forecasting, account planning, quota management & sales methodology to create a holistic view of organizational revenue. Capture account intelligence & insights to create actionable account plans that help you forecast accurately.

Overview Reviews More Details

Watch Demo

ONE App for Revenue Intelligence
• AI-Powered Sales Forecasting
• More power with Sales Methodology
• Empowered with insightful Account Planning
NextQuarter
SaaS Methodology

ONE App for Revenue Intelligence, powered by NextQuarter
Sales Forecasting powered with AI with Predictive Opportunity Score
Influence Sales to reach decision makers. Streamline sales process and increase revenue & marketing intelligence
User identity and AI-powered sales insights to help you reach the right people, at the right time, with the right message
Sales Methodology is configured to help you create actionable account plans that help you forecast accurately
Start your trial for free today! (30-day trial)

You will be taken to the **Confirm Installation Details** popup.

Confirm Installation Details

i Review the [customization guide](#) for installation and configuration steps.

Package Predictive Sales Forecasting (NextQ 2022 / 1.25.0)	Version NextQ 2022 / 1.25.0
Subscription Free	Organization AccNavTrial
Duration 30 Days	Number of Subscribers 5 Subscribers
Username 	

After the details have been populated from your profile, check the ***I have read and agree to the Terms and conditions*** box and click on ***Confirm and Install*** (all outlined in red) to Proceed.

Confirm Installation Details

Here are the details we'll share from your profile [Edit Profile](#)

* First Name

* Last Name

Job Title

* Email

Phone

* Company

* Country

State/Province

☒ I have read and agree to the [terms and conditions](#).

This field is required

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review](#).

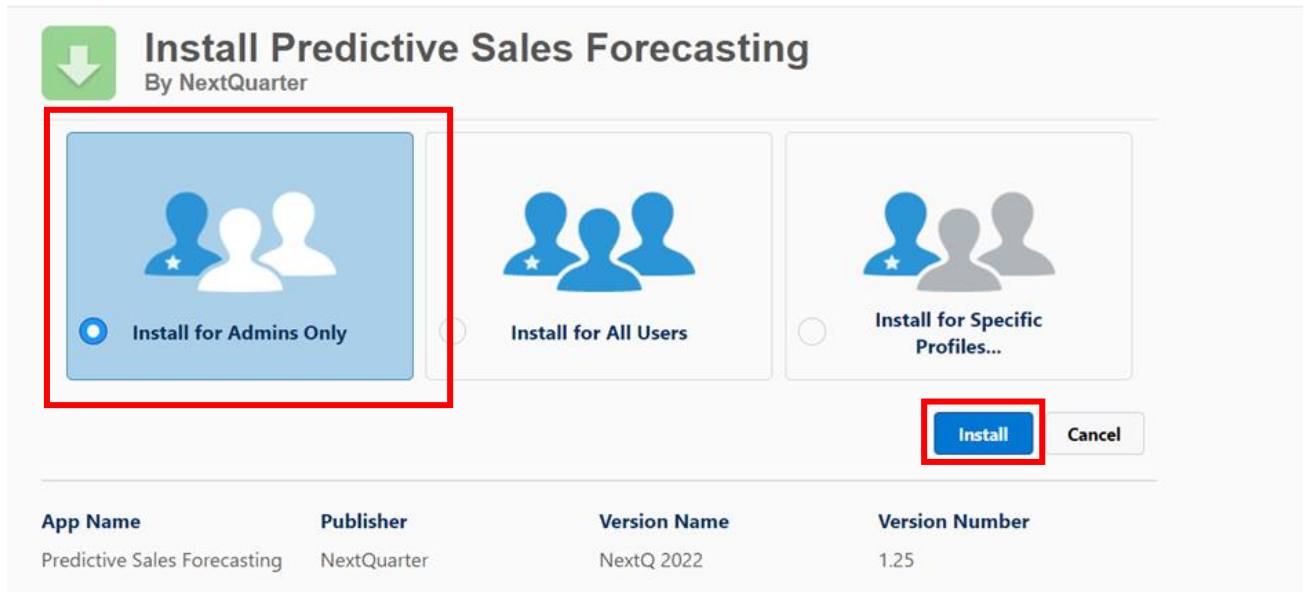
☒ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel

Confirm and Install

On Clicking the button, the user will be taken to the ***Install Predictive Sales Forecasting*** screen.

Select **Install for Admins Only** and click the **Install** button (outlined in red) to begin the installation.



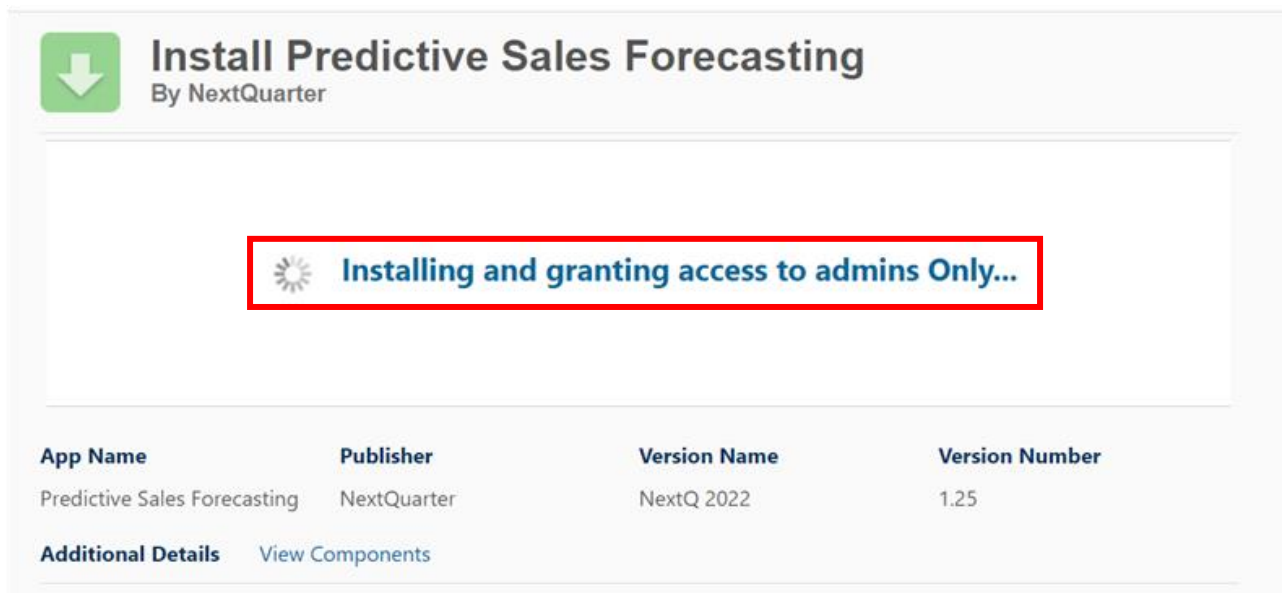
Install Predictive Sales Forecasting
By NextQuarter

☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

Install Cancel

App Name	Publisher	Version Name	Version Number
Predictive Sales Forecasting	NextQuarter	NextQ 2022	1.25

*Note – This guide illustrates the admin-only steps. Users can select the three options for the profiles they wish to install.



Install Predictive Sales Forecasting
By NextQuarter

Installing and granting access to admins Only...

App Name	Publisher	Version Name	Version Number
Predictive Sales Forecasting	NextQuarter	NextQ 2022	1.25

Additional Details [View Components](#)

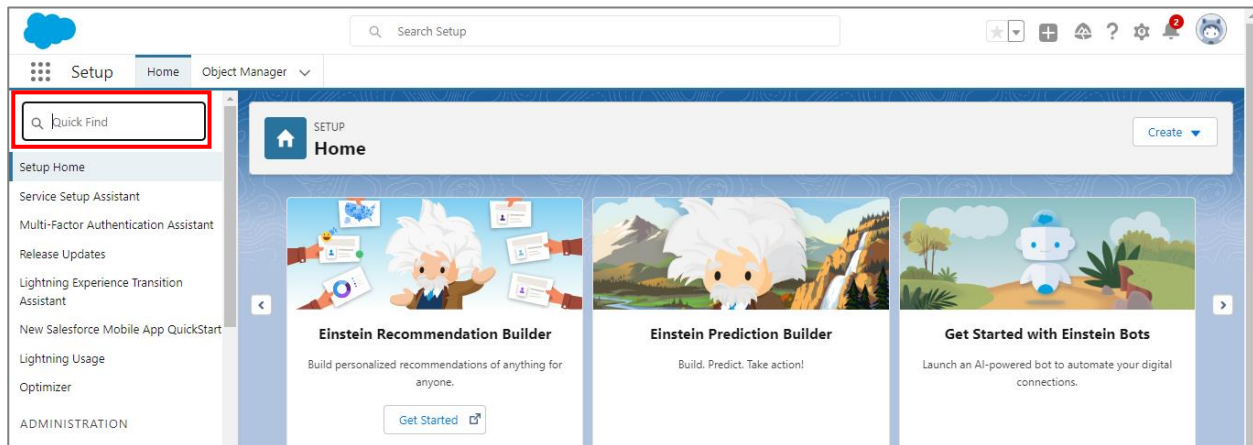
The application installation waiting screen will be displayed, and you may see the notification (outlined in red).

4. Post Installation Steps

Once the application has been installed, the admin must complete two post-installation steps.

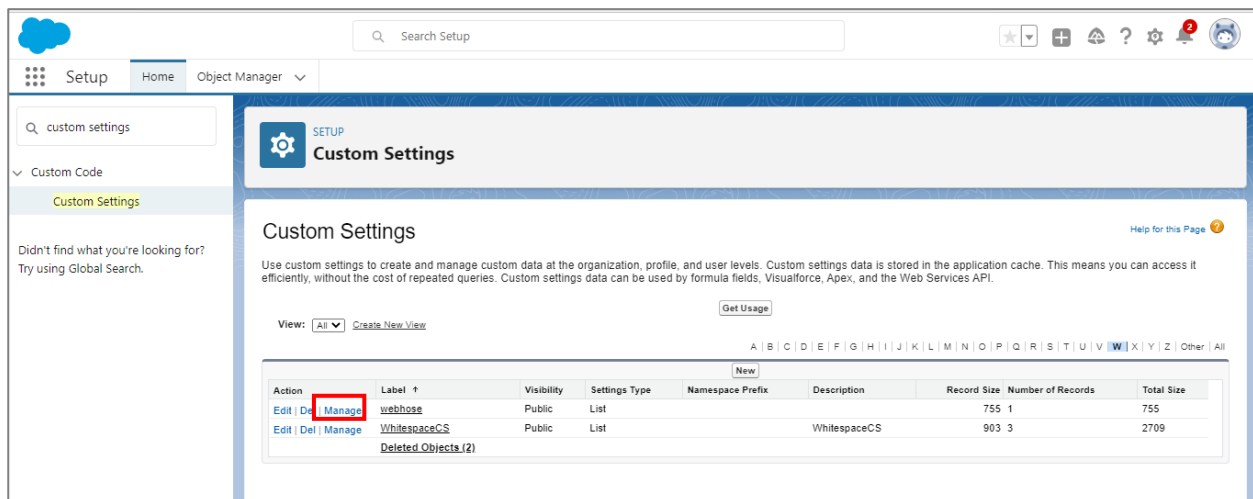
4.1. Custom Settings Setup

Navigate to the Setup page, and search for **Custom Settings** on the **Quick Find** box (outlined in red).



On the Custom Settings, locate the webhose custom setting, and click on **Manage** (outlined in red).

*Note - webhose.io is now webz.io



On the screen, click on **New** and enter the following details.

