

# Oracle® Fusion Cloud EPM

## Working with Sales Planning



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Oracle Fusion Cloud EPM Working with Sales Planning,

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# 1

## Creating and Running an EPM Center of Excellence

A best practice for EPM is to create a CoE (Center of Excellence).

An **EPM CoE** is a unified effort to ensure adoption and best practices. It drives transformation in business processes related to performance management and the use of technology-enabled solutions.

Cloud adoption can empower your organization to improve business agility and promote innovative solutions. An EPM CoE oversees your cloud initiative, and it can help protect and maintain your investment and promote effective use.

The EPM CoE team:

- Ensures cloud adoption, helping your organization get the most out of your Cloud EPM investment
- Serves as a steering committee for best practices
- Leads EPM-related change management initiatives and drives transformation

All customers can benefit from an EPM CoE, including customers who have already implemented EPM.

### How Do I Get Started?

Click to get best practices, guidance, and strategies for your own EPM CoE: [Introduction to EPM Center of Excellence](#).

### Learn More

- Watch the Cloud Customer Connect webinar: [Creating and Running a Center of Excellence \(CoE\) for Cloud EPM](#)
- Watch the videos: [Overview: EPM Center of Excellence](#) and [Creating a Center of Excellence](#).
- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.





# 2

## Welcome to Sales Planning

### Related Topics

- [About Sales Planning](#)  
Sales Planning 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 Sales Planning and related services.
- [Related Guides](#)  
See these related guides for more information about working with Sales Planning.
- [Navigating in Sales Planning](#)  
Review these useful tips for navigating in Sales Planning.
- [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 Sales Planning.
- [Reporting in Sales Planning](#)

## About Sales Planning


Sales Planning 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

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Your Goal	Watch This Video
Learn more about Sales Planning.	 <a href="#">Overview: Take a Tour of Sales Planning Cloud</a>

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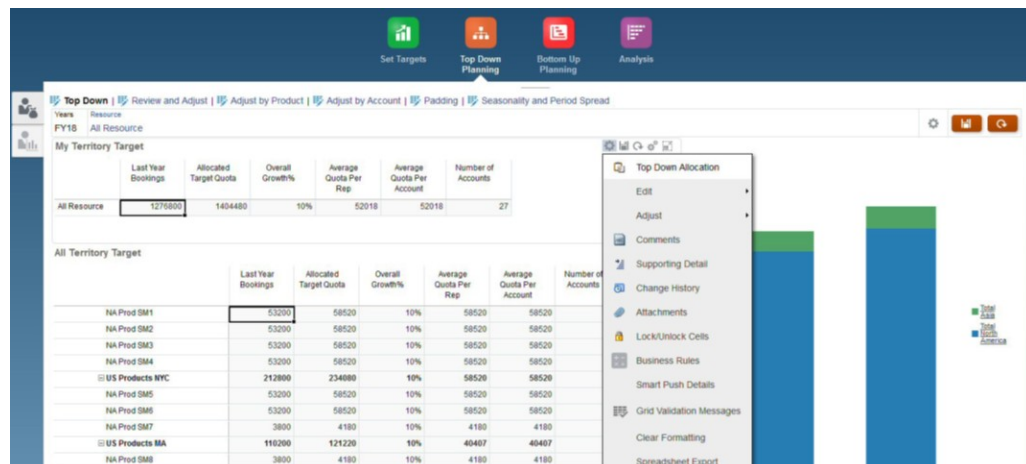
## About Quota Planning

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 Sales Planning. Learn how to set variables, prepare actual and forecast data, and verify the configuration.

**Learn How**



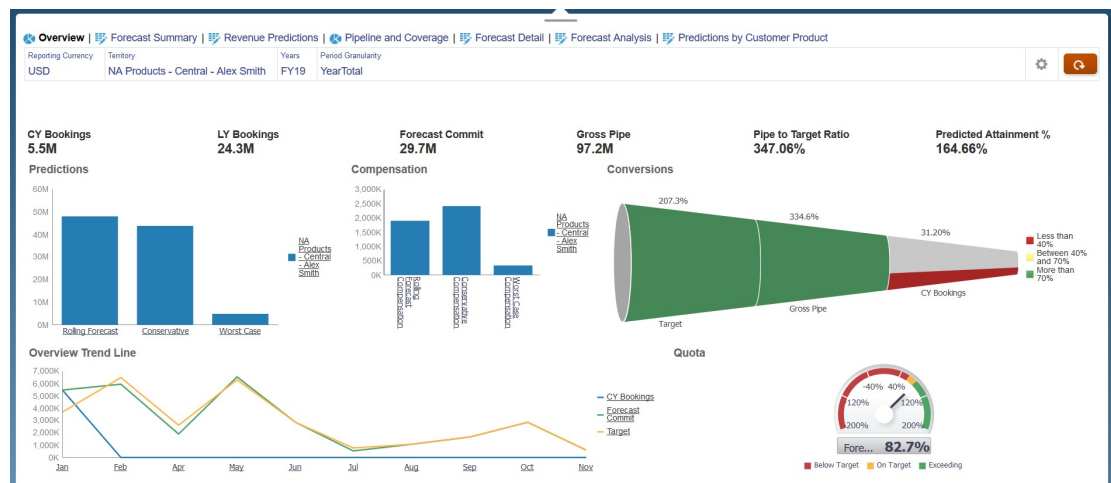
## About Advanced Sales Forecasting

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 Sales Planning.
- 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.	 <a href="#">Overview: Advanced Sales Forecasting in Oracle Sales Planning Cloud</a>

## 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.	 <a href="#">Creating and Configuring Advanced Sales Forecasting in Oracle Sales Planning Cloud - Tutorial</a>

## About Key Account Planning

Key Account Planning expands Sales Planning to cover a data driven approach to sales baseline planning and impact of trade promotions on sales plans. This results in an overall view of the customer profit and loss including an assessment of promoted and non promoted volume and revenue by customer and product group. Key Account Planning helps key account managers plan trade promotion strategies in order to optimize their trade spends and offers collaborative sales planning. By using baseline planning and promotion planning, key account managers or sales managers can perform gap analysis and see the uplifts - the impact on sales volume or revenue - from running trade promotions.

