

Oracle® Cloud

Working with Oracle Sales Planning Cloud



E95909-09



Oracle Cloud Working with Oracle Sales Planning Cloud,

E95909-09

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Documentation Feedback

To provide feedback on this documentation, click the Feedback button at the bottom of the page in any Oracle Help Center topic. You can also send email to epmdoc_ww@oracle.com.

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Welcome to Sales Planning

Related Topics

- [About Sales Planning](#)
Oracle Sales Planning Cloud provides an extensible framework for planning and managing sales performance.
- [Learning More About Sales Planning](#)
Use these resources to get more information or help about Oracle Sales Planning Cloud and related services.
- [Related Guides](#)
See these related guides for more information about working with Oracle Sales Planning Cloud.
- [Navigating in Sales Planning](#)
Review these useful tips for navigating in Oracle Sales Planning Cloud.
- [Working with Smart View](#)
Oracle Smart View for Office provides a common Microsoft Office interface designed specifically for Oracle Enterprise Performance Management Cloud services, including Oracle Sales Planning Cloud.
- [Reporting in Sales Planning](#)

About Sales Planning

Oracle Sales Planning Cloud provides an extensible framework for planning and managing sales performance.

Using Sales Planning enables you to automate critical processes by eliminating spreadsheets in key sales operations processes and improves collaboration for planning, modeling and reporting of sales quotas, attainment, and sales forecasts.

Sales Planning is extensible using the EPM Cloud platform to further add additional configurations and personalization into your sales planning application with custom navigation flows, dashboards, and infolets. Use tasks and approvals to manage the quota planning process. Use Groovy rules to customize even further for enhanced calculation and business rules. Sales Planning can be integrated with Oracle Engagement Cloud – Sales Cloud for pushing quota targets to incentive compensation or bring in actual attainment.

Videos

Your Goal

Learn more about Sales Planning.

Watch This Video



[Overview: Take a Tour of Sales Planning Cloud](#)

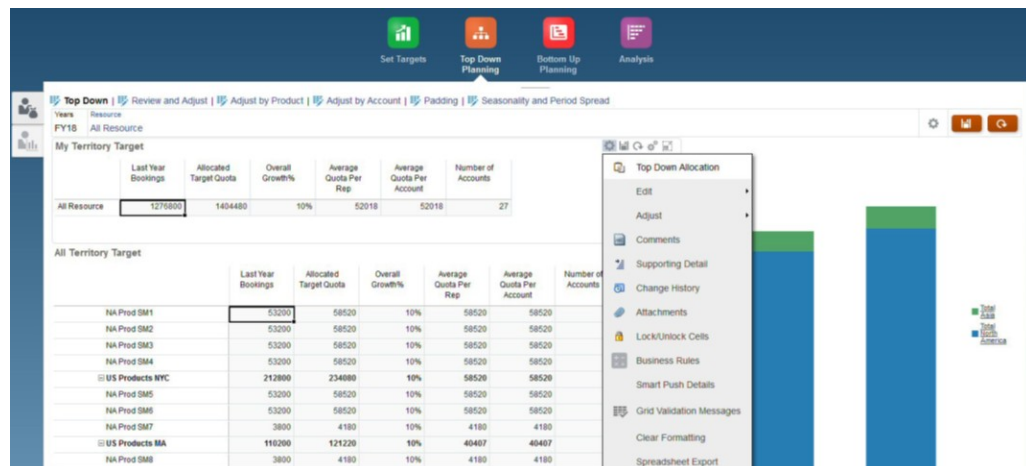
About Quota Planning

The Quota Planning business process offers top-down and bottom-up target quota planning by territory, product, account, or other custom dimensions. Use Predictive Planning and *what if scenario planning* to explore and compare different quota scenarios for informed decision making. Quota Planning builds best practices into its content, including its forms, calculations, dashboards, infolets, drivers, and measures.

Quota Planning helps you plan reliable target quotas by engaging all of the participants of the process, for example, the VP of Sales, Sales Operations, Sales Managers, and Sales Reps. Set a target quota for the next year. Then, optimize your results by making adjustments by product, applying padding or seasonality, or performing predictive planning or what-if analysis. When the target is ready, planners perform top-down or waterfall planning to allocate the target quota throughout the hierarchy.

If needed in your organization, you can also perform bottom-up planning to get quota commitments from Sales Reps, allowing a collaborative approach. After the target quotas are pushed up to the next level of the hierarchy and aggregated, you can compare top-down and bottom-up results. Use the built-in dashboards to analyze and evaluate your quota plans with quota attainments.

Enhance the planning process in your organization by adding additional measures, task lists, or approvals.



Videos

Your Goal

Learn more about Quota Planning.

Watch This Video



[Overview: Quota Planning in Oracle Sales Planning Cloud](#)


Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal

See how to enable and configure Quota Planning in Oracle Sales Planning Cloud. Learn how to set variables, prepare actual and forecast data, and verify the configuration.

Learn How

 [Creating and Configuring Quota Planning in Oracle Sales Planning Cloud - Tutorial](#)

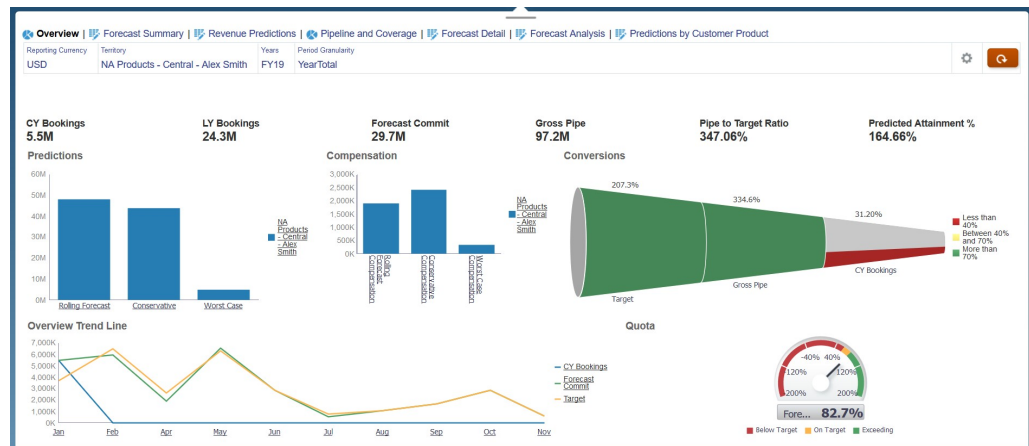
About Advanced Sales Forecasting

Advanced Sales Forecasting provides a robust platform for the sales forecasting process, allowing multidimensional sales forecasting across territory, products, accounts, channels, or other custom dimensions.


It offers sales teams connected sales planning with integration between Quota Planning, compensation planning, and sales forecasts. With Advanced Sales Forecasting, you can plan at the weekly or monthly level, and use a rolling forecast if your business requires it. It offers these key features:

- Out-of-box best practice content for sales forecasting and analysis, including metrics, KPIs, and measures to help data-driven sales forecasting across the Sales hierarchy.
- Extensibility using the Planning Cloud platform, allowing additional configurations, such as custom forms and dashboards, measures, dimensions, navigation flows, and Groovy rules for custom calculations.
- Ability to adjust forecast commitment at the territory level or detailed level (for example, by product or account) to facilitate collaborative data-driven forecast commitment.
- Predictive Planning to take the guesswork out of your forecasting.
- Oracle Smart View for Office, which provides a common Microsoft Office interface designed specifically for Oracle Enterprise Performance Management Cloud services, including Oracle Sales Planning Cloud.
- Instantaneous aggregations and reporting using out-of-box reporting cube.

Advanced Sales Forecasting ensures greater reliability in your forecasts, and accountability and collaboration between Sales Management and Sales Reps.




