

Oracle® Cloud

Administering Oracle Sales Planning Cloud



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Oracle Cloud Administering Oracle Sales Planning Cloud,

E95906-13

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Welcome to Sales Planning

Related Topics

- [About Sales Planning](#)
Oracle Sales Planning Cloud provides an extensible framework for planning and managing sales performance.
- [Related Guides](#)
See these related guides for more information about working with Oracle Sales Planning Cloud.
- [Navigating in Sales Planning](#)
Review these useful tips for navigating in Oracle Sales Planning Cloud.

About Sales Planning

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

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

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

Videos

| Your Goal | Watch This Video |
|----------------------------------|--|
| Learn more about Sales Planning. |  Overview: Take a Tour of Sales Planning Cloud |

About Quota Planning

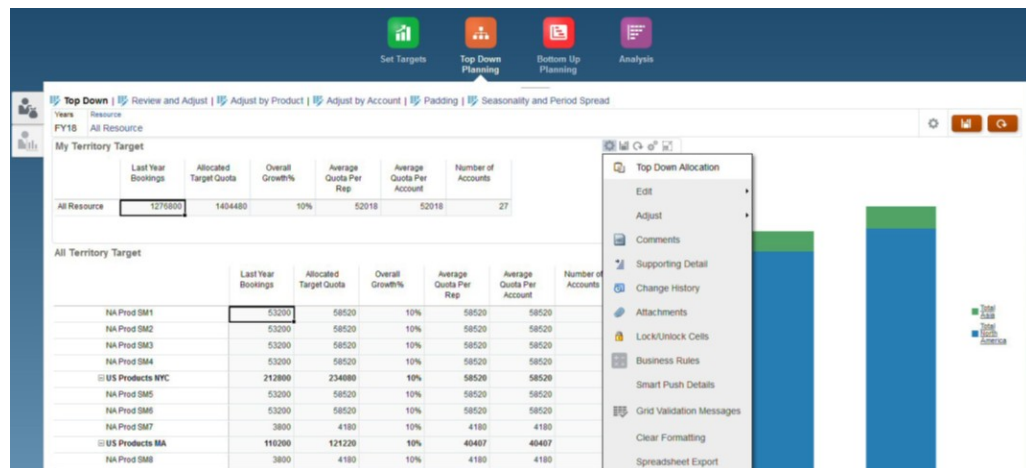
The Quota Planning business process offers top-down and bottom-up target quota planning by territory, product, account, or other custom dimensions. Use Predictive Planning and *what if scenario planning* to explore and compare different quota scenarios for informed decision making. Quota Planning builds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

Quota Planning helps you plan reliable target quotas by engaging all of the participants of the process, for example, the VP of Sales, Sales Operations, Sales Managers, and Sales Reps. Set a target quota for the next year. Then, optimize

your results by making adjustments by product, applying padding or seasonality, or performing predictive planning or what-if analysis. When the target is ready, planners perform top-down or waterfall planning to allocate the target quota throughout the hierarchy.

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

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



Videos

Your Goal

Learn more about Quota Planning.

Watch This Video

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


Tutorials

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

Your Goal

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

Learn How

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

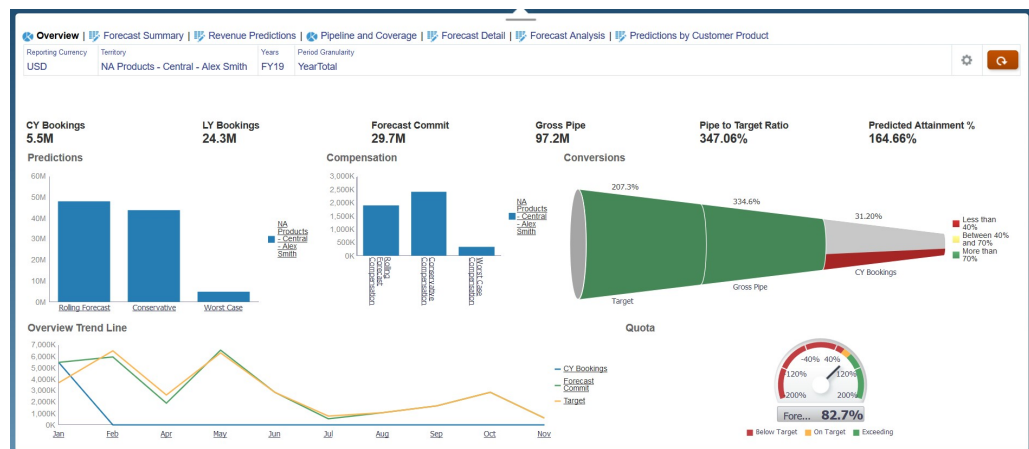
About Advanced Sales Forecasting

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

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

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

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



Videos

Your Goal

Learn more about Advanced Sales Forecasting.


Watch This Video



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

Tutorials

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

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

Learning More About Sales Planning

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



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

Related Guides

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

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

To get started using Sales Planning, see these guides:

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

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

Design:

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

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

User:

- [Working with Planning](#)
- [Working with Smart View](#)

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

Administration:



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

Development:

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

Navigating in Sales Planning

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

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





Maximize

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

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

| Years | Currency |
|-------|----------|
| FY18 | USD |

| 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.

2

Setting Up Your Application

Related Topics

- [Implementation Checklist](#)
Perform these tasks to set up Oracle Sales Planning Cloud.
- [Creating an Application](#)
To get started, create a Sales application.
- [Setting Substitution Variables for Quota Planning](#)
Set the substitution variables for Quota Planning for the current planning year for which you are setting targets and the immediately preceding planning year.
- [Setting User Variables](#)
Each planner must set the user variables described in this topic.
- [Integrating Quota Planning and Advanced Sales Forecasting](#)

Implementation Checklist

Perform these tasks to set up Oracle Sales Planning Cloud.

1. Create a Sales application. See [Creating an Application](#).
2. If your application is multicurrency, use the Dimension Editor to add dimension members for each reporting currency. See [About Editing Dimensions in the Simplified Dimension Editor](#). Use the **Exchange Rates** form to define the exchange rates between the main currency and each reporting currency.
3. If you are using Quota Planning, enable and configure Quota Planning and import metadata:
 - [Enabling Quota Planning Features](#)
 - [Configuring Quota Planning](#)
4. If you are using Advanced Sales Forecasting, enable and configure Advanced Sales Forecasting and import metadata.



Note:

If you are using both Advanced Sales Forecasting and Quota Planning, enable and configure Quota Planning first.

If you want to enable integration between Advanced Sales Forecasting and Quota Planning, in the **Integrations** section on the **Enable** page for Advanced Sales Forecasting, select **Target Quota from Quota Planning**:

- [Enabling Advanced Sales Forecasting](#)
- [Configuring Advanced Sales Forecasting](#)
- [Importing Advanced Sales Forecasting Metadata and Data](#)

- After you configure, and whenever you make configuration changes or import metadata, refresh the database:



Click **Application**, and then **Configure**. Then from the **Actions** menu, select **Refresh Database**, then **Create**, and then **Refresh Database**.



- Import data, including the previous year bookings or revenue. See [Importing Data](#). To import metadata or data from Oracle Engagement Cloud, see [Integrating with Oracle Engagement Cloud](#).

- Run rules to process actuals data. From the Home page, click **Rules**, launch the rule, specify required options, and then click **Launch**. Run these rules any time you import data.



- Process Actuals** rule for Quota Planning. Enter the historical years for which you have data, and select the scenario and version to which to load data. For more information about Quota Planning rules, see [Quota Planning Rules](#).
- Prepare Actual** and **Forecast Prep** rules for Advanced Sales Forecasting. For more information about Advanced Sales Forecasting rules, see [Advanced Sales Forecasting Rules](#).