Name - **URL**

URL 1 - %20AND%20-

text%3A(%22Mergers%20%26%20Acquisitions%22%20OR%20%22Digital%20Health%20Solutions%22%20OR%20%22Future%20of%20Work%22%20OR%20%22Pension%20Risk%20Management%22%20OR%20%22HR%20Transformation%22%20OR%20%22Global%20Investment%20Research%22)

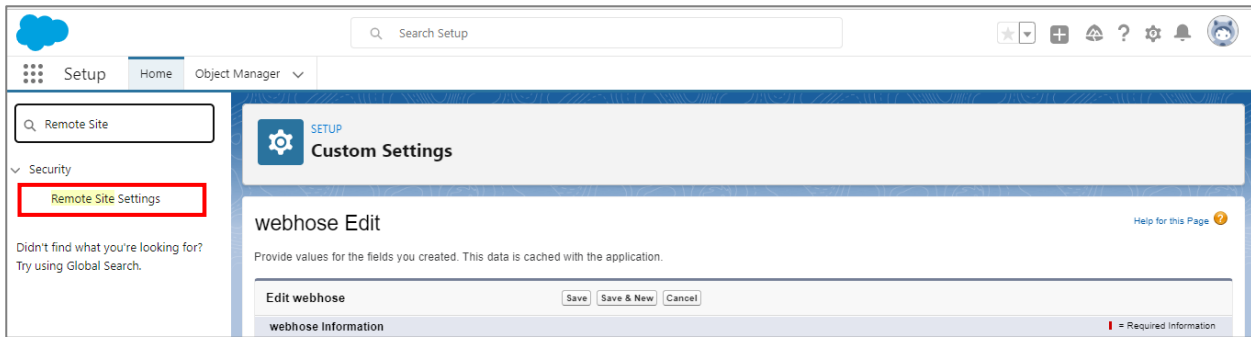
URL - <https://webhose.io/filterWebContent?token=2f534ac8-8a84-437a-81f2-7bb6ae12875d&format=json&size=50&ts=1589881583057&sort=crawled&q=thread.title%3A>

The screenshot shows the Salesforce 'Custom Settings' page for 'webhose'. The 'Name' field is highlighted with a red box and contains the value 'URL'. The 'URL 1' field contains a long string of escaped characters. The 'URL' field contains a long URL. The page has a sidebar with 'Setup', 'Home', and 'Object Manager' tabs. The main content area is titled 'webhose Edit' and includes a 'webhose Information' section with a red box around the 'Name' field.

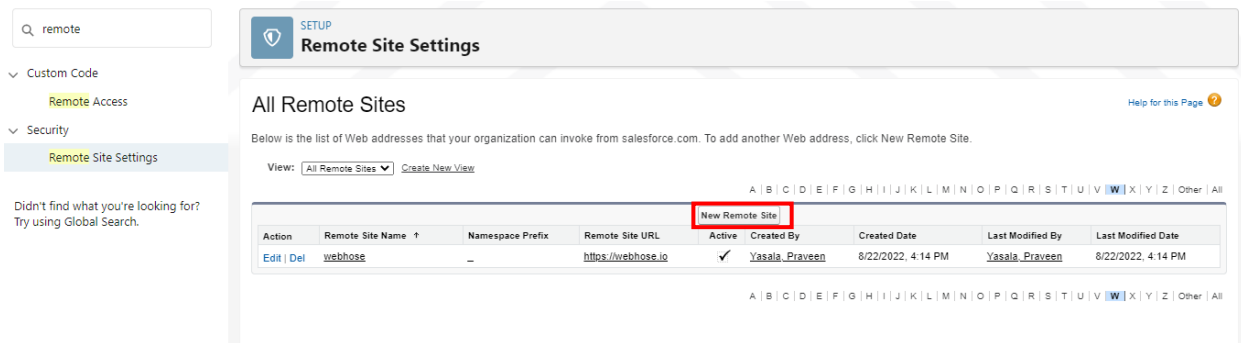
4.2. Remote Site Settings

The admin must complete the second post-installation step, the Remote Site Settings. The Remote Site Setting allows Salesforce to make a callout to webhose.io API and obtain the data.

Click on the Quick Find box, search for **Remote Site Settings**, and click on the link (outlined in red) to navigate the page.



Click the New Remote Site button on the Remote Site Settings page (outlined in red).



Enter the following details –

Name – Webhose

Remote Site URL - <https://webhose.io>

Active – true

Setup Home Object Manager

Remote Site

Security

Remote Site Settings

Didn't find what you're looking for?
Try using Global Search.

Remote Site Settings

Remote Site Details

Help for this Page

Remote Site Detail		Edit	Delete	Clone
Remote Site Name	webhose			
Remote Site URL	https://webhose.io			
Disable Protocol Security	☐			
Description				
Active	☒			
Created By		Fayaz Shaik 8/18/2022, 7:13 AM		
		Edit	Delete	Clone

Modified By Fayaz Shaik 8/18/2022, 7:13 AM

The post-installation steps are now complete.

5. Configuration Steps

5.1. Post Install Steps

- a. Open the NextQ Configuration page, by clicking on the tab, and click on the **Post Install Steps** tab (both outlined in red).

The screenshot shows the NextQuarter configuration page. The 'NextQ Configuration' tab is selected in the top navigation bar. On the left sidebar, the 'Post Install Steps' tab is highlighted. The main content area displays the 'Post Install Steps' section with a list of 'Batches to Run':

- To Generate the Opportunity Insight records for all the existing Opportunities in the Org. (Run Batch button)
- To Generate JSON records for all the existing Accounts and Opportunities for the Users in the Org. (Run Batch button)
- To Generate Cluster Junction records for all the existing Accounts with the Clusters defined in the Org. (Run Batch button)

Below these, a note states: "1. Before running the below batches, please navigate to Engagement AI tab and under Engagement Score V1 tab, open Access tab and select the profiles under Profile section and Save it. 2. Follow the same above step for Engagement Score V2 tab. 3. Create a Task or Event with the Trigger Filters configured for any contact to generate the Score Card object record." Below the note are two more items:

- To Update the Score Card object records and Generate Scores and Scales from Contact Object in Custom Metadata. (Run Batch button)
- To Generate ES History object records with the Scores and Scales generated from the above runned batch. (Run Batch button)

- b. Click on the **Run Batch** button (outlined in red) to generate the Opportunity Insights records, JSON, and Cluster Junction records for the historical data in the org.

5.2. Org Wide Setting

- a. Navigate to the Org Wide Setting tab under the NextQ Configuration page.

