

Oracle Sales Planning Cloud

An Overview

And

Application Creation Steps

Version History

Version	Date (dd / mmm / yyyy)	Modification	Author
0.1	04 / Apr / 2019	Initial document	Amit Sharma

Overview Oracle Sales Planning Cloud

Oracle Sales Planning Cloud is a new addition in Oracle Enterprise PBCS solution stack keeping same EPBCS frameworks. Oracle Sales Planning focuses on a) Planning, directing, evaluating sales b) Sales quotation planning at territory or resource level c) Benchmark for evaluating sales effectiveness d) Sales commission planning.

It enables what if scenario planning to explore and compare different quota scenarios for informed decision making. Similar to other EPBCS solution, Quota Planning builds best practices into its content, including its forms, calculations, dashboards, infolets, drivers, and measures. Streamline automate critical sales planning processes by eliminating high error prone spread sheets based sales operations processes. It is built on top of three major sales quota setting

1. Quota planning business process
2. Use Groovy rules to customize enhanced calculation and business rules
3. Provide navigation flows, dashboards, and infolets
4. Provide tasks and approvals to manage the quota planning process
5. Integrated with Oracle Engagement Cloud – Sales Cloud

Planning Model Sales quotation can be planned by territory or by resource. The lowest level in each hierarchy is typically a Sales Rep. However, in both model successful forecasting needs to be a scenario-based process, taking into account both the past and the future. Likewise other products in the same category, Sales Quotation planning is also based on making the right assumptions, and drivers.

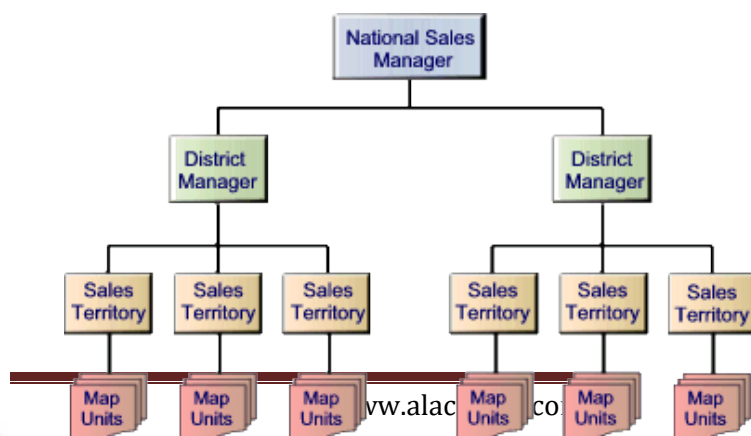
Planning Model

Enable quota planning by territory or resource and add custom dimensions. [more](#)

- Territory
- Resource

Optional Dimensions

- Accounts
- Product
- Geography



Key functionalities: By Enable additional features i.e analyzing, and optimizing target quotas, one can model scenario based sales quotation planning.

Key Functionality
Enable additional features for setting, analyzing, and optimizing target quotas. [more](#)

Overlay Targets
 Seasonality

Padding

What If Scenarios

Overlay Targets—Use to perform quota planning for teams that support the sales team and that have a separate target quota to achieve.

Seasonality—By default, quota targets are spread evenly across time periods or based on the allocations that follow historical trends or data. Use Seasonality to adjust the year total allocation by month according to your business's seasonality.

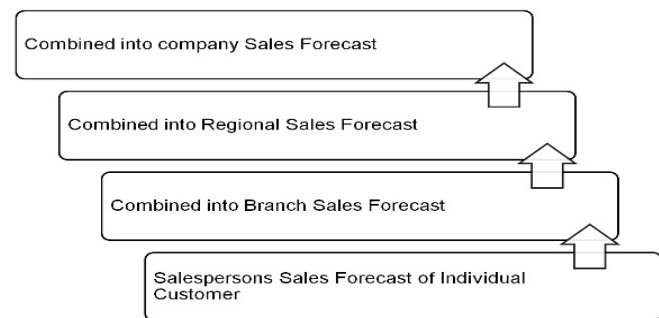
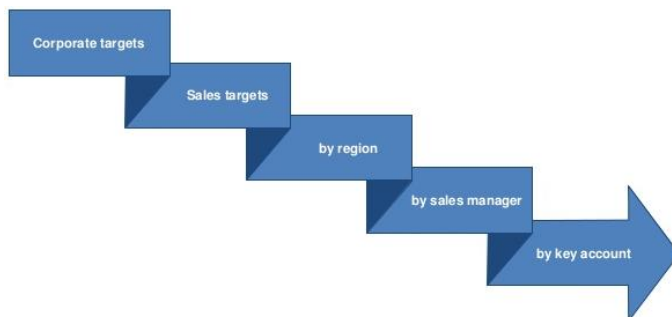
Padding—After setting a target, use padding to make a global adjustment by increasing or decreasing targets by a percentage. **What If Scenarios**—Use to evaluate worst case, best case, and conservative scenarios

Planning Methodology : The Quota Planning business process offers top-down and bottom up target quota planning by territory, product, account, or other custom dimensions.