Videos

Your Goal	Watch This Video
Learn more about Advanced Sales Forecasting.	 Overview: Advanced Sales Forecasting in Oracle Sales Planning Cloud

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
See how to enable and configure Advanced Sales Forecasting in Sales Planning. Learn how to set variables, prepare actual and forecast data, and verify the configuration.	 Creating and Configuring Advanced Sales Forecasting in Oracle Sales Planning Cloud - Tutorial

Learning More About Sales Planning

Use these resources to get more information or help about Oracle Sales Planning Cloud and related services.



- Click **Academy** on the Home page.
- To get Help, click the arrow next to your user icon in the upper right corner of the screen, and then click **Help**.
- See related guides. See [Related Guides](#).

Related Guides

See these related guides for more information about working with Oracle Sales Planning Cloud.

Sales Planning is supported by the many Oracle Enterprise Performance Management Cloud components.

To get started using Sales Planning, see these guides:

- [Getting Started for Administrators](#)
- [Getting Started for Users](#)

To extend the power and flexibility of Sales Planning, see the following guides. Note that some functionality described in the related guides may vary from what is available in Sales Planning. For example, Sales Planning does not allow classic dimension editor.

Design:

[Designing with Calculation Manager](#) for information related to designing Groovy rules

Designing with Financial Reporting Web Studio for Oracle Enterprise Performance Management Cloud

User:

- [Working with Planning](#)
- [Working with Smart View](#)
- [Working with Predictive Planning in Smart View](#)
- [Working with Financial Reporting for Oracle Enterprise Performance Management Cloud](#)
- [Accessibility Guide](#)

Administration:



- [Administering Planning](#)
- [Administering Data Management](#)
- [Administering Access Control](#)
- [Administering Migration](#)
- [Working with EPM Automate](#)
- [Third-Party Acknowledgments](#)

Development:

- [Java API Reference for Groovy Rules](#)
- [Smart View for Office Developer's Guide](#)

Navigating in Sales Planning

Review these useful tips for navigating in Oracle Sales Planning Cloud.

- To return to the Home page when you've navigated away from it, click the Oracle logo in the upper left corner (or your custom logo) or the Home  icon.
- To see additional administrator tasks in the Navigator, click the horizontal bars next to the Oracle logo (or your custom logo) .
- Expand a dashboard to full screen by clicking the Show/Hide bar at the top of the dashboard; click it again to return to normal view.
- Hover the cursor in the upper right corner of a form or dashboard to see a menu of options appropriate to the context, such as Actions, Save, Refresh, Settings,





Maximize

- In a subcomponent, use the horizontal and vertical tabs to switch tasks and categories.

For example, in the Quota Planning **Set Targets** component, use the vertical tabs to switch between reviewing overview dashboards, setting target quotas, and performing predictive planning. The vertical tabs are different depending on the features that are enabled. Use the horizontal tabs to switch categories within a

task. For example, in **Set Targets**, choose between setting overall targets and adjusting targets by product.



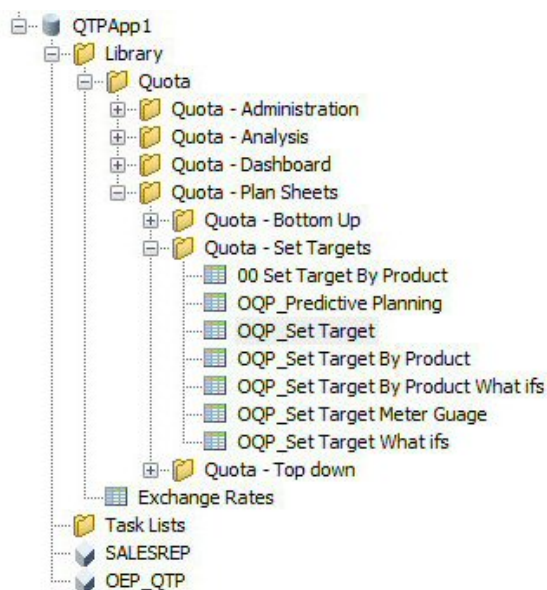
The icon  indicates a reporting form for reviewing data, not for data entry. The icon  indicates that a form is a data entry form for entering planning details.

Working with Smart View

Oracle Smart View for Office provides a common Microsoft Office interface designed specifically for Oracle Enterprise Performance Management Cloud services, including Oracle Sales Planning Cloud.

You can download Smart View from the **Settings and Actions** menu. For details about downloading and connecting to Smart View, see [Getting Started with Oracle Enterprise Performance Management Cloud for Users](#).

When working with Sales Planning in Smart View, access forms from **Plan Sheets**. For example, to set the quota target in Quota Planning, in Smart View, select **Quota - Plan Sheets**, then **Quota - Set Targets**, and then **OQP_Set_Target**.



For more information about working with Smart View, see [Working with Oracle Smart View for Office](#).

Videos

Your Goal

Watch this overview video to learn more about working with Sales Planning in Smart View.

Watch This Video



[Overview: Smart View and Sales Planning](#)

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal

Learn how to set overall quota targets, and set targets by product in Smart View for Sales Planning. After allocating target quota, you review and adjust quota by product in Smart View, and then you review quota in PowerPoint.

Learn How



[Setting and Analyzing Quotas in Sales Planning with Smart View](#)

Reporting in Sales Planning

Oracle Sales Planning Cloud provides a comprehensive report authoring solution that enables you to quickly create dynamic and interactive reports in PDF, HTML, and Excel format. Accurate and timely reports based on real-time data are critical for planning and decision making at multiple levels in a sales organization.

The graphical interface of the report designer allows you to swiftly design report frameworks using objects. The wide range of formatting and design options give you maximum control on the layout of the report.

Power users build report definitions using the Report Designer. Power users assign access to viewers, who use these report definitions to generate reports.

For example, sales managers can design a report definition to analyze quota attainment based on product, account, or territory. The regional manager can use this definition to generate reports based on different criteria.

Targets by Account
NA Products - Central - Alex Smith - FY19

	Last Year Bookings	Target Quota	Overall Growth%
▶ Consumer Products	4,304,750	4,821,320	12.0%
▶ Engineering & Construction	4,570,000	5,118,400	12.0%
▶ Financial Services	1,000,000	1,120,000	12.0%
▶ Healthcare	18,242,250	20,431,320	12.0%
▶ High Technology	5,237,000	5,865,440	12.0%
▶ Industrial Manufacturing	4,698,000	5,261,760	12.0%
▶ Professional Services	4,530,000	5,073,600	12.0%
▶ Public Sector	6,156,000	6,894,720	12.0%
▶ Retail	3,115,000	3,488,800	12.0%
All Accounts	51,853,000	58,075,360	12.0%

Export In Query-Ready Mode



Report definitions that are built using the report designer act as a framework to retrieve real-time data in reports.

In the Reporting Web Studio, you can design reports by inserting, positioning, and customizing objects such as grids, charts, textboxes and images.

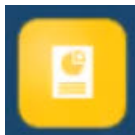
The Reporting Web Studio provides:

- Different chart types
- Dynamic member selection
- Sorting
- Conditional formatting and suppression
- Zoom and drill to details
- Report linking
- Data source features such as:
 - Supporting detail
 - Cell text and file attachments
 - Drill to source data

You can preview reports any time from the report designer and save them as time-specific snapshots.

Once a report is designed, viewers such as regional or operations managers can view and interact with reports in HTML, PDF or Excel format. They can specify criteria for report data by selecting members for dimensions. They can also zoom and drill to access more information and they can download reports.

To design reports, from the Navigator , click **Reporting Web Studio**. To work with reports, from the Home page, click **Reports**



For more information, see:

- [Designing with Financial Reporting Web Studio for Oracle Enterprise Performance Management Cloud.](#)
- [Working with Financial Reporting for Oracle Enterprise Performance Management Cloud](#)

Videos

Your Goal

Learn more about reporting in Sales Planning.