The screenshot shows the NextQuarter configuration page with the 'Org Wide Setting' tab selected in the left sidebar. The main content area displays the 'Engagement Scale' configuration section, which includes:

- Engagement Scale**
 - ☒ Is Active
 - ☒ Is AI
 - ☒ Display Engagement
- * Engagement Display**: Text (dropdown menu)
- * Category**: Email/Event/Gift (dropdown menu)
- * Scale Range**: 30-70/100 (dropdown menu)
- Scale Text**: Low/Med/High/Very High (dropdown menu)
- Opportunity Field Mapping**
 - * Opportunity Amount Field: Amount (dropdown menu)

- b. Field values are auto assigned by default on this page. Admins can configure the field values as per their requirements.

5.3. Forecast Category Mapping

- a. Navigate to the **Forecast Category Mapping** tab under the **NextQ Configuration** page.

The screenshot displays the NextQuarter application interface. The top navigation bar includes the NextQuarter logo, a search bar, and various utility icons. The left sidebar lists several configuration options, with 'Forecast Category Mapping' highlighted in a red box. The main content area is divided into four sections, each representing a forecast category: Best Case, Closed, Commit, and Pipeline. Each section contains two columns: 'Available Forecast Category' and 'Selected Forecast Category'. The 'Best Case' section shows 'Omitted', 'Pipeline', 'Commit', and 'Closed' in the available column, with 'Best Case' selected in the selected column. The 'Closed' section shows 'Omitted', 'Pipeline', 'Best Case', and 'Commit' in the available column, with 'Closed' selected in the selected column. The 'Commit' section shows 'Omitted', 'Pipeline', 'Best Case', and 'Closed' in the available column, with 'Commit' selected in the selected column. The 'Pipeline' section shows 'Omitted', 'Best Case', 'Commit', and 'Closed' in the available column, with 'Pipeline' selected in the selected column.

- b. Forecast Category values are assigned by default on this page. Admins can configure the values as per their requirements.

5.4. Quota Management

- a. Navigate to the **Quota Management** tab under the **NextQ Configuration** page.

NextQuarter
formerly Forecastia

Search...

NextQ Accounts Opportunities Contacts Opportunity Management **NextQ Configuration**

NextQ Configuration

Post Install Steps
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Renewal Management
Market Insight Admin
Risk Assessment

Quota Management

Role View Manager View

Planning Year: 2022 Role: All Sub Role: All

Import Quota Export Quota

	Name	Year	Manager	Q1 Amount	Q2 Amount	Q3 Amount	Q4 Amount
1	Sophia	2022	Harshitha Duplicate	\$100,000	\$25,000	\$45,000	\$55,000
2	mohammed	2022	Harshitha Duplicate	\$2,000	\$100,000	\$35,000	\$5,000
3	Samuel	2022		\$2,000	\$2,500	\$35,000	\$55,000
4	Lendra Kimmy	2022		\$2,000	\$47,000	\$35,000	\$55,000
5	Krishna Jha	2022		\$5,000	\$47,000	\$1,000	\$55,000

- b. Admin can import and export quota data from the buttons (outlined in red) on the page and see the data as Role or Manager view (outlined in red).

5.5. Engagement AI

- a. Navigate to the **Engagement AI** tab under the **NextQ Configuration** page.

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Search...

NextQ Accounts Opportunities Contacts Opportunity Management **NextQ Configuration**

NextQ Configuration

Post Install Steps
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Renewal Management
Market Insight Admin
Risk Assessment
Goals and Actions

Engagement Score V1 Engagement Score V2

Engagement Config Access Trigger Details Object Map

Engagement Config

New Engagement Config

Conf...	Category	Type	Contact ...	Display in UI	Active	Score Val...	Days Bef...	Action
Config 3	Meetings	Calls and Mee...		✓	✓	5	5	Edit
Config 4	Campaign	Outreach Cam...		✓	✓	4	10	Edit
Config 5	Salesforce	Salesforce Ca...		✓	✓	2	10	Edit
Config 1	Email Interacti...	Sent Email		✓	✓	1	8	Edit
Config 2	Email Interacti...	Received Emails		✓	✓	2	10	Edit

- b. On the **Engagement Config** sub-tab under the **Engagement Score V1** tab, configurations are specified by default to generate the number of scorecards for Contacts with the score value. Admin can add the new config by clicking on the **New Engagement Config** button and make the default configuration

inactive or change the values of the default configuration by clicking the **Edit** button as per their requirements.

The screenshot shows the NextQuarter configuration interface. The 'Engagement Score V1' tab is selected, and the 'Access' sub-tab is active. The 'Feature is Active' checkbox is checked. A list of profiles is shown, including 'System Administrator' and 'Work.com Only User'. The 'Account Types' section on the right lists various roles like 'Prospect', 'Customer - Direct', etc.

- c. Open the **Access** sub-tab under the **Engagement Score V1** tab, click on the checkbox to make the feature active (outlined in red), and select the profiles (outlined in red) to give feature access to the selected.

The screenshot shows the NextQuarter configuration interface. The 'Engagement Score V1' tab is selected, and the 'Trigger Details' sub-tab is active. The 'Trigger Object' is set to 'Task'. The 'Trigger Events' section shows 'After Insert' selected. The 'Trigger filters' section shows two filters: 'Trigger Filter 1' and 'Trigger Filter 2'. The 'Filter Logic' is set to '1 OR 2'.

Label	Field Label	Operator	Value	Active	Action
1 Trigger Filter 1	Subject	contains	[Salesforce]	true	Edit
2 Trigger Filter 2	Subject	contains	[Outlook] [Email]	true	Edit

- d. Open the **Trigger Details** sub-tab under the **Engagement Score V1** tab. Admins can modify the existing filter by clicking the **Edit** button and create the new filter by clicking the **New Trigger Filter** button. After adding/modifying the trigger filter values, choose the **Filter Logic**, and click the **Save** button to save the configuration.
- e. Ensure that the value or text (outlined in green) matches the subject or any selected field on the task record.

*Note – Only two trigger filters can be added.

*Note – Admins must complete the same steps to configure **Events** under the **Engagement Score V2** tab.

- f. Once the above steps are completed, Click the **Post Install Steps** tab to open and click the **Run Batch** button (outlined in red) to update the Scorecard record and generate ES Scores and ES Scales for the contact record.

