

Getting Started with the Sales Model

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To get familiar with the [Sales](#) model you can install it with a sample configuration which includes sample data. You can find directions on how to configure the model with sample data in [Setting Up the Sales Model](#). The model can also be set up without sample data. Follow the steps below to configure the model and populate it with your company's data.

The steps below explain how to configure the model and populate it with your own data.

Note that the instructions below are based on using an Excel workbook to collect relevant data and figures into worksheets and uploading them into the Jedox database. Jedox offers you a variety of ways to achieve the same goal, e.g. editing elements manually in the [Modeler](#), defining a job in the [Integrator](#) to connect to your ERP. In the context of this article, we'll stick to using the Excel workbook – feel free to use the most appropriate method for your needs.

The [Sales](#) model comes with an Excel Workbook containing a sample configuration as well as sample data. You will find this in Jedox Web > Report Designer > [Models](#) > [Sales/Files/Sample Data/Sales sample data](#). Save a copy of this workbook (using [Export](#) from the context menu) locally, edit it to replace the sample configuration and

data with your own.

You can configure dimensions, as well as cubes by [uploading](#) your modified Excel workbook into the model you're working with via the steps below:

- I. Open Modeler > [Database Name] > Dimensions or Cubes > [Dimension's or Cube's name] and choose [Upload file](#) from the context menu.
- II. The Dimension/Cube Upload Wizard opens which guides you through the steps.
- III. Select the modified copy of the workbook from your local file system. For details, see [Dimension and Cube Interfaces](#).

Use the essential steps below for configuring the model and modifying individual worksheets in the Excel workbook:

1. Set up Model	Install the model without sample data. For directions, see Setting Up the Sales Model .
2. Set up Languages	<ol style="list-style-type: none">1. Remove unnecessary languages from the model by going to Modeler > [Database Name] > Internationalization and selecting the language(s) you would like to remove and then Delete (-). Once the languages are removed from the model, attributes in the workbook using that language can be ignored. Columns that have been localized will have the default attribute name followed by an @ symbol with the country code for the language in the format xx_XX. For example, attribute Label in the Version worksheet has localized columns Label@de_DE, Label@fr_FR, and Label@es_ES for translations in German, French, and Spanish respectively.2. To add a language go to Modeler > [Database Name] > Internationalization and then New (+) to select the language you would like to add from the menu. Once the new language has been added, go to the worksheet of the dimensions and cubes you would like to update with the translations for the new language. For example, to add a new column to the worksheet for the Version dimension of the Name attribute in Portuguese (Brazil), you'd add Name@pt_BR.
3. Add Legal Entities	Legal Entity is a required dimension for the presentation of reports, it identifies a company or a group of companies within a report. You can edit it within the Legal Entity worksheet and upload it to the Legal Entity dimension with the upload wizard. If you only have one legal entity, you still have to use this dimension, populate it with the single entity that you have. Use the standard settings provided by the upload wizard to populate this dimension. Make sure that the Currency attribute is populated with local currencies.

4. Add Products	<p>Products are articles or services that your company sells. You can add them to your Sales Model by updating the Article worksheet. Upload the worksheet to the Article dimension within the model. Make sure to add your company product hierarchy to the worksheet under the :parent and :child columns. Use the standard settings provided by the upload wizard to populate this dimension.</p>
5. Add Customers	<p>You can add customers to your Sales Model by updating the Customer worksheet. Upload the worksheet to the Customer dimension within the model. Make sure to add your company product hierarchy to the worksheet under the :parent and :child columns. Use the standard settings provided by the upload wizard to populate this dimension.</p>
6. Add Sales Channels	<p>Sales Channels are the ways you bring your product or service to customers. You can add Sales Channels to your Sales Model by updating the Sales Channel worksheet. Upload the worksheet to the Sales Channel dimension within the model. Use the standard settings provided by the upload wizard to populate this dimension. Note that the Sales Channel dimension is found only in the Sales cube.</p>
7. Configure Sales Measures	<p>Sales measures are financial results of your company based on income earned and costs. You can add Sales measures to your Sales Model by updating the Sales measure worksheet. Upload the worksheets to the Sales measure dimension within the model. Make sure to add your company Sales measure hierarchy to the worksheet under the :parent and :child columns. Use the standard settings provided by the upload wizard to populate this dimension.</p>
8. Configure Sales Planning Measures	<p>Sales Planning measures are financial results of your company based on income earned and costs, which includes your current Sales measures and can include existing plans as well. You can add Sales Planning measures to your Sales Model by updating the Sales Planning measure worksheet. Upload the worksheet to the Sales Planning measure dimension within the model. Make sure to add your company Sales Planning measure hierarchy to the worksheet under the :parent and :child columns. Use the standard settings provided by the upload wizard to populate this dimension.</p>
9. Configure Sales Order Status	<p>Sales Order Status describes the state of your company orders. You can add Sales Order Status to your Sales Model by updating the Sales Order Status worksheet. Upload the worksheet to the Sales Order Status dimension within the model. Make sure to add your company order status hierarchy to the worksheet under the :parent and :child columns. Use the standard settings provided by the upload wizard to populate this dimension.</p>
10. Adjust Time Span	<p>The time span of the model can be adjusted to fit your organization's historical data and planning horizon in the Time Editor tab of the Month dimension.</p>
11. Change Forecast Versions	<ol style="list-style-type: none"> The elements in the Version dimension helps you to compare figures for reporting and planning. A minimum of two forecast elements are required. The Actual Months attribute of the forecast elements must have a value between 1 and 11.
12. Set Up Currency Conversion	<ol style="list-style-type: none"> When a company or a group of companies stores accounting data, one currency like the Euro or Dollar, must be chosen. This currency which is called the Source Currency will be stated under the Currency attribute within the Legal Entity dimension. You have to update source currencies in the Currency worksheet and upload them to the Currency dimension of the model. Use the standard settings provided by the upload wizard to populate this dimension. You need currency conversion when a source currency has to be converted into another currency for reporting purposes. The set of currencies available for conversion is called the Target Currency. To define target currencies you have to update and upload the Currency and Target Currency worksheets to the Currency and Target Currency dimensions. You can import the actual exchange rates into the model by using the import exchange rates interfaces. All of the planning versions (Budget & forecast versions) can be set from the January average rate. You can load planning Exchange Rates via the Exchange Rates worksheet and upload them into the Exchange Rates cube.