Watch This Video



[Overview: Reporting in Sales Planning](#)

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal

Learn how to design a new report in Reporting Web Studio to report on Sales Planning data. You add components such as grids, charts, and headers into a report and you set up those components to define how they are displayed.



Learn How

[Reporting in Sales Planning](#)

2

Working with Quota Planning

Related Topics

- [Quota Planning Methodologies](#)
Quota Planning supports three methods for allocating a target quota.
- [Task Overview](#)
Review the tasks you'll perform in Quota Planning. In general, you'll perform tasks in this order.
- [Setting User Variables](#)
Each planner must set the user variables described in this topic.
- [Setting Quota Targets](#)
Setting quota targets is the first step in the quota planning process.
- [Performing Top-Down Planning](#)
After the target quota is set, use top-down planning to allocate the target quota.
- [Performing Bottom-Up Planning](#)
Bottom-up planning is a collaborative approach performed in addition to top-down planning.
- [Analyzing Quota Plans](#)
The Quota Planning **Analysis** component provides predefined dashboards that give you insight into your quota plans.

Quota Planning Methodologies

Quota Planning supports three methods for allocating a target quota.

- Top-down planning—Allocates the target quota starting at the highest level of the hierarchy down to each level of the dimension hierarchy, through the entire hierarchy. Use this method when target setting is centralized.
- Waterfall planning —Allocates the target quota starting at the highest level of the hierarchy step by step down to each level of the dimension hierarchy. Each level in the hierarchy reviews and makes adjustments before pushing the target quota down to the next level. Use this method when target setting is more decentralized with input from regional or business line sales leaders. One of the benefits of waterfall planning is that the adjustments made by sales managers are not visible to subordinates, who see only the adjusted target quota.
- Bottom-up—A collaborative approach performed in addition to top-down planning. After top-down allocation is complete, each level in the hierarchy, starting with the lowest level, reviews their target quota, enters their quota commitments, and pushes them up to the next level in the hierarchy.

Depending on how your administrator configured the application, you can:

- Perform bottom-up planning in addition to top-down or waterfall planning, and then compare the results.
- Plan by territory or resource.

- Plan overlay target quotas in addition to your primary target quotas.

Task Overview

Review the tasks you'll perform in Quota Planning. In general, you'll perform tasks in this order.

1. Set user variables. See [Setting User Variables](#).
2. Set a quota target for the next planning year at the All Territory or All Resource level. Sales Management or Sales Operations often performs this task. See [Setting Quota Targets](#).
3. Adjust target quota if needed by product. See [Adjusting Targets by Product](#).
4. Fine tune the target quota in one of these ways, and if desired, use the revised results for your target quota plan.
 - Use Predictive Planning to predict future values and optionally use predicted values in your plan. See [Predicting Target Quota Values](#).
 - Perform what if planning by analyzing different scenarios for best case, worst case, and conservative case and optionally use one of these scenarios as your plan. See [Performing What-If Analysis for Target Quota](#).
5. When the top level target quota is set, allocate the target quota using top-down planning and make any required adjustments. See [Performing Top-Down Planning](#). The type of planning available is based on how your administrator set up the application:
 - For top-down planning, see [Performing Allocations](#). This is a single step process that pushes the target quota down through all levels of the hierarchy.
 - For top-down waterfall planning, see [Performing Waterfall Allocations](#). This is an iterative process. Each level of the hierarchy has a chance to review the allocated target quota, make adjustments, and then push the allocations down to the next level in the hierarchy.

 **Note:**

If you adjust the overall target quota in **Set Targets**, you must allocate the target quota again.

6. If your company uses bottom-up planning, perform bottom-up planning after completing top-down planning. Each level in the hierarchy, starting at the lowest level, reviews their allocated quota, makes any required adjustments, and pushes it up to the next higher level of the hierarchy for review and approval. See [Performing Bottom-Up Planning](#).

Bottom-up quota planning can be an iterative process, where a sales rep submits their target quota up to their manager, their manager makes an adjustment, and the sales rep reviews and resubmits. Quota Planning maintains two versions of the numbers: target version and bottom-up version.

7. If required for your business, adjust the final target quota with padding. Someone at or near the top of the hierarchy usually performs this task. See [Adjusting Quota Targets by Padding](#).

8. Analyze target quota using provided charts, dashboards, and infolets. If you perform both top-down and bottom-up planning you can compare the results. See [Analyzing Quota Plans](#).
9. Work with reports. See [Reporting in Sales Planning](#), [Designing with Financial Reporting Web Studio for Oracle Enterprise Performance Management Cloud](#), and [Working with Financial Reporting for Oracle Enterprise Performance Management Cloud](#).







To get started, from the Home page, click **Quota Planning** and then select a component.

 **Note:**

You might not see all the features described in this section, depending on what your Administrator has enabled, and the navigation flow might look different depending on what has been set up for your business.

Table 2-1 Quota Planning tasks

Task	Perform These Tasks	More Information
 Set Targets	Set a target quota for the next year and make adjustments before pushing the target quota down to the next level in the hierarchy. Setting targets is the first step in quota planning.	Setting Quota Targets
 Top Down Planning	Perform top-down planning and make adjustments.	Performing Top-Down Planning
 Bottom Up Planning	After completing top-down planning, you can also perform bottom-up planning and compare the results.	Performing Bottom-Up Planning
 Analysis	Analyze your quota plans with predefined dashboards.	Analyzing Quota Plans

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal

See how to set quota targets, make forecast predictions, perform what-if analysis, and adjust quota by product using Quota Planning. You also allocate quota by region, apply seasonal adjustments, and set overlay targets.

Learn How



[Setting and Analyzing Data-Driven Quotas in Sales Planning](#)

Setting User Variables

Each planner must set the user variables described in this topic.

User variables define the context for forms and dashboards.



1. On the Home page, click **Tools**, and then **User Preferences**



The **User Variables** page lists the user variables that the administrator has set up for each dimension and under **Member**, the currently selected member for each variable.

2. If you enabled Quota Planning, select members for these user variables:
 - Accounts—Select your account.
 - Overlay Territory—Typically used for the overlay territory.
 - Product—Select your product.
 - Sales Rep Territory—Typically used for Sales Reps for use in bottom-up planning.
 - Scenario—Select your scenario.
 - Territory—Typically used for the main process for Sales Managers and Sales VPs.
3. If you enabled Advanced Sales Forecasting, select members for these user variables:
 - Currency— Select your input currency.
 - Period Granularity—Select the granularity applicable to your forecasting, reporting, and analysis. Select **Weekly Plan** to forecast at the weekly level. Select **YearTotal** to forecast at the monthly level.
 - Forecasting Scenario—Select either **Forecast** or **Rolling Forecast**, depending on which features are enabled and how you want to do your forecasting.
 - Reporting currency— Select your reporting currency.
 - Forecasting Version—Select **Working Bottom Up** if you are building your forecast in detail.
 - Years—Typically select the current year. Most forms use the substitution variable set for **OEP_CurYr** (Current Year), but you can select a different year; for example, to see future years.
 - Account Segments—Select the account segment to use for detailed analysis.
 - Product Family—Select the product to use for detailed product analysis.
 - Territory or Resource—Select the territory or resource of focus.

- Drivers—Select the measure (or parent member of a set of measures) to analyze, depending on what is set up in your application, such as units or average selling price. If the Product dimension is enabled, select **OGS_Product Measure**.

4. Click **Save**.

Setting Quota Targets

Setting quota targets is the first step in the quota planning process.

The target quota is the high-level strategic plan for the next year, set for the All Territory or All Resource Level—the highest level in the hierarchy. It's usually set by someone in Sales Management or Sales Operations.