NextQuarter
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Search...

NextQ Accounts Opportunities Contacts Opportunity Management **NextQ Configuration**

NextQ Configuration

Post Install Steps

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Account Scorecard

Post Install Steps

Batches to Run

- To Generate the Opportunity Insight records for all the existing Opportunities in the Org. **Run Batch**
- To Generate JSON records for all the existing Accounts and Opportunities for the Users in the Org. **Run Batch**
- To Generate Cluster Junction records for all the existing Accounts with the Clusters defined in the Org. **Run Batch**

Note: 1. Before running the below batches, please navigate to **Engagement AI** tab and under **Engagement Score V1** tab, open **Access** tab and select the profiles under **Profile** section and **Save** it.
2. Follow the same above step for **Engagement Score V2** tab.
3. Create a Task or Event with the Trigger Filters configured for any contact to generate the Score Card object record.

- To Update the Score Card object records and Generate Scores and Scales from Contact Object in Custom Metadata. **Run Batch**
- To Generate ES History object records with the Scores and Scales generated from the above runned batch. **Run Batch**

5.6. Cluster Management

- a. Navigate to the **Cluster Management** tab under the **NextQ Configuration** page.

The screenshot shows the NextQuarter NextQ Configuration page. The left sidebar contains a list of configuration options, with **Cluster Management** highlighted in a red box. The main content area is titled **NextQ Configuration** and has a sub-tab **Cluster Settings** highlighted in a red box. Under **Cluster Settings**, there are three checkboxes: ☒ **Enable Clusters for Accounts**, ☐ **Enable Clusters for Opportunities**, and ☐ **Enable Clusters for Users**. Below these is a table of Cluster Type records. A **New** button is located at the top right of the table.

Cluster Type Name	Is Hierarchy	Assign Accounts	Assign Opportunities	Assign Users	Is Active	Description
Region	true	true	false	false	true	Test Description
Industry	true	false	false	false	true	test
Company Size	true	true	true	false	false	
Industry	true	true	false	false	true	

- b. Under the **Cluster Settings** sub-tab, create a Cluster Type record.

The screenshot shows the NextQuarter NextQ Configuration page. The left sidebar is the same as in the previous screenshot. The main content area is titled **NextQ Configuration** and has a sub-tab **Cluster Hierarchy** highlighted in a red box. Under **Cluster Hierarchy**, there is a table of Cluster Type records. A **New** button is located at the top right of the table.

Cluster Type Name	Assign Accounts	Assign Opportunities	Assign Users	Is Active	Description
> Region					
> Industry					
> Industry					

- c. Navigate to the **Cluster Hierarchy** sub-tab and create a Cluster record under the Cluster Type records.

NextQuarter
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NextQ Accounts Opportunities Contacts Opportunity Management NextQ Configuration

NextQ Configuration

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Cluster Settings Cluster Hierarchy

Cluster Type Name Assign Accounts Assign Opportunities Assign Users Is Active Description

Region
USA
Industry
Industry

Edit
Process

New

- d. Once the Cluster records are created, open the carrot button beside the cluster and click the **Process** option.

Trigger Details

Cluster

Cluster Name
USA

Automation
Available

Trigger filters

Note* - Maximum two filters can be applied.

New Trigger Filter

Label	Field Label	Operator	Value	Active
1 filter 1	Account Currency	Equals	USD	false

Filter Logic
Only 1

Cancel Save

- e. Create a **New Trigger Filter**, choose the Filter Logic, and click the **Save** button.

5.7. Sales Methodology

- a. Navigate to the **Sales Methodology** tab under the **NextQ Configuration** page.

NextQuarter
Summary Forecasting

Search...

NextQ Accounts Opportunities Contacts Opportunity Management **NextQ Configuration**

NextQ Configuration

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Name ↑	Is Deployed	Created By
1 Opportunity Risks	false	mohammed

Create New Template

- b. Click the **Create New Template** button to create a template for the sales methodology page for the opportunity.

Opportunity Risks

Add Section

* Section Title
Unnamed Section

Weightage(%) 0 Section Score 0

Score 0 Mandatory

Radio Button

✓ Radio Button
Short Text
Combobox

Question

Option 1 Score 0

Option 2 Score 0

Add Option

Publish Save as Draft

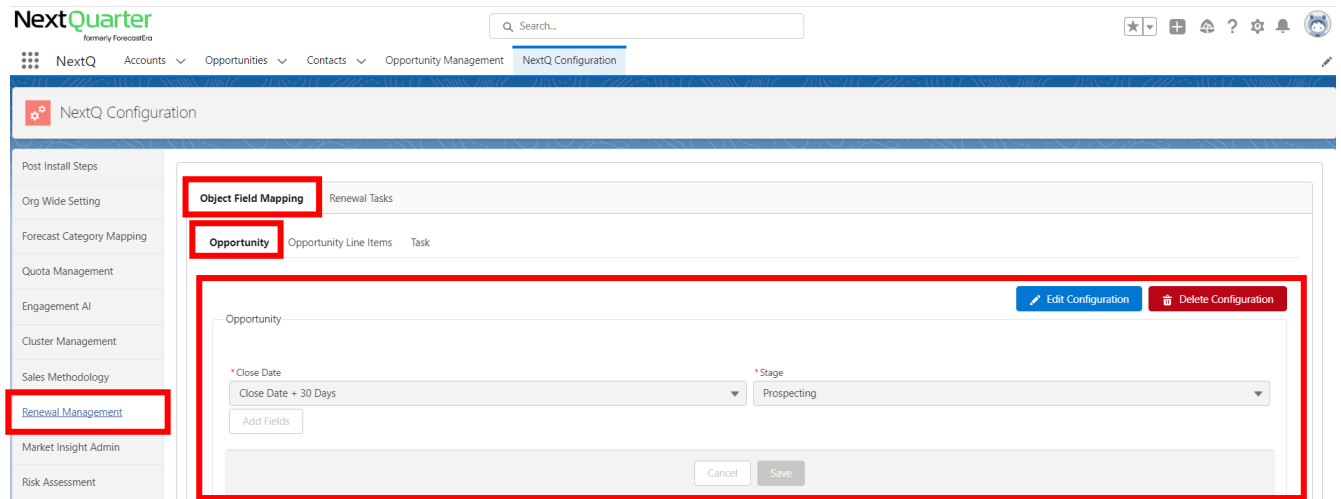
- c. Admin can add and delete sections by clicking the **Add Section** button (outlined in red) and **Delete** icon (outlined in red) on the template.
- d. Admin can add the questions to each section by clicking the + icon (outlined in red) under **Section**, choosing the question type (outlined in red) for each question, and clicking **Publish**.