13. Configure Workflow	<ol style="list-style-type: none"> 1. Email notification for any workflow steps is required for you to contact your users about the workflow tasks they must complete. Below are a few points for you to remember when setting up email notification. 2. Set up SMTP Mailer: To set up the SMTP mailer go to Administration > Settings > Global > Tasks > Smtm to update the values for the mailer. See Adjust Email Notification Settings for details. 3. Configure User data: In Administration > Users, add the e-mail addresses and user groups for every member of the workflow. See Administration Panel for details. Note: Users should be set up with-in groups, see Assigning Activities to User Groups for details. 4. Configure e-mail notifications: The subject, body and editable fields of the e-mail notification can be configured in the E-Mail Notification report inside the model's Workflow Task Reports. The text for the subject and body of the notification is stored in the _WF Activity Dimension.
14. Add Logo	Replace the Jedox logo within the web reports to your company logo. See Configuring Design Elements .
15. Change Cell Styles	Modify the default cell styles within the web reports to your company style. See Configuring Design Elements .

At this point basic configuration is complete! Follow the steps below to use the models:

16. Initial Data Import	To import actual figures (e.g. historical data up to the most recent month) and the existing plans, use Upload file on the Sales and Sales Planning cube.
17. Import Actual Figures	To import actual figures on a monthly basis you can use Upload file on the Sales cube. This is a quick way to get started, but if you want, for example, to enable daily reporting, you can extend this functionality by using an Integrator job that connects directly to your finance system or ERP and loads in automatically.
18. Review the Actual Figures	<p>If you've imported actuals, multiple currencies may be required within the system before reviewing the figures. Access the Import Exchange Rates form within the Exchange Rates input screen to import the exchange rates into the system. Once that is completed, use the Sales Actual report to review current reporting positions in both local and target currencies.</p>
19. Do Mid-Term Planning	<ol style="list-style-type: none"> 1. If you need to do the mid-term planning, you'll have to prepare the system to receive data. Use the Exchange Rates input screen to update the currencies in your mid-term plan. 2. You can optionally use the Sales Workflow Administration form to monitor changes made by user groups during a certain time period. To collect data without monitoring the workflow move on to step e. Open Modeler > [Database Name] > Dimensions > _WF Task dimension to create a new element of the form "Sales Mid-Term Planning yyyy - yyyy+2" where yyyy is the first and yyyy+2 is the last of your three year mid-term planning time span. 3. Open the Sales Workflow Administration form, select the workflow task you created from the drop-down list, then select the symbol for further details (⋮) which opens a pop-up screen where you'll be able to define the workflow task properties: Set Cube to "Sales", Step Dimension to "Customer" and Workflow Type to "WF_Approval_Activities". You can set a due date and assignments (i.e. select Data Entry, Review or Revise options) using the further details button (⋮) for particular elements on the same form. Close the Sales Workflow Tasks form which has automatically saved your entries. 4. Back on the Sales Workflow Administration form press the Play button (⏮) in the form to begin the task. 5. Use the Sales Mid-Term Planning input screen to create and adjust the plan across multiple years.
20. Create your Budget	<ol style="list-style-type: none"> 1. If you need to prepare your budget, you'll have to prepare the system to receive data. Use the Exchange Rates input screen to update the currencies in your budget. 2. You can optionally use the Sales Workflow Administration form to monitor changes made by user groups during a certain time period. To collect data without monitoring the workflow move on to step e. Open Modeler > [Database Name] > Dimensions > _WF Task dimension to create a new element of the form "Sales Budget yyyy" where yyyy is the budget year. 3. See 18c 4. See 18d 5. Use the Sales Gross Earnings, Sales Gross Revenue, Sales Commission, or Sales Cost and Contribution Margin input screens to prepare your company budget.

21. Do your Forecast

1. If you need to create a forecast, you'll have to prepare the system to receive data. Use the [Exchange Rates](#) input screen to update the currencies in your forecast.
 2. You can optionally use the [Sales Workflow Administration](#) form to monitor changes made by user groups during a certain time period. To collect data without monitoring the workflow move on to step e. Open Modeler > [Database Name] > Dimensions > [_WF Task](#) dimension to create a new element of the form "Sales Forecast-Version yyyy" where Forecast-Version is the appropriate forecast element of the [Version](#) dimension and yyyy is the forecast year.
 3. See 18c
 4. See 18d
 5. Then use the [Sales Forecast Initialization](#) form to populate the forecast version. Once you've populated the forecast version, use the input the [Sales Gross Earnings](#), [Sales Gross Revenue](#), [Sales Commission](#), or [Sales Cost and Contribution Margin](#) input screens to make updates.
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