

Oracle® Fusion Cloud EPM

Administering Sales Planning



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Oracle Fusion Cloud EPM Administering Sales Planning,

E95906-28

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Documentation Accessibility

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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.
- [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.


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

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

About Quota Planning

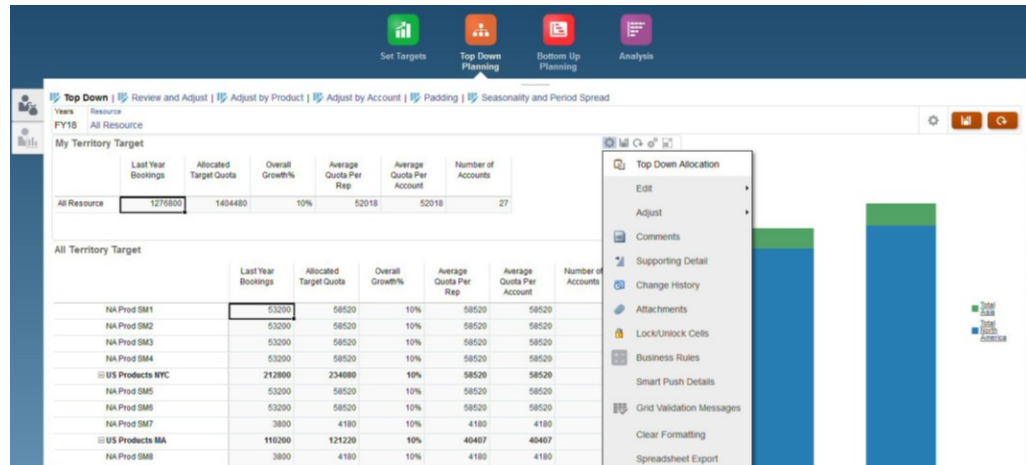
The Quota Planning business process offers top-down and bottom-up target quota planning by territory, product, account, or other custom dimensions. Use Predictive Planning and *what if scenario planning* to explore and compare different quota scenarios for informed decision making. Quota Planning builds 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 Sales Planning. 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](#)

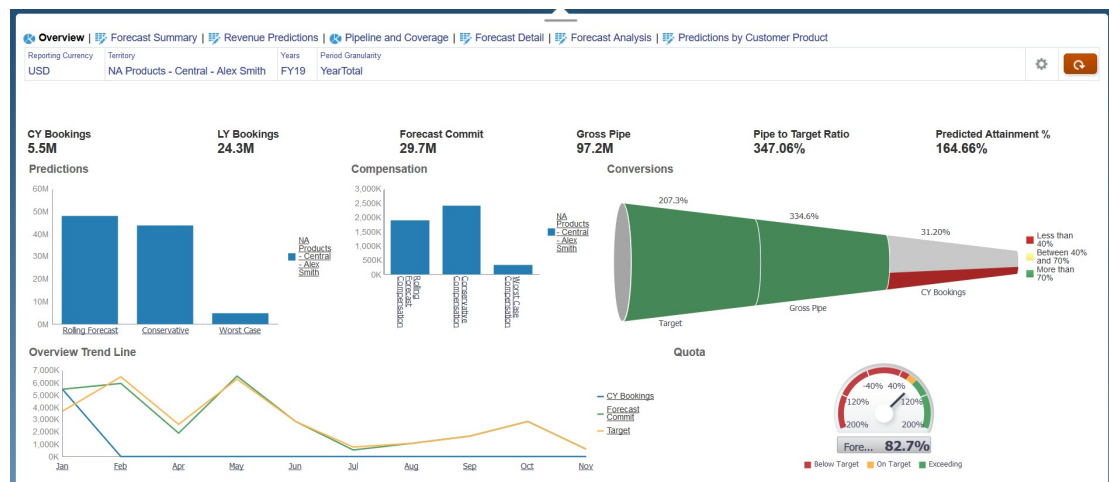
About Advanced Sales Forecasting

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 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

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

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.

Learn How

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

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.	 Overview: Key Account Planning in Sales Planning Cloud

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.



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.

3

Setting Up Your Application

Related Topics

- [Implementation Checklist](#)
Perform these tasks to set up Sales Planning.
- [Creating an Application](#)
To get started, create a Sales Planning application.
- [Enabling Essbase Hybrid Block Storage Option \(BSO\) Cubes](#)

Implementation Checklist

Perform these tasks to set up Sales Planning.

1. Create a Sales Planning 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](#)
5. If you are using Key Account Planning, enable and configure Key Account Planning and import metadata.
If you want to enable integration between Key Account Planning and Quota Planning, enable Quota Planning first. Then when enabling Key Account Planning, in the

Integration To section on the **Enable** page for Key Account Planning, select **Quota for Targets**.

- [Enabling Key Account Planning](#)
 - [Configuring Key Account Planning](#)
 - [Importing Key Account Planning Metadata and Data](#)
6. 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**.

7. 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](#).





8. Run rules to process 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.
- Quota Planning—**Process Actuals** rule. 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](#).
 - Advanced Sales Forecasting—**Prepare Actual** and **Forecast Prep** rules. For more information about Advanced Sales Forecasting rules, see [Advanced Sales Forecasting Rules](#).
 - Key Account Planning—**Seed Baseline Plan**. Run this rule at the start of a new planning process as a method to pre-populate the base plan after you load historical data. For more information about Key Account Planning rules, see [Key Account Planning 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**.
- To see only Key Account Planning rules, click **All Cubes** next to the Filter, and from the **Cube** list, select **OEP_KAP** or **OEP_KREP**.

9. For Key Account Planning, run the data map to push data to the reporting cube. From the Home page, click **Application**, then click **Data Exchange**, and then click the **Data Maps** tab. From the **Actions** menu next to **Key Accounts to Reporting**, click **Push Data**.
10. Set substitution variables for Quota Planning. See [Setting Substitution Variables for Quota Planning](#).
11. Set required user variables. See [Setting User Variables](#).

12. For Advanced Sales Forecasting and Key Account Planning, set application settings for predictions to indicate where to find actual values. See [What Application and System Settings Can I Specify?](#)
13. Create the required user and group accounts and grant permissions. See [Getting Started with Oracle Enterprise Performance Management Cloud for Administrators](#).
14. 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**.
15. 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](#).
 - Set up predictions to run automatically with Auto Predict. See [Setting Up Predictions to Run Automatically with Auto Predict](#).
 - 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](#)
 - [Designing with Reports 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

Your Goal

Learn more about creating an application, enabling, and configuring Advanced Sales Forecasting.

Learn how to configure Key Account Planning in Sales Planning. In this tutorial, you learn to create a Sales Planning application, enable Quota Planning, configure Key Account Planning, and set time period granularity. 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.

Learn what tasks you need to complete after configuring Key Account Planning in Sales Planning. In this tutorial, see how to set values to Quota Planning substitution variables, add or import metadata, import historical data, assign values to user variables, run rules to Process Actuals and Seed Baseline Plans, and run a data map to push data to the reporting cube.