Planning Methodology
Select the type of quota planning to enable. [more](#)

Top Down
 Waterfall

Bottom Up



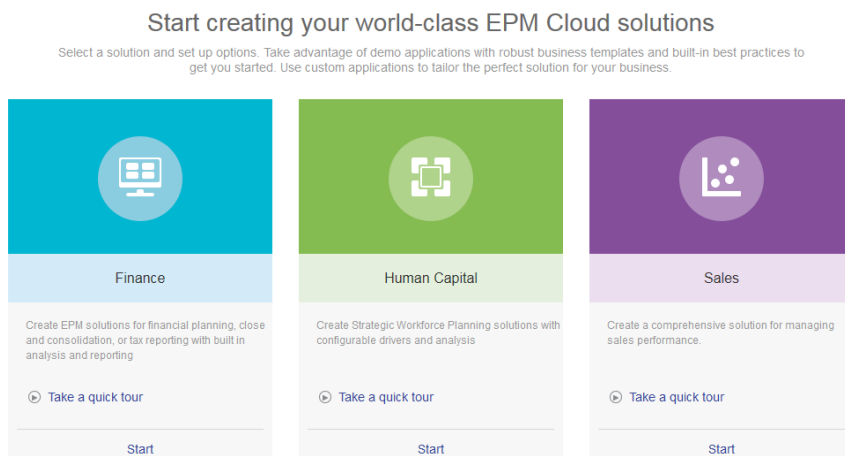
Planners perform top-down or waterfall planning to allocate the target quota throughout the hierarchy. Waterfall planning provides departmental control as It allows deadlines to be set for each stage of development, which keeps a product moving nicely through the development process.

Predictive Planning: Enable the ability to perform predictive planning to predict future target quota values. If you have historical revenue data by territory or product, you can perform a statistical analysis on the data to predict future results.



Creating Sales Planning Cloud Application

Upon login, you find the below screen, which allows you to create different types of application. Finance PBCS, Enterprise PBCS, FCCS and Tax Provisioning, Hume Capital : Strategic Workforce Planning and finally Sales Planning Cloud.



Define application name and description.

Create Application: General

Specify Planning Start and End Year but planning process continue more years can be added. The financial start month is considered to be Jan in the below screen shot. It is multicurrency application and USD considered is considered as default currency. Reporting ASO cube is SALESREP

Create Application: Details

Back Cancel

General Details Customize Review Next

Start and End year 2016 to 2026

First Month of Fiscal Year January

Weekly Distribution Even Distribution

Other Details

Main Currency USD United States of America Dollar

Multicurrency Yes

* Name of Reporting Cube SALESREP

Final view before creating application.

Create Application: Review

Back Cancel

General Details Customize Review Create

SalesPLN - Sales
Oracle Sales PL...

Start and End Period	2016-2026 (11 Years)
First Month of Fiscal Year	January
Weekly Distribution	Even Distribution

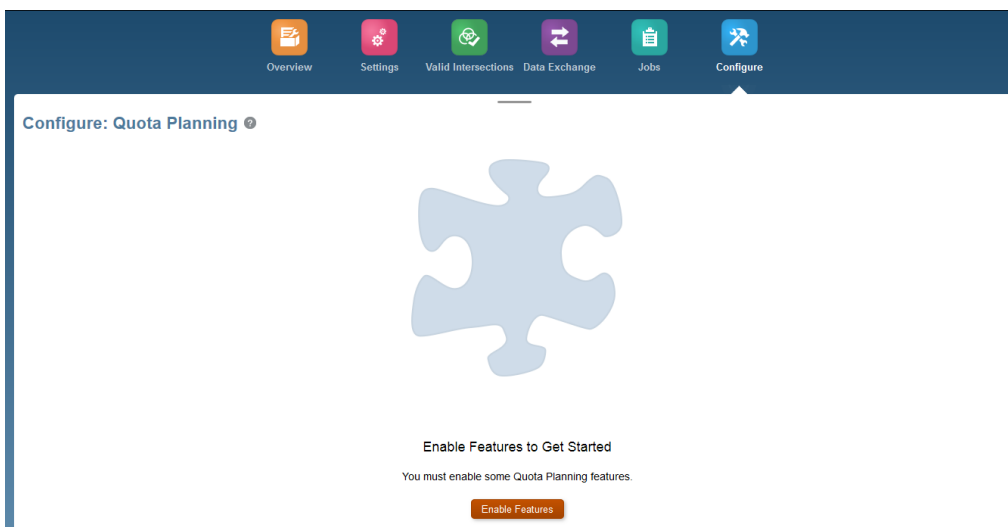
Other Details

Currency	USD
Multicurrency	Yes - Simplified
Name of Reporting Cube	SALESREP

100%

Cubes
■ Reporting Cube : SALESREP (7)

Default configuration screen. Various configuration parameters given as described above.