Set a target quota for the next year and make adjustments before allocating the target quota down the hierarchy. Planners perform top-down or waterfall planning and optionally bottom-up planning to allocate the target quota throughout the hierarchy.

Quota targets are set at a yearly level:

- As a percentage, based on growth over last year's actuals values
- As an absolute number
- By running a prediction and using the predicted value as the target



The **Set Targets** component provides several ways to help you set your quota targets.

Prerequisite: An administrator must have loaded the previous year's bookings/revenue for all the territories or resources and run the **Process Actuals** rule.



From the Home page, click **Quota Planning**, and then click **Set Targets**



Table 2-2 Setting Quota Targets






Task	Description	More Information
 Overview	See an overview of revenue and quota along with other important measures.	Analyzing Quota Targets with Dashboards

Table 2-2 (Cont.) Setting Quota Targets

Task	Description	More Information
 Set Growth	<ul style="list-style-type: none"> Set your target quota using a growth rate method or by entering a value. Adjust target quota values by product if required for your business. Perform what-if analysis and adjust your target if needed based on best case, worst case, and conservative scenarios. 	<ul style="list-style-type: none"> Entering Target Growth Rates Adjusting Targets by Product Performing What-If Analysis for Target Quota
 Predictive Planning	Predict target quota values and compare to growth rate-based targets. Optionally, use predicted values as your target quota.	Predicting Target Quota Values

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn how to set overall quota targets, and set targets by product in Oracle Smart View for Office for Oracle Sales Planning Cloud. After allocating target quota, you review and adjust quota by product in Smart View, and then you review quota in PowerPoint.	 Setting and Analyzing Quotas in Sales Planning with Smart View
Learn more about setting quota targets.	 Setting Quota Targets

Setting Quota Targets

Setting quota targets is the first step in the quota planning process.

The target quota is the high-level strategic plan for the next year, set for the All Territory or All Resource Level—the highest level in the hierarchy. It's usually set by someone in Sales Management or Sales Operations.

Set a target quota for the next year and make adjustments before allocating the target quota down the hierarchy. Planners perform top-down or waterfall planning and optionally bottom-up planning to allocate the target quota throughout the hierarchy.

Quota targets are set at a yearly level:

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- As an absolute number
- By running a prediction and using the predicted value as the target



The **Set Targets** component provides several ways to help you set your quota targets.




Prerequisite: An administrator must have loaded the previous year's bookings/revenue for all the territories or resources and run the **Process Actuals** rule.



From the Home page, click **Quota Planning**, and then click **Set Targets**





Table 2-3 Setting Quota Targets

Task	Description	More Information
 Overview	See an overview of revenue and quota along with other important measures.	Analyzing Quota Targets with Dashboards
 Set Growth	<ul style="list-style-type: none"> Set your target quota using a growth rate method or by entering a value. Adjust target quota values by product if required for your business. Perform what-if analysis and adjust your target if needed based on best case, worst case, and conservative scenarios. 	<ul style="list-style-type: none"> Entering Target Growth Rates Adjusting Targets by Product Performing What-If Analysis for Target Quota
 Predictive Planning	Predict target quota values and compare to growth rate-based targets. Optionally, use predicted values as your target quota.	Predicting Target Quota Values

Tutorials




Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn how to set overall quota targets, and set targets by product in Oracle Smart View for Office for Oracle Sales Planning Cloud. After allocating target quota, you review and adjust quota by product in Smart View, and then you review quota in PowerPoint.	 Setting and Analyzing Quotas in Sales Planning with Smart View
Learn more about setting quota targets.	 Setting Quota Targets

Entering Target Growth Rates

Enter your target quota for the upcoming planning year.

Quota planning is done for the next planning year, based on growth over last year's actuals values, at the All Territory or All Resource level. You can also directly enter a value for the target.

1. From the Home page, click **Quota Planning** , then click **Set Targets** , and then click **Set Growth** .
 2. In **Plan YOY Growth %** enter a percentage growth rate from the previous year's revenue for All Territories or All Resources, and then click **Save**. Alternatively, you can enter a value in **Plan Target Quota**. The **Plan YOY Growth %** is calculated for you.
Target Quota is updated and the charts and dashboards reflect the target quota. Average quota per rep is also calculated.

Next, make any adjustments to the target quota:

- Adjust target quota values by product if required for your business. See [Adjusting Targets by Product](#).
- Perform what-if analysis and adjust your target if needed based on best case, worst case, and conservative scenarios. See [Performing What-If Analysis for Target Quota](#).
- Predict target quota values and compare to growth rate-based targets. Optionally, use predicted values in your plan. See [Predicting Target Quota Values](#).

When the target quota is ready, allocate it using top-down or waterfall planning. See [Performing Top-Down Planning](#).

Adjusting Targets by Product

If you are planning by Product, you can fine tune your quota target by adjusting target quota values by product.

Initially, all products have the same year over year growth percentage as set in the **Set Overall Targets** tab. Adjust by product as required for your business.




1. From the Home page, click **Quota Planning** , then click **Set Targets** , and then click **Set Growth** .
 2. Click **Adjust Targets by Product**.
 3. Adjust the target quota year over year growth percentage for each product.

4. If you've planned for different scenarios, to adjust quota by product for different scenarios, select the scenario from the list, and then enter adjusted quota targets.
5. Click **Save**.
Year over year growth percentage is adjusted based on your changes.
6. To see the adjusted overall target, click **Set Overall Targets**.

Performing What-If Analysis for Target Quota

After you've set your initial target quota for the planning year, you can perform what-if analysis to evaluate different scenarios.

Evaluate best case, worst case, and conservative scenarios compared to your base plan, and optionally use the values in your plan.

1. From the Home page, click **Quota Planning** , then click **Set Targets** , and then click **Set Growth** .
 2. On the **Set Overall Targets** horizontal tab, from the **Actions** menu, click **Seed What If Scenarios**.
 3. Enter percentage values for **Worst Case**, **Best Case**, and **Conservative** scenarios compared to the base plan, and then click **Launch**.
Additional data and charts are added to the **Set Overall Targets** page so you can evaluate and compare best case, worst case, and conservative scenarios to your base plan.

Tip:

On the **Adjust Targets by Product** page, change the scenario in the POV to see the different scenarios by product.




4. To copy data from a scenario back to your Plan Target Quota, from the **Actions** menu, click **Copy Data What If**, select source and target scenarios, and then click **Launch**.

To clear the what if scenarios, from the **Actions** menu, click **Clear What If Scenarios**.

Predicting Target Quota Values



If you have historical revenue data by territory or resource, you can perform a statistical analysis on the data to predict future revenue results.

Running Predictive Planning predicts future revenue by territory or resource. Using a predicted result leaves the guesswork out of setting your targets. When you run a prediction, historical data for each member on the form is retrieved and then analyzed using time series forecasting techniques to predict the future performance for these members. The more years of historical data you have, the more accurate the prediction will be.

1. From the Home page, click **Quota Planning** , then click **Set Targets** , and then click **Predict Targets** .
 2. By default, Predictive Planning predicts future revenue at the at the All Territory or All Resource level. To predict at a different level, change the POV.
 3. From the **Actions** menu, select **Predictive Planning**.
The prediction runs, and a results area opens below the form with a chart and detailed information about the prediction.

Use the results to compare the predicted values to your planned target values for each member, along with values for worst case and best case scenarios.




See Predicting Future Values Based on Past Performance for more information about working in the prediction area.

You can also change the chart display and change historical and future date ranges for the prediction. See Customizing the Chart.
4. To see overall predicted revenue compared to last year's bookings and your overall planned target quota, click **Set Growth**  and review the **Predicted Revenue** column. If needed, adjust your **YOY Growth %**.
5. For a more accurate and statistically-based plan, you can use predicted values as the target. Click **Set Growth**  and then from the **Actions** menu, select **Set Predictive As Target**.
The target quota is updated to use the predicted value.