*Note –

1. The sum of all sections' weightage in the template should not exceed 100.
2. The sum of all questions in one section should not be more than 100.
3. Admin can create more than one Sales Methodology template.

5.8. Renewal Management

- Click the **Renewal Management** tab under the **NextQ Configuration** page.
- Admin needs to map the related Opportunity – To display the renewal opportunity on the account level.



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Search...

NextQ Accounts Opportunities Contacts Opportunity Management NextQ Configuration

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Risk Assessment

Object Field Mapping Renewal Tasks

Opportunity Opportunity Line Items Task

Opportunity

Edit Configuration Delete Configuration

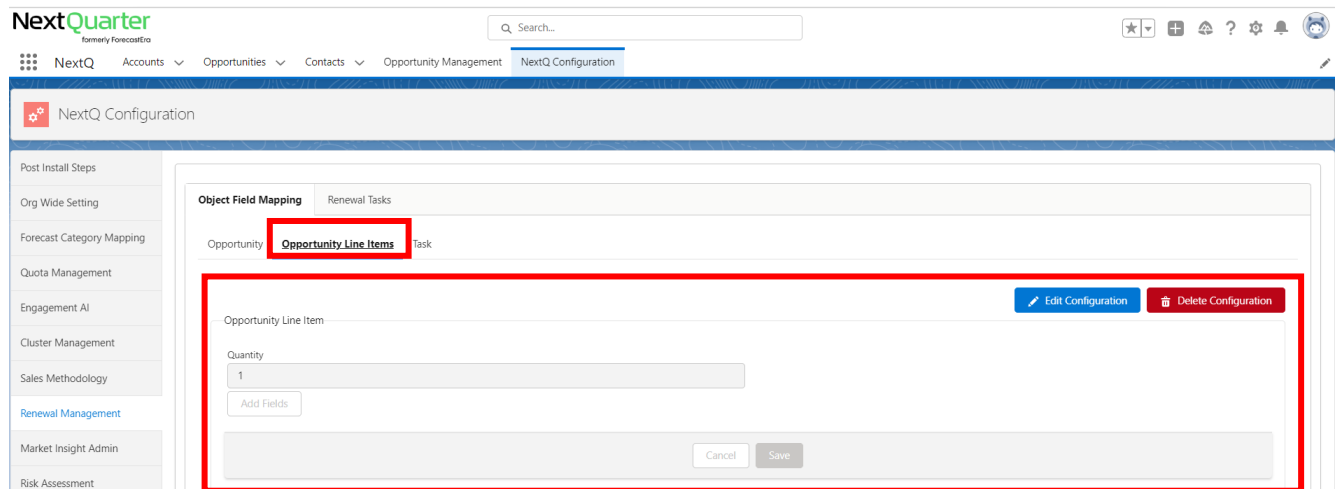
* Close Date
Close Date + 30 Days

* Stage
Prospecting

Add Fields

Cancel Save

- Admin needs to map the related opportunity line items (Standard Product) - to display the renewal opportunity line Item on the account level.



NextQuarter
formerly ForecastPro

Search...

NextQ Accounts Opportunities Contacts Opportunity Management NextQ Configuration

NextQ Configuration

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Risk Assessment

Object Field Mapping Renewal Tasks

Opportunity **Opportunity Line Items** Task

Opportunity Line Item

Edit Configuration Delete Configuration

Quantity
1

Add Fields

Cancel Save

- Admin needs to map the related task object – to display the data related to the selected fields.

Org Wide Setting
Forecast Category Mapping
Quota Management
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Sales Methodology
Renewal Management
Market Insight Admin
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Object Field Mapping Renewal Tasks
Opportunity Opportunity Line Item **Task**

Edit Configuration Delete Configuration

Task

* Subject [Outreach] [Email] * ActivityDate Today + 30 Days
* Status Not Started * Priority High
* Description Test Description
Add Fields
Cancel Save

e. Renewal Tasks

- I. Admin needs to create the task data – by default, task level defined data will be displayed when the user clicks the + button, and then the user can modify field values and save the renewal tasks records.

Engagement AI
Cluster Management
Sales Methodology
Renewal Management
Market Insight Admin
Risk Assessment
Goals and Actions
Account Scorecard

Renewal Tasks

* Subject [Outreach] [Email] Call with Dev Team
* ActivityDate Today + 30 Days
* Status Not Started
* Priority High
* Description Test Description

* Subject [Outreach] [Email] Call with Business team
* ActivityDate Today + 90 Days
* Status In Progress
* Priority High
* Description Test Description

* Subject [Outreach] [Email] Call with technical team
* ActivityDate Today + 180 Days
* Status Completed
* Priority High
* Description Test Description

5.9. Market Insights Admin

Add the **Account Plan Type** field on the account layout to display data related to Market Insights.

Account ACME

Industry	Employees
Annual Revenue	SIC Code
Account Currency USD - U.S. Dollar	Account Plan Type Global
Billing Address	Shipping Address
Customer Priority	SLA

NextQ Configurations > **Market Insight** tab > Make sure to Include the record.

Only Included records data will display under **Account** in the **Market Insights** tab.

* Note - After including the data, the user needs to schedule the batch to see the news feed data on the account level.

