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Personalizing Oracle Sales Planning Cloud
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Welcome to Oracle Sales Planning Cloud

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

About Oracle Sales Planning Cloud

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

Using Oracle Sales Planning Cloud enables you to automate critical processes by eliminating spreadsheets in key sales operations processes and improves collaboration for planning and modeling sales quotas.

Oracle Sales Planning Cloud is extensible using the EPM Cloud framework 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. Oracle Sales Planning Cloud can be integrated with Oracle Engagement Cloud – Sales Cloud for pushing quota targets to incentive compensation or bring in actual attainment.

Watch this overview video to learn more about Oracle Sales Planning Cloud.

Overview Video.

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.

Watch this overview video to learn more about Quota Planning.

Overview Video

Learning More About Oracle Sales Planning Cloud

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

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

Related Guides

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

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

To get started using Oracle Sales Planning Cloud, see these guides:

- Getting Started for Administrators
- Getting Started for Users

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

Design:

Designing with Calculation Manager for information related to designing Groovy rules.

User:

- Working with Planning
- Working with Smart View
- Working with Predictive Planning in Smart View
- Accessibility Guide
Administration:
- Administering Planning
- Administering Data Management
- Administering Access Control
- Administering Migration
- Working with EPM Automate
- Third-Party Acknowledgments

Development:
- Java API Reference for Groovy Rules
- Smart View for Office Developer’s Guide

Navigating in Oracle Sales Planning Cloud

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

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

For example, in the Quota Planning Set Targets component, use the vertical tabs to switch between reviewing overview dashboards, setting target quotas, and performing predictive planning. The vertical tabs are different depending on the features that are enabled. Use the horizontal tabs to switch categories within a task. For example, in Set Targets, choose between setting overall targets and adjusting targets by product.
The icon indicates a reporting form for reviewing data, not for data entry. The icon indicates that a form is a data entry form for entering planning details.
2
Setting Up Your Application

Related Topics

• **Implementation Checklist**
  Perform these tasks to set up Oracle Sales Planning Cloud.

• **Creating an Application**
  To get started, create a Sales application.

• **Setting Substitution Variables**
  Set the substitution variables for the current planning year for which you are setting targets and the immediately preceding planning year.

• **Setting User Variables**
  Each planner must set the user variables described in this topic.

**Implementation Checklist**

Perform these tasks to set up Oracle Sales Planning Cloud.

1. Create a Sales application. See Creating an Application.

2. If your application is multicurrency, use the Dimension Editor to add dimension members for each reporting currency. See About Editing Dimensions in the Simplified Dimension Editor. Use the **Exchange Rates** form to define the exchange rates between the main currency and each reporting currency.


5. 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**.

6. Import data, including the previous year bookings/revenue, and then run the **Process Actuals** rule for Quota Planning. 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. See Importing Data.

7. Set substitution variables. See Setting Substitution Variables.

8. Set required user variables. See Setting User Variables.
9. Create the required user and group accounts and grant permissions. See Getting Started with Oracle Enterprise Performance Management Cloud for Administrators.

10. 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.

11. Use any of the following methods to configure and extend the framework:
   • Manage dimensions and members. See About Editing Dimensions in the Simplified Dimension Editor.
   • Customize the navigation flow for your business needs. For example, you can set up different navigation flows for different roles in your organization. See Designing Custom Navigation Flows.
   • Modify the existing forms, dashboards, or infolets or create new ones. See Administering Forms, Designing Dashboards, and Designing Infolets.
   • Define the approval process by defining the approval units and promotional paths for approving plans in your organization, for example to approve bottom up plans. See Managing Approvals.
   • Create task lists to help guide your organization through the quota planning process. See Administering Task Lists.
   • 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 Oracle Sales Planning Cloud.

   **Note:**

   You can use Groovy rules only for applications of type “Enterprise” (available with Enterprise PBCS or PBCS Plus One licenses), Oracle Strategic Workforce Planning Cloud, or Oracle Sales Planning Cloud.

   Watch these tutorial videos to learn more about creating an application, enabling, and configuring Quota Planning.

   - Tutorial Video
   - Tutorial Video

**Creating an Application**

To get started, create a Sales application.
1. Log in and select **Start** under **Sales**.