Analyzing Quota Targets with Dashboards

Predefined dashboards give you insight into overall quota planning. You can drill in to members in dashboard charts to see the level of detail you want.

At any time during your quota planning process, use the dashboards in **Set Targets** to get an overview of your revenue and quota plans.

1. From the Home page, click **Quota Planning** , and then click **Set Targets** .
 2. Click **Overview** .

Performing Top-Down Planning

After the target quota is set, use top-down planning to allocate the target quota.

Depending on how your administrator set up the application, perform either top-down planning or waterfall planning.

- Top-down—When target setting is centralized, planners perform top-down planning to allocate the target quota starting at the highest level of the hierarchy down to each level of the dimension hierarchy, through the entire hierarchy.
- Top-down waterfall—When target setting is decentralized with input from all levels of the hierarchy, planners perform waterfall planning to allocate the target quota starting at the highest level of the hierarchy step by step down to each level of the dimension hierarchy. Each level in the hierarchy reviews and makes adjustments before pushing the target quota down to the next level.

Planners can make adjustments to the quota target before allocating it:

- Adjust by product, for example to modify quotas to plan for portfolio changes.
- Adjust by account, for example to modify quotas if historical data doesn't reflect customer potential.
- Adjust for seasonality and periods, for example to reflect consumer and sales trends or holiday periods.
- Adjust by padding.



From the Home page, click **Quota Planning** and then click **Top Down**



Planning

Table 2-4 Top Down Planning Tasks







Top Down Planning	Description	More Information
 Top Down	Review your target quota and make any required adjustments before allocating the target quota to all levels in the hierarchy: <ul style="list-style-type: none"> • Perform top-down allocation • Adjust allocations by product or account • Adjust allocations using seasonality • Adjust allocations by padding. This is the final step in the quota planning process. 	<ul style="list-style-type: none"> • Performing Allocations • Adjusting Allocated Quota Targets By Product or By Account • Adjusting Allocated Quota Targets for Seasonality • Adjusting Quota Targets by Padding

Table 2-4 (Cont.) Top Down Planning Tasks

Top Down Planning	Description	More Information
 Top Down Waterfall	Review your target quota and make any required adjustments before allocating the target quota to the next level of the hierarchy: <ul style="list-style-type: none"> • Perform top-down waterfall allocation • Adjust allocations by product or account • Adjust allocations using seasonality 	<ul style="list-style-type: none"> • Performing Waterfall Allocations • Adjusting Allocated Quota Targets By Product or By Account • Adjusting Allocated Quota Targets for Seasonality
 Padding	Adjust allocations by padding. This is the final step in the quota planning process.	Adjusting Quota Targets by Padding
 Top Down Multi Currency Analysis	If the application uses multiple currencies, users can review quota measures in their own currency. For example, if quota is set across the hierarchy using the main currency USD, a user in France can review the data in Euros. Select the reporting currency from the POV, and then from the Actions menu, click Business Rules , and then click the Calculate Currencies rule.	
 Overlay Targets	Plan overlay targets for supporting teams.	Planning Using Overlay Targets

Tutorials




Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn more about top-down planning.	 Performing Top Down Sales Quota Planning

Performing Allocations

Review the target quota and make any required adjustments before allocating the target quota down to all levels in the hierarchy.




With planning, the top level target quota is spread through all levels in the hierarchy based on historical data.

1. From the Home page, click **Quota Planning** , and then click **Top Down Planning**  .
2. On the **Top Down**  vertical tab, on the **Top Down** horizontal tab, review the target quota information.
3. From the **Actions** menu, select **Top Down Allocation**.
The target quota is allocated to all levels of the hierarchy.
4. To make adjustments, click the **Review and Adjust** horizontal tab, and then in the **All Territory Target** area, make adjustments in **Adjustment Value** if needed, and then click **Save**.
Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If your administrator requires it, you must ensure that adjusted values equal the overall **Allocated Quota**.
5. Make any adjustments by product or account, or for seasonality. See [Adjusting Allocated Quota Targets By Product or By Account](#) and [Adjusting Allocated Quota Targets for Seasonality](#).
6. As the last step in the quota planning process, senior managers can apply padding if required. See [Adjusting Quota Targets by Padding](#).
If your team is also performing bottom-up planning, apply padding after the bottom-up planning process is complete.

Performing Waterfall Allocations

Review your allocated target quota and make any required adjustments before submitting the quota to the next level of the hierarchy.

The top level target quota is spread throughout the hierarchy based on historical data. With waterfall planning, each level in the hierarchy can review their allocated target quota, make adjustments if needed, and push to the next level of the hierarchy.





1. From the Home page, click **Quota Planning** , and then click **Top Down Planning**  .
2. On the **Top Down Waterfall**  vertical tab, on the **Top Down and Adjust** tab, in the **My Target** area, select your level of the territory or resource hierarchy from the POV if needed.
3. Review your allocated quota and then from the **Actions** menu, select **Waterfall Allocation**.
The quota is pushed down to the next level of the hierarchy and the **My Team Target** area is updated with **Allocated Target Quota** values.

The Waterfall Allocation rule pushes down the allocation distribution based on last year's bookings across products, accounts, time periods, or other dimensions depending on the dimensionality of your application.

4. In the **My Team Target** area, review the **Allocated Target Quota** and make adjustments in **Adjustment Value** if needed, and then click **Save**. Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If your administrator requires it, you must ensure that adjusted values equal the overall **Allocated Quota**.
5. Make any adjustments by product or account, or for seasonality. See [Adjusting Allocated Quota Targets By Product or By Account](#) and [Adjusting Allocated Quota Targets for Seasonality](#).
6. Based on the system set up in your organization, notify the next lower level in the hierarchy. Now the next level down in the hierarchy can go through this same process. Repeat the process until the target quota is allocated to the lowest level in the hierarchy.
7. As the last step in the quota planning process, senior managers can apply padding if required. See [Adjusting Quota Targets by Padding](#). If your team is also performing bottom-up planning, apply padding after the bottom-up planning process is complete.

Adjusting Allocated Quota Targets By Product or By Account

You can make adjustments to the allocated quota for your team by product or account.





1. From the Home page, click **Quota Planning** , and then click **Top Down Planning** .
 2. On the **Top Down Waterfall**  or **Top Down**  vertical tab, click the **Adjust by Product** or **Adjust by Account** horizontal tab.
 3. In the **My Team's Target By <Product or Account>** area (for waterfall planning) or the **All Territory By <Product or Account>** area (for planning), change the values in **Adjustment Value** for each product or account and then click **Save**. You can't enter values that would go over the overall target value, and the overall target is not changed by values you enter here.

Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If your administrator requires it, you must ensure that adjusted values equal the overall **Allocated Quota**.

Adjusting Allocated Quota Targets for Seasonality

By default, quota targets are spread based on historical data, however if needed you can adjust the spreading by season.




Make adjustments for each month for the upcoming planning year, for example to reflect consumer and sales trends or holiday periods. This option overwrites the original spreading with the seasonally adjusted spreading.

1. From the Home page, click **Quota Planning** , and then click **Top Down Planning**  .
2. On the **Top Down Waterfall**  or **Top Down**  vertical tab , click the **Seasonality and Period Spread** horizontal tab.
3. Adjust percentages for each period.
Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If your administrator requires it, you must ensure that adjusted values equal the overall **Allocated Quota**.
4. From the **Actions** menu, select **Apply Seasonality**.
The target quota grid and charts are updated with the newly spread values. The seasonality changes are applied to the parent and children members.

Adjusting Quota Targets by Padding

After your top level target quota is final, you can pad the results.

Padding is a final company-wide adjustment at the top level to adjust the whole target quota, for example to modify quotas in anticipation of known or possible risks. Typically padding is the last step in the quota planning process, performed after top-down and bottom-up planning is complete. Typically someone at or near the top of the hierarchy performs this task.