Batch Name - FcstNewsFeedBatchSch()

NextQ Accounts Opportunities Contacts Opportunity Management FCST Configuration

Quota Management
Engagement AI
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Market Insights

Market Insights Settings
Market Insights Settings for Account Planner

Create New Category

S.No	Insight Name	Tags	Include
1	Employee Engagement	Benefits Engagement, Total Rewards, EVP Total Rewards, Incentive plan design, Surveys and Reports, Executive Comp	Included
2	Mergers and Acquisition	Due diligence, Pre-close planning, Post-close, Strategy and readiness	Included
3	Health Insurance	Insurance, Health Insurance, Health & Human Service, Military Healthcare service, Telehealth	Included
4	HR Transformation	HR Transformation, HR Service, Workforce, HCM, Employee, Human Capital Management, Payroll, People Management	Included
5	Energy & Power	Energy, Environment, Minerals, Mining, Utilities, Energy Technology	Included
6	INFORMATION TECHNOLOGY & TELECOMMUNICATION	Global Advertising Market Research Report 2011-2023, Global Advertising Market Data Survey Report 2025, Global Cold Chain Logistics Market Data Survey Report 2025, Global Enterprise Cyber Security Market Research Report 2011-2023,	Included
7	Hosting Services	Hosting Services, Managed Hosting, Hosting, AWS, Azure	Included


**Lightning Experience
Transition Assistant**
Move to the new, more productive
Salesforce.

[Get Started](#)

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- ▶ Manage Users
- ▶ Manage Apps
- ▶ Company Profile
- ▶ Data Classification
- ▶ Privacy Center
- ▶ Security Controls
- ▶ Domain Management
- ▶ Communication Templates
- ▶ Translation Workbench
- ▶ Data Management
- ▶ Mobile Administration
- ▶ Desktop Administration
- ▶ Outlook Integration and Sync

[Save](#) [Cancel](#) [Delete](#)

Job Name

Apex Class 

Schedule Apex Execution

Frequency ☒ Weekly ☐ Monthly

Recurs every week on

- ☐ Sunday
- ☒ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

Start [8/22/2022]

End [8/22/2022]

Preferred Start Time ▼

Exact start time will depend on job queue activity.

[Save](#) [Cancel](#) [Delete](#)

5.10. Risk Assessment

Admin needs to create the template for Risk Assessment on the account level.

*Note -

1. Combination of all sections' weightage in the template should not be more than 100.
2. Combination of all questions in one section should not be more than 100.

Post Install Steps Org Wide Setting Forecast Category Mapping Quota Management Engagement AI Cluster Management	Create New Template		
	Name ↑	Is Deployed	Created By
	1 Account Risks	true	Praveen Yasala

Post Install Steps

Org Wide Setting

Forecast Category Mapping

Quota Management

Engagement AI

Cluster Management

Sales Methodology

Renewal Management

Market Insight Admin

Risk Assessment

Goals and Actions

Account Risks Copy

Add Section

Section Title

External Operational Risks

Weightage(%)

8

Section Score

100

Score

50

Mandatory

Combobox

Has the Great Resignation affected the client's ability to operate effectively?

Yes

Score

0

No

Score

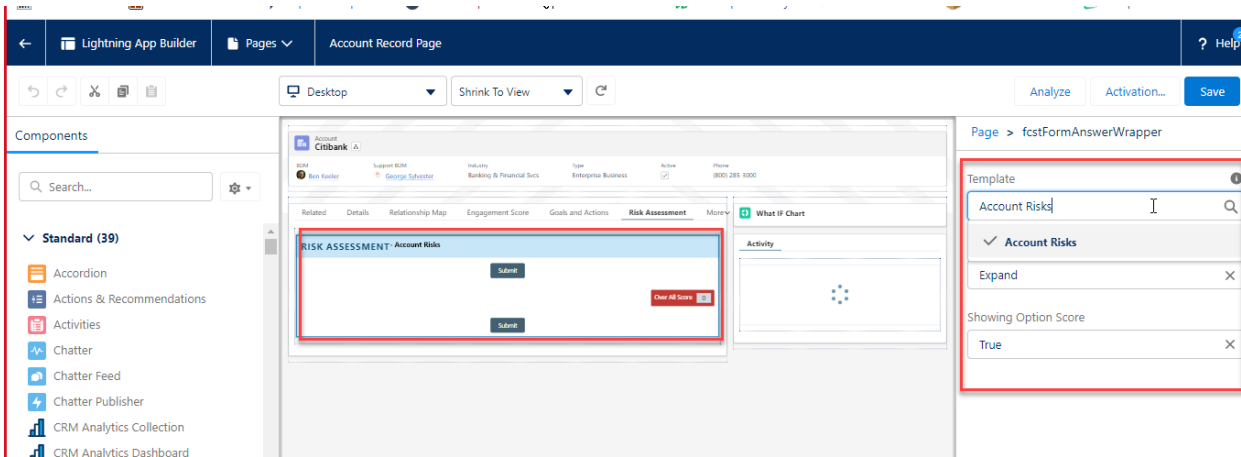
50

Add Option

*Note - Admin can create more than one Risk Assessment template.

To display the New Risk Assessment Template:

- a. Navigate to the gear icon.
- b. Click **Edit Page**.
- c. Click the **Risk Assessment** tab.
- d. Click on the middle panel in the **Risk Assessment**.
- e. Assign the new template to the right-side panel.
- f. Click **Save**.

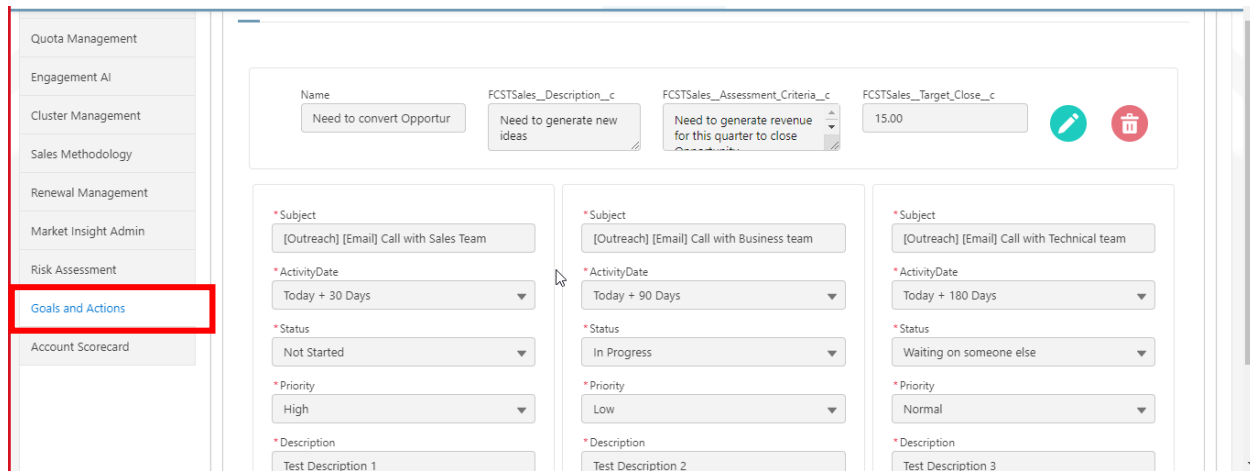


5.11. Goals and Actions

Note - The user should define data in the Renewal Management tab before creating data in Goals and Actions.