Learn about setting up users and groups.

Learn about setting up roles and permissions.

Learn how you can export URLs from Sales Planning so you can embed artifacts in other systems such as ERP Cloud Financials. Use direct links to represent most business process artifacts alongside your other source system pages, enhancing your processes with functionally-tailored forms, grids, reports, and dashboards for seamless cross-system navigation.

Watch This Video



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



[Configuring Key Account Planning in Oracle Sales Planning Cloud](#)



[Performing Post Configuration Tasks for Key Account Planning in Oracle Sales Planning Cloud](#)



[Setting Up Users and Groups for Oracle Sales Planning Cloud](#)



[Setting Up Roles and Permissions in Oracle Sales Planning Cloud](#)



[Overview: Embed Content Using Direct Links](#)

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.

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.

Learn How



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



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

Your Goal

Learn how to manage security in Access Control and set up access permissions in Sales Planning.


See how to define and run file-based data integrations in Sales Planning.

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.

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.

Learn How

 [Setting Up Sales Planning Security - Tutorial](#)

 [Loading Data into Sales Planning using Data Integration - Tutorial](#)

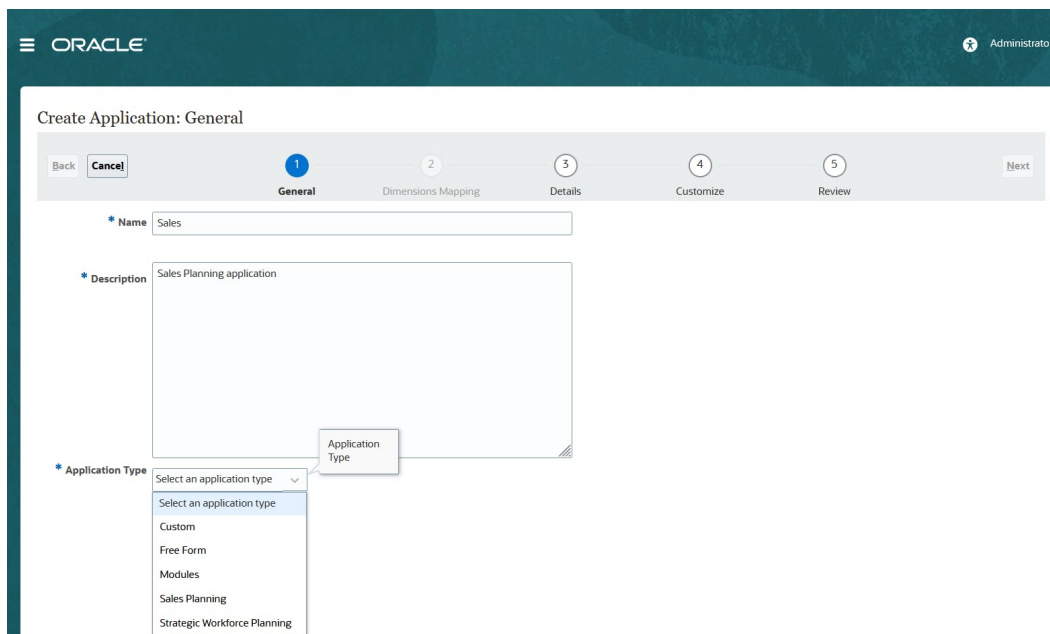
 [Designing Navigation Flows in Sales Planning](#)

 [Designing Forms in Sales Planning](#)

Creating an Application

To get started, create a Sales Planning application.

1. On the landing page, click **SELECT** under **Planning** to view available options for creating a Planning application. Under **Create a new application**, click **START**. Enter an application name and description, and for **Application Type**, select **Sales Planning**, and then click **Next**.



If you are using the legacy Oracle Sales Planning Cloud SKU, log in and select **Start** under **Sales**. Enter an application name and description and then click **Next**.

2. 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.

- **Task Flow Type**—Choose a **Task Flow Type** for the application:
 - **Task List**—Task lists are a classic feature which guides users through the planning process by listing tasks, instructions, and end dates.
For more information about task lists, see *Administering Task Lists in Administering Planning*.
 - **EPM Task Manager**—This is the default option for new applications. EPM Task Manager provides centralized monitoring of all tasks and provides a visible, automated, repeatable system of record for running an application.
For more information about EPM Task Manager, see *Administering Tasks with Task Manager in Administering Planning*.



 **Note:**

There is no migration from existing Task Lists to the EPM Task Manager. If you want to continue using classic Task Lists, select the **Task List** option during application creation.

- **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**—Sales Planning delivers a reporting cube called **SALESREP**. You can configure the dimensionality of the cube for your reporting requirements.
3. Click **Next**, review your selections, and then click **Create**.
 4. Click **Configure** to enable and configure the application. See:
 - [Configuring Quota Planning](#)
 - [Configuring Advanced Sales Forecasting](#)

- [Configuring Key Account Planning](#)

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 Sales Planning 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.
- If you enabled Key Account Planning:
 - **OEP_KAP**—Planning input cube for data entry (BSO)
 - **OEP_KREP**—Reporting cube (ASO)

Enabling Essbase Hybrid Block Storage Option (BSO) Cubes

Hybrid BSO cubes support some Aggregate Storage Option (ASO) capabilities in addition to BSO capabilities. Hybrid cubes provide many benefits including smaller database and application size, better cube refresh performance, faster import and export of data, improved performance of business rules, and faster daily maintenance of the business process.

Beginning with Release 21.04, Sales Planning supports Essbase Hybrid Block Storage Option (BSO) cubes. Any new applications you create are automatically created with Hybrid mode enabled.

If you created your application prior to Release 21.04, or if you create a new application using a release provisioned prior to Release 21.04, you can enable Hybrid mode to support Essbase hybrid block storage option (BSO) cubes if it's not already enabled.



Note:

Key Account Planning requires Hybrid Mode to be enabled.

Prerequisite: In Quota Planning, for any sparse dimension parent set to **Dynamic Calc**, change the setting to **Store**.

To enable Hybrid cubes for existing applications:

1. From the Home page, select **Application** and then **Overview**.
2. From **Actions**, select **Enable Hybrid Mode**.

Hybrid mode notes:

- If your subscription is not deployed to use Hybrid-enabled Essbase, you won't see the **Enable Hybrid Mode** option. You must first upgrade Essbase and then enable Hybrid mode. Upgrading the Essbase version is a self-service operation using the `recreate EPM Automate` command.

See [Recreate](#) for information on upgrading Essbase.

- You'll see a validation error message when you enable Hybrid if a sparse dimension parent in Quota Planning is set to **Dynamic Calc**.
- After you enable Hybrid mode, you can't make a sparse dimension parent **Dynamic Calc** in Quota Planning.

For more information, see:

- [About Essbase in EPM Cloud](#) in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*
- [recreate](#) in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*

 **Note:**

Because Sales Planning supports Hybrid cubes, when Hybrid Mode is enabled, you can set up predictions to run automatically with Auto Predict. For more information, see [Setting Up Predictions to Run Automatically with Auto Predict](#).