1. From the Home page, click **Quota Planning** , and then click **Top Down Planning**  .
2. Click **Padding**  .
3. Enter a padding percentage in the **Input Padding %** column, and then click **Save**.
4. From the **Actions** menu, click **Business Rules**, and then launch the **Top Down Padding** rule.
5. Review the padding adjustment value and the final target quota in the **My Team's Final Target** area.

 **Note:**




If you make any further adjustments or re-allocate, you must adjust the padding again.

Planning Using Overlay Targets

You can plan using overlay targets for those not directly responsible for the quota who provide a support role in meeting quota targets.

For example, plan quotas for Specialist Sales, who support the main sales teams, using overlay targets. Their quotas are measured on impacted revenue.

Overlay growth percentage is based on a percentage over last year impacted bookings.

- From the Home page, click **Quota Planning** , and then click **Top Down Planning** .
- Click **Overlay Targets** .
- In the **My Overlay Target** area, enter an overlay growth percentage and then click **Save**.
- In the **My Team's Overlay Target** area, enter an overlay adjustment if required, and then click **Save**.
- To apply seasonality to overlay targets, click the **Seasonality and Period Spread** horizontal tab, adjust percentages for each period, and then from the **Actions** menu, select **Apply Overlay Seasonality**.

Performing Bottom-Up Planning

Bottom-up planning is a collaborative approach performed in addition to top-down planning.

With bottom-up planning, each Sales Rep gets involved in the process. After top-down allocation is complete, each level in the hierarchy, starting with the lowest level, reviews their final top-down quota, makes required adjustments for their accounts, and submits their expected quota to the next higher level of the hierarchy.

Bottom-up quota planning can be an iterative process, where a sales rep submits their target quota up to their manager, their manager makes an adjustment, and the sales rep reviews and resubmits.




Bottom-up planning allows you to add a new product or account and allocate quota to it. So you can allocate even if there is no historical data.

Your administrator might have set up an approvals process to manage this workflow.

From the Home page, click **Quota Planning** , and then click **Bottom Up**


Planning 

Table 2-5 Bottom Up Planning Tasks

Bottom Up Planning	Description	More Information
 Plan Quotas	<p>The lowest level in the hierarchy (for example, a sales rep) reviews their target quota, makes any required adjustments, and then submits the target quota to the next higher level in the hierarchy for approval:</p> <ul style="list-style-type: none"> Plan your target quota, and if needed, add another account to plan against Adjust your target quota by product, and if needed, add a product to adjust by Review and evaluate different scenarios for your target quota 	<ul style="list-style-type: none"> Preparing Bottom-Up Quota Plans Adjusting Bottom-Up Quotas by Product Performing What If Analysis for Bottom-Up Quota Plans
 Manage Quotas	<p>Managers review their team's proposed target quotas, make adjustments, and submit to the next higher level of the hierarchy:</p> <ul style="list-style-type: none"> Review and adjust quota targets Adjust quota targets by product Adjust target quota for seasonality 	<ul style="list-style-type: none"> Reviewing and Adjusting Your Team's Bottom-Up Target Quota (for Managers) Adjusting Bottom-Up Plans by Product (for Managers) Adjusting Bottom-Up Quota Targets for Seasonality (for Managers)
 Multi Currency Analysis	<p>If the application uses multiple currencies, users can review quota measures in their own currency. For example, if quota is set across the hierarchy using the main currency USD, a user in France can review the data in Euros.</p> <p>Select the reporting currency from the POV, and then from the Actions menu, click Business Rules, and then click the Calculate Currencies rule.</p>	




Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn more about bottom-up planning.	 Performing Bottom Up Quota and Account Planning

Preparing Bottom-Up Quota Plans

The lowest level in the hierarchy (for example, a sales rep) reviews their target quota, makes any required adjustments, and then submits the target quota to the next higher level in the hierarchy for approval.

- From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Plan Quotas** .
- On the **Plan Quota** horizontal tab, change the POV to reflect your level in the hierarchy if needed.
- In the **My Summary Quota** area, review the top-down quota allocated to you by your manager, along with the overall growth percentage.
- In the **Set Quota** area, enter your proposed target quota for each account, and then click **Save**.

Note:




If you need to plan against another account, you can add an account that already exists in the hierarchy. In the **Set Quota** area, from the **Actions** menu, select **Add Account**. Select the account to add, enter the proposed quota amount, and then click **Launch**.

- In the **My Summary Quota** area, from the **Actions** menu, select **Aggregate Quota**.
- Make any adjustments by product or perform what-if planning to evaluate different scenarios. See [Adjusting Bottom-Up Quotas by Product](#) and [Performing What If Analysis for Bottom-Up Quota Plans](#).

Based on the system set up in your organization, when your quota plan is complete, notify the next higher level in the hierarchy. Now the next level up in the hierarchy can review and make adjustments to their team's quota. See [Reviewing and Adjusting Your Team's Bottom-Up Target Quota \(for Managers\)](#).

Adjusting Bottom-Up Quotas by Product

After you've estimated your bottom-up quota, you can adjust the quota allocation amounts by product.




1. From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Plan Quotas** .
2. Click the **Adjust by Product** horizontal tab.
3. In the **Set Quota by Product** area, change the values for each product and then click **Save**.

Note:

If you need to plan against another product, you can add a product that already exists in the hierarchy. From the **Set Quota by Product** area, from the **Actions** menu, select **Add Product**. Select the product to add, enter the proposed quota amount, and then click **Launch**.




Performing What If Analysis for Bottom-Up Quota Plans

Sales reps can fine tune their target before pushing it up to the next level in the hierarchy.

1. From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Plan Quotas** .
2. Click the **Scenario Comparison and Analysis** horizontal tab.
3. From the **Actions** menu, select **Seed What If Scenarios**.
4. Enter percentage values for **Worst Case**, **Best Case**, and **Conservative**, and then click **Launch**.
Additional data and charts are added to the page so you can evaluate and compare best case, worst case, and conservative scenarios to your plan quota.
5. To copy data from a scenario back to your plan, from the **Actions** menu, click **Copy Data What If**, select source and target scenarios, and then click **Launch**.
To clear the what if scenarios, from the **Actions** menu, click **Clear What If Scenarios**.

Reviewing and Adjusting Your Team's Bottom-Up Target Quota (for Managers)

When your team has completed their bottom-up quota targets, you can review the targets and make adjustments before pushing up to the next level of the hierarchy.




1. From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Manage Quotas** .
2. On the **Manager Quota Review and Adjust** horizontal tab, change the POV to reflect your level in the hierarchy if needed.
3. From the **Actions** menu, select **Aggregate Quota**.
The rule aggregates the numbers for your team in the next lower level of the hierarchy.
4. In the **My Team's Quota** area, make any changes in the **Adjustment Value** column and then click **Save**.
For bottom-up planning, this value is not restricted.
5. In the **My Summary Quota** area, review the **Adjusted Value** and **Adjusted Quota**.
6. Make any adjustments by product or for seasonality. See [Adjusting Bottom-Up Plans by Product \(for Managers\)](#) and [Adjusting Bottom-Up Quota Targets for Seasonality \(for Managers\)](#).
7. When adjustments are complete, on the **Manager Quota Review and Adjust** horizontal tab, from the **Actions** menu, select **Aggregate Quota**.

Based on the system set up in your organization, notify the next higher level in the hierarchy. Now the next level up in the hierarchy can go through this same process. Repeat the process until the target quota is allocated to the highest level in the hierarchy.

When bottom-up planning is complete, managers can review and compare top-down and bottom-up target quota, add padding if required, and finalize the quota plan.

Adjusting Bottom-Up Plans by Product (for Managers)

Managers can adjust their team's bottom-up plans by product before submitting to the next higher level in the hierarchy.