You'll perform these tasks in Key Account Planning:

- Perform baseline planning. Run predictions on your forecast by key account and product segment, perform what if scenario modeling, and make adjustments.
- Then, in your baseline plan, use building blocks such as different pricing, placements, and product variants to identify the additional non promotional sales plan adjustments.
- Next, add, analyze and adjust trade promotional activities to strategically close the gap between your target and plan, identifying each promotion's incremental uplift volume on an account, trade spends and profit and loss, including additional contract measures specified for the customer and COGS, to get a full view of customer profit and loss.
- Last, review volume and revenue plans and analyze trade spends and historical promotions to inform your key account planning and other sales planning decisions.

Key functionality includes:


- Baseline Planning including built-in Predictive Planning
- Integration with Quota Planning to bring in targets
- Gap Analysis – Target versus Baseline

- Trade Promotion Planning
  - Promotions planning by dates that drive the volumes and trade spends to corresponding months based on specified uplifts
  - Promotional What-ifs
  - Variable spending. These calculations cover taking the variable cost and applies them to promoted period volumes
  - Promotional planning use cases
    - \* Promotion spanning across periods
    - \* Promotions for single or multiple products
    - \* Multiple promotions for the same product in a period
    - \* Multiple promotions for the same product with overlapping dates
  - Adjustments to uplifts by Products
- Trade Spend Summary and ROI on Uplift and Revenue
- Customer Profit and Loss
  - By Customer and Product Group
  - Revenue and Uplift Revenue
  - Trade Spends – Variable and Fixed
  - COGS
  - Contract measures
- Analytics
  - Overview Dashboards with KPIs and visualization
  - Promoted and Non promoted volumes across the customer / product/ territory hierarchy
  - Key Account Summary

Key Account Planning connects sales planning with trade promotions marketing campaigns to increase sales volume or revenue. Key Account Planning:

- Provides forecast accuracy and reliability with data-driven sales plans for customer and product groups including trade promotions.
- Fosters collaboration and accountability.
- Helps you evaluate right promotion strategies by analyzing the effectiveness of your trade promotions.
- Offers what-if scenario planning to evaluate different promotion strategies.
- Eases the pain of managing multiple spreadsheets.
- Offers an extensible framework based on a robust Planning platform and ability to integrate with Sales Cloud.

## Videos

Your Goal	Watch This
Learn more about Key Account Planning.	 <a href="#">Overview: Key Account Planning in Sales Planning Cloud</a>

## Learning More About Sales Planning

Use these resources to get more information or help about Sales Planning 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 Sales Planning.

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

### Getting Started

To get started using Sales Planning, see these guides:

- [Getting Started for Administrators](#)
- [Getting Started for Users](#)
- [Deploying and Administering Oracle Smart View for Office \(Mac and Browser\)](#)
- [Creating and Running an EPM Center of Excellence](#)
- [Getting Started with the Digital Assistant for Oracle Cloud Enterprise Performance Management](#)
- [Oracle Enterprise Performance Management Cloud Operations Guide](#)

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](#)

- [Designing with Reports for Oracle Enterprise Performance Management Cloud](#)

### User

- [Working with Planning](#)
- [Working with Smart View](#)
- [Working with Oracle Smart View for Office \(Mac and Browser\)](#)
- [Working with Predictive Planning in Smart View](#)
- [Working with Financial Reporting for Oracle Enterprise Performance Management Cloud](#)
- [Working with Reports for Oracle Enterprise Performance Management Cloud](#)
- [Accessibility Guide](#)

### Administration




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

### Development

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

## Navigating in Sales Planning



Review these useful tips for navigating in Sales Planning.

- 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.

Set Overall Targets   Adjust Targets by Product		
Years	Currency	
FY18	USD	
Set YoY Growth		
Plan	Plan	Plan
Last Year Bookings	Predicted Revenue	YOY Growth%

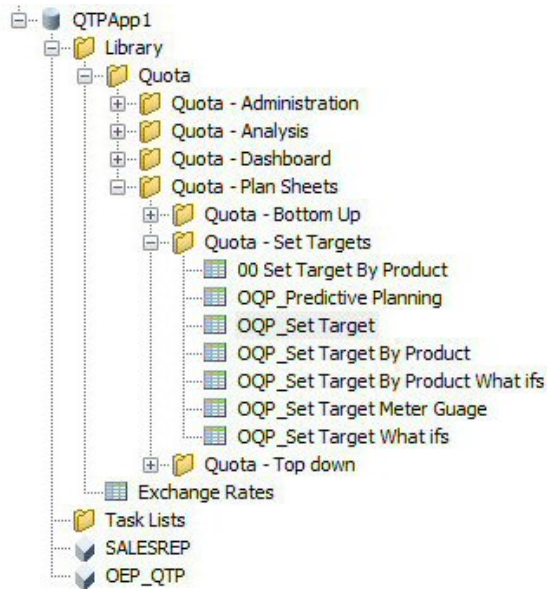
The icon  indicates a reporting form for reviewing data, not for data entry. The icon  indicates that a form is a data entry form for entering planning details.