 **Tip:**

- To see only Quota Planning rules, click **All Cubes** next to the Filter, and from the **Cube** list, select **OEP_QTP**.
- To see only Advanced Sales Forecasting rules, click **All Cubes** next to the Filter, and from the **Cube** list, select **OEP_GSP**.

- Set substitution variables for Quota Planning. See [Setting Substitution Variables for Quota Planning](#).
- Set required user variables. See [Setting User Variables](#).
- For Advanced Sales Forecasting, set application settings for predictions to indicate where to find actual values. See [What Application and System Settings Can I Specify?](#)
- Create the required user and group accounts and grant permissions. See [Getting Started with Oracle Enterprise Performance Management Cloud for Administrators](#).
- Make the application available to planners. From the Home page, click









Application, and then **Settings**. In **System Settings**, change **Enable Use of the Application for** to **All Users**.



- Use any of the following methods to configure and extend the framework:
 - Manage dimensions and members. See [About Editing Dimensions in the Simplified Dimension Editor](#).


- Customize the navigation flow for your business needs. For example, you can set up different navigation flows for different roles in your organization. See [Designing Custom Navigation Flows](#).
- Modify the existing forms, dashboards, or infolets, or create new ones. See [Administering Forms](#), [Designing Dashboards](#), and [Designing Infolets](#).
- Define the approval process by defining the approval units and promotional paths for approving plans in your organization, for example, to approve bottom-up plans. See [Managing Approvals](#).
- Create task lists to help guide your organization through the quota planning process. See [Administering Task Lists](#).
- Design and work with reports. See [Designing with Financial Reporting Web Studio for Oracle Enterprise Performance Management Cloud](#).
- Define Groovy rules to perform custom calculations. For information about designing Groovy rules, see [Creating a Groovy Business Rule in Designing with Calculation Manager for Oracle Enterprise Performance Management Cloud](#) and [Oracle Enterprise Performance Management Cloud, Groovy Rules Java API Reference](#). You can write custom calculations using the Groovy object model. To simplify writing the calculations, the traditional Essbase calculation language has been disabled in Sales Planning.






Videos

| Your Goal | Watch This Video |
|---|--|
| Learn about creating an application and enabling Quota Planning. |  Creating and Enabling Quota Planning Applications |
| Learn about configuring Quota Planning. |  Configuring Quota Planning |
| Learn about creating an application and enabling Advanced Sales Forecasting. |  Creating and Enabling Advanced Sales Forecasting in Oracle Sales Planning Cloud |
| Learn more about creating an application, enabling, and configuring Advanced Sales Forecasting. |  Configuring Advanced Sales Forecasting in Oracle Sales Planning Cloud |
| Learn about setting up users and groups. |  Setting Up Users and Groups for Oracle Sales Planning Cloud |
| Learn about setting up roles and permissions. |  Setting Up Roles and Permissions in Oracle Sales Planning Cloud |

Tutorials

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

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

| Your Goal | Learn How |
|---|---|
| See how to enable and configure Advanced Sales Forecasting in Sales Planning. Learn how to set variables, prepare actual and forecast data, and verify the configuration. |  Creating and Configuring Advanced Sales Forecasting in Oracle Sales Planning Cloud - Tutorial |
| Learn how to manage security in Access Control and set up access permissions in Sales Planning. |  Setting Up Sales Planning Security - Tutorial |
| See how to define and run file-based data integrations in Sales Planning. |  Loading Data into Sales Planning using Data Integration - Tutorial |
| See how to customize navigation flows in Sales Planning. Learn how to modify the clusters and cards in the interface and control how various roles or groups interact with the business process. |  Designing Navigation Flows in Sales Planning |
| See how to create forms that allow planners to collect data, perform reviews, analysis, and reporting. Learn more about form components, access permissions, and best practice design considerations. |  Designing Forms in Sales Planning |

Creating an Application

To get started, create a Sales application.

1. Log in and select **Start** under **Sales Planning**.
2. Enter an application name and description and then click **Next**.
3. Specify this information.
 - **Start and End year**—Years to include in the application. Make sure to include the year that contains the historic actuals required for planning and analysis. For example, for an application beginning in 2019, select 2018 as the start year so that the latest actuals are available for setting targets using year over year growth percentage, and for reporting purposes.
 - **First Month of Fiscal Year**—Month in which your fiscal year begins.
 - **Weekly Distribution**—Sets the monthly distribution pattern, based on the number of fiscal weeks in a month.



This selection determines how data in summary time periods spreads within the base time period. When users enter data into summary time periods, such as quarters, the value is distributed over base time periods in the summary time period.

If you select a weekly distribution pattern other than **Even**, the application treats quarterly values as if they were divided into 13 weeks and distributes weeks according to the selected pattern. For example, if you select **5-4-4**, the first month in a quarter has five weeks, and the last two months in the quarter have four weeks.

- **Main Currency**—For a multicurrency application, this is the default reporting currency and the currency against which exchange rates are loaded.

- **Multicurrency**—Multicurrency support is provided by the Currency dimension, and enables reporting in different currencies.
 - **Name of Reporting Cube**—Oracle Sales Planning Cloud delivers a reporting cube called **SALESREP**. You can configure the dimensionality of the cube for your reporting requirements.
4. Click **Next**, review your selections, and then click **Create**.
 5. Click **Configure** to enable and configure the application. See [Configuring Quota Planning](#) and [Configuring Advanced Sales Forecasting](#).

Videos

| Your Goal | Watch This Video |
|---|--|
| Learn about creating an application for Quota Planning. |  Creating and Enabling Quota Planning Applications |
| Learn about creating an application for Advanced Sales Forecasting. |  Creating and Enabling Advanced Sales Forecasting in Oracle Sales Planning Cloud |

About Sales Planning Applications



When you create an Oracle Sales Planning Cloud application, the following cubes are created:

- **SalesRep**—Reporting cube (ASO)
- If you enabled Quota Planning: **OEP_QTP**—Planning input cube for data entry (BSO)
- If you enabled Advanced Sales Forecasting:
 - **OEP_GSP**— Planning input cube for data entry (BSO). All of the planning at the leaf level is performed in this cube.
 - **OEP_GREP**—Reporting cube (ASO). This out-of-box reporting cube offers instantaneous aggregations and reporting. When you save data in a form, the data is pushed from **OEP_GSP** to **OEP_GREP** for fast aggregation.

Setting Substitution Variables for Quota Planning

Set the substitution variables for Quota Planning for the current planning year for which you are setting targets and the immediately preceding planning year.

This steps is for Quota Planning only.

1. From the Home page, click **Tools** , then **Variables** , and then click the **Substitution Variables** tab.
2. Select members for **OEP_CurYr** and **OEP_PriorYr**. Optionally set the other substitution variables if you want to use something other than the default values.

Setting User Variables

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

User variables define the context for forms and dashboards.



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



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

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

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

Integrating Quota Planning and Advanced Sales Forecasting

Oracle Sales Planning Cloud uses data maps for out of box integration between Quota Planning and Advanced Sales Forecasting for connected sales planning. After completing the quota planning process, you can push the target quota from Quota Planning to seed the forecast target in Advanced Sales Forecasting, as a starting point for your sales forecast.

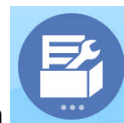
This section describes the overall process for integrating.

To implement integration between Quota Planning and Advanced Sales Forecasting, follow this overall process.

1. Enable and configure Quota Planning.
2. Enable and configure Advanced Sales Forecasting. In the **Integrations** section on the **Enable** page, you must select **Target Quota from Quota Planning**. Enabling Advanced Sales Forecasting with this option creates a data map: **Quota Planning Sales Forecast Integration**. The data map's detailed mappings are automatically populated between the dimension members in Quota Planning and in Advanced Sales Forecasting.

The final target quota value from Quota Planning, along with the padding adjustment value from the Plan scenario (if there is one), is mapped to the target forecast value in the Forecast scenario in Advanced Sales Forecasting.