1. From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Manage Quotas** .
2. Click the **Manager Adjust by Product** horizontal tab.

3. In the **My Team Quota by Product** area, change the values in **Adjustment Value** for each product and then click **Save**.
For bottom-up planning, this value is not restricted.
4. When adjustments are complete, on the **Manager Quota Review and Adjust** horizontal tab, from the **Actions** menu, select **Aggregate Quota**.

Adjusting Bottom-Up Quota Targets for Seasonality (for Managers)

By default, quota targets are spread based on historical data, however you can adjust the spreading if needed by season.

Make adjustments for each month for the upcoming planning year, for example to reflect consumer and sales trends or holiday periods. This option overwrites the original spreading with the seasonally adjusted spreading.

1. From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Manage Quotas** .
2. Click the **Seasonality and Period Spread** horizontal tab.
3. Adjust percentages for each period.
4. From the **Actions** menu, select **Apply Seasonality**.
The grid and charts are updated with the newly spread values.
5. When adjustments are complete, on the **Manager Quota Review and Adjust** horizontal tab, from the **Actions** menu, select **Aggregate Quota**.

Analyzing Quota Plans

The Quota Planning **Analysis** component provides predefined dashboards that give you insight into your quota plans.

To analyze Quota Planning target quota, from the Home page, click **Quota Planning**




, then click **Analysis**



, and then select the type of analysis to review.

Table 2-6 Analyzing Quota Plans

Task	Description
Quota Analysis	Review top-down quota analysis, bottom-up quota analysis, or compare top-down and bottom-up results.
Analysis by Dimensions	Analyze quota plans by product or account, depending on the features enabled for the application.

Additionally, use the provided infolets to gain quick insights into data to help guide your decisions and actions. From the Home page, click the Infolet dots towards the top of the Home page. .

3

Working with Advanced Sales Forecasting

Related Topics

- [Task Overview](#)
Review the tasks you'll perform in Advanced Sales Forecasting.
- [Setting User Variables](#)
Each planner must set the user variables described in this topic.
- [Performing Generic Sales Forecasting](#)
Use generic sales forecasting to review, adjust, predict, and analyze your sales forecasts.

Task Overview

Review the tasks you'll perform in Advanced Sales Forecasting.

Advanced Sales Forecasting offers collaborative sales forecasting. Your administrator loads data, such as historical actuals, forecast commits from CRM, pipeline, and quota data. Starting with this data, sales managers and sales representatives use predictive planning and forecast adjustments to arrive at reliable sales forecast commitments. Depending on the granularity of your model, you forecast at a weekly, monthly, or rolling forecast level.


In general, you'll perform tasks in this order.

1. Set user variables. See [Setting User Variables](#).
2. Review your forecast target and forecast commit at the territory or resource level or at the detailed account and product level. See [Reviewing Forecast Data](#).
3. If your administrator loaded historical data, run revenue predictions at a high level to analyze what-if scenarios for best case, worst case, and conservative scenarios. See [Improving Forecast Accuracy with Predictions](#).
4. Review the **Pipeline and Coverage** dashboard.
5. After reviewing your forecast, predictions, and pipeline, make adjustments, if needed. See [Adjusting the Forecast](#).
6. Run predictions at the detailed level and compare various what-if scenarios to your forecast. See [Improving Forecast Accuracy with Predictions](#).
7. After reviewing your forecast at the detailed level, make forecast commitment adjustments at the detailed customer or product level if needed. See [Adjusting the Forecast](#).
8. Review the **Overview** and **Pipeline and Coverage** dashboards and confirm that your forecast commit is final.
9. Work with reports. See [Reporting in Sales Planning](#), [Designing with Financial Reporting Web Studio for Oracle Enterprise Performance Management Cloud](#), and [Working with Financial Reporting for Oracle Enterprise Performance Management Cloud](#).



To get started, from the Home page, click **Advanced Sales Forecasting** and then make a selection.

Table 3-1 Advanced Sales Forecasting Tasks

Tasks	Perform These Tasks	More Information
 Generic	<ul style="list-style-type: none"> • Overview • Forecast Summary • Revenue Predictions • Pipeline and Coverage • Forecast Detail • Forecast Analysis • Predictions by Customer Product 	Performing Generic Sales Forecasting

Setting User Variables

Each planner must set the user variables described in this topic.

User variables define the context for forms and dashboards.



1. On the Home page, click **Tools** and then **User Preferences**



The **User Variables** page lists the user variables that the administrator has set up for each dimension and under **Member**, the currently selected member for each variable.

2. If you enabled Quota Planning, select members for these user variables:
 - Accounts—Select your account.
 - Overlay Territory—Typically used for the overlay territory.
 - Product—Select your product.
 - Sales Rep Territory—Typically used for Sales Reps for use in bottom-up planning.
 - Scenario—Select your scenario.
 - Territory—Typically used for the main process for Sales Managers and Sales VPs.
3. If you enabled Advanced Sales Forecasting, select members for these user variables:
 - Currency— Select your input currency.

- Period Granularity—Select the granularity applicable to your forecasting, reporting, and analysis. Select **Weekly Plan** to forecast at the weekly level. Select **YearTotal** to forecast at the monthly level.
- Forecasting Scenario—Select either **Forecast** or **Rolling Forecast**, depending on which features are enabled and how you want to do your forecasting.
- Reporting currency— Select your reporting currency.
- Forecasting Version—Select **Working Bottom Up** if you are building your forecast in detail.
- Years—Typically select the current year. Most forms use the substitution variable set for **OEP_CurYr** (Current Year), but you can select a different year; for example, to see future years.
- Account Segments—Select the account segment to use for detailed analysis.
- Product Family—Select the product to use for detailed product analysis.
- Territory or Resource—Select the territory or resource of focus.
- Drivers—Select the measure (or parent member of a set of measures) to analyze, depending on what is set up in your application, such as units or average selling price. If the Product dimension is enabled, select **OGS_Product Measure**.

4. Click **Save**.

Performing Generic Sales Forecasting

Use generic sales forecasting to review, adjust, predict, and analyze your sales forecasts.

From the Home page, click **Advanced Sales Forecasting**  and then click

Generic .

Table 3-2 Generic Sales Forecasting Tasks


Task	Description	More Information
Overview	Get an overview of your sales performance.	
Forecast Summary	Review and adjust forecast data at the territory or resource level.	<ul style="list-style-type: none"> • Reviewing Forecast Data • Adjusting the Forecast
Revenue Predictions	If you have historical data, you can use Predictive Planning to predict revenue forecast accuracy at a high level.	Improving Forecast Accuracy with Predictions
Pipeline and Coverage	Analyze your pipeline and coverage.	

Table 3-2 (Cont.) Generic Sales Forecasting Tasks

Task	Description	More Information
Forecast Detail	<p>If your administrator enabled Account and Product dimensions and loaded forecast data at a detailed level, you can review and adjust at a more detailed level:</p> <ul style="list-style-type: none"> Review forecast data at the detailed level. Make adjustments to your team's forecast at a more detailed level. 	<ul style="list-style-type: none"> Reviewing Forecast Data Adjusting the Forecast
Forecast Analysis	Analyze your forecast as it relates to the forecast drivers, such as sales units or average price.	Reviewing Forecast Data
Predictions by Customer Product	If you have historical data, you can use Predictive Planning to predict revenue forecast accuracy at a more granular level.	Improving Forecast Accuracy with Predictions

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn more about how to make forecast predictions, analyze forecast data, and adjust forecast commitments using Advanced Sales Forecasting.	 Predicting, Forecasting, and Analyzing with Oracle Sales Planning Cloud

Reviewing Forecast Data

Review forecast data at a territory or resource level or at a detailed account and product level.