The user needs to create the data in **Goal & Tasks**.

Default task records data is displayed from **Renewal Management > Task** sub-tab.



- a. Admin needs to create the record to be displayed at the account level.

5.12. Account Scorecard

NextQuarter formerly ForecastPro

Search...

NextQ Accounts Opportunities Contacts Opportunity Management **NextQ Configuration**

NextQ Configuration

Post Install Steps
Org Wide Setting
Forecast Category Mapping
Quota Management
Engagement AI
Cluster Management
Sales Methodology
Renewal Management
Market Insight Admin
Risk Assessment
Goals and Actions
Account Scorecard
Finance Grid Configuration
WhiteSpace Configuration

Create New

Name	Order	IsActive	Action
test	1	false	
Financial Scorecard	2	true	

Account Level Scorecard

NextQuarter formerly ForecastPro

Search...

NextQ Accounts Opportunities Contacts Opportunity Management NextQ Configuration

Citibank - Account Planning

Relationship Map Engagement Score Competitive Assessment Risk Assessment **Scorecard** Action Plan WhatIf Renewals Market Insights WhiteSpace Key Technology Engagement Idea Summary MSA Customer Value Ambitions Strategy SWOT Customer Product Executive Summary

Account Team Business Unit Hierarchy Generate PDF

Account Scorecard

Financial Scorecard

Positive Neutral Negative

Salesforce Sans 12 B I U L R A S

Please Update comments

5.13. Finance Grid Configuration

NextQ Configuration

Post Install Steps

- Org Wide Setting
- Forecast Category Mapping
- Quota Management
- Engagement AI
- Cluster Management
- Sales Methodology
- Renewal Management
- Market Insight Admin
- Risk Assessment
- Goals and Actions
- Account Scorecard
- Finance Grid Configuration**
- WhiteSpace Configuration

Client Margins

Available Fields

- Annuity
- Apps
- BSv
- CAGR Percent
- CIS
- Comments

Selected Fields

- Financial Grid Name
- APAC
- Software
- 2019
- 2020
- 2021

Revenue Forecast

Available Fields

- APAC
- Annuity
- Apps
- BSv
- CIS
- Comments

Selected Fields

- Financial Grid Name
- CAGR Percent
- Current Year Budget
- Current Year Forecast
- MU
- Y1 Growth Percent

WhiteSpace Configuration

Available Fields

- APAC
- Apps
- BSv
- CAGR Percent

Selected Fields

- Financial Grid Name
- Annuity
- Project
- Services

Navigate to the Finance grid section (outlined in red) under NextQ Configuration.

By default, all the fields will be selected for all the sections visible on the Finance Grid section (outlined in red).

Admin can include more fields or exclude existing fields from any section. These will be displayed for the specific finance type table on the application UI under the Finance grid tab.

More details on this will be available in the subsequent release.

5.14. WhiteSpace Configuration

The last section under NextQ Configuration is WhiteSpace Configuration (outlined in red).

The screenshot displays the 'NextQ Configuration' page in the NextQuarter application. The left sidebar contains a list of configuration options, with 'WhiteSpace Configuration' highlighted by a red rectangular box. The main content area shows a table for configuring KPI weightages for different cluster types. The table has the following structure:

Cluster Type	TCV WON %	Average Deal Velocity %	Win Ratio (Count) %	Win Ratio (Amount) %	Average Deal Size %	Total Deals Won %
Region	0	0	0	0	0	0
Industry	0	0	0	0	0	0
Industry	0	0	0	0	0	0

A 'Save' button is located below the table.

Here, the Admin can view the cluster type records created and can configure weightage of each KPI for the specific cluster type to help calculate the recommendation percentage for every product under Whitespace Tab on the application UI.

*Note – All the active Cluster types defined under the Cluster Management section will be displayed on this section.

6. Next Steps

- a. Open the **Post Install Steps** tab on the **NextQ Configuration** page and follow the next steps mentioned in the section.

Next Step

1. Assign users to the Permission Sets to give access to the One Product Application.
 - a. NextQ Full Access.
 - b. NextQ Limited Access.

7. Standard Layout – Custom Fields

The admin must create records for all the fields listed in the table below to ensure that the application features work as desired.

Account	Parent Account
	Ultimate Parent
	Account Plan Type
	Industry
	YearStarted
	Annual Revenue
	Employees
	President & CEO
	Executive Sponsor
	ES Score Average
	ESScore
	ESHistoryCount
	Region
	Primary BU
	Key products
	Headquarters
Opportunity	Fcst Days to Close
	DAYS IN CURRENT STAGE
	FCST Opportunity Insight
	FCST Is Renewable
	FCST Days Before Renewal
	FCST Previous Renewal
	FCST Strategic Opportunity
	FCST RM Contact
	Forecast In
	Days to close
	Notes

	Rating
Contact	Title
	Department
	Reports To
	Budget Owner
	Relationship
	Influencer
	FCST RMScore
	FCST RM Scoring
	FCST Dont display in ForecastEra
	FCST Default Chart
	FCST Engagement Score
	ESScore
	ES Score
	FCST is Strategic Contact
	Facebook URL
	Linkedin URL
	Twitter URL
	Email
	Mobile

*Note – This step is critical for the application to work correctly.

ForecastEra is now Next Quarter.