3. In Quota Planning, perform the quota planning process to achieve a target quota.
4. When the quota plan is complete, an administrator pushes the target quota from Quota Planning using the predefined data map:



- a. From the Home page, click **Application** , then **Data Exchange**



, and then **Data Maps**.

- b. From the **Actions** menu for **Quota Planning Sales Forecast Integration**, select **Synchronize** to synchronize dimensions and members between source and target.
- c. From the **Actions** menu for **Quota Planning Sales Forecast Integration**, select **Push Data**. This pushes the target quota value from Quota Planning to Advanced Sales Forecasting.



5. Run the **Base Forecast Push** rule. From the Home page, click **Rules**, and then click **Launch** next to **Base Forecast Push**. Select only the Version and Year that have been updated.

You see the target quota as a starting point for the base forecast target in the forecast scenario of Advanced Sales Forecasting at all levels of the hierarchy.

Rerun these data maps whenever the target quota is updated.

Videos

Your Goal

Learn more about integrating Quota Planning and Advanced Sales Forecasting.

Watch This Video



[Integrating Quota Planning and Advanced Sales Forecasting in Oracle Sales Planning Cloud](#)

3

Configuring Quota Planning

Related Topics

- [Enabling Quota Planning Features](#)
Before users can start planning, you must enable Quota Planning features.
- [Configuring Quota Planning](#)
Perform these steps after enabling Quota Planning features to import metadata, add or import additional measures, and configure features.
- [Post Configuration Tasks](#)
After configuring Quota Planning, perform these tasks.
- [Quota Planning Rules](#)
Review the rules used to calculate values in Quota Planning.

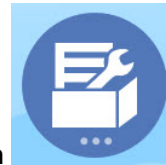
Enabling Quota Planning Features

Before users can start planning, you must enable Quota Planning features.

Based on your selections, dimensions, forms, and measures are created.

Note:

- Define all optional and custom dimensions the first time you enable features. This creates the Quota Planning business model. Because you can't add additional dimensions later, consider carefully the dimensions required for your business. Note that you can add reporting (attribute) dimensions later using the Dimension Editor.
- You can't disable features later.



1. From the Home page, click **Application** , and then click **Configure**



2. From the **Configure** list, select **Quota Planning**.
3. On the Configure page, click **Enable Features**.
4. Select the features to enable, and then click **Enable**.
While you can enable more features later, Oracle recommends that you enable only the features that planners currently require.

Table 3-1 Enabling Quota Planning Features


| Enable | Description |
|-------------------|---|
| Planning Model | <p>Enable quota planning by territory or resource and add custom dimensions.</p> <p>Select the type of hierarchy for quota planning. You can plan by territory or by resource. The lowest level in each hierarchy for territory or resource often maps to a Sales Rep, but you can create territories or resources based on your sales organization hierarchy.</p> <p>Optionally, enable these additional commonly-used dimensions:</p> <ul style="list-style-type: none"> • Accounts (customers) • Product (high-level product families) • Geography (a reporting dimension, configured as an attribute of Territory) <p>These core custom dimensions have predefined functionality and artifacts associated with them.</p> <p>You must add custom dimensions when you first enable Quota Planning.</p> <p>You can add additional custom dimensions in Map/Rename Dimensions.</p> |
| Unit of Measure | <p>Select whether to plan by Amount (such as currency) or Units (such as volume).</p> |
| Key Functionality | <p>Enable additional features for setting, analyzing, and optimizing target quotas.</p> <ul style="list-style-type: none"> • Overlay Targets—Use to perform quota planning for a specialist team; these teams often have a separate quota to achieve. • Seasonality—By default, quota targets are spread based on historical trends or data. Use Seasonality to adjust the year total allocation by month according to your business's seasonality. • Padding—After setting a target, use padding to make a global adjustment by increasing or decreasing targets by a percentage. • What If Scenarios—Use to evaluate worst case, best case, and conservative scenarios. |

Table 3-1 (Cont.) Enabling Quota Planning Features

| Enable | Description |
|-----------------------|--|
| Planning Methodology | <p>Select the type of quota planning to enable.</p> <ul style="list-style-type: none"> • Top Down—Allocate 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—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. Use this method when target setting is more decentralized with input from regional or business line sales leaders. • 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. |
| Predictive Planning | <p>Enable the ability to predict future target quota values based on historical revenue.</p> <p>If you have historical revenue data by territory or product, you can perform a statistical analysis on the data to predict future results.</p> |
| Map/Rename Dimensions | <ul style="list-style-type: none"> • Add custom dimensions to your application. You can enable up to three additional custom dimensions. Default names are Auxiliary 1, Auxiliary 2, and Auxiliary 3, but you can rename those if needed, for example to Sales Channel, or whatever is required for your business needs. • Map custom dimensions to existing dimensions. • Rename base dimensions. <p>You must map, rename, and enable custom dimensions the first time you enable features.</p> <p>You can't rename Measures or the Territory or Resource dimension names.</p> |


The Quota Planning artifacts are populated, including dimensions, forms, and measures.

Videos

| Your Goal | Watch This Video |
|---|---|
| Learn about enabling Quota Planning features. |  Creating and Enabling Quota Planning Applications |

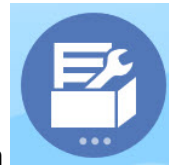
Tutorials

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

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

Configuring Quota Planning

Perform these steps after enabling Quota Planning features to import metadata, add or import additional measures, and configure features.



1. From the Home page, click **Application** , and then click **Configure**

2. From the **Configure** list, select **Quota Planning**.
3. Perform all mandatory tasks for importing metadata, configuring Quota Planning, and adding or importing additional measures. Perform the optional tasks required for your business.
4. After configuring, and any time you make changes in configuration or import metadata, refresh the database. From the **Configure** page, select **Refresh Database** from the **Actions** menu. Click **Create**, and then click **Refresh Database**.
5. Import your business data to populate the application and then run the **Process Actuals** rule. See [Importing Data](#).

Table 3-2 Configuring Quota Planning

| Configure | Description |
|---|--|
| Accounts, Product, Geography | <p>Import the dimension members (master data) and hierarchy that represent your business's accounts or customers, products, or geography.</p> <p>For the Accounts dimension, create a hierarchy with logical parent members instead of a flat structure.</p> |
| <Custom Dimension> | <p>Import the dimension members (master data) and hierarchy to populate the <customName> dimension. Use if you enabled the <customName> dimension.</p> |
| Territory | <p>Import the dimension members (master data) and hierarchy that represent your business's sales territories.</p> |
| Resource | <p>Import the dimension members (master data) and hierarchy that represent your business's resources. If you are integrating with Oracle Engagement Cloud Incentive Compensation, use numerical IDs for Resource dimension members.</p> |
| Allow Overrides on Allocated Target Quota | <p>Specify whether to allow users to override the total allocated target during top-down planning.</p> <p>Select Yes to allow users to adjust values that would allow the total to go over or under the allocated quota amount. Select No so that users cannot adjust values that would make the total go over or under the allocated quota amount.</p> <p>This task must be performed after setting user variables. See Setting User Variables.</p> |
| Seasonality | <p>Use this option if you enabled Seasonality.</p> <p>Specify default percentages for each month to indicate the seasonality for your business. You can adjust these values later at the Territory or Resource level.</p> <p>This task must be performed after setting user variables. See Setting User Variables.</p> |
| Bottom Up Quota Measures | <p>Add or import additional bottom up quota measures. If your business process requires, you might need to add logic or calculations related to any custom measures.</p> <p>See Adding Custom Measures.</p> |
| Overlay Quota Measures | <p>Add or import additional overlay quota measures. If your business process requires, you might need to add logic or calculations related to any custom measures.</p> <p>See Adding Custom Measures.</p> |

Table 3-2 (Cont.) Configuring Quota Planning

| Configure | Description |
|-------------------------|---|
| Quota Measures | Add or import additional quota measures that apply to all types of quota planning. If your business process requires, you might need to add logic or calculations related to any custom measures. See Adding Custom Measures . |
| Top Down Quota Measures | Add or import additional top-down quota measures. If your business process requires, you might need to add logic or calculations related to any custom measures. See Adding Custom Measures . |

 **Note:**


Oracle recommends that you use **Configure** to import metadata, which ensures that metadata is loaded correctly to work with the provided rules and forms. If you choose to use the Dimension Editor to load metadata, the primary hierarchy for a dimension should go under the **All** member for the dimension. You can add alternative hierarchies under the Root member as well, but the member should be a *Parent* or rollup type member. No parent or member should be set to rollup/aggregate to the root member of a dimension, because the root member can't be displayed on any form, dashboard, or report.