## 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 Sales Planning.

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

### Tutorials

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

Table 2-1 Tutorials

Your Goal	Learn How
Learn how to report on data with attribute hierarchies. You can view and report on data organized by attribute on the web on forms and dashboards, with MR reports, or in Oracle Smart View for Office with ad hoc analysis.	 <a href="#">Reporting on Data with Attribute Hierarchies</a>

## Working with the Reports Reporting Solution

Reports is available in Sales Planning alongside, and eventually replacing, Financial Reporting. Reports provides a user-friendly, robust report development framework along with an enriched report viewer experience.

Reports also includes books and bursting. Books provide the ability to group together one or more reports, books, and other documents, to generate a single PDF output. The bursting feature enables you to run a single report or book for more than one member of a single dimension for one data source, and publish a PDF output for each member. You can schedule a bursting definition as a Scheduled Job.

Reports, books, and bursting definitions are stored in the repository, along with Documents used and generated with Books and Bursting. For example, MS Word and PDF documents inserted in Books and CSV files used in a bursting definition, along with PDF files generated by a bursting definition.

You can migrate Financial Reporting reports to Reports either with in-place migration where you can migrate all or individual reports, or by importing Financial Reporting report files that were exported locally from the Explore Repository. Please note when migrating, the system will convert as many elements of the original report into the Reports equivalent as possible. However, there are differences between the two solutions, and not all elements exist in both solutions. You may have to modify certain elements after the report has been migrated in order to produce a report that is equivalent to the original report.

Financial Reporting will eventually be removed at some future undetermined date, after you have ample time to migrate your content from Financial Reporting to Reports.

To view the next-generation Reports, on the Home page, click **Reports**, and then click



the **Reports** tab on the left side of the page.

For more information, see:

- [Working with Reports for Oracle Enterprise Performance Management Cloud](#)
- [Designing with Reports for Oracle Enterprise Performance Management Cloud](#)

## Working with Legacy Financial Reports

Sales Planning 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%
<b>All Accounts</b>	<b>51,853,000</b>	<b>58,075,360</b>	<b>12.0%</b>

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, on the Home page, click **Reports**, and then click the **Financial**

**Reports** tab  on the left side of the page.

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	Watch This Video
Learn more about reporting in Sales Planning.	 <a href="#">Overview: Reporting in Sales Planning</a>

### Tutorials

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

Your Goal	Learn How
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.	 <a href="#">Reporting in Sales Planning</a>

# 3

## 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 3-1 Quota Planning tasks**

Task	Perform These Tasks	More Information
 <b>Set Targets</b>	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.	<a href="#">Setting Quota Targets</a>
 <b>Top Down Planning</b>	Perform top-down planning and make adjustments.	<a href="#">Performing Top-Down Planning</a>
 <b>Bottom Up Planning</b>	After completing top-down planning, you can also perform bottom-up planning and compare the results.	<a href="#">Performing Bottom-Up Planning</a>
 <b>Analysis</b>	Analyze your quota plans with predefined dashboards.	<a href="#">Analyzing Quota Plans</a>

**Tutorials**

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

Your Goal	Learn How
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.	 <a href="#">Setting and Analyzing Data-Driven Quotas in Sales Planning</a>



# 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 click **User Preferences**



The **User Variables** tab 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. If you enabled Key Account Planning, select members for these user variables:
  - Accounts Segments—Select the customer segment or key account that should be the default.
  - Period Granularity—Select the period that you want to see for the data.
  - Product Family—Select the default product group that you want to plan for.
  - Reporting Currency—Select the currency that you are using for planning.
  - Territory—Select your territory for planning (for example, it could be your region or your sales organization).
  - Years—Select the year that you want to see by default.
  - Currency—Select the currency that you are using for planning.
  - Current Promotion—Select the default promotion that you want to see.
  - Key Account Scenario—Select the Plan or Forecast scenario that you want to plan.
  - Key Account Version—Select the version that you want to plan.
5. 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 3-2 Setting Quota Targets**

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

### 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 Sales Planning. After allocating target quota, you review and adjust quota by product in Smart View, and then you review quota in PowerPoint.	 <a href="#">Setting and Analyzing Quotas in Sales Planning with Smart View</a>
Learn more about setting quota targets.	 <a href="#">Setting Quota Targets</a>

## Setting Quota Targets

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

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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 3-3 Setting Quota Targets**

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

### 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 Oracle Smart View for Office 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](#)

**Your Goal**

Learn more about setting quota targets.

