

PeopleSoft®

PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 SP1 Reports

August 2005

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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

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- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

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See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

PeopleSoft EnterpriseOne CRM Application Fundamentals Reports

This appendix provides an overview of CRM Application Fundamentals reports and allows you to:

- View summary tables of all reports.
- View detail information about selected reports.

PeopleSoft EnterpriseOne CRM Application Fundamentals Reports: A to Z

These tables list the CRM Application Fundamentals reports, sorted alphanumerically by report ID. The report tables are broken down into these categories:

- Lead
- Opportunity
- Forecast
- Action Plan/Activity
- Competitor
- Customer
- Employee
- Partner
- Contact
- Product Catalog

Lead

These reports are available for sales leads:

Report ID and Report Name	Description	Navigation
R90CB010A Lead Tracking Report	This report includes all leads that have been entered during the specified date range, organized by lead status.	Leads (G90CA0201), select Lead Tracking

Report ID and Report Name	Description	Navigation
R90CB010B Lead By Product Category Report	This report includes a list of leads for each product line. The report includes the lead name, company, city, and qualification score.	Leads (G90CA0201), select Lead By Product
R90CB010C Lead By Lead Source Report	This report includes a list of leads, organized by lead source. The report includes each lead's name, company, city, state, and phone number. The report also includes the total number of leads per lead source.	Leads (G90CA0201), select Lead By Lead Source
R90CB5161, Version XJDE5160 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5160 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5160)
R90CB5161, Version XJDE5161 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5161 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5161)
R90CB5161, Version XJDE5163 Lead Address Avery Report	This report produces shipping labels for each active lead in the system in Avery 5163 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Shipping Address (Avery 5163)
R90CB5161, Version XJDE5389 Lead Address Avery Report	This report produces index post card labels for each active lead in the system in Avery 5389 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Index Post Card (Avery 5389)
R90CB5161, Version XJDE5663 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5663 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Clear Address (Avery 5663)

Opportunity

These reports are available for sales opportunities:

Report ID and Report Name	Description	Navigation
R90CB020A Opportunities by Channels Report	This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel
R90CB020B Opportunities by Probability Report	This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability
R90CB020C Opportunities by Probability for a Sales Rep Report	This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability For Selected Sales Representatives
R90CB020D Opportunities by Territories Report	This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Territory

Report ID and Report Name	Description	Navigation
R90CB020E Opportunities by Channels for a Sales Rep Report	This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel For Selected Sales Representatives
R90CB020I Opportunity Summary Report	This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.	Opportunity (G90CA0202), select Opportunity Summary

Forecast

These reports are available for sales forecasts:

Report ID and Report Name	Description	Navigation
R90CB06A Forecast - Frozen Forecast Status Report	This report displays a frozen forecast with all of the forecast’s associated opportunities as of the current date. The report enables users to review the change, if any, in the dollar amounts for opportunities between the current date and the date the forecast was frozen.	Forecast (G90CA0203), select Frozen Forecast Status
R90CB020F Opportunity Pipeline Review by Close Date Report	This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.	Forecast (G90CA0203), select Pipeline Review By Close Date

Action Plan/Activity

These reports are available for activities and action plans:

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List Report	This report includes summary information about all action plans, such as the description of the plan, and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CA0204), select Action Plan Listing

Report ID and Report Name	Description	Navigation
R90CA1301B Activities for a Customer Contact Report	This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CA0204), select Activities By Customer
R90CA13D Periodic Planner Report	This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.	Action Plan/Activity (G90CA0204), select Activity - Periodic Planner

Competitor

These reports are available for competitors:

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail Report	This report includes all information about a competitor and their products. You can use this report to compare the products from your organization with those of the competitors.	Competitor (G90CA0205), select Competitor Product Selected

Customer

These reports are available for customers:

Report ID and Report Name	Description	Navigation
R90CA080B Customer/Contact Summary Report	This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CA0206), select Customer Contact Summary
R90CA080G Customer Summary - Selected Report	This report includes summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CA0206), select Customer Summary
R90CA0111A Contacts for a Customer Report	This report lists each contact, along with the associated contact information for each selected customer.	Customer (G90CA0206), select Contacts by Customer

Employee

These reports are available for employees:

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List Report	This report includes all active employees in the system, along with their titles and phone numbers.	Employee (G90CA0207), select Employee Phone List

Partner

These reports are available for partners:

Report ID and Report Name	Description	Navigation
R90CA01B Partner Listing Report	This report includes all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CA0208), select Partner List

Contact

These reports are available for contacts:

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Summary Shipping - Avery 5163 Report	This report produces shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address Shipping (Avery 5163)
R90CA070B Contact Summary Shipping - Avery 5160 Report	This report produces mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5160)
R90CA070C Contact Avery 5161 Report	This report produces mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5161)

Product Catalog

These reports are available for product catalogs:

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List Report	This report includes all product catalogs, along with the available products associated with each catalog.	Product Catalog (G90CA02010), select Product Catalog List

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

Action Plan Listing
PeopleSoft, Inc.

