Oracle® Customer Intelligence

Concepts and Procedures

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Understanding Oracle Customer Intelligence

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Customer List

Use this report to display a high-level list, in column format, of all your customers based upon your selection criteria: customer name, customer category, market segment, organization, geographical locations, such as country, state, and city.

- Customer Name
- Account Number
- Acquired Date (the date a new customer is created into the system)
- First Order Date (the date the first order is entered into the system)
- Last Order Date (the date of the most recent order)
- Profitability (sale revenue - cost of goods sold divided by sales revenue)
- Market Segment Code (user-defined code, as a strategically defined market segment code, such as Apps, Tools, and Database)
- Customer Category Code (user-defined code describing customer category, such as large, medium, and small)
- Organization (user-defined code that can business unit or operating unit)
- Location (physical location of the account)

When the search results yield more than one record though simple, advanced, or alpha search, the report provides you with a list of customers and their accounts.

Customer Account Transaction Detail: Campaign

Use this report to display detailed information of a campaign you initiated for a customer account.

Customer Account Transaction List: Campaign

To display a list of campaigns for a customer's account, use this report.

By default, the report displays the first ten most recent campaigns. The user-level profile option, BIC Number of Records in Customer Report, controls the default value.

Customer Account Transaction Detail: Contact

You can use this report to display detailed information of all your customer account contacts.

Customer Account Transaction Detail: Contract

Use this report to display detailed information of contract and service details for a customer account.

Customer Account Transaction Detail: Installed Base

This report displays detailed information of a product in Installed Base for a customer account. Detailed data showing on this page are product and its service details.

Customer Account Transaction Detail: Interaction

This report displays detailed information of an interaction for a customer account. Detailed data showing on this page are interaction header and its notes information.

Customer Account Transaction Detail: Invoice

This report displays detailed information of an invoice sent to a customer account. Detailed data showing on this page are both invoice header and line detail information.

Customer Account Transaction List: Invoice

This report displays list of invoices for a customer account.

Customer Account Transaction Detail: Order

This report displays detailed information of an order made by a customer account. Detailed data on this page show order header and line detail information.

Customer Account Transaction Detail: Sales Quote

To see a sales quote for a customer account, use this report and view detailed data displayed in quote header and line detail information.

Customer Account Transaction Detail: Service Request

This report displays detailed information of a service request for a customer account. Detailed data showing on this page are service request detail with its associated tasks and interactions.

Customer Satisfaction Report

You can use this report to analyze and display a graphical representation of aggregated results from various measures: shipment, quality, billing, and service and contract satisfaction measures.

The customer safisfaction index represent benefits your customers receive by associating with your company; therby, providing you with information to identify the most beneficial performance improvements for your retention strategies.

To build retention strategies, consider the identification of performance improvements, which is based upon you internal calculations and values set to the customer satisfaction index. The following are values for your drivers: orders, interactions, service requests, calls, contracts, and payment transactions. In addtion to the drivers, consider your customer satisfaction surveys to validate and compare your values against the industry benchmark's values.

The View By parameter controls the display of the Year-Over-Year's measurement. All other parameters have the default value of All. You can change the parameter values to other dimensions, such as Market Segment, Customer Category, or Operating Unit. After selecting the parameter, click the Run Report button to execute the query.

Once you execute the query, the graph will change, and the data will reflect your selection. The graph will display your selection of segment codes as column titles and hyper-links. You can click on any of these links to see segment details by the satisfaction measures.

Customer Satisfaction by Billing Report

This report enables user to analyze the customer satisfaction by its sub measure, Billing. This report provides user with graphical representation of results from the Billing measure.

You can display the result from the billing sub measure for a selected segment selected, by clicking on its hyper-link from the previous report, which is the Customer Satisfaction Decomposition Report.

The displays is a chart with data for the measurments used to analyze the Billing Satisfaction, for an on-time payment rate. An On-time payment rate is the average number of invoices paid on or before the due date.

You cannont select any parameter values for this report.

Customer Satisfaction by Quality Report

This report enables user to analyze the customer satisfaction by its sub measure, Quality. This report provides user with graphical representation of results from the Quality sub measures.

The customer safisfaction index represent benefits your customers receive by associating with your company; therby, providing you with information to identify the most beneficial performance improvements for your retention strategies.

To build retention strategies, consider the identification of performance improvements, which is based upon you internal calculations and values set to the customer satisfaction index. The following are values for your drivers: orders, interactions, service requests, calls, contracts, and payment transactions. In addtion to the drivers, consider your customer satisfaction surveys to validate and compare your values against the industry benchmark's values.

Customer Satisfaction by Contract Report

This report enables user to analyze the customer satisfaction by its sub measure, Contract. This report provides user with graphical representation of results from the Contract measure.

You can display the results from the Contract sub measure for a selected segment,   by clicking on its hyper-link from the previous report, which is the Customer Satisfaction Decomposition Report.

The displays is a chart with data for the measurments used to analyze the Contract Satisfaction: total number of active contracts, average contract period for all contracts, and average contract period for active contracts.

You cannont select any parameter values for this report.

Customer Satisfaction by Service Report

This report enables user to analyze the customer satisfaction by its sub measure, Service. This report provides user with graphical representation of results from the Service measure.