**Learn How**[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**





**Table 3-4 Top Down Planning Tasks**

Top Down Planning	Description	More Information
 <b>Top Down</b>	<p>Review your target quota and make any required adjustments before allocating the target quota to all levels in the hierarchy:</p> <ul style="list-style-type: none"> <li>• Perform top-down allocation</li> <li>• Adjust allocations by product or account</li> <li>• Adjust allocations using seasonality</li> <li>• Adjust allocations by padding. This is the final step in the quota planning process.</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Performing Allocations</a></li> <li>• <a href="#">Adjusting Allocated Quota Targets By Product or By Account</a></li> <li>• <a href="#">Adjusting Allocated Quota Targets for Seasonality</a></li> <li>• <a href="#">Adjusting Quota Targets by Padding</a></li> </ul>
 <b>Top Down Waterfall</b>	<p>Review your target quota and make any required adjustments before allocating the target quota to the next level of the hierarchy:</p> <ul style="list-style-type: none"> <li>• Perform top-down waterfall allocation</li> <li>• Adjust allocations by product or account</li> <li>• Adjust allocations using seasonality</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Performing Waterfall Allocations</a></li> <li>• <a href="#">Adjusting Allocated Quota Targets By Product or By Account</a></li> <li>• <a href="#">Adjusting Allocated Quota Targets for Seasonality</a></li> </ul>
 <b>Padding</b>	<p>Adjust allocations by padding. This is the final step in the quota planning process.</p>	<p><a href="#">Adjusting Quota Targets by Padding</a></p>
 <b>Top Down Multi Currency Analysis</b>	<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 <b>Actions</b> menu, click <b>Business Rules</b>, and then click the <b>Calculate Currencies</b> rule.</p>	
 <b>Overlay Targets</b>	<p>Plan overlay targets for supporting teams.</p>	<p><a href="#">Planning Using Overlay Targets</a></p>

## Tutorials

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

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### Your Goal

Learn more about top-down planning.

### Learn How




 [Performing Top Down Sales Quota Planning](#)

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## 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.

- From the Home page, click **Quota Planning** , and then click **Top Down** .
  - On the **Top Down**  vertical tab, on the **Top Down** horizontal tab, review the target quota information.
  - From the **Actions** menu, select **Top Down Allocation**.  
The target quota is allocated to all levels of the hierarchy.
  - 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**.
  - 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](#).
  - 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**  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.

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.

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

**Planning**



2. Click **Overlay Targets** .
3. In the **My Overlay Target** area, enter an overlay growth percentage and then click **Save**.
4. In the **My Team's Overlay Target** area, enter an overlay adjustment if required, and then click **Save**.
5. 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 3-5 Bottom Up Planning Tasks**


Bottom Up Planning	Description	More Information
 <b>Plan Quotas</b>	<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"> <li>Plan your target quota, and if needed, add another account to plan against</li> <li>Adjust your target quota by product, and if needed, add a product to adjust by</li> <li>Review and evaluate different scenarios for your target quota</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Preparing Bottom-Up Quota Plans</a></li> <li><a href="#">Adjusting Bottom-Up Quotas by Product</a></li> <li><a href="#">Performing What If Analysis for Bottom-Up Quota Plans</a></li> </ul>

**Table 3-5 (Cont.) Bottom Up Planning Tasks**

Bottom Up Planning	Description	More Information
 <b>Manage Quotas</b>	<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"> <li>Review and adjust quota targets</li> <li>Adjust quota targets by product</li> <li>Adjust target quota for seasonality</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Reviewing and Adjusting Your Team's Bottom-Up Target Quota (for Managers)</a></li> <li><a href="#">Adjusting Bottom-Up Plans by Product (for Managers)</a></li> <li><a href="#">Adjusting Bottom-Up Quota Targets for Seasonality (for Managers)</a></li> </ul>
 <b>Multi Currency Analysis</b>	<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 <b>Actions</b> menu, click <b>Business Rules</b>, and then click the <b>Calculate Currencies</b> 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.	 <a href="#">Performing Bottom Up Quota and Account Planning</a>

## 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** .

2. On the **Plan Quota** horizontal tab, change the POV to reflect your level in the hierarchy if needed.
3. In the **My Summary Quota** area, review the top-down quota allocated to you by your manager, along with the overall growth percentage.
4. 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**.

5. In the **My Summary Quota** area, from the **Actions** menu, select **Aggregate Quota**.
6. 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.



- From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Plan Quotas** .
  - Click the **Scenario Comparison and Analysis** horizontal tab.
  - From the **Actions** menu, select **Seed What If Scenarios**.
  - 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.
  - 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.




- From the Home page, click **Quota Planning** , then click **Bottom Up Planning** , and then click **Manage Quotas** .
- On the **Manager Quota Review and Adjust** horizontal tab, change the POV to reflect your level in the hierarchy if needed.
- From the **Actions** menu, select **Aggregate Quota**.  
The rule aggregates the numbers for your team in the next lower level of the hierarchy.
- 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.
- In the **My Summary Quota** area, review the **Adjusted Value** and **Adjusted Quota**.
- 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 \(for Managers\)](#).
- 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 3-6 Analyzing Quota Plans**

Task	Description
<b>Quota Analysis</b>	Review top-down quota analysis, bottom-up quota analysis, or compare top-down and bottom-up results.
<b>Analysis by Dimensions</b>	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. .