2. Enter an application name and description and then click **Next**.

3. Specify this information.
   - **Start and End year**—Years to include in the application. Make sure to include the year that contains the historic actuals required for planning and analysis. For example, for an application beginning in 2018, select 2017 as the start year so that the latest actuals are available for setting targets using year over year growth percentage, and for reporting purposes.
   - **First Month of Fiscal Year**—Month in which your fiscal year begins.
   - **Weekly Distribution**—Sets the monthly distribution pattern, based on the number of fiscal weeks in a month.
     This selection determines how data in summary time periods spreads within the base time period. When users enter data into summary time periods, such as quarters, the value is distributed over base time periods in the summary time period. If you select a weekly distribution pattern other than **Even**, the application treats quarterly values as if they were divided into 13 weeks and distributes weeks according to the selected pattern. For example, if you select **5-4-4**, the first month in a quarter has five weeks, and the last two months in the quarter have four weeks.
   - **Main Currency**—For a multicurrency application, this is the default reporting currency and the currency against which exchange rates are loaded.
   - **Multicurrency**—Multicurrency support is provided by the Currency dimension, and enables reporting in different currencies.
   - **Name of Reporting Cube**—Oracle Sales Planning Cloud delivers a reporting cube called **SALESREP**. You can configure the dimensionality of the cube for your reporting requirements.

4. Click **Next**, review your selections, and then click **Create**.

Watch this tutorial video to learn more about creating an application.

### Tutorial Video

**Setting Substitution Variables**

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

1. From the Home page, click **Tools**, then **Variables**, and then click the **Substitution Variables** tab.

2. Select members for **OEP_CurYr** and **OEP_PriorYr**. Optionally set the other substitution variables if you want to use something other than the default values.
Setting User Variables

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

User variables define the context for forms and dashboards.

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

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

2. Select members for these user variables for Quota Planning:
   - Accounts
   - Overlay Territory—Typically used for the overlay territory.
   - Product
   - Sales Rep Territory—Typically used for Sales Reps for use in bottom up planning.
   - Scenario
   - Territory—Typically used for the main process for Sales Managers and Sales VPs.

3. Click Save.
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. On the Configure page, click **Enable Features**.

3. 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>
<thead>
<tr>
<th>Enable</th>
<th>Description</th>
</tr>
</thead>
</table>
| Planning Model        | Enable quota planning by territory or resource and add custom dimensions. 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. Optionally, enable these additional commonly-used dimensions:  
|                       | • Accounts (customers)  
|                       | • Product (high-level product families)  
|                       | • Geography (a reporting dimension, configured as an attribute of Territory)  
|                       | These core custom dimensions have pre-defined functionality and artifacts associated with them. You must add custom dimensions when you first enable Quota Planning. You can add additional custom dimensions in Map/Rename Dimensions. |
| Unit of Measure       | Select whether to plan by **Amount** (such as currency) or **Units** (such as volume).                                                                                                                                                                                                                                                   |
| Key Functionality     | Enable additional features for setting, analyzing, and optimizing target quotas.  
|                       | • Overlay Targets—Use to perform quota planning for a specialist team; these teams often have a separate quota to achieve.  
|                       | • Seasonality—By default, quota targets are spread based on historical trends or data. Use Seasonality to adjust the year total allocation by month according to your business's seasonality.  
|                       | • Padding—After setting a target, use padding to make a global adjustment by increasing or decreasing targets by a percentage.  
|                       | • What If Scenarios—Use to evaluate worst case, best case, and conservative scenarios.                                                                                                                                                                                                                                                     |
Table 3-1  (Cont.) Enabling Quota Planning Features