Videos

| Your Goal | Watch This Video |
|---|--|
| Learn about configuring Quota Planning. |  Configuring Quota Planning |

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 Quota Planning in Oracle Sales Planning Cloud. Learn how to set variables, prepare actual and forecast data, and verify the configuration. |  Creating and Configuring Quota Planning in Oracle Sales Planning Cloud - Tutorial |

Adding Custom Measures

Depending on the number of custom measures you need to add, perform one of these tasks:

- A small quantity—Add them directly in the **Configure** page.
- A large quantity—Import them by:
 - Exporting the existing set.
 - Modifying the exported spreadsheet to add rows and data for the custom measures.
 - Importing the spreadsheet.

This export and import process speeds up the design and maintenance of the application. When requirements change, you can repeat this process as many times as needed.

To add measures:

1. Select the configuration task.
2. Perform a task:
 - To add a measure, select **Add** from the **Actions** menu, and then enter details in the new row.
 - To modify a group of measures, or to add many new ones, export the set of predefined measures (select **Export** from the **Actions** menu), and then modify the export file in Excel. You can edit predefined measures, make a copy of a measure and modify it to create a new one, or add new measures. Then, import the modified file (select **Import** from the **Actions** menu).
 - To export or import all measures, use **Batch Export** or **Batch Import**.

 **Note:**

- Specify unique member names and aliases for custom members so they don't conflict with any provided members.
- If you must delete a measure, check the formulas of the other measures in its group to see if they reference the measure that you want to remove. If they do, update their logic accordingly.
- You can't edit or delete provided measures.

Tutorials

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

Your Goal

See how you can enhance the planning process in your organization by adding measures. Learn how you can add custom measures in the dimension hierarchy and include them in dashboards.

Learn How



[Adding Measures in Sales Planning](#)

Post Configuration Tasks

After configuring Quota Planning, perform these tasks.

- Refresh the cube after configuring and any time you import metadata.
- Import data, including the previous year bookings/revenue, and then run the **Process Actuals** rule for Quota Planning. See [Importing Data](#).
- Set substitution variables. See [Setting Substitution Variables for Quota Planning](#).
- Set user variables. See [Setting User Variables](#).

Quota Planning Rules

Review the rules used to calculate values in Quota Planning.



From the Home page, click **Rules**.

Tip:

To see only Quota Planning rules, click **All Cubes** next to the Filter, and from the **Cube** list select **OEP_QTP**.

Many of these rules are associated with forms, either from the Actions menu, or set to **Run on Save**. Planners run these rules as part of the planning process.

Table 3-3 Quota Planning Rules

| Rule |
|-----------------------------------|
| Add Account (Bottom Up) |
| Add Product (Bottom Up) |
| Adjust Aggregation (Bottom Up) |
| Apply Seasonality |
| Apply Top Down Seasonality |
| Apply Waterfall Seasonality |
| Bottom Up Aggregation |
| Bottom Up Aggregation by Account |
| Bottom Up Allocation |
| Bottom Up Seasonality |
| Clear Bottom Up What If Scenarios |
| Clear What If Scenarios |
| Copy Bottom Up What If |
| Copy Data What If |
| Copy What If Scenarios |
| Global Seasonality |

Table 3-3 (Cont.) Quota Planning Rules

| Rule |
|----------------------------------|
| Overlay Seasonality |
| Predictive Aggregation |
| Process Actuals |
| Quota Aggregation |
| Seed Bottom Up What If Scenarios |
| Seed What If Scenarios |
| Set Overlay Target |
| Set Predicted Values As Target |
| Set Target |
| Set Target by Product |
| Top Down Adjustment |
| Top Down Allocation |
| Top Down Padding |
| Validate Adjustment |
| Validate Adjustment by Dimension |
| OQP_ValidateSeasonality |
| Validate Seasonality |
| Waterfall Adjustment |
| Waterfall Allocation |

4

Configuring Advanced Sales Forecasting

Related Topics

- [Enabling Advanced Sales Forecasting](#)
Before users can start planning, you must enable Advanced Sales Forecasting features.
- [Configuring Advanced Sales Forecasting](#)
Perform these steps after enabling Advanced Sales Forecasting features to configure features.
- [Post Configuration Tasks](#)
After configuring Advanced Sales Forecasting, perform these tasks.
- [Advanced Sales Forecasting Rules](#)
Review the rules used to calculate values in Advanced Sales Forecasting.

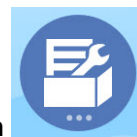
Enabling Advanced Sales Forecasting

Before users can start planning, you must enable Advanced Sales Forecasting features.

Based on your selections, dimensions, forms, and measures are created.

Note:

- If you will also be using Quota Planning, enable and configure Quota Planning first.
- Define all optional and custom dimensions the first time you enable features. This creates the Advanced Sales Forecasting business model. Because you can't add additional dimensions later, consider carefully the dimensions required for your business. Note that you can add reporting (attribute) dimensions later using the Dimension Editor.
- You can't disable features later.



1. From the Home page, click **Application**, and then click **Configure**



2. From the **Configure** list, click **Advanced Sales Forecasting**.
3. On the Configure page, click **Enable Features**.
4. Select the features to enable, and then click **Enable**.

While you can enable more features later, Oracle recommends that you enable only the features that planners currently require.

Table 4-1 Enabling Advanced Sales Forecasting Features



| Enable | Description |
|---------------------------|--|
| Planning By | <p>Enable sales forecast planning by territory or resource and add custom dimensions.</p> <p>Select the type of hierarchy for advanced sales forecasting. You can plan by territory or by resource.</p> <p>If you've already enabled Quota Planning, the Planning By dimension is selected for you. For example, if you chose to plan by Territory in Quota Planning, planning by Territory is automatically selected for you in Advanced Sales Forecasting.</p> <p>Optionally, enable these additional commonly-used dimensions, which can be different than the dimensions selected for Quota Planning.</p> <ul style="list-style-type: none"> • Accounts (customers) • Product (high-level product families) • Geography (an attribute dimension for Territory) <p>These core custom dimensions have pre-defined functionality and artifacts associated with them.</p> <p>You must add custom dimensions when you first enable Advanced Sales Forecasting.</p> <p>You can add up to three additional custom dimensions in Map/Rename Dimensions.</p> |
| Planning Time Granularity | <p>Enable planning by the selected time granularity.</p> <p>You can plan at the monthly level or at the weekly level. By default, monthly planning is enabled.</p> <p>If you select weekly and monthly planning, you must also select an option for mapping weekly data to monthly data. Forms are designed so you can view plan data at the granularity you select. If you select both weekly and monthly, you can see data in the forms at either the monthly or weekly level.</p> <p>You can also leverage a rolling forecast range at a weekly, monthly, or quarterly granularity. You can plan continuously at a weekly level for 13, 26, or 52 weeks, at a monthly level for 12, 18, 24, 30, 36, 48, or 60 months, or at a quarterly level for 4, 6, or 8 quarters. When you enable rolling forecast, the Rolling Forecast scenario is created. When you update the current time period, forms are updated to add or drop time periods to reflect the updated rolling forecast range.</p> |