# 4

## 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 4-1 Advanced Sales Forecasting Tasks**

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

## 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 click **User Preferences**



The **User Variables** tab 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. If you enabled Key Account Planning, select members for these user variables:
    - Accounts Segments—Select the customer segment or key account that should be the default.
    - Period Granularity—Select the period that you want to see for the data.
    - Product Family—Select the default product group that you want to plan for.
    - Reporting Currency—Select the currency that you are using for planning.
    - Territory—Select your territory for planning (for example, it could be your region or your sales organization).
    - Years—Select the year that you want to see by default.
    - Currency—Select the currency that you are using for planning.
    - Current Promotion—Select the default promotion that you want to see.
    - Key Account Scenario—Select the Plan or Forecast scenario that you want to plan.
    - Key Account Version—Select the version that you want to plan.
  5. 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 4-2 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"> <li>• <a href="#">Reviewing Forecast Data</a></li> <li>• <a href="#">Adjusting the Forecast</a></li> </ul>
Revenue Predictions	If you have historical data, you can use Predictive Planning to predict revenue forecast accuracy at a high level.	<a href="#">Improving Forecast Accuracy with Predictions</a>
Pipeline and Coverage	Analyze your pipeline and coverage.	
Forecast Detail	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: <ul style="list-style-type: none"> <li>• Review forecast data at the detailed level.</li> <li>• Make adjustments to your team's forecast at a more detailed level.</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Reviewing Forecast Data</a></li> <li>• <a href="#">Adjusting the Forecast</a></li> </ul>
Forecast Analysis	Analyze your forecast as it relates to the forecast drivers, such as sales units or average price.	<a href="#">Reviewing Forecast Data</a>
Predictions by Customer Product	If you have historical data, you can use Predictive Planning to predict revenue forecast accuracy at a more granular level.	<a href="#">Improving Forecast Accuracy with Predictions</a>

### 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.	 <a href="#">Predicting, Forecasting, and Analyzing with Oracle Sales Planning Cloud</a>

## 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](#).

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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**.



- 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 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.

#### Learn How

 [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.

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

**Generic** .

- 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.
- 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.

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#### Your Goal

Learn more about forecasting with different time granularities.

#### Learn How

 [Forecasting with Different Time Granularities in Oracle Sales Planning Cloud](#)

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## 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 **Forecasting 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.

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**Your Goal**

Learn more about forecasting with different time granularities.

**Learn How**

 [Forecasting with Different Time Granularities in Oracle Sales Planning Cloud](#)

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# 5

## Working with Key Account Planning

### Related Topics

- [Task Overview](#)  
Review the tasks you'll perform in Key Account Planning.
- [Setting User Variables](#)  
Each planner must set the user variables described in this topic.
- [Entering Assumptions](#)  
Enter assumptions that drive revenue calculations for promotions and key account planning.
- [Performing Baseline Planning](#)  
Before getting started with planning promotions, build a baseline plan.
- [Planning Trade Promotions](#)  
Key Account managers can add, analyze, and adjust trade promotional activities to strategically close the gap between the target and the plan.
- [Analyzing Trade Promotions](#)  
Use the Analysis dashboards for a high level visual summary of key data such as the overall plan by volume or revenue, promoted versus non promoted revenue and volume, key accounts, and profit and loss.

### Task Overview

Review the tasks you'll perform in Key Account Planning.

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

1. Set user variables for your products. Each planner sets their own user variables. See [Setting User Variables](#).
2. Enter key assumptions for your products that drive revenue calculations and calculations for promotions. See [Entering Assumptions](#).
3. Perform baseline planning. The baseline plan equals the *base* plus *building blocks*. See [Performing Baseline Planning](#).
  - Estimate the base forecast. You can predict it using Predictive Planning or manually enter it. See [Predicting Base Values](#).
  - Add building blocks to make non-promotional adjustments on top of the base, to arrive at a baseline plan. Building blocks are typically product, placement, and price. See [Adding Building Blocks](#).
4. Perform a gap analysis to compare target versus baseline. See [Performing a Gap Analysis](#).
5. Plan trade promotions to bridge the gap between the target and the baseline. See [Planning Trade Promotions](#).
6. Perform what-if planning to evaluate different scenarios for your promotions. See [Performing Uplift What-If Planning](#).

- Analyze your promotions and make decisions about how to fill the gap between the target and the baseline. See [Analyzing Trade Promotions](#).







To get started, from the Home page click **Key Account Planning** and then click 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 5-1 Key Account Planning Tasks**

Component	Perform These Tasks	More Information
 <b>Baseline</b>	Start your planning here by estimating the base forecast, adding building blocks, and then reviewing the gap analysis.	<a href="#">Performing Baseline Planning</a>
 <b>Trade Promotions</b>	Plan trade promotions to bridge the gap between the target and the baseline. Perform what-if planning to evaluate different scenarios. Review the Customer Profit and Loss and the Promotional Profit and Loss.	<a href="#">Planning Trade Promotions</a>
 <b>Analysis</b>	Analyze your promotions and make decisions about how to fill the gap between the target and the baseline. Use the Analysis dashboards for a high level visual summary of key data such as the overall plan by volume or revenue, promoted versus non promoted revenue and volume, key accounts, and profit and loss.	<a href="#">Analyzing Trade Promotions</a>
 <b>Assumptions</b>	Define key assumptions for your application.	<a href="#">Entering Assumptions</a>

**Tutorials**

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

Your Goal	Learn How
Learn how to plan for baseline volume, add building blocks, perform gap analysis, plan trade promotions, perform what-if analysis, and analyze promotions in Key Account Planning using Use Cases.	 <a href="#">Sales and Promotional Planning</a>

## 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 click **User Preferences**



The **User Variables** tab 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. If you enabled Key Account Planning, select members for these user variables:
    - Accounts Segments—Select the customer segment or key account that should be the default.
    - Period Granularity—Select the period that you want to see for the data.
    - Product Family—Select the default product group that you want to plan for.
    - Reporting Currency—Select the currency that you are using for planning.
    - Territory—Select your territory for planning (for example, it could be your region or your sales organization).
    - Years—Select the year that you want to see by default.
    - Currency—Select the currency that you are using for planning.
    - Current Promotion—Select the default promotion that you want to see.
    - Key Account Scenario—Select the Plan or Forecast scenario that you want to plan.
    - Key Account Version—Select the version that you want to plan.
  5. Click **Save**.