4

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 4-1 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 4-1 (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. 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

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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

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 4-2 Configuring Quota Planning

Configure	Description
Accounts, Product, Geography	Import the dimension members (master data) and hierarchy that represent your business's accounts or customers, products, or geography. For the Accounts dimension, create a hierarchy with logical parent members instead of a flat structure.

Table 4-2 (Cont.) Configuring Quota Planning

Configure	Description
<Custom Dimension>	Import the dimension members (master data) and hierarchy to populate the <customName> dimension. Use if you enabled the <customName> dimension.
Territory	Import the dimension members (master data) and hierarchy that represent your business's sales territories.
Resource	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.
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. 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>
Quota Measures	<p>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.</p> <p>See Adding Custom Measures.</p>

Table 4-2 (Cont.) Configuring Quota Planning


Configure	Description
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

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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

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](#).

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 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**.

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 4-3 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
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

5

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.
- [Integrating Quota Planning and Advanced Sales Forecasting](#)
You can push the target quota from Quota Planning to Advanced Sales Forecasting.
- [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 5-1 Enabling Advanced Sales Forecasting Features



Enable	Description
Planning By	<p>Enable sales forecast planning by territory or resource and add custom dimensions. 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 5-1 (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
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Learn about enabling Advanced Sales Forecasting.	 Creating and Enabling Advanced Sales Forecasting in Oracle Sales Planning Cloud



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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

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	Watch This Video
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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. Sales Planning 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.

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**.

Integrating Quota Planning and Advanced Sales Forecasting

You can push the target quota from Quota Planning to Advanced Sales Forecasting.

Sales Planning 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	Watch This Video
Learn more about integrating Quota Planning and Advanced Sales Forecasting.	 Integrating Quota Planning and Advanced Sales Forecasting in Oracle Sales Planning Cloud

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 5-2 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).

Table 5-2 (Cont.) Advanced Sales Forecasting Rules

Rule	Type	Description
Prepare Actual	Ruleset	<p>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.</p> <p>The ruleset includes:</p> <ul style="list-style-type: none"> • Process Actual • Execute Data Push <p>Run this rule at these times:</p> <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	<p>Copies data from Actual to Forecast. Don't run this rule on its own. Run Forecast Prep instead.</p>
Process Actual	Rule	<p>Copies data from OGS_CY Bookings to OGS_Sales Revenue. Don't run this rule on its own. Run Prepare Actual instead.</p>
Push To Reporting Cube	Groovy Rule. Smart Push on form.	<p>Executes Smart Push for any Adjustments made in a form. Pushes data to the reporting cube.</p>
Roll Up	Rule	<p>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.</p>
RptTotals to GSP	Rule	<p>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.</p>

Table 5-2 (Cont.) Advanced Sales Forecasting Rules

Rule	Type	Description
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).

6

Configuring Key Account Planning

Related Topics

- [Considerations and Prerequisites](#)
- [Enabling Key Account Planning](#)
- [Configuring Key Account Planning](#)
- [Post Configuration Tasks](#)
- [Integrating Quota Planning and Key Account Planning](#)
You can push the quota from Quota Planning to Key Account Planning.
- [Key Account Planning Rules](#)
- [Key Account Planning Calculations](#)

Considerations and Prerequisites

Considerations and prerequisites for implementing Key Account Planning:

- See the [Implementation Checklist](#) for an overview of the steps required to set up, enable, and configure.
- Key Account Planning requires **Hybrid Mode** to support Essbase hybrid block storage option (BSO) cubes.

Beginning with Release 21.04, Sales Planning supports Essbase Hybrid Block Storage Option (BSO) cubes. Any new applications you create are automatically created with Hybrid mode enabled.

If you created your application prior to Release 21.04, you can enable Hybrid mode to support Essbase hybrid block storage option (BSO) cubes if it's not already enabled. See [Enabling Essbase Hybrid Block Storage Option \(BSO\) Cubes](#).
- Accounts and Product are required dimensions.
- You can import target values from Quota Planning to Key Account Planning.
- You can create either a **Volume and Revenue** model or a **Revenue** only model.

Enabling Key Account Planning

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

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

 **Note:**

- Define all optional and custom dimensions the first time you enable features. 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.

If you will be using Quota Planning to import target values from Quota Planning to Key Account Planning, you must enable Quota Planning before you can select the **Quota for Targets** integration option.

Prerequisite:

Key Account Planning requires that the application uses Hybrid mode. See [Enabling Essbase Hybrid Block Storage Option \(BSO\) Cubes](#).

1. From the Home page, click **Application**



, and then click **Configure** .

2. From the **Configure** list, select **Key Account 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 6-1 Enabling Key Account Planning Features

Enable	Description
Planning By	<p>Enable key account planning by territory or resource.</p> <p>Select the type of hierarchy for key account planning. 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 Key Account Planning.</p>

Table 6-1 (Cont.) Enabling Key Account Planning Features

Enable	Description
Planning Features	<p>Select planning features.</p> <ul style="list-style-type: none"> • Baseline Planning—Select either Volume and Revenue or Revenue. By default, Volume and Revenue is selected. In a Revenue only model: <ul style="list-style-type: none"> – There are no measures added for Volume. – There are no calculations for Revenue; Revenue is direct input only. – Uplift is calculated based on Revenue instead of Volume. – Variable spending is calculated as a percentage of Revenue. – There are no per unit contract measures added. – Dashboards and forms reflect Revenue only. • Building Block Planning—Use building blocks such as different pricing, placements, and product variants to identify the additional non promotional sales plan adjustments • Trade Promotions Planning—Add, analyze and adjust trade promotions to strategically close the gap between your target and plan, identifying each promotion’s incremental uplift percent on the base that is planned by account and product group, 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. Includes: <ul style="list-style-type: none"> – 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 • Customer Profit and Loss—Analyze the impact of your promotions: <ul style="list-style-type: none"> – By Customer and Product Group – Revenue and Uplift Revenue – Trade Spends – Variable and Fixed – COGS – Contract measures • Contract Measures and Cost of Sales—Available if you enabled Trade Promotions Planning and Customer

Table 6-1 (Cont.) Enabling Key Account Planning Features

Enable	Description
Intelligent Performance Management	<p>Profit and Loss. Adds measures for contract assumptions and entries in the Customer Profit and Loss. You can add additional measures if needed.</p> <ul style="list-style-type: none"> • Cost of Sales—Available if you enabled Trade Promotions Planning and Customer Profit and Loss. Adds measures for cost of sales assumptions and entries in the Customer Profit and Loss. <p>Select Predict Base Forecast to enable the ability to predict the baseline plan based on historical actuals.</p> <p>If you have historical volume or 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 to form your baseline plan.</p>
Integration To	<p>Select Quota for Targets to enable the ability to integrate target quota data from Quota Planning.</p> <p>Quota Planning must be enabled before you can select this option.</p> <p>Enabling this option creates a data map: Quota to Target in Key Account Planning Revenue (if the Quota Planning unit of measure is Amount) or Quota to Target in Key Account Planning (if the Quota Planning unit of measure is Units).</p> <p>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 sales target for key accounts and product group in Key Account Planning. The data map pushes sales data only (not promotional data).</p>
Map/Rename Dimensions	<ul style="list-style-type: none"> • Add custom dimensions to your application. Product and Accounts are provided; you can rename them if needed. 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>

Sign out, and then sign in again. The Key Account Planning artifacts are populated, including a navigation flow, dimensions, forms, and measures, based on the features you enabled.