Table 4-1 (Cont.) Enabling Advanced Sales Forecasting Features

| Enable | Description |
|--|--|
| Predictive Planning | <p>Enable the ability to predict future sales forecast values based on historical revenue.</p> <p>If you have historical revenue data by territory or detail level (such as product or customer), you can perform a statistical analysis on the data to predict future results.</p> |
| Integrations: Target Quota from Quota Planning | <p>Enable the ability to integrate target quota data from Quota Planning.</p> <p>If you've also enabled Quota Planning, enabling this option creates a data map: Quota Planning Sales Forecast Integration. When your quota planning is finalized, you can push the final target quota numbers by Territory or Resource from Quota Planning to use as a starting point for your sales forecast in Advanced Sales Forecasting.</p> <p>For more information, see Integrating Quota Planning and Advanced Sales Forecasting.</p> |
| Map/Rename Dimensions | <ul style="list-style-type: none"> • Add custom dimensions to your application. You can enable up to three additional custom dimensions. • Map custom dimensions to existing dimensions. • Rename base dimensions. <p>You must enable, map, and rename custom dimensions the first time you enable features.</p> <p>You can't rename Measures or the Territory or Resource dimension names.</p> |

The Advanced Sales Forecasting artifacts are populated, including dimensions, forms, and measures.

Videos

| Your Goal | Watch This Video |
|---|--|
| Learn about enabling and configuring forecasting with different time granularities. |  Forecasting with Different Time Granularities in Oracle Sales Planning Cloud |
| Learn about enabling Advanced Sales Forecasting. |  Creating and Enabling Advanced Sales Forecasting in Oracle Sales Planning Cloud |


Tutorials

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

Your Goal

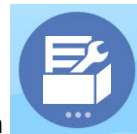
See how to enable and configure Advanced Sales Forecasting in Oracle Sales Planning Cloud. Learn how to set variables, prepare actual and forecast data, and verify the configuration.

Learn How

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

Configuring Advanced Sales Forecasting

Perform these steps after enabling Advanced Sales Forecasting features to configure features.



1. From the Home page, click **Application** , and then click **Configure**



2. From the **Configure** list, select **Advanced Sales Forecasting**.
3. Click **Time Period Configuration** and make your selections.
 - Select the current fiscal year, period, week (if weekly planning is enabled), and the start year for the plan.
 - If you enabled rolling forecast, select the planning frequency and number of periods for the rolling forecast. The rolling forecast range, if you enabled rolling forecast, is updated based on your selections.

Videos

Your Goal

Learn about configuring Advanced Sales Forecasting.

Watch This Video

 [Configuring Advanced Sales Forecasting in Oracle Sales Planning Cloud](#)

Learn about enabling and configuring forecasting with different time granularities.

 [Forecasting with Different Time Granularities 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 Advanced Sales Forecasting in Oracle Sales Planning Cloud. Learn how to set variables, prepare actual and forecast data, and verify the configuration.

Learn How

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

Post Configuration Tasks

After configuring Advanced Sales Forecasting, perform these tasks.

1. Import metadata. See [Importing Advanced Sales Forecasting Metadata and Data](#).
2. Refresh the cube after configuring and any time you import metadata.
3. Import data, including historical revenue data, and then run the **Prepare Actual** rule for Advanced Sales Forecasting. See [Importing Advanced Sales Forecasting Metadata and Data](#).
4. Set user variables. See [Setting User Variables](#).
5. Set application settings for predictions to indicate where to find actual values. See [What Application and System Settings Can I Specify?](#).
6. Enter compensation assumptions. See [Preparing Compensation Assumptions](#).
7. Run Advanced Sales Forecasting rules. See [Advanced Sales Forecasting Rules](#). In preparation for planning, make sure to run these rules:
 - **Prepare Actual**
 - **Forecast Prep**
 - **RptTotals to GSP**, if you enabled it Predictive Planning

Importing Advanced Sales Forecasting Metadata and Data

1. Add or import metadata for each enabled dimension using the Dimension Editor. From the Home page, click **Application**, and then click **Overview**. Click the **Dimensions** tab and then from the **Cube** list, select **OEP_GSP**. See [Importing Metadata](#).

Note:

When you use the Dimension Editor to load metadata, the primary hierarchy for a dimension should go under the **All** member for the dimension. You can add alternative hierarchies under the Root member as well, but the member should be a *Parent* or rollup type member. No parent or member should be set to roll up and aggregate to the root member of a dimension, because the root member can't be displayed on any form, dashboard, or report.

Note:

When you import metadata, ensure that metadata is set for both OEP_GSP and OEP_GREP. Both the planning cube (BSO) and reporting cube (ASO) must be enabled because aggregations for forecast measures occur in the reporting cube.

2. After configuring, and any time you make changes in configuration or import metadata, refresh the database. From the **Configure** page, select **Refresh**

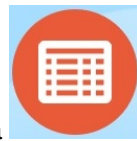
Database from the **Actions** menu. Click **Create**, and then click **Refresh Database**.

3. Import your business data to populate the application and then run the **Prepare Actual** rule. Oracle Sales Planning Cloud includes templates for loading Advanced Sales Forecasting data. See [Importing Advanced Sales Forecasting Data](#). See [Importing Data](#) for general information about importing data.

Preparing Compensation Assumptions

You can analyze compensation as part of your sales forecasting.

If you want to analyze compensation and see commission compensation on dashboards, enter compensation assumptions for different scenarios.



1. From the Home page, click **Data**, navigate to **Sales Forecasting, Plan Sheets**, and then open **Enter Compensation Percentage**.
2. Enter the commission percentage for each scenario and then click **Save**.

Sales analysts can see the commission compensation on the **Overview** and **Forecast Summary** dashboards.

Advanced Sales Forecasting Rules

Review the rules used to calculate values in Advanced Sales Forecasting.

In preparation for forecast planning, make sure to run these rules:

- **Prepare Actual**
- **Forecast Prep**
- **RptTotals to GSP**, if you enabled if Predictive Planning



From the Home page, click **Rules**.

Tip:

To see only Advanced Sales Forecasting rules, click **All Cubes** next to the Filter, and from the **Cube** list select **OEP_OGS**.

Some of these rules are associated with forms, either from the Actions menu, or set to **Run on Save**. Planners run these rules as part of the planning process.

Table 4-2 Advanced Sales Forecasting Rules

| Rule | Type | Description |
|--|----------------------------------|--|
| Base Forecast Push | Groovy rule. Smart push on form. | Executes push to the reporting cube on a data form. |
| Execute Data Push | Rule | Pushes data for a particular slice to the reporting cube. Pushes data based on run-time prompt for Scenario, Years, and Version. |
| Forecast Prep | Ruleset | Copies actuals for selected periods to the Forecast scenario and then pushes data to the reporting cube for the selected Year and Version. The ruleset includes: <ul style="list-style-type: none"> • Prepare Forecast • Execute Data Push |
| Convert Monthly Data to Weekly in Form | Rule | Converts monthly data in a form to weekly data. Run this rule only when it is associated with a form, not from the Rules card. |
| Convert Monthly Data to Weekly | Rule | Converts monthly data to weekly data (batch conversion). |
| Prepare Actual | Ruleset | Copies data from OGS_CY Bookings to OGS_Sales Revenue and then pushes data to the reporting cube for the selected Actual, Period(s), and Years. The ruleset includes: <ul style="list-style-type: none"> • Process Actual • Execute Data Push Run this rule at these times: <ul style="list-style-type: none"> • For Current Year—Run any time you import a new period of actuals data. • For Previous years—Run one time when you build the application, if you import historical data. Run for all periods and years for which historical data exists. You don't need to run this rule again unless data changes for historical years. |
| Prepare Forecast | Rule | Copies data from Actual to Forecast. Don't run this rule on its own. Run Forecast Prep instead. |