Customer Satisfaction By Shipment Report

This report enables user to analyze the customer satisfaction by its sub measure, Shipment. This report provides user with graphical representation of results from the Shipment sub measures.

Customer Acquisition Analysis: Year-Over-Year

This report allows you to view the number of new customer accounts you acquired year-over-year in any of the following dimensions:

- Market Segment
- Customer Category
- Geography

Customer Acquisition Analysis: Dimension

This report allows you to view many new customer accounts that you acquired over time by using the following dimensions:

- Market Segment
- Customer Category
- Geography

Customer Profitability Analysis: Year-Over-Year

To analyze the profitability of your customers year-over-year, use this report and a combination of the following dimensions:

- Market Segment
- Customer Category
- Operating Unit
- Geography
- Product Line

Customer Activation Analysis: Year-Over-Year

You can view all the new customers you activated year-over-year in any of the the following dimensions:

- Market Segment
- Customer Category
- Geography

Customer Profitability Analysis: Dimension

To analyze the profitability of your customers over time, use a combination of the the following dimensions:

- Market Segment
- Customer Category
- Operating Unit
- Geography
- Product Line

Customer Activation Analysis: Dimension

To view the number of new customer accounts you activated over time, use the following dimensions:

- Market Segment
- Customer Category
- Geography

Customer Revenue Analysis: Year-Over-Year

To analyze the revenue from your customer year-over-year, use a combination of any of the following dimensions:

- Market Segment
- Customer Category
- Operating Unit
- Geography
- Product Line

Customer Revenue Analysis: Dimension

Use this report to analyze the revenue from your customers over time, by using a combination of the following dimensions:

- Market Segment
- Customer Category
- Operating Unit
- Geography
- Product Line

Customer Retention Analysis: Year-Over-Year

To view year-over-year customer retention rates, use a combination of any of the following dimensions:

- Market Segment
- Customer Category
- Geography

Also, you can use thise report to analyze the number of customer accounts that are new, retained, reactivated, and churned.

Customer Retention Portfolio Analysis

Customer Retention Analysis: Year-Over-Year and Customer Retention Analysis: Dimension are drill-down reports, enabling you to view four analytic graphs:

- Revenue, Profitability
- Loyalty
- Satisfaction

This report provides the complete listing of the customers within their particular cell.

Customer Lifecycle Analysis

To view customer lifecycle distributions trends over time, use a combination of any of the following dimensions:

- Market Segment
- Customer Category
- Geography

You can also analyze over time the number and percentage of your customer accounts that are new, growing, stable, declining, defected, and insignificant.

Customer Loyalty Analysis: Year-Over-Year

To analyze year-over-year customer loyalty, use this report to disply a graphical representation of results from various measures, such as order amount, order quantity, order recency, order frequency, and years of association for customer loyalty.

Customer Loyalty Analysis: Dimension

To anlalyze customer loyalty over time, use a combination of any of the following dimensions:

- Market Segment
- Customer Category
- Operating Unit
- Geography
- Loyalty Index

This report provides you with a graphical representation of results from various measures, such as order amount, order quantity, order recency, order frequency, and years of association, for customer loyalty.

Customer Loyalty Analysis: Index Decomposition

This report displays a graphical representation for you to analyze customer loyalty decomposed to its sub measures, such as order amount, order quantity, order recency, order frequency, and years of association.

Using Oracle Customer Intelligence

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Using Customer List

To create a report, follow these steps:

1. Clink on the Account Number link and go to the Customer Account Overview page.

Using the Customer Search bar at the top of the page, you can search customers by entering customer's name, advanced search option, or enter the first initial, with a wild card, "%" of customer's name.

Using Customer Account Transaction Detail: Campaign

When you click on a campaign, from the list of campaigns on the Customer Account Overview Report, you will generate the Customer Account Transaction Detail: Campaign report.

To Navigate, to other reports, follow these steps:

1. Click on the Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction List: Campaign

To run a report for other date ranges, follow these steps:

1. Input From and To dates to choose the date range.
2. Click on Run Report to execute the query.
3. Click on a Campaign Id to see more details about the campaign.

To Navigate to other reports, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.

3. Click on browser's Back button to navigate back to the customer account overview on the previous page.

Using Customer Account Transaction Detail: Contact

To generate this report, follow these steps:

1. Access the Customer Account Overview Report.
2. Click on More Contacts.

To navigate to other reports, follow these steps:

To navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to Customer Account Overview on the previous page.

Using Customer Account Transaction Detail: Contract

To create a report, follow these steps:

1. Go to the Customer Account Overview report
2. Access the list of contracts.
3. Click on any of the contracts listed.

To navigate to other reports, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the contract list on the previous page.

Using Customer Account Transaction List: Contract

To create a report, follow these steps:

1. Input From and To date to choose the date range.
2. Click Run Report to execute the query.

3. Click on a Contract Number to see more details about the contract.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction List: Installed Base

To create a report, follow these steps:

1. Input the From and To dates to choose the date range and click on Run Report to execute the query.
2. Click on a product name to see more details about the product in installed base.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction Detail: Interaction

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.

2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction List: Interaction

To create a report, follow these steps:

1. Input the From and To dates to choose the date range and click on Run Report to execute the query.
2. Click on a product name to see more details about the interaction of the product.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction Detail: Invoice