What Happens When You Enable Key Account Planning

When you enable Key Account Planning, artifacts are added to the application, depending on what you enabled:

- Cubes—an input cube (OEP_KAP) and a reporting cube (OEP_KREP).
- Dimensions and members, including:
 - BaselinePromotions (in OEP_KAP) and members for building blocks and promotions.
 - Promotion Type (in OEP_KREP).
 - Plan Element dimension is shared with Advanced Sales Forecasting.
 - Territory, Product, and Accounts dimensions are shared with Advanced Sales Forecasting and Quota Planning.
- Measures, including Volume, Revenue, Trade Promotion, Building Blocks, and Cost Assumptions for contracts and cost of sales, Financial, and KPIs.
 - Contract costs are not associated with the promotions. You can enter contract rates at higher levels of the products and accounts hierarchies and push the contract assumptions down the hierarchy. At the lowest level of the hierarchy, you can make an adjustment to the contract percentage. You can also load contract measures at the leaf level. Contract measures, such as a percentage, per unit (in a volume-based application), or flat fee, are used to calculate costs.
 - Cost of Sales measures includes Cost of Goods Sold (COGS). COGS are defined per unit in a volume-based application. They can be entered or loaded for products across any customer. COGS are used in the Customer Profit and Loss calculations.
- Navigation flow.
- Forms and dashboards.
- Rules. See [Key Account Planning Rules](#)
- Data maps.
 - **Key Accounts to Reporting**
 - **Key Promotions to Reporting** if you enabled **Trade Promotions**
 - **Quota to Target in Key Account Planning Revenue** if you enabled integration between Quota Planning and Key Account Planning
- Smart Lists—**OEP_AccountsSM**, **OEP_ProductSM**, **OEP_TPTypeSM**.
- Data load templates to load data for Key Account Planning based on the features that are enabled.


Configuring Key Account Planning

Perform these steps after enabling Key Account Planning features to configure features.


1. From the Home page, click **Application** , and then click **Configure** .
2. From the **Configure** list, select **Key Account Planning**.
3. Click **Time Period Configuration** and make your selections for current fiscal year, period, and the start year for the plan, and then click **Save**.

Post Configuration Tasks

After configuring Key Account Planning, perform these tasks.

1. Import metadata. See [Importing Key Account Planning Metadata and Data](#).
2. Refresh the cube after configuring and any time you import metadata.
3. Import data. See [Importing Key Account Planning 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. In preparation for planning, run the rule **Seed Baseline Plan**. From the Home page, click  **Rules**, launch the **Seed Baseline Plan** rule, enter values, and then click **Launch**.
7. Run the datamap to push data to the reporting cube. From the Home page, click **Application**, then click **Data Exchange**, and then click the **Data Maps** tab. From the **Actions** menu next to **Key Accounts to Reporting**, click **Push Data**.

Videos

Your Goal	Watch This Video
Learn what tasks you need to complete after configuring Key Account Planning in Sales Planning. In this tutorial, see how to set values to Quota Planning substitution variables, add or import metadata, import historical data, assign values to user variables, run rules to Process Actuals and Seed Baseline Plans, and run a data map to push data to the reporting cube.	 Performing Post Configuration Tasks for Key Account Planning in Oracle Sales Planning Cloud

Importing Key Account Planning 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_KAP**. 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.

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. Sales Planning includes templates for loading data. See [Importing Key Account Planning Data](#). See [Importing Data](#) for general information about importing data.

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**.



Integrating Quota Planning and Key Account Planning

You can push the quota from Quota Planning to Key Account Planning.

Sales Planning uses data maps for out of box integration between Quota Planning and Key Account Planning for connected sales planning. After completing the quota planning process, you can push the target quota from Quota Planning to Key Account Planning to set as a sales target for key accounts and product group.

This section describes the overall process for integrating.

To implement integration between Quota Planning and Key Account Planning, follow this overall process.

1. Enable and configure Quota Planning.
2. Enable and configure Key Account Planning. In the **Integration To** section on the **Enable** page, you must select **Quota for Targets**.
Enabling Key Account Planning with this option creates a data map: **Quota to Target in Key Account Planning Revenue**. The data map's detailed mappings are automatically populated between the source dimension members in Quota Planning and the target dimension members in Key Account Planning.
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**.

 **Note:**

If metadata has changed, from the **Actions** menu for **Quota to Target in Key Account Planning Revenue**, select **Synchronize** to synchronize dimensions and members between source and target.

- b. From the **Actions** menu for **Quota to Target in Key Account Planning Revenue**, select **Push Data**.
- c. To push the data to the Key Account Planning reporting cube, from the **Actions** menu for **Key Accounts to Reporting**, select **Push Data**.

The final target quota value (OQP_Adjusted Target Quota and OQP_Padding Adjustment Value) from Quota Planning is pushed to OEP_Base Target in the Forecast scenario in Key Account Planning.

If the Quota Planning unit of measure is **Amount**, target values are pushed to Revenue in Key Account Planning. If the Quota Planning unit of measure is **Units**, target values are pushed to Volume in Key Account Planning.

Units from Quota Planning can be pushed only to a Key Account Planning **Volume and Revenue** model. Revenue from Quota Planning can be pushed to a Key Account Planning **Volume and Revenue** model or to a **Revenue** model.

You see the allocated quota from Quota Planning as the starting point for the target in Key Account Planning. Data is pushed to all levels of the hierarchy (for example, by territory, product, and accounts). You can review the target data in dashboards in Key Account Planning, for example in **Gap Analysis**, where you can review the target, baseline, gap, and uplift for revenue and volume.

Rerun these data maps whenever the target quota is updated.

Key Account Planning Rules

Review the rules used to calculate values in Key Account Planning.



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

 **Tip:**

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

In preparation for planning, run the **Seed Baseline Plan** rule after loading actuals.