<table>
<thead>
<tr>
<th>Enable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Methodology</td>
<td>Select the type of quota planning to enable.</td>
</tr>
<tr>
<td></td>
<td>• 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.</td>
</tr>
<tr>
<td></td>
<td>• 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.</td>
</tr>
<tr>
<td></td>
<td>• 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.</td>
</tr>
<tr>
<td>Predictive Planning</td>
<td>Enable the ability to predict future target quota values based on historical revenue.</td>
</tr>
<tr>
<td></td>
<td>If you have historical revenue data by territory or product, you can perform a statistical analysis on the data to predict future results.</td>
</tr>
<tr>
<td>Map/Rename Dimensions</td>
<td>• 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.</td>
</tr>
<tr>
<td></td>
<td>• Map custom dimensions to existing dimensions.</td>
</tr>
<tr>
<td></td>
<td>• Rename base dimensions.</td>
</tr>
<tr>
<td></td>
<td>You must map, rename, and enable custom dimensions the first time you enable features. You can't rename Measures or the Territory or Resource dimension names.</td>
</tr>
</tbody>
</table>

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

Watch this tutorial video to learn more about enabling Quota Planning features.
Tutorial Video

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. Perform all mandatory tasks for importing metadata, configuring Quota Planning, and adding or importing additional measures. Perform the optional tasks required for your business.

3. 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.

4. Import your business data to populate the application and then run the Process Actuals rule. See Importing Data.

Table 3-2 Configuring Quota Planning

<table>
<thead>
<tr>
<th>Configure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts, Product, Geography</td>
<td>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.</td>
</tr>
<tr>
<td>&lt;Custom Dimension&gt;</td>
<td>Import the dimension members (master data) and hierarchy to populate the &lt;customName&gt; dimension. Use if you enabled the &lt;customName&gt; dimension.</td>
</tr>
<tr>
<td>Territory</td>
<td>Import the dimension members (master data) and hierarchy that represent your business's sales territories.</td>
</tr>
<tr>
<td>Resource</td>
<td>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.</td>
</tr>
<tr>
<td>Configure</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Allow Overrides on Allocated Target Quota</td>
<td>Specify whether to allow users to override the total allocated target during top down planning. Select <strong>Yes</strong> to allow users to adjust values that would allow the total to go over or under the allocated quota amount. Select <strong>No</strong> so that users cannot adjust values that would make the total go over or under the allocated quota amount. This task must be performed after setting user variables. See Setting User Variables.</td>
</tr>
<tr>
<td>Seasonality</td>
<td>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. This task must be performed after setting user variables. See Setting User Variables.</td>
</tr>
<tr>
<td>Bottom Up Quota Measures</td>
<td>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. See Adding Custom Measures.</td>
</tr>
<tr>
<td>Overlay Quota Measures</td>
<td>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. See Adding Custom Measures.</td>
</tr>
<tr>
<td>Quota Measures</td>
<td>Add or import additional quota measures that apply to all types of quota planning. If your business process requires, you might need to add logic or calculations related to any custom measures. See Adding Custom Measures.</td>
</tr>
<tr>
<td>Top Down Quota Measures</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

Watch this tutorial video to learn more about configuring Quota Planning.

*Tutorial Video*

**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 driver that you want to remove. If they do, update their logic accordingly.
- You can't edit or delete provided measures.

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.
- Set user variables. See Setting User Variables.

Quota Planning Rules

Review the rules used to calculate values in Quota Planning.

From the Home page, click Rules.

Tip:

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

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

Table 3-3  Quota Planning Rules

<table>
<thead>
<tr>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Account (Bottom Up)</td>
</tr>
<tr>
<td>Add Product (Bottom Up)</td>
</tr>
<tr>
<td>Adjust Aggregation (Bottom Up)</td>
</tr>
<tr>
<td>Apply Seasonality</td>
</tr>
<tr>
<td>Apply Top Down Seasonality</td>
</tr>
<tr>
<td>Apply Waterfall Seasonality</td>
</tr>
</tbody>
</table>
### Table 3-3  (Cont.) Quota Planning Rules