## Entering Assumptions



Enter assumptions that drive revenue calculations for promotions and key account planning.

Enter key factors in your application for volume and revenue based applications. For example, the sales price per unit drives revenue calculations.

You can enter assumptions for:

- Sales Price Per Unit
- Cost of Sales
- Contract Rates

Enter assumptions for account and product combinations.

1. From the Home page, click **Key Account Planning**  and then click **Assumptions** .
2. In the POV, select the Products and Customers for the assumptions you want to enter.
3. Click the tab for the assumptions you want to enter:
  - **Sales Price Per Unit**. You can enter sales price at the beginning balance (in the **Assumptions** column) or at a monthly level if the price is variable across different periods. If there is no monthly value, the beginning balance value is used in calculations.

- **Cost of Sales.** Enter the cost per unit, defined for each product across any customer. This value drives the COGs for the Customer Profit and Loss.
- **Enter Contract Rates.** Enter rates as a percentage, or as a flat rate for **Listing Fees** and **COGS per Unit**.  
For contract rates, when you save your changes, the assumptions that you entered populate all the way down through the hierarchy. You can adjust these values as needed for members at lower levels in the hierarchy. When you save the adjustments, they populate down to any members lower in the hierarchy. Any further changes you make at higher levels in the hierarchy continue to percolate down to any members lower in the hierarchy.

4. Enter your assumptions and then click **Save**.

The assumptions drive other calculations, based on revenue or volume, depending on the type of measure. Percentage measures are calculated based on revenue. Per unit measures are calculated based on volume. These assumptions drive calculations such as Customer Profit and Loss.

## Performing Baseline Planning


Before getting started with planning promotions, build a baseline plan.

You start baseline planning by estimating the base forecast. Next, add building blocks. The Baseline = Base + Building Blocks.

You can estimate the base using Predictive Planning or you can manually enter or load values, or copy them from actuals.



Next, add on to the base by adding building blocks such as different pricing, placements, and product variants to identify the additional non promotional sales plan adjustments.

Use the baseline plan to compare to the target, and then review the gap analysis. The Target Baseline Gap = Target – Baseline. After you review the gap analysis, start planning promotions to fill the gap between the baseline and the target.

The **Baseline**  component provides several ways to help you perform baseline planning.

From the Home page, click **Key Account Planning**  and then click **Baseline** .

**Table 5-2 Baseline Planning Tasks**


Task	Description	More Information
<b>Overview - Volume</b> and <b>Overview - Revenue</b>	Review dashboards to evaluate where you are in the current planning process. You can review the current gap, and compare the volume for the promoted period and non-promoted period. In a Revenue only model, you see only <b>Overview Revenue</b> .	From the Home page, click <b>Key Account Planning</b>  , then click <b>Baseline</b>  , and then click <b>Overview - Volume</b> or <b>Overview - Revenue</b>



**Table 5-2 (Cont.) Baseline Planning Tasks**

Task	Description	More Information
<b>Prediction Volume and Prediction Revenue</b>	Derive future volume and revenue using Predictive Planning as a way to update your base forecast.	<a href="#">Predicting Base Values</a>
<b>Building Blocks</b>	Add building blocks such as different pricing, placements, and product variants to identify the additional non promotional sales plan adjustments.	<a href="#">Adding Building Blocks</a>
<b>Gap Analysis</b>	Review the gap analysis for your account and product combination by comparing the target to the baseline. Target Baseline Gap = Target – Baseline.  After you've planned your promotions, come back to the Gap Analysis to review uplifts from the promotions.	<a href="#">Performing a Gap Analysis</a>

**Videos**

Your Goal	Watch This Video
Learn how Key Account Planning extends the capabilities of Sales Planning to let you model and plan baseline sales and trade promotions for key accounts and products based on forecasts, what-if scenarios, and desired outcomes. In this tutorial, see how you can perform baseline volume planning with Predictive Planning and plan for trade promotions to close the gap between your target and baseline for a full month.	 <a href="#">Baseline Volume Planning with Predictive Planning</a>

## Predicting Base Values




If you have historical data, you can use Predictive Planning to estimate your base forecast.

Predict the base volume or revenue by key account or product and use time-series historical data to identify best case, worst case and other scenarios. Make adjustments as needed, and when you're happy with predicted results, you can copy them to your plan.

Running Predictive Planning predicts future values for the base values, leaving the guesswork out of setting your base forecast. When you run a prediction, historical data for each member 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.

In a **Volume and Revenue** model, predictions are done by volume; revenue is calculated. In a **Revenue** model, predictions are done by Revenue.

To predict base values:

1. From the Home page, click **Key Account Planning** , then click **Baseline** .
2. Click the **Prediction - Volume** tab.
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 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. If you want, you can copy the results of one of the prediction scenarios. In the Prediction area, click **Paste** , select the Paste options, click **Paste**, and then 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.

The **Prediction - Volume** form is updated with prediction results.

## Adding Building Blocks



After estimating your base forecast, use building blocks to build your baseline plan on top of the base forecast for volume or revenue.

Building blocks are adjustments or increments to the base plan based on different factors that affect additional sales volume or revenue. Use building blocks to plan items such as product display redesigns or pricing reductions. You can also define your own building blocks such as store refurbishments or placement changes. Key Account Planning provides three building blocks—Product, Pricing, Placements. Your administrator might have added additional building blocks or renamed them.