Table 6-2 Key Account Planning Rules

Rule	Description	How to Run
Seed Baseline Plan	Seeds the baseline plan after loading actuals data. Takes last year's actuals data and pushes it to the forecast baseline plan for the next year. Run this rule at the start of a new planning process as a method to pre-populate the base plan after you load historical data.	From the Home page, click Rules , and then launch Seed Baseline Plan .
Prepare Forecast	After initially loading actuals, when you subsequently load updated actuals for recent periods (for example, every month to get the latest data), run this rule to seed the new period actuals into forecast and keep the remaining periods as forecast. It also copies the data to reporting cube.	From the Home page, click Rules , and then launch Prepare Forecast .
Calculate	In a volume and revenue model, calculates the revenue from volume and price. Calculate takes <code>volume x avg selling price</code> to calculate revenue.	Runs when you click Save on these forms: <ul style="list-style-type: none"> • What If - Uplift Revenue • What If - Uplift Volume • Set Up Building Blocks
Contract Rates	Spreads the specified contract rates for customer and product through the hierarchy.	Runs when you click Save on this form: Enter Contract Rates .
Cost of Sales	Spreads the specified cost of sales for product through the hierarchy across any customer.	Runs when you click Save on this form: Enter Cost of Sales .
Calculate Cost Measures	Calculates the cost measures based on the input drivers for contract rates and Cost of Sales.	From the Home page, click Rules , and then launch Calculate Cost Measures .
Form Push To Reporting	Pushes calculated data from the input cube to the reporting cube for instant aggregations.	Runs when you click Save on these forms: <ul style="list-style-type: none"> • Set Up Building Blocks – Revenue • Total BaseLine – Revenue • Total BaseLine - Volume

Table 6-2 (Cont.) Key Account Planning Rules

Rule	Description	How to Run
Add Promotion	Adds a promotion based on the values you enter.	<ol style="list-style-type: none"> 1. From the Home page, click Key Account Planning and then click Trade Promotions. 2. Right-click in Set Up Promotions and then click Add Promotion.
Promotion to Product	Associates a product with a promotion, and assigns the promotion volumes and trade spends to selected products as uplifts and trade spends.	<p>Runs when you click Save on this form: Promotion to Product.</p> <ol style="list-style-type: none"> 1. From the Home page, click Key Account Planning and then click Trade Promotions. 2. Right-click a promotion and then click Assign Product.
Multi Product Assumptions Update	Updates all products that are included in a promotion for any change in assumption.	Runs when you click Save on this form: Set Up Trade Promotions .
Remove Assignment	Removes a product's assignment from a promotion.	<ol style="list-style-type: none"> 1. From the Home page, click Key Account Planning and then click Trade Promotions. 2. In the Promotion to Product area, right-click a product and then click Remove Assignment.
Remove Promotion	Removes a promotion and recalculates.	<ol style="list-style-type: none"> 1. From the Home page, click Key Account Planning and then click Trade Promotions. 2. Right-click a promotion and then click Remove Promotion.
Calculate Promotion Days by Product	Calculates the number of promotion days per product for all the applied promotions.	Runs when you click Save on this form: Set Up Trade Promotions .

Table 6-2 (Cont.) Key Account Planning Rules

Rule	Description	How to Run
Promoted Period (and Calculate Promoted Period)	Calculates the promoted period and non promoted period volume and revenue across the promotion and products.	From the Home page, click Rules , and then launch Promoted Period . Or: <ol style="list-style-type: none"> From the Home page, click Key Account Planning and then click Trade Promotions. Right-click a promotion, and then click Calculate Promoted Period.
Promotion Adjustment	After promotions are calculated and assigned to products, if adjustments are made, this rule posts the adjustments in the appropriate promotion periods.	Runs when you click Save on this form: Promotion to Product . <ol style="list-style-type: none"> From the Home page, click Key Account Planning and then click Trade Promotions. In the Promotion to Product area, enter an absolute value in the Adjustment column and then click Save.
Copy to WhatIf	Calculates and pushes the uplifts for different what-if scenarios.	Runs when you click Save on this form: Enter What If Percentage .
What If Push	Pushes any manual adjustments to what-ifs to the reporting cube for only those products that have changed.	Runs when you click Save on this form: What If - Uplift Volume .

ROI and ROI on Uplift are calculated as member formulas.

Key Account Planning Calculations

Here are how some of the Key Account Planning measures are calculated:

- Total Volume = Baseline + Uplift
- Baseline = Base + Building Blocks
- Uplift = Uplift % x Baseline for Promoted Period
- Baseline for Promoted Period = Baseline x Total Promo Days for Each Promotion / Total Days in Period
- Promoted Period Volume/Revenue = Baseline for Promoted Period + Uplift
- Non Promoted Period Volume/Revenue = Total Volume/Revenue – Promoted Period Volume/Revenue

- Total Promo Days = Total Days in a period where promotions are run. If multiple promotions are run with overlapping days, those overlapping days will be not considered. For example, if a promotion is run from 1 June to 10 June and another promotion is run from 7 June to 25 June, Total Promo Days is 25 days.
- Promoted Volume Per Promoted Day = Promoted Period Volume / Total Promo Days
- Variable Spends = Promoted Volume Per Promoted Day x Variable Cost Per Unit x Promoted Days
- Trade Spends = Variable Spends + Fixed Spends
- ROI on Uplift = Uplift Revenue - Trade Spends / Uplift Revenue
- ROI on Revenue = Uplift Revenue - Trade Spends / Revenue

Use Cases

Key Account Planning supports the following use cases for trade promotion planning:

- Promotion for full period—Promotions are run for the entire period(s), for example 1 March 2021 to 30 April 2021. The uplifts, variable spends, and fixed spends are spread for the entire periods. These become promoted period volumes or revenue.
- Promotion for part of the period—Promotions are run for part of the period, for example 15 May 2021 to 30 May 2021. The baseline volume / revenue are considered for the part period and uplifts are calculated on the baseline of the promoted period. This spreads the uplifts to the part period based on date range. Fixed and variable spends are calculated and spread to these period ranges.
- Promotion across periods—Promotions are run across periods, for example 15 June 2021 to 5 July 2021. The baseline volume/revenue are considered for each of the part periods and uplift is applied to the same. Fixed spend for the promotion is spread across the periods. Variable spends are calculated for individual periods based on promoted period volumes and revenue. Overall promotion period volume and revenue are calculated as well as variable /fixed spends across periods.
- Promotions with overlapping days—Promotions are run for same product with overlapping periods, for example Promotion A runs from 15 May to 10 June and Promotion B runs from 1 June to 25 June. Similar to promotion across periods but for the new overlapping promotions, the promoted days are only incremental days of the baseline. In the case of Promotion B, 15 days are considered (11 Jun to 25 June, because 1 June to 10 June is already considered for Promotion A).
- Promotions for multiple products—Promotions can be assigned to multiple products, selected using **Assign Product**. Products can be all leaf level products in the product or brand hierarchy or they can be selected as specific products across different product hierarchies. Uplift % is applied to each of the products based on each product's baseline. You can also remove assignments.

7

Maintaining Your Application

As your business changes, continue to update drivers, accounts, users, and so on to keep your application up to date.

You can easily perform these tasks by returning to the Configuration tasks.

On a monthly basis, you must update the current planning period:

1. From the Home page, click **Application**, then **Configure**, and then select a module.
2. From the **Configure** page, select **Planning and Forecast Preparation**.
3. Select the current planning month from the **Period** list and then click **Save**.


Managing Alias Tables

When you enable a Planning module, alias tables are loaded only for the default language, rather than for all of the supported languages.

For new applications, after you enable a module, you can use a new option, **Manage Seeded Alias Tables**, to load alias tables for other languages.