Quota Planning - Enable Features ?



Enable

Close

Planning Model

Enable quota planning by territory or resource and add custom dimensions. [more](#)

- Territory
- Resource

Optional Dimensions

- Accounts
- Product
- Geography

Unit of Measure

Enable planning by amount or units. [more](#)

- Amount
- Units

Key Functionality

Enable additional features for setting, analyzing, and optimizing target quotas. [more](#)

- Overlay Targets
- Seasonality
- Padding
- What if Scenarios

Planning Methodology

Select the type of quota planning to enable. [more](#)

- Top Down
- Waterfall
- Bottom Up

Predictive Planning

Enable the ability to predict future target quota values. [more](#)



- Timeseries

Map/Rename Dimensions

Map existing dimensions and enable custom dimensions. [more](#)

Map/Rename Dimensions

Map existing dimensions and enable custom dimensions. [more](#)

Enable	Name	Map/Rename	
<input checked="" type="checkbox"/>	Auxiliary 1	Distribution_Channel	
<input type="checkbox"/>	Auxiliary 2		
<input type="checkbox"/>	Auxiliary 3		
<input checked="" type="checkbox"/>	Accounts	Accounts	

Warning

The features you've chosen will be enabled. Do you wish to continue?

Yes

No

The Quota Planning functionality that you selected was successfully enabled. Before you can use these features, sign out and then sign in again.

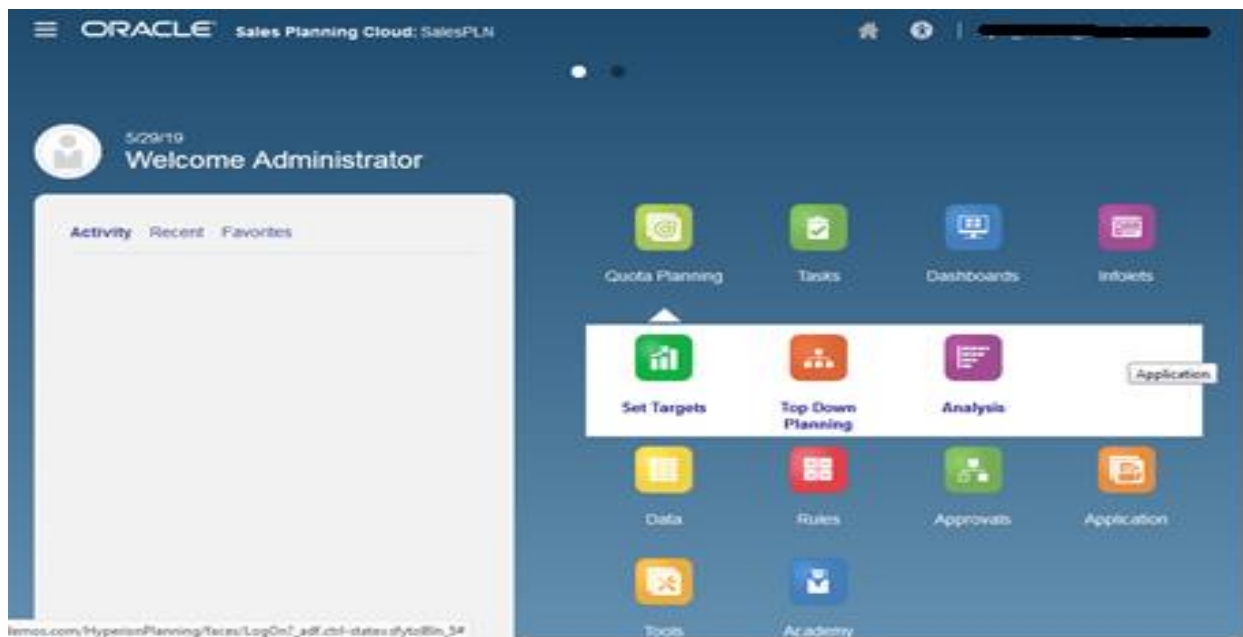
OK

Configure: Quota Planning ?