As you add building blocks, volume and revenue are recalculated so you can see the impact on the gap between the target and the baseline. When you make an adjustment, you can immediately see the impact. For example:

- Baseline volume increases due to new product packaging and new product introduction within a specific product category.
- Baseline volume increases due to superior placement with the retailer.
- Baseline volume decreases due to a store closure.

To add building blocks:

1. From the Home page, click **Key Account Planning** , and then click **Baseline** .
2. Click the **Building Blocks** tab.
3. Click the row for **Placement, Product, Pricing**, or other building blocks in your application.
4. Enter a description, and then enter values in the form. You can also create rules to derive the values you want.  
Enter values for the volume change expected from the building block, and then click **Save**.

Baseline volume is adjusted by an increase or decrease due to the building blocks for the corresponding time periods. Review the gap analysis again to see the impact of your changes.

## Performing a Gap Analysis



Review the gap analysis for your account and product combination by comparing the target to the baseline.

The target baseline gap is the difference between the target and the baseline. (Target Baseline Gap = Target – Baseline.)

The gap analysis gives a key account manager a view of where you are in the planning process. This is the starting point for planning your trade promotions. You'll use trade promotions to help reduce the gap so you can meet your target.

After you've planned your promotions, come back to the gap analysis to evaluate the different promotional strategies that will reduce or bridge the gap between the plan and target.

To review the gap analysis:

1. From the Home page, click **Key Account Planning** , and then click **Baseline** .
2. Click the **Gap Analysis** tab.

## Planning Trade Promotions


Key Account managers can add, analyze, and adjust trade promotional activities to strategically close the gap between the target and the plan.

Plan time-bound, ongoing, or overlapping trade promotions that are specifically designed for key accounts or particular product segments. You can plan by volume or revenue. You can plan for a single product or for multiple products.

You can identify the relationship between promotions and uplifts (the expected incremental volume or revenue due to the promotion), and see how uplifts bridge the gap between plan and target so you can optimize your strategy for key retail accounts or product segments. You can also plan for fixed or variable trade spends to evaluate

leaflet, discounts, incentives, coupons, and other trade spends. You can have your administrator add more fixed or variable spend types.

You can also model different what if scenarios for each promotion's uplifts to identify their most conservative, best case, or worst case; enhancing your decision making.

The **Trade Promotions**  component provides several ways to help you plan trade promotions.

From the Home page, click **Key Account Planning** , and then click **Trade Promotions** .

**Table 5-3 Trade Promotions Tasks**

Task	Description	More Information
<b>Promotions Planning - Volume and Promotions Planning - Revenue</b>	<p>Add a trade promotion and make adjustments to the promotion plan.</p> <p>In a volume based application, you plan the volume and the costs associated with the promotion. You can add drivers that represent the cost for the promotion, such as off invoice, cost for the display, lump sum costs, and so on.</p> <p>In a volume and revenue based application, you see only the <b>Promotions Planning - Volume</b> tab. In this case, revenue is derived from the volume.</p>	<p><a href="#">Adding Promotions and Making Adjustments to a Product Promotion</a></p>
<b>Uplift What Ifs</b>	<p>Model different what if scenarios for each promotion's uplifts to identify their most conservative, best case, or worst case; enhancing your decision making.</p>	<p><a href="#">Performing Uplift What-If Planning</a></p>

**Table 5-3 (Cont.) Trade Promotions Tasks**

Task	Description	More Information
<b>Trade Spending Summary</b>	Use <b>Trade Spending Summary</b> to review trade spend costs by key account or product segment, compare fixed versus variable spends and see the total revenue uplift, and identify the return on investment in terms of revenue for key accounts or segments. In addition, you see an aggregated view of trade spend summary and ROI for product groups and customer segments in the product, customer, or territory hierarchy, with numbers rolling up instantly.	<a href="#">Reviewing the Trade Spending Summary</a>
<b>Customer Profit and Loss and Promotional Profit and Loss</b>	Key account managers can evaluate the profit and loss for critical accounts, product segments, and promotions; helping you understand exactly what you spend and are projected to gain through promotional activities.	<a href="#">Reviewing the Profit and Loss</a>

## Adding Promotions

Plan time-bound, ongoing, or overlapping trade promotions that are specifically designed for key accounts or particular product segments.


Key account managers use **Trade Promotions** to plan the promotions for their accounts. You can plan by volume or revenue, for one or more products. Promotion uplift is spread across products and is allocated across the periods that the promotion runs.

You also plan the costs associated with the promotion.

- Variable costs are applied to the total volume—the uplift volume plus the original baseline volume—across the promotion period.
- Fixed costs are spread across the promotion period.

The promoted volume and other measures are calculated, and charts and dashboards are updated as you make changes to the promotion.