Use the **Forecast Summary** form to:

- Review the forecast target (typically from Quota Planning if you are integrating Quota Planning with Advanced Sales Forecasting) in the top half of the dashboard.
- Review pipeline and commission compensation details.
- Review the forecast commit (typically loaded from the CRM system) in the bottom half of the dashboard. If needed, you can make adjustments to the forecast commit. See [Adjusting the Forecast](#).

If your administrator enabled the Account and Product dimensions and loaded forecast data at a detailed level, use the **Forecast Detail** form to review data at a more detailed

level. If needed, you can make adjustments at a detailed level. See [Adjusting the Forecast](#).



Use the **Forecast Analysis** form to review revenue drivers and their impact on revenue.

Improving Forecast Accuracy with Predictions

If you have historical data, you can use Predictive Planning to get insight into a data driven forecast, which leads to better forecast accuracy.


Running Predictive Planning predicts future values for the remaining forecast or rolling forecast periods, leaving the guesswork out of setting your forecast commitments. When you run a prediction, historical data for each member on the form is retrieved and then analyzed using time series forecasting techniques to predict the future performance for these members. The more years of historical data you have, the more accurate the prediction will be.

You can copy the results of a prediction and paste them into a scenario. For example, you can take the Best Case from a prediction and paste it into future periods of your Forecast Working scenario.

1. From the Home page, click **Advanced Sales Forecasting** , then click **Generic** , and then click **Revenue Predictions** to make predictions at a territory or resource level, or **Predictions by Customer Product** to make predictions at a more granular level by customer or product, if your administrator enabled these dimensions and loaded data at a detailed level.
2. From the **Actions** menu, select **Predictive Planning**.
The prediction runs, and a results area opens below the form with a chart and detailed information about the prediction.

Use the results to compare the predicted values to your values for each member, along with values for worst case and best case scenarios.

See Predicting Future Values Based on Past Performance for more information about working in the prediction area.

You can also change the chart display and change historical and future date ranges for the prediction. See Customizing the Chart.
3. After running the prediction, you can change the scenario in the POV to see the prediction results: From **Scenario**, click **What-ifs**, and then click **Conservative**, **Best Case**, or **Worst Case**.
4. If you want, you can copy the results of one of the prediction scenarios to one of your forecast scenarios. In the Prediction area, click **Paste** , then select the Paste options, then click **Paste**, and click **Save**. Paste options:
 - **Results**—Which predicted values to copy, and the scenario to paste them to.
 - **Prediction Range**—The range of values to paste—the entire prediction range, or the number of periods you specify.


- **Members**—Whether to paste values for only the currently selected member or all members on the form.

For example, you can copy the Best Case values from the prediction and paste them to your forecast Best Cast scenario.

The **Forecast Summary** form is updated with prediction results for each scenario.

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn how to make forecast predictions, and analyze forecast data using Advanced Sales Forecasting. You also review the pipeline coverage, and the forecast summary to see the target, predicted revenue, forecast commitment, and forecast adjustments and you adjust forecast commitments.	 Predicting, Forecasting, and Analyzing with Sales Planning

Adjusting the Forecast

Sales managers can collaborate with their sales reps to review current forecast commits and make necessary adjustments.

After reviewing your team's forecast, forecast predictions, pipeline, and coverage, make adjustments to your team's forecast, if needed.

1. From the Home page, click **Advanced Sales Forecasting** , and then click

Generic



2. To adjust forecasts at a summary level (by territory or resource), click **Forecast Summary** and then make adjustments to your team's forecast for the current period in the **Forecast Adjustment** area.
3. To adjust forecasts at a detailed level (by product or customer), click **Forecast Detail**. In the **Adjustment** area, select from the POV to determine how granular you want to make your adjustment, select the measure to adjust (for example, **Forecast Commit**), and then enter your adjustment.

Forecasting at the Weekly Level

If weekly forecasting is enabled in your application, you can review data at both the weekly level and monthly level.


After forecasting at the weekly level, run the **Convert Weekly Data to Monthly** rule to convert weekly data to monthly data before viewing dashboards.

After forecasting at the monthly level, run the **Convert Monthly Data to Weekly** rule to convert monthly data to weekly data before viewing dashboards.

Alternatively, run "Convert Weekly Data to Monthly in Form" and "Convert Monthly Data to Weekly in Form" from the **Actions** menu for a form if your administrator associated these rules with your form.

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn more about forecasting with different time granularities.	 Forecasting with Different Time Granularities in Oracle Sales Planning Cloud

Forecast Planning Using a Rolling Forecast

If rolling forecasting is enabled in your application, you can forecast using a rolling forecast.

If your administrator enabled rolling forecast, you can plan using a rolling forecast in addition to, or instead of, standard forecasting.


With rolling forecasts, you can perform continuous planning so you can plan beyond a one year horizon. Depending on how your administrator set up rolling forecast, you can plan continuously at a weekly level for either 13, 26, or 52 weeks, at a monthly level for either 12, 18, 24, 30, 36, 48, or 60 months, or at a quarterly level for either 4, 6, or 8 quarters.

When your administrator updates the current time period, forms and dashboards are automatically updated to add or drop time periods to the reflect the updated rolling forecast range.

To forecast using a rolling forecast, select **Rolling Forecast** for the **Scenario** user variable. See [Setting User Variables](#). Forms are updated to show the rolling forecast time periods.

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
Learn more about forecasting with different time granularities.	 Forecasting with Different Time Granularities in Oracle Sales Planning Cloud

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Accessibility

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#) website.

All videos for this cloud service have HTML equivalent topics.

Enabling Accessibility Settings

To enable accessibility settings, click the button at the top right of the Home page to open a dialog box with options for Screen Reader Mode and High Contrast mode.

Recommendations

If you use screen reading software, Oracle recommends that you use Internet Explorer. Some service component screens may not display properly if you use Google Chrome.

General Considerations and Notes

Note these general considerations for using keyboard equivalents and for online help.

Using Keyboard Equivalents

When you use keyboard equivalents, note that:

- The underlined letter that typically appears in a menu title, menu item, or button text is called a mnemonic. Because Oracle considers mnemonics to be self-documenting, additional documentation for mnemonics is not necessarily provided. You can use mnemonics where they are implemented.
- Some mnemonics are repeated. For example, on the File menu, the underlined mnemonic **D** is used for both the **D**el~~e~~te and the **D**e~~a~~ctivate menu items. When mnemonics are repeated, the first time you press **D**, the item to be deleted is highlighted. Press **Enter** to delete or press **D** again to highlight the **D**e~~a~~ctivate button, and then press **Enter** to deactivate.
- Keystrokes listed are standard for PCs. iOS standard keys may be different.

For additional information, see [Keyboard Equivalents](#).

Online Help

For information about working with online Help, see [Help Menu](#).

Accessibility Features

These features are provided:

- Support for screen readers and magnifiers
- Keyboard navigation equivalents for all objects
- `Alt` and `Title` attributes for all objects, images, and page titles
- Support for expanding and collapsing trees using the `Enter` key and keyboard equivalents
- Data form access using keyboard equivalents
- Tab indexing, implemented from left to right on all pages
- A button at the top right corner of the page opens a dialog box with options for screen reader mode and high contrast

 **Note:**

To read elements that are read only and do not get focus using keyboard navigation, use the arrow keys to read text. This applies, for example, to task list status.

 **Note:**

When moving to the Approvals subcomponent from another subcomponent, such as Revenue, a Filter popup may display.

This feature allows an end user to submit, review, approve, or reject a planning unit. When users come to this feature, planning units are listed for the scenario and version that were most recently used by them while entering data into forms. If no scenario and version were most recently used, a Filter popup displays that allows users to select the scenario and the version. The user can select the scenario and version member for which they want to see planning units.

Using Screen Reader Mode

For information about using screen reader mode, see [Using Screen Reader Mode](#).