Table 4-2 (Cont.) Advanced Sales Forecasting Rules

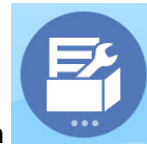
| Rule | Type | Description |
|--|----------------------------------|--|
| Process Actual | Rule | Copies data from OGS_CY Bookings to OGS_Sales Revenue. Don't run this rule on its own. Run Prepare Actual instead. |
| Push To Reporting Cube | Groovy Rule. Smart Push on form. | Executes Smart Push for any Adjustments made in a form. Pushes data to the reporting cube. |
| Roll Up | Rule | Rolls up the cube. Typically not needed, because aggregation is performed in the reporting cube. All dashboards and reporting forms are associated with the reporting cube for fast aggregation. |
| RptTotals to GSP | Rule | Takes the total for enabled custom dimensions to Any Member for Predictive Planning purposes. This allows users to run predictions at the Territory level and not at a detailed level. |
| Convert Weekly Data to Monthly in Form | Rule | Converts weekly data in a form to monthly data. Run this rule only when it is associated with a form, not from the Rules card. |
| Convert Weekly Data to Monthly | Rule | Converts weekly data to monthly data (batch conversion). |

A

Importing Data

You can download data import templates from within the application. The templates are generated based on the features you've enabled and the custom dimensions that were added.

To download the data import templates:



1. From the Home page, click **Application** and then click **Configure**



2. From the **Configure** list, select the module for which you want to download templates, and then from the **Actions** menu, select **Download Data Load Templates**.
3. Save the ZIP file locally, and then extract the CSV files.

Perform these tasks to import data:


1. Before importing data, configure the application as described in this help system and use **Configure** to import the dimensional metadata.

Note:

Oracle recommends that you use **Configure** to import metadata, which ensures that metadata is loaded correctly to work with the provided rules and forms. If you choose to use the Dimension Editor to load metadata, the primary hierarchy for pre-defined dimensions should go under the appropriate "Total" member for the dimension. The primary hierarchy for Custom dimensions should go under the appropriate "All" member for the dimension. You can add alternate hierarchies under the Root member as well, but the member should be a *Parent* or rollup type member. No parent or member should be set to aggregate to the root member of a dimension, because the root member can't be displayed on any form, dashboard, or report.

2. Specify the appropriate data import settings. See *Administering Data Load Settings*.
3. **Optional:** Make a backup copy of the data import templates to which you can revert, if necessary.
4. **Optional:** Back up the application.
5. If you created custom Smart Lists, import them before the associated data (available only for some modules.)

To identify the Smart List to import and their entry names:

- a. Click **Navigator** , and then from **Create and Manage**, click **Smart Lists**.
 - b. Select the Smart List, click **Edit**, and then **Entries**.
 - c. Note the associated names.
6. Open the templates in Microsoft Excel and customize them to specify your business data.
 7. **Optional:** To ensure that your data will import and calculate correctly, import it into a test application first.
 8. Import the data into your production application.
 9. For the first data import, run the rules required to process and calculate the data.

When customizing the templates:

- Don't enter zeros.
- To import data, you must have at least one member from all dimensions in the file to import.
- Remove columns for which you have no data. For example, if your periodicity is monthly, you can delete columns for Qtrly 1 - 4.
- If member names start with zeros (0), change numeric columns to text.

Importing Quota Planning Data

Use the provided templates to import data for Quota Planning.

Quota Planning templates are available based on the options selected when you enable features, and include any custom dimensions you added when you enabled features.

- ImpactedRevenueBookings.csv
 —If you are planning overlay targets by amount, loads current year and previous year impacted bookings.
- ImpactedUnitsBookings.csv
 —If you are planning overlay targets by units, loads current year and previous year impacted bookings.
- RevenueBookings.csv
 —If you are planning by amount, loads current year and previous actual bookings.
- UnitsBookings.csv
 —If you are planning by units, loads current year and previous actual bookings.

After importing data, run the **Process Actuals** rule. From the Home page, click **Rules**



, launch the **Process Actuals** rule, enter the historical years for which you have data, and then click **Launch**. Run this rule any time you import data.

Importing Advanced Sales Forecasting Data

Import data for Advanced Sales Forecasting.



Import the following data:

- Actuals data. Historical data is required to use predictions. Typically, load data to **OGS_CY Booking** as the Measure for historical data.
- Other data:
 - OGS_Pipeline
 - OGS_Committed Forecast
 - Quota. If you enabled integration with Quota Planning, run the data map to push data from Quota Planning to Advanced Sales Forecasting whenever the quota target is updated. See [Integrating Quota Planning and Advanced Sales Forecasting](#).
 - Load data to **OGS_Base Forecast**, to differentiate it from Adjustments.

 **Note:**

When loading the data for committed forecast and pipeline, you can load at specific product or customer level or at the territory level. If you are loading data at the territory level, load the data at Any Product, Any Customer, Any <Custom Dimension> level.


Advanced Sales Forecasting provides templates for importing data.

1. From the Home page, click **Application** , and then click **Configure** .
2. From the **Configure** list, click **Advanced Sales Forecasting**.
3. From the **Actions** menu, select **Download Data Load Templates**, and then save the file.

The following templates are available:

- Advanced Sales Forecasting CRM Data Load File.csv
- Advanced Sales Forecasting CRM Weekly Data Load File.csv
- Advanced Sales Forecasting Data Load File.csv
- Advanced Sales Forecasting Weekly Data Load File.csv

After importing data, run the **Prepare Actual** rule. From the Home page, click **Rules**

, launch the **Prepare Actual** rule, enter the historical years for which you have data, and then click **Launch**. Run this rule any time you import data.

B

Personalizing Sales Planning

Oracle Sales Planning Cloud offers a comprehensive, end-to-end data-driven solution. It includes a pre-build solution for Quota Planning and Advanced Sales Forecasting. Additionally, Sales Planning is extensible using the EPM Cloud framework to add additional configurations and personalization into your sales planning application with personalized navigation flows, measures, dashboards, and infolets.

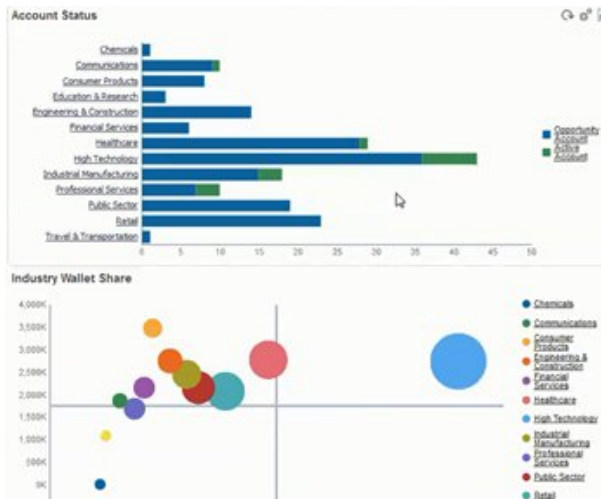
This topic shows some of the ways you can personalize Sales Planning. For example, you can enable territory and resource modeling and include optimization tools including account segmentation for strategic account planning and resource assignment.

Account Segmentation

With account segmentation, Sales Operations determines the best way to focus on relationships yielding the most value or indicating high opportunity by analyzing accounts by industry, revenue range, size, employee range, and status. For example, you can build a personalized navigation flow for account segmentation:



After reviewing the account structure, you can create segments to harness wallet share and market potential, re-segment accounts, and modify the territory to assign accounts accordingly. Use a personalized dashboard and charts for analysis:



Videos

Your Goal

Learn more about account segmentation in Sales Planning.