To add a new promotion:

1. From the Home page, click **Key Account Planning** , and then click **Trade Promotions** .

2. Click the **Promotions Planning - Volume** tab or the **Promotions Planning - Revenue** tab.
3. Right-click in **Set Up Promotions**, and then click **Add Promotion**.
4. Enter a **Promotion Name**.
5. Select a **Promotion Type**, for example, **Price Reduction**, **Display**, or **Leaflet**, depending on what your administrator has provided for your business.
6. Enter a **Start Date** and **End Date** for the promotion.
7. In **Uplift %**, enter the percentage of incremental uplift in volume you expect due to the promotion, and then click **Launch**. The uplift is calculated as a percentage of the baseline volume for each product.  
The promotion is created for all level 0 members in the hierarchy. The uplift volume is spread across the promotion period and is also pushed to lower level members in the hierarchy.
8. Add additional details such as variable spends and fixed costs related to the promotion, and then click **Save**.
  - Variable costs—**Off Invoice UOM** and **Bill Back UOM**.  
The variable costs are applied to the uplift volume plus the baseline volume across the promotion period (the promoted volume per day for applicable products).
  - Fixed costs—**Feature**, **Display**, **Other**.  
The fixed costs are spread across the promotion period.

Your administrator might have added additional measures for fixed or variable spends.

You can change values later if needed.

### Assigning Products to a Promotion

After you create a promotion, associate it with one or more products.

1. In **Set Up Promotions**, right-click a promotion and then click **Assign Product**.
2. Select the product or products to associate with the promotion, and then click **Launch**. You can select multiple products from different parents in the Products hierarchy and apply them to the same promotion.  
Products can have multiple promotions associated with them, and the promotions can overlap.
3. To see all of the products associated with a promotion, in the **Promotion to Product** area, select a promotion. You see the associated volume, revenue, and trade spending for each product associated with the promotion.

#### Note:



To remove a product from a promotion, in the **Promotion to Product** area, right-click a product and then click **Remove Assignment**.

After adding a promotion and assigning products to the promotion, calculate the promotion, and then review the **Gap Analysis**, the **Customer Profit and Loss**, and the **Promotional Profit and Loss** to see how each promotion is contributing to incremental revenue or volume and trade spends.

## Making Adjustments to a Product Promotion

After you've assigned a promotion to products and calculated the promotion, uplifts are calculated based on the percentage you specified and are spread across the promotion date range. Evaluate whether you need to make any additional adjustments for the promotion for specific products in a multiple product promotion. Adjustments are spread across the promotion date range.

To make adjustments to a product in a promotion:

1. From the Home page, click **Key Account Planning** , and then click **Trade Promotions** .
2. In the **Promotion to Product** area, select the promotion, and then for the product you want to adjust, enter an absolute value in the **Adjustment** column. Adjustments are made as an absolute value increase or decrease to the volume or revenue calculated for the product by the **Uplift %** entered for the promotion. The adjustment is spread only to the promotion period range.
3. Click **Save**.  
The adjustment is spread across periods for the promotion date range.

## Calculating a Promotion

After adding a promotion, assigning products, and making any adjustments, calculate the promotion.



To calculate a promotion, in **Set Up Promotions**, right-click the promotion, and then click **Calculate Promoted Period**.

Running this rule calculates the promoted period and non promoted period volume and revenue across the promotion and products.

## Removing a Promotion

If needed, you can remove a promotion.

To remove a promotion:



1. From the Home page, click **Key Account Planning** , and then click **Trade Promotions** .
  2. Right-click a promotion, then click **Remove Promotion**, and then click **Launch**.  
The promotion is removed, along with the associated uplifts and other costs that were associated with the promotion.
- After removing a promotion, re-run the **Calculate Promoted Period** rule again.

## Performing Uplift What-If Planning

Use what-if scenario planning to evaluate different promotion strategies.

After planning your promotions, you can model different what if scenarios for each promotion's uplifts to identify their most conservative, best case or worst case; enhancing your decision making.

To perform what-if planning:



1. From the Home page, click **Key Account Planning**  and then click **Trade Promotions** .
2. Click the **Uplift Whatifs** tab.
3. In the **Increase / (Decrease) %** area, enter a value for **Conservative**, **Best Case**, and **Worst Case** scenarios, and then click **Save**.  
For example, if your conservative estimate is a 2% uplift increase over the Forecast, enter .02.
4. Evaluate the conservative, best case, and worst case expected uplift from planned promotions by promotion and by product in the chart and form.

## Reviewing the Trade Spending Summary

Use the **Trade Spending Summary** to review trade spend costs by key account or product segment, compare fixed versus variable spends and see the total revenue uplift, and identify the return on investment in terms of revenue for key accounts or segments.

In addition, you see an aggregated view of trade spend summary and ROI for product groups and customer segments in the product, customer, or territory hierarchy, with numbers rolling up instantly.

To review the **Trade Spending Summary**:



1. From the Home page, click **Key Account Planning** , and then click **Trade Promotions** .
2. Click the **Trade Spending Summary** tab.

## Reviewing the Profit and Loss

You can evaluate the profit and loss for critical accounts, product segments, and promotions, helping you understand exactly what you spend and are projected to gain through trade promotion activities.

To review the **Customer Profit and Loss** or the **Promotional Profit and Loss**:





1. From the Home page, click **Key Account Planning** , and then click **Trade Promotions** .
2. Click the **Customer Profit and Loss** tab or the **Promotional Profit and Loss** tab.

## Analyzing Trade Promotions

Use the Analysis dashboards for a high level visual summary of key data such as the overall plan by volume or revenue, promoted versus non promoted revenue and volume, key accounts, and profit and loss.

Analyze your promotions and make decisions about how to fill the gap between the target and the baseline.

To analyze promotions:

1. From the Home page, click **Key Account Planning** , and then click **Analysis** .
2. Click the tabs to review different data and analyses:
  - Overview - Volume and Overview - Revenue—Review the promoted volume and non promoted volume
  - Key Account Summary
  - Actuals
  - Contract Costs