For existing applications, you can remove alias tables for languages you don't need.

To add or delete alias tables:

1. From the Navigator, under **Create and Manage**, click **Alias Tables**.
2. From the **Actions** menu, click  **Manage Seeded Alias Tables** (available after you have enabled a module).
3. Select the languages you want to load, or clear the selection for languages you want to delete and then click **OK**.
4. After the languages load, refresh the cube.

Notes about managing alias tables.

- You can load up to 30 alias tables in Planning Modules.
- When you incrementally enable features or new modules, alias tables are loaded for your selected languages for any new members.
- If you've customized any labels in an alias table, those customizations are applied to any new members added when you incrementally enable features.

A

Importing Data

Before importing data, configure the application as described in this help system and import the dimensional metadata.

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. Specify the appropriate data import settings. See *Administering Data Load Settings*.
2. **Optional:** Make a backup copy of the data import templates to which you can revert, if necessary.
3. **Optional:** Back up the application.
4. 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.
5. Open the templates in Microsoft Excel and customize them to specify your business data.
 6. **Optional:** To ensure that your data will import and calculate correctly, import it into a test application first.
 7. Import the data into your production application.
 8. 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.

Importing Key Account Planning Data

You can import the following data for Key Account Planning.

- Target for sales. Either load the target, or import it from Quota Planning. If you want to load the target from Quota Planning, see [Integrating Quota Planning and Key Account Planning](#). If you load the target, load it to OEP_Base Target in the BaselinePromotions dimension.
- Historical data.
- Volume and revenue data.
- Actuals if you want to track the progress of the promotion.

Key Account Planning provides templates for downloading data.

1. From the Home page, click **Application** , and then click **Configure** .
2. From the **Configure** list, click **Key Account Planning**.
3. From the **Actions** menu, select **Download Data Load Templates**, and then save the file, SALESPLN_KEY_ACCOUNT_PLANNING_DATA_LOAD_TEMPLATES.zip.
4. Unzip the file.

The following templates are available:

- Historical Reporting Only Data Load Template.csv
- Volume and Revenue - Promotion.csv
- Volume and Revenue.csv

After importing data, run the **Seed Baseline Plan** rule. From the Home page, click



Rules, launch the **Seed Baseline Plan** rule, enter values, and then click **Launch**.

After subsequently loading updated actuals for recent periods (for example, every month), run the **Prepare Forecast** rule to seed the new period actuals into forecast and keep the remaining periods as forecast. This rule also copies the data to reporting cube.

B

Updating Artifacts

Enhancements available in certain releases, described here, require updates to some provided artifacts if you have customized the artifacts.

- If you haven't modified these artifacts, the artifacts and features are available to you with the release.
- Because customized artifacts aren't updated during a new release, if you've customized these artifacts and want to take advantage of the new features, perform these steps:
 1. Perform a full backup after the update and download it locally.
 2. Review the list of modified artifacts and determine if you have modified any of them. See [Reviewing Modified Artifacts](#).

Tip:

For any artifacts listed below that you have modified, consider creating a copy of your modified artifact and using that as a reference for the changes you made to it. You can delete the copy after you reimplement your customizations.

3. After the update, reverse the customizations to the artifacts you've identified to restore the artifacts to the provided format. See [Reversing Customizations](#).
4. Reimplement your customizations to the artifacts, if necessary.
5. For any restored Calculation Manager rules or templates, after they are final, be sure to deploy the updated rules or templates to the application for any impacted artifacts. See [Showing the Usages of a Custom Template and Deploying Business Rules and Business Rulesets](#).

Updating Artifacts for all Planning Modules

September 2023

Beginning with 23.09, you can now manage alias tables for Planning Modules. See [Managing Alias Tables](#) for details on this enhancement.

If you are importing a snapshot to 23.09 (or later) from a release earlier than 23.08, alias tables are created but they might be empty. To resolve this issue, use the **Manage Seeded Alias Tables** option to add aliases for the languages you want.

As part of this enhancement, aliases for some members for certain languages have been added. If a module is updated in the future, these aliases will be loaded. If you have any custom members with the same alias, this can cause a cube refresh error. Review the list of new aliases and make any changes as needed to your custom members.

New Aliases in 23.09

Table B-1 Financials, Workforce, Capital, and Projects with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Account	<ul style="list-style-type: none"> • OFS_Other Cash (3 shared members) • OPF_% Complete • OPF_Accrued Revenue • OPF_Capitalizable (3 shared members) • OPF_Cost Plus Revenue Assumptions • OPF_Custom Direct Input Assumptions • OPF_Equipment Description • OPF_Financial Performance Measures • OPF_KPIs • OPF_Obligation Details • OPF_Performance Metrics • OPF_Project Detail Information • OPF_Project Read Only Properties • OPF_Required Equipment Assumptions • OPF_Revenue Recognition % • OPF_Total Expenses - Store • OPF_When Period • OPF_When Year • OWP_Cut-off Date • OWP_CYTD Gross Earnings • OWP_CYTD Taxable Compensation • OWP_FTE Variance • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_IsEmpty • OWP_Rec. Merit % (2 shared members) • OWP_Start Date (2 shared members) • OWP_Workforce Planning Accounts for Forms • OWP_Workforce Planning Accounts for VC
Jobs	OWP_All Jobs
Period	Project Financial Mapping
Version	OEP_Target
Resource Class	OPF_Load
Age Band	<ul style="list-style-type: none"> • No Age Band • OWP_Total Age Band
Gender	<ul style="list-style-type: none"> • No Gender • OWP_Total Gender
Highest Education Degree	<ul style="list-style-type: none"> • No Highest Education Degree • OWP_Total Highest Education Degree
Skill Set	<ul style="list-style-type: none"> • No Skill Set • OWP_Total Skill Set

Table B-1 (Cont.) Financials, Workforce, Capital, and Projects with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Union Code	<ul style="list-style-type: none"><li data-bbox="883 373 1101 401">• No Union Code<li data-bbox="883 405 1170 432">• OWP_All Union Code<li data-bbox="883 436 1195 464">• OWP_Total Union Code

Table B-2 Financials, Workforce, Capital, and Projects with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Account	<ul style="list-style-type: none"> • OCX_Impairment Value Assumptions • OFS_Other Cash (3 shared members) • OPF_% Complete • OPF_Accrued Revenue • OPF_Capital Integration Properties • OPF_Capitalizable (3 shared members) • OPF_Cost Plus Revenue Assumptions • OPF_Custom Direct Input Assumptions • OPF_Equipment Description • OPF_Financial Performance Measures • OPF_Indirect Integration Properties • OPF_Integration Properties • OPF_Integration Status Description (2 shared members) • OPF_KPIs • OPF_Obligation Details • OPF_Performance Metrics • OPF_Project Detail Information • OPF_Project Integration Status (2 shared members) • OPF_Project Read Only Properties • OPF_Project Template - Capital (3 shared members) • OPF_Project Template - Indirect (3 shared members) • OPF_Recognized Revenue • OPF_Reporting Properties • OPF_Revenue Recognition % • OPF_Standard Integration Properties • OPF_Total Expenses - Store • OPF_When Period • OPF_When Year • OWP_Cut-off Date • OWP_CYTD Gross Earnings • OWP_CYTD Taxable Compensation • OWP_FTE Variance • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_IsEmpty • OWP_Rec. Merit % (2 shared members) • OWP_Start Date (2 shared members) • OWP_Workforce Planning Accounts for Forms • OWP_Workforce Planning Accounts for VC • OPF_Project Description
Component	<ul style="list-style-type: none"> • OWP_Merit Increase • OWP_No Grade