Filter: All Types ⌵ All Statuses ⌵ Actions Enable Features

Name	Type	Status	Executed	Action
Accounts Import Accounts	Metadata Optional	🔗 Not Configured		...
Distribution_Channels Import Distribution_Channels	Metadata Optional	🔗 Not Configured		...
Allow Overrides on Allocated Target Quota Allow users to override the total allocated target.	Maintenance Mandatory	🔗 Not Configured		...
Seasonality Configure quota planning seasonality.	Maintenance Mandatory	🔗 Not Configured		...
Overlay Quota Measures Configure overlay quota measures.	Metadata Optional	🔗 Not Configured		...
Quota Measures Configure quota measures.	Metadata Optional	🔗 Not Configured		...
Top Down Quota Measures Configure top down quota measures.	Metadata Optional	🔗 Not Configured		...

Post configuration home screen.



System creates two cubes OEP_QTP and SALESREP. OEP_QTP allows users to create custom dimension. I have created Distribution channel through which the sales leads and target can be captured.

ORACLE Sales Planning Cloud: SalesPLN | epm_default_cloud_admin

Application

Refresh Actions

Overview Cubes Dimensions Activity Reports

Cube: OEP_QTP Create Import Export

Type	Name	Order	Dense	Evaluation Order	Modified
Measures	69 Members		<input checked="" type="checkbox"/>	1	5/29/19 epm_default_clo
Period	20 Members	^ v	<input checked="" type="checkbox"/>	-	5/29/19 epm_default_clo
Accounts	4 Members	^ v	<input type="checkbox"/>	-	5/29/19 module_admin
Years	12 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Distribution_Channels	4 Members	^ v	<input type="checkbox"/>	-	5/29/19 module_admin
Territory	6 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Currency	5 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Scenario	9 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Version	4 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo

https://ucf4-epm1262-gse.oracleledemos.com/HyperionPlanning/faces/StructureHomeTF/EfsStructurePSB?_adf.ctrl-state=sfytol8ln_8&_afLoop=636694939246949#

ORACLE Sales Planning Cloud: SalesPLN | epm_default_cloud_admin

Application

Refresh Actions

Overview Cubes Dimensions Activity Reports

Cube: SALESREP Create Import Export

Type	Name	Order	Dense	Evaluation Order	Modified
Measures	0 Members	v	<input checked="" type="checkbox"/>	-	5/29/19 epm_default_clo
Period	18 Members	^ v	<input checked="" type="checkbox"/>	-	5/29/19 epm_default_clo
Years	12 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Scenario	9 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Version	2 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Currency	5 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo
Territory	1 Members	^ v	<input type="checkbox"/>	-	5/29/19 epm_default_clo

https://ucf4-epm1262-gse.oracleledemos.com/HyperionPlanning/faces/StructureHomeTF/EfsStructurePSB?_adf.ctrl-state=sfytol8ln_8&_afLoop=636694939246949#

Below are the application Sales Quotation KPIs can be configured from Application configuration menu.

Overlay Quota Measures

Component: Overlay Key Performance Indicators

Actions Save Close

Name	Alias(Default)	Time Balance	Data Storage	Data Type	Smart Lists	Action
OQP_Topdown Overlay Growth?	Top Down Overlay Growth%	Flow	Dynamic Calc	Percentage	None	...

Quota Measures

Actions Save Close

Component Quota Key Performance Indicators

Name	Alias(Default)	Time Balance	Data Storage	Data Type	Smart Lists	Action
OQP_Number of Reps	Number of Reps	Balance	Never Share	Currency	None	...
OQP_Average LY Bookings Per	Average Last Year Bookings Per Rep	Flow	Dynamic Calc	Currency	None	...
OQP_Number of Accounts	No of Accounts	Balance	Never Share	Currency	None	...
OQP_Average Quota Per Accou	Average Quota Per Account	Flow	Dynamic Calc	Currency	None	...
OQP_Overall Growth%	Overall Growth%	Flow	Dynamic Calc	Percentage	None	...
OQP_Average Quota Per Rep	Average Quota Per Rep	Flow	Dynamic Calc	Currency	None	...
OQP_No of Accounts	Number of Accounts	Flow	Dynamic Calc	Currency	None	...

Top Down Quota Measures

Actions Save Close

Component Top Down Key Performance Indicators

Name	Alias(Default)	Time Balance	Data Storage	Data Type	Smart Lists	Action
OQP_Overall Growth%	Overall Growth%	Flow	Store	Percentage	None	...
OQP_Average Quota Per Rep	Average Quota Per Rep	Flow	Store	Currency	None	...
OQP_Average Quota Per Accou	Average Quota Per Account	Flow	Store	Currency	None	...
OQP_No of Accounts	Number of Accounts	Flow	Store	Currency	None	...

Once all drivers, assumption, data load and business rules invoked, below dashboards gets rendered.