Watch This Video

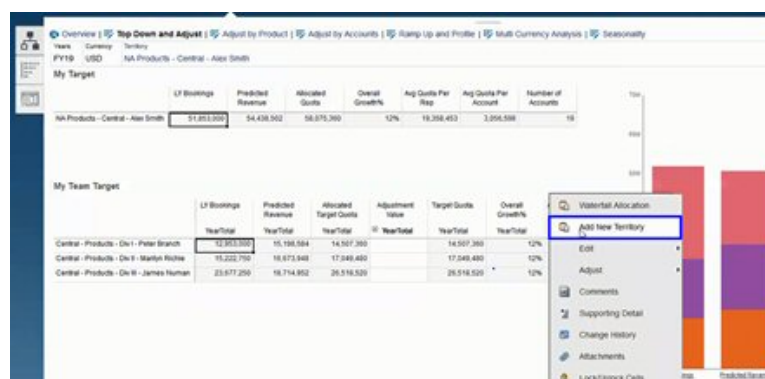


[Overview: Account Segmentation for Optimal Sales Strategy in Sales Planning Cloud](#)

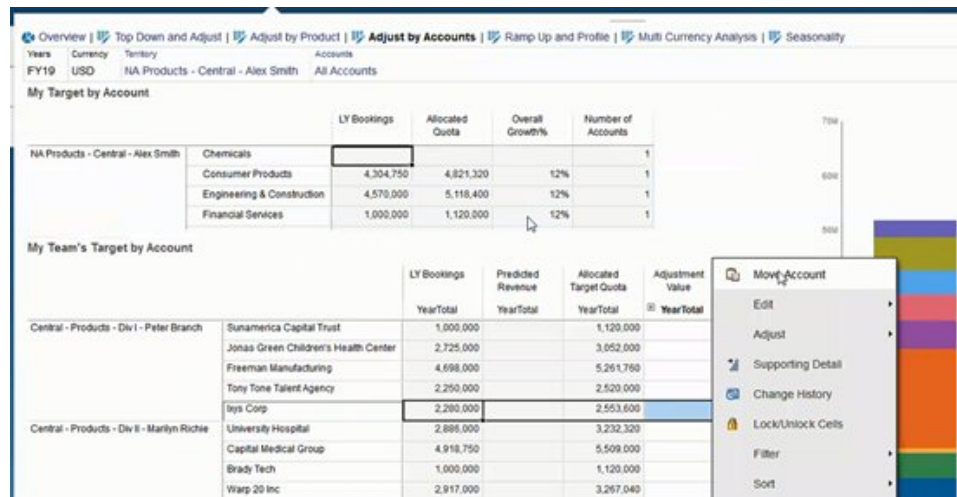
Territory Modeling

With territory modeling, Sales Operations and management can collaboratively define the territory hierarchy, creating effective coverage models, maximizing resources, and driving potential sales. Modeling can be done by combining region, product, channel, or a set of accounts.

Territories can be added, split, and combined, and accounts transferred accordingly. Quotas are planned against existing territories or by integrating new territories that are defined and managed by business administrators. For example, in this personalized Top Down and Adjust form, you see some of Alex Smith's Central Division sales reps by product, and information such as their allocated quotas, target quotas, predicted revenue, and overall growth. You can add a New Territory to set quotas for new territories:

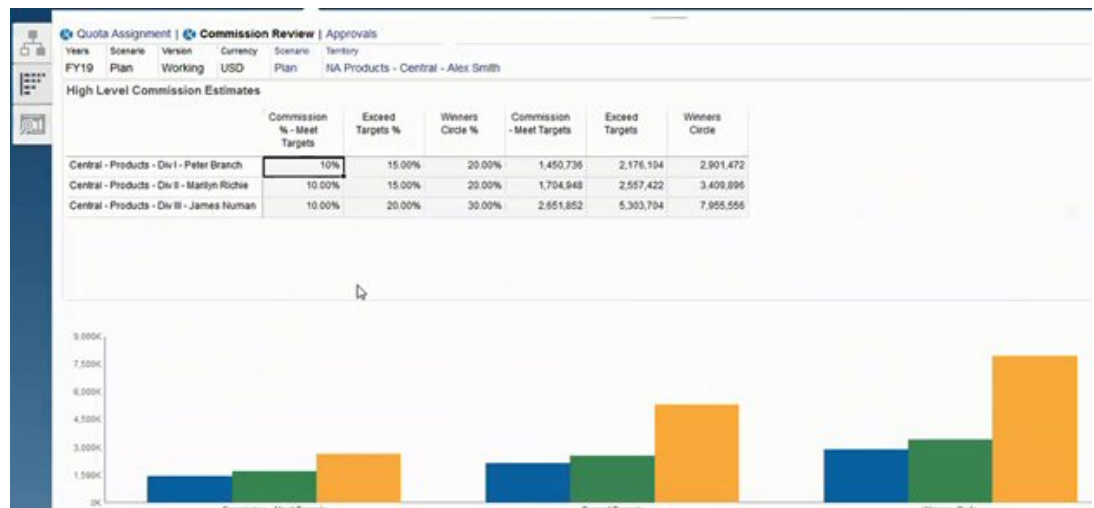


Accounts can then be moved across territories and transferred between reps to support the territory structure. For example, create an Action menu and associated rule to move accounts:



Commission Planning

With commission review, managers can define and analyze the compensation incentive scenarios that reward different levels of performance. For example, define measures and create a personalized commission review form:



Ramp Up and Profiling

With ramp up and profile, you can determine your team's true selling ability and capacity using weighted attributes *before* allocating final quota targets. This gives sales operations, sales managers, and regional managers the data-driven insight about individual rep potential that they need to set optimal quota targets and drive performance.

With ramp up profiling, reps are evaluated by attributes to determine if their targets:

- Are suitable given their capacity and experience
- Will grow their real potential
- Drive optimal outcomes

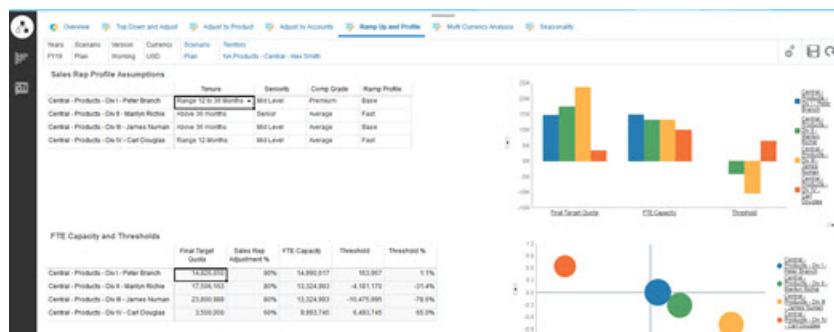
You can analyze reps using the following provided attributes that capture key data:

- Tenure—To reflect a rep's number of years on your team or with the company
- Seniority—To reflect a rep's level of experience and performance
- Compensation grade—To reflect a rep's salary, commission pay, or a combination of salary and other incentives and benefits
- Ramp up—To indicate how quickly a rep learns

This data-driven evaluation helps you ensure a rep's quota target is appropriate, actionable, won't cause huge commission payouts, and will grow potential.

Here's an example of how you, a Sales Manager, can use ramp up and profile. These examples show a sample application with additional configuration required.

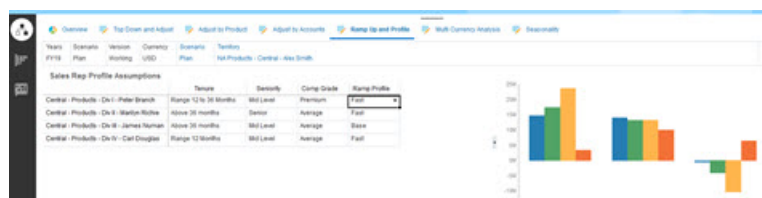
On the Ramp up and Profile tab, use the provided attributes that you can weight to identify your reps' true potential through FTE capacity. This helps ensure that their allocated quota targets are realistic and suitable.



You can add your own attributes to further evaluate rep potential using custom criteria.

Then, adjust each rep's attributes to recalculate their true capacity and to compare their capacity against their target quota; ensuring quotas aren't too high or low.

For example, a rep with a premium compensation grade and fast ramp up would have higher capacity and be expected to meet a higher quota target than other reps.



A high positive threshold means that a rep's quota isn't challenging enough based on their experience and compensation grade, and that they can likely sell more. A negative threshold indicates a high, challenging target that a rep might not reach.

| FTE Capacity and Thresholds | | | | | |
|--|--------------------|------------------------|--------------|-------------|-------------|
| | Final Target Quota | Sales Rep Adjustment % | FTE Capacity | Threshold | Threshold % |
| Central - Products - Div I - Peter Branch | 14,825,550 | 90% | 14,990,617 | 163,967 | 1.1% |
| Central - Products - Div II - Marilyn Richie | 17,506,163 | 80% | 13,324,993 | -4,181,170 | -31.4% |
| Central - Products - Div III - James Numan | 23,800,988 | 80% | 13,324,993 | -10,475,995 | -78.9% |
| Central - Products - Div IV - Carl Douglas | 3,500,000 | 60% | 9,993,745 | 6,493,745 | 65.0% |

You can make quota adjustments based on threshold analysis, for example, you could assign more quota for a rep at a positive capacity, and lower a high quota if there is insufficient capacity.

As a Sales Manager, this ability to evaluate the targets of each rep based on data, not intuition, and each rep's unique attributes and potential is invaluable; enhancing quota planning and best driving results.

Overview of extending Sales Planning to use ramp up and profiling for quota planning:

1. Create Smart Lists for some of the measures. For example:
 - Start Month—Months/year combination or date. Using date results in more complex calculations.
 - Seniority—Senior, Mid-level, Junior
 - Comp Grade—Premium, High, Average, Below Average
 - Ramp Profile—Base, Fast, Slow
2. Add measures and assign Smart Lists.
 - Start Month
 - Seniority
 - Comp Grade
 - Ramp Profile
3. Add member formulas for **Sales Rep Adjustments, FTE Capacity, Threshold, and Threshold %**.

For Sales Rep Adjustment, define weights for scores. For example:

- Tenure—25 Points
- Seniority—25 Points
- Comp Grade—30 Points
- Ramp up—20 Points

Define the scores. For example:



- Tenure (Quota Year Start Month – Start Month)
 - Range < 12 Months—10 Points
 - Range 12 to 36 Months—15 Points
 - Range > 36 Months—25 Points
- Seniority
 - Senior—25 Points
 - Mid-level—20 Points
 - Junior—10 Points

- Comp Grade
 - Premium—30 Points
 - High—20 Points
 - Average—10 Points
- Ramp up
 - Base—25 Points
 - Fast—20 Points
 - Slow—10 Points

Define the formulas. For example:

- **Sales Rep Adjustment %** = Criteria / Total Score, using a weighted score of the Sales Rep attributes.
 - **FTE Capacity** = Sales Rep Adjustment % × Last Year Bookings Per Rep @ All Territory
 - **Threshold** = FTE Capacity – Final Target Quota
 - **Threshold %** = Threshold / FTE Capacity
4. Create custom forms. For example:
 - Ramp Up and Sales Rep Adjustment
 - Ramp up, Commissions and Sales Rep Adjustment
 - Ramp Up Sales Profile Bar Chart
 - Ramp Up Sales Profile Bubble Chart
 5. Create a dashboard.
 6. Add the dashboard to the navigation flow.

Videos

| Your Goal | Watch This Video |
|---|---|
| For Sales Operations, Sales Managers and Regional Managers, learn how to analyze sales reps by key data-driven attributes to identify their true capacity and define appropriate and actionable quota targets for optimal quota attainment. |  Overview: Ramp up and Profile for Analyzing Reps and Setting Optimal Quotas |
| Learn more about Sales Planning. |  Overview: Take a Tour of Sales Planning Cloud |

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Integrating with Oracle Engagement Cloud

Related Topics

- [Integrating Dimension Metadata from Oracle Engagement Cloud with Sales Planning](#)
You can extract dimension metadata from Oracle Engagement Cloud and import it into Oracle Sales Planning Cloud for use with Quota Planning.
- [Integrating Sales Data from Oracle Engagement Cloud with Sales Planning](#)
You can extract historical actual order data from Oracle Engagement Cloud and import it into Oracle Sales Planning Cloud for use with Quota Planning.


Integrating Dimension Metadata from Oracle Engagement Cloud with Sales Planning

You can extract dimension metadata from Oracle Engagement Cloud and import it into Oracle Sales Planning Cloud for use with Quota Planning.

There are several methods for integrating your Quota Planning data and metadata with Engagement Cloud. For example, you can use Data Management or the metadata import in Sales Planning.

This topic gives an overview of how to export data from Engagement Cloud using Oracle BI, and then import the data to Sales Planning using Data Management.

For details on using Data Management, see [Administering Data Management for Oracle Enterprise Performance Management Cloud](#).

1. In Oracle BI, create a report that returns the dimension members you want to export for loading into Sales Planning.
2. In Engagement Cloud, navigate to **Reports and Analytics**, click **Browse Catalog**, select the report, and then export the file in CSV format.
3. Import the data to Sales Planning:
 - a. In Sales Planning, navigate to **Data Management**: From the Home page, click **Navigator** , and then under **Integration**, click **Data Management**. You can also perform many of the steps using the simplified user interface: From the Home page, click **Application**, then **Data Exchange**, and then **Data Integration**.
 - b. In Data Management, import the file. See [Integrating Metadata](#) for details.
 - c. After running the data load rule, make sure to refresh the outline.
4. In Sales Planning, verify that the new members were loaded.

Tutorials

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

Your Goal

Learn about integrating dimension metadata from Oracle Engagement Cloud with Sales Planning.

Learn How

 [Integrating Dimension Metadata with Oracle Sales Planning Cloud](#)


Integrating Sales Data from Oracle Engagement Cloud with Sales Planning

You can extract historical actual order data from Oracle Engagement Cloud and import it into Oracle Sales Planning Cloud for use with Quota Planning.

There are several methods for integrating your Quota Planning data and metadata with Engagement Cloud. For example, you can use Data Management or the data import in Sales Planning.

This topic gives an overview of how to export data from Engagement Cloud using Oracle BI, and then import the data to Sales Planning using Data Management.

For details on using Data Management, see [Administering Data Management for Oracle Enterprise Performance Management Cloud](#).

1. In Oracle BI, create a report that returns the order data for the year that you want to export for loading into Sales Planning.
2. In Engagement Cloud, navigate to **Reports and Analytics**, click **Browse Catalog**, select the report, and then export the file in CSV format.
3. Import the data to Sales Planning:
 - a. In Sales Planning, navigate to **Data Management**: From the Home page, click **Navigator** , and then under **Integration**, click **Data Management**. You can also perform many of the steps using the simplified user interface: From the Home page, click **Application**, then **Data Exchange**, and then **Data Integration**.
 - b. In Data Management, import the file. See [Integrating Data Using a File](#) for details.
 - c. After running the data load rule, make sure to refresh the outline.
4. In Sales Planning, run the **Process Actuals** rule: Navigate to **Rules**, launch **Process Actuals**, select the year, scenario, and version, and then click **Launch**. The prompts let you aggregate actual data from the selected year and copy it to the selected version and scenario.
5. Now there is data in the form, and you're ready to start the quota planning process by setting targets based on the growth rate from last year's revenue. See [Setting Quota Targets](#).


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Your Goal

Learn about integrating sales data from Oracle Engagement Cloud with Sales Planning.

Learn How

 [Integrating Sales Data from Engagement Cloud with Oracle Sales Planning Cloud](#)