Table B-2 (Cont.) Financials, Workforce, Capital, and Projects with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Employee	OWP_New Employees
Entity	OEP_Home Entity
Period	Project Financial Mapping
Version	OEP_Target
Resource Class	<ul style="list-style-type: none"> OPF_Adjustment (+/-) OPF_Load
Age Band	<ul style="list-style-type: none"> No Age Band OWP_Total Age Band
Gender	<ul style="list-style-type: none"> No Gender OWP_Total Gender
Highest Education Degree	<ul style="list-style-type: none"> No Highest Education Degree OWP_Total Highest Education Degree
Skill Set	<ul style="list-style-type: none"> No Skill Set OWP_Total Skill Set
Union Code	<ul style="list-style-type: none"> No Union Code OWP_All Union Code OWP_Total Union Code

Table B-3 Strategic Workforce Planning with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Account	<ul style="list-style-type: none"> OWP_Average Compensation Rates OWP_CYTD Gross Earnings OWP_CYTD Taxable Compensation OWP_FYTD Gross Earnings OWP_FYTD Taxable Compensation OWP_IsEmpty OWP_Rec. Merit % (3 Shared members) OWP_Start Date (3 shared members) OWP_Strategic Headcount Planning Accounts for Forms OWP_Workforce Planning Accounts for Forms OWP_Workforce Planning Accounts for VC
Age Band	No Age Band
Component	<ul style="list-style-type: none"> OWP_Attrition Drivers OWP_Merit Increase OWP_No Grade
Employee	OWP_New Employees
Entity	OEP_Home Entity
Period	<ul style="list-style-type: none"> BegBalance No Period OEP_Yearly Plan

Table B-3 (Cont.) Strategic Workforce Planning with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Version	OEP_Target

Table B-4 Strategic Workforce Planning with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Account	<ul style="list-style-type: none"> • OWP_Average Compensation Rates • OWP_Cut-off Date • OWP_CYTD Gross Earnings • OWP_CYTD Taxable Compensation • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_FTE Variance • OWP_FYTD Gross Earnings • OWP_FYTD Taxable Compensation • OWP_IsEmpty • OWP_Rec. Merit % (3 Shared members) • OWP_Start Date (3 shared members) • OWP_Strategic Headcount Planning Accounts for Forms • OWP_Workforce Planning Accounts for Forms • OWP_Workforce Planning Accounts for VC
Age Band	No Age Band
Component	<ul style="list-style-type: none"> • OWP_Attrition Drivers • OWP_Merit Increase • OWP_No Grade
Employee	OWP_New Employees
Entity	OEP_Home Entity
Period	<ul style="list-style-type: none"> • BegBalance • No Period • OEP_Yearly Plan
Version	OEP_Target

Table B-5 Sales Planning Quota Planning Module with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Measure	OQP_Unit of Measures
Period	<ul style="list-style-type: none"> • No Period • OEP_Qrtly Plan • OEP_Weekly Plan
Product	No Product

Table B-5 (Cont.) Sales Planning Quota Planning Module with the Essbase Version that Does not Support Hybrid Cubes

Dimension	Members
Scenario	OEP_Rolling Forecast
Territory	OEP_Unspecified Territory
Version	OEP_Working Bottom Up
Years	No Year
Plan Element	<ul style="list-style-type: none"> • OGS_Total Plan • OGS_Total Line Items • OGS_Base Forecast • OGS_Adjustment (+/-) • Line 2 • Line 3 • Line 4
View	<ul style="list-style-type: none"> • Periodic • YTD




Table B-6 Sales Planning Quota Planning Module with the Essbase Version that Supports Hybrid Cubes

Dimension	Members
Measure	OQP_Unit of Measures
Period	<ul style="list-style-type: none"> • No Period • OEP_W1 to OEP_W52 • OEP_Weekly Plan
Product	No Product
Scenario	OEP_Scenarios
Territory	OEP_Unspecified Territory
Years	No Year

Reviewing Modified Artifacts

You can check which original application artifacts, such as forms and menus, have been modified.

To review the artifacts in your application:

1. Click **Application** , then **Configure** , and then select Financials, Workforce, Projects, or Capital.
2. From the **Actions** menu, select **Review Modified Artifacts**.
3. Click **Filter**  to select an artifact type, and then click **Apply**.

The artifacts that have been modified are listed.

Reversing Customizations

To undo customizations to predefined artifacts:


1. From the Home page, click **Application** , then **Configure**, and then select a module.
2. From the **Actions** menu, select **Review Modified Artifacts**. Click **Filter**  to select different artifact types.
3. Select the artifacts, and then click **Restore**.

Table B-7 Video

Your Goal	Watch This Video
Learn about restoring artifacts to their predefined state.	 Restoring Artifacts in Oracle Enterprise Planning Cloud

C

Personalizing Sales Planning

Sales Planning 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.

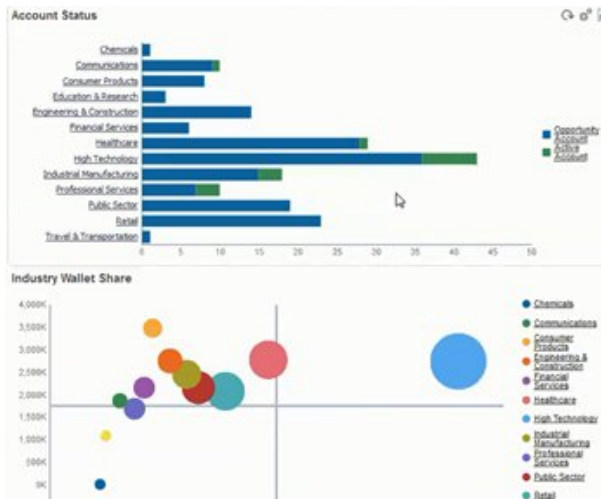
This topic shows some of the ways you can personalize Sales Planning. For example, you can enable territory and resource modeling and include optimization tools including account segmentation for strategic account planning and resource assignment.

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

Watch This Video

Learn more about account segmentation in Sales Planning.

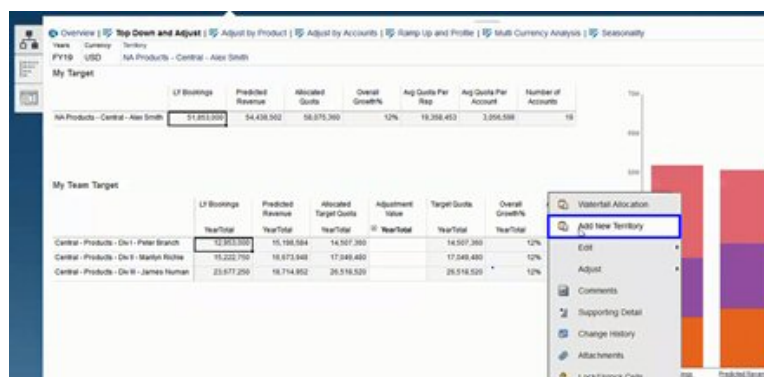


[Overview: Account Segmentation for Optimal Sales Strategy in Sales Planning Cloud](#)

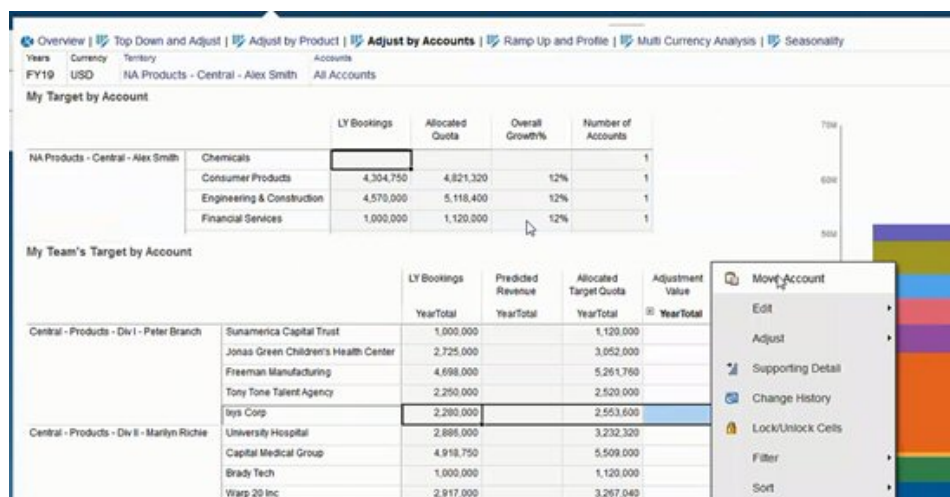
Territory Modeling

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:

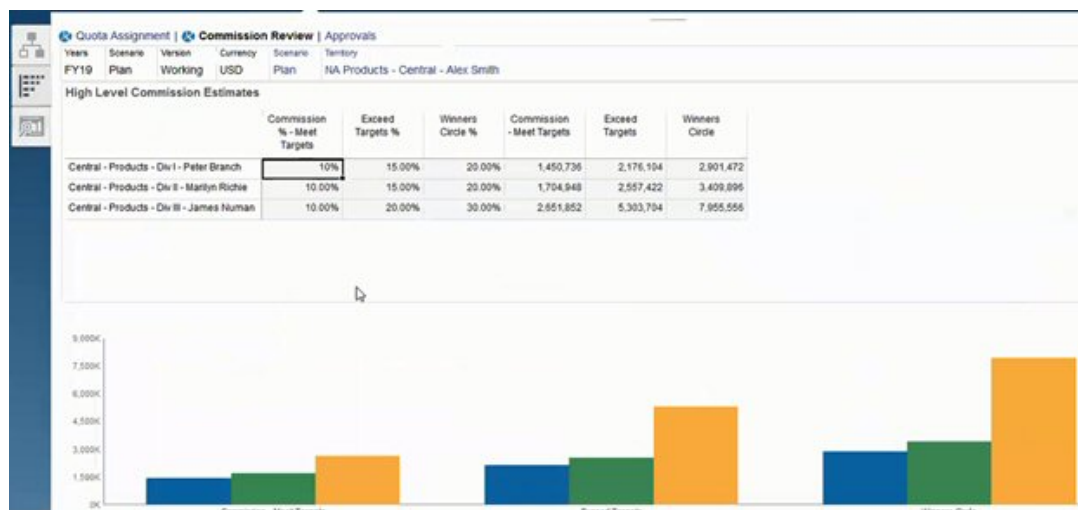


Accounts can then be moved across territories and transferred between reps to support the territory structure. For example, create an Action menu and associated rule to move accounts:



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

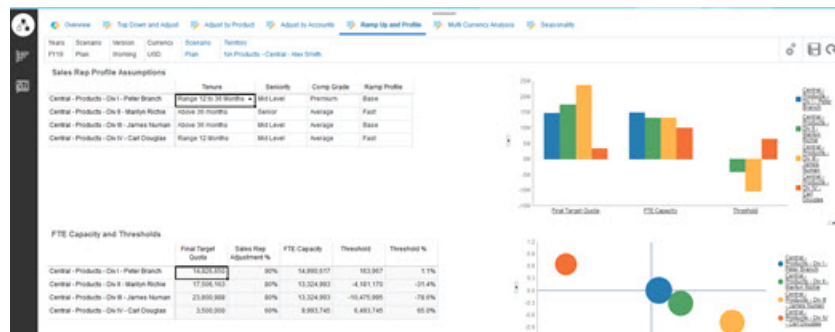
You can analyze reps using the following provided attributes that capture key data:

- 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.

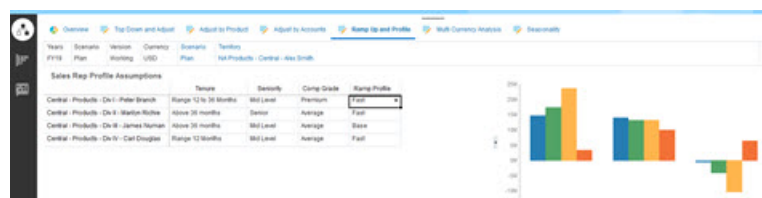
On the Ramp up and Profile tab, use the provided attributes that you can weight to identify your reps' true potential through FTE capacity. This helps ensure that their allocated quota targets are realistic and suitable.



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 high 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.

	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

D

Integrating with Oracle Engagement Cloud

Integrating Dimension Metadata from Oracle Engagement Cloud with Sales Planning

You can extract dimension metadata from Oracle Engagement Cloud and import it into Sales Planning 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 Integration 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 Integration.

For details on using Data Integration, see *Administering Data Integration 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. From the Home page, click **Application**, then **Data Exchange**, and then **Data Integration**.
 - b. In Data Integration, import the file. See Integrating Metadata from the Oracle ERP Cloud in *Administering Data Integration for Oracle Enterprise Performance Management Cloud* 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 Sales Planning 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](#).


Tutorials

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

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](#)

E

Sales Planning Best Practices

Use these best practices for Sales Planning.

This table provides links to the best practices mentioned in this guide.

Table E-1 Best Practices for Sales Planning

Best Practice For	See this Section
Creating and running an EPM Center of Excellence	Creating and Running an EPM Center of Excellence
Designing forms in Sales Planning	Designing Forms in Sales Planning

In addition, review the best practices for Planning in Planning Best Practices in *Administering Planning*.