<table>
<thead>
<tr>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bottom Up Aggregation</td>
</tr>
<tr>
<td>Bottom Up Aggregation by Account</td>
</tr>
<tr>
<td>Bottom Up Allocation</td>
</tr>
<tr>
<td>Bottom Up Seasonality</td>
</tr>
<tr>
<td>Clear Bottom Up What If Scenarios</td>
</tr>
<tr>
<td>Clear What If Scenarios</td>
</tr>
<tr>
<td>Copy Bottom Up What If</td>
</tr>
<tr>
<td>Copy Data What If</td>
</tr>
<tr>
<td>Copy What If Scenarios</td>
</tr>
<tr>
<td>Global Seasonality</td>
</tr>
<tr>
<td>Overlay Seasonality</td>
</tr>
<tr>
<td>Predictive Aggregation</td>
</tr>
<tr>
<td>Process Actuals</td>
</tr>
<tr>
<td>Quota Aggregation</td>
</tr>
<tr>
<td>Seed Bottom Up What If Scenarios</td>
</tr>
<tr>
<td>Seed What If Scenarios</td>
</tr>
<tr>
<td>Set Overlay Target</td>
</tr>
<tr>
<td>Set Predicted Values As Target</td>
</tr>
<tr>
<td>Set Target</td>
</tr>
<tr>
<td>Set Target by Product</td>
</tr>
<tr>
<td>Top Down Adjustment</td>
</tr>
<tr>
<td>Top Down Allocation</td>
</tr>
<tr>
<td>Top Down Padding</td>
</tr>
<tr>
<td>Validate Adjustment</td>
</tr>
<tr>
<td>Validate Adjustment by Dimension</td>
</tr>
<tr>
<td>OQP.ValidateSeasonality</td>
</tr>
<tr>
<td>Validate Seasonality</td>
</tr>
<tr>
<td>Waterfall Adjustment</td>
</tr>
<tr>
<td>Waterfall Allocation</td>
</tr>
</tbody>
</table>
Importing Data

You can download data import templates for each business process 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 business process for which you want to download templates, and then from the Actions menu, select Download Data Load Templates.

3. Save the zip file locally, and then extract the csv files.

Perform these tasks to import data:

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

   **Note:**

   Oracle recommends that you use Configure to import metadata, which ensures that metadata is loaded correctly to work with the provided rules and forms. If you choose to use the Dimension Editor to load metadata, the primary hierarchy for 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.

   2. Specify the appropriate data import settings. See Administering Data Load Settings.

   3. **Optional:** Make a backup copy of the data import templates to which you can revert if necessary.

   4. **Optional:** Back up the application.

   5. If you created custom Smart Lists, import them before the associated data.

      (Available only for some business processes.)

To identify the Smart List to import and their entry names:
a. Click Navigator, and then Smart Lists from Create and Manage.

b. Select the Smart List, click Edit, and then Entries.

c. Note the associated names.

6. Open the templates in Microsoft Excel, and customize them to specify your business data.

7. Optional: To ensure that your data will import and calculate correctly, import it into a test application first.

8. Import the data into your production application.

9. For the first data import, run the rules required to process and calculate the data. See the sections on each business process.

When customizing the templates:

- Don't enter zeros.
- To import data you must have one member at least from all dimensions in the file to import.
- Remove columns for which you have no data. For example, if your periodocity 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.
Personalizing Oracle Sales Planning Cloud

Oracle Sales Planning Cloud offers a comprehensive, end-to-end data-driven solution. It includes a pre-build solution for Quota Planning. Additionally, Oracle Sales Planning Cloud 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 Oracle Sales Planning Cloud. For example, you can enable territory and resource modeling and include optimization tools including account segmentation for strategic account planning and resource assignment.

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:

![Diagram of account segmentation](image)

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:
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:
To enhance quota planning, ramp up and profiling and commission planning help sales managers and regional managers ensure their team’s target are appropriate, actionable, and won’t cause huge commission payouts.

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

For example, this personalized Ramp Up and Profile form shows information such as tenure, seniority, compensation grade, and ramp up profile for some of Alex Smith’s Central Division sales reps:

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:
With sales forecasting, regional managers and their reps can perform collaborative weekly reviews to determine how opportunities align with target quotas. They can:

- Analyze forecasts by territory, key accounts, and opportunity
- Get more insight using predictive planning and probability metrics
- Make adjustments accordingly to ensure forecast accuracy

For example, create an Opportunity Overview dashboard showing a variety of graphs that indicate forecast values for measures such as revenue, revenue by sales reps, predicted pipeline revenue, and the probability of reps reaching their quotas. These can be evaluated by territory, opportunity and account:

Watch this overview video to learn more about Oracle Sales Planning Cloud.

[Overview Video]