Lisa Moyte Action Plan #1

Description Lisa Action Plan Description #1

Activity #1

Activity Type	MEETING
Assigned To	Lisa Moyte
Start Time	05/10/05
Number of Days	0
Commitment Level	2

Activity #2

Activity Type	MEETING
Assigned To	
Start Time	05/10/05
Number of Days	0
Commitment Level	2

Contacts for a Customer

Name	Work Number	Fax Number	Title	Address	City	State
42101 -Cont1						

Financial Company

Name	Work Number	Fax Number	Title	Address	City	State
Rose	303 55555		Sales			

MS-Contact Account

Name	Work Number	Fax Number	Title	Address	City	State
Niki Contact	741 236 9985			963 Bixford road	Denver	CO
Ian Contact	888 741 2365			84 Sansbury Lane	Tampa	FL
Betsy Landry						
Lindsay Newport						
Angi Burton			CE	8521 Longfellow Road	Denver	CO
Lacy Contact	874 552 3698			23 Lacy Street	Las Vegas	NC

Email Merge Account

Name	Work Number	Fax Number	Title	Address	City	State
Emma Contactmerge						
Connie Contactmerge						
Mary Contactmerge						

Mail Merge Account

Name	Work Number	Fax Number	Title	Address	City	State
Thomas MailMerge			IT Manager	99 Technology Way	New York	NY
Meredith MailMerge			Purchasing Manager	1045 Ballantyne Corportate Pkwy	Charlotte	NC
Chris Contact			Secretary	1 Technology Way	Denver	CO

TestSalesTeam

Name	Work Number	Fax Number	Title	Address	City	State
Test						

CVNS

Name	Work Number	Fax Number	Title	Address	City	State
Test Test						

Exchange Enterprise

Employee Phone List

PeopleSoft, Inc.

Name	Title	Work Number
EEO Test 009		
EEO Test 010		
EEO Test 011		
EEO Test 012		
EEO Test 013		
EEO Test 014		
EEO Test 015		
EEO Test 016		
EEO Test 017		
EEO Test 018		
EEO Test 019		
EEO Test 020		
EEO Test 021		
EEO Test 022		
EEO Test 023		
EEO Test 024		
EEO Test 025		
EEO Test 026		
EEO Test 027		
EEO Test 028		
EEO Test 029		
EEO Test 030		
EEO Test 031		
EEO Test 032		
EEO Test 033		
EEO Test 034		
EEO Test 035		
EEO Test 036		
EEO Test 037		
EEO Test 038		
EEO Test 039		
EEO Test 040		
EEO Test 041		
EEO Test 042		
EEO Test 043		
EEO Test 044		
EEO Test 045		
EEO Test 046		
EEO Test 047		
EEO Test 048		
EEO Test 049		
EEO Test 050		

EH200	Bike Rack - Trunk Mount Strap
EH300	Bike Rack - Trunk Mount Strap
MSCC11	Bread Maker
MSCC12	Bread Maker
900439	Suresh Bike Rack - Trunk Mount
900551	Suresh Bike2Rack - Trunk Mount
ABC_ITEM	Bike Rack - Trunk Mount
ABC_ITEM2	Bike Rack - Trunk Mount
PUR200	PUR200
740501	Bike Rack - Trunk Mount
52051	Bike Rack - Trunk Mount

Touring bikes

Bike trailer

1001	Bike Rack - Trunk Mount
2600	Bike Trailer
421D	Bike Rack - Trunk Mount
422D	Bike Rack - Trunk Mount
72525	Bike Rack - Trunk Mount
838145	Item Notes Test
838250	Location Template Validation
838487	Item Alternative Description
NEWITEM7187891	NEWITEM7187891
SAR7185415	SAR7185415
TEST1001	Bike Rack - Trunk Mount
SAR6713520 1	SAR6713520 1
LR1001	LR Bike Rack - Trunk Mount
41116	Bike Rack - Trunk Mount
GG1001	Gopal - Bike Rack
SARTE1	Bike Rack - Trunk Mount
SARETE1	Bike Rack - Trunk Mount
SARETE2	Bike Rack - Trunk Mount
SARETE3	Bike Rack - Trunk Mount
SARETE4	Bike Rack - Trunk Mount
SARETE5	Bike Rack - Trunk Mount
SARETE6	Bike Rack - Trunk Mount
SARETE7	Bike Rack - Trunk Mount
SARETE8	Bike Rack - Trunk Mount
SARETE9	Bike Rack - Trunk Mount
SARETE10	Bike Rack - Trunk Mount
TESTAS	Bike Rack - Trunk Mount
TESTAS2	Bike Rack - Trunk Mount
SRM100	Bike Rack - Trunk Mount
EH200	Bike Rack - Trunk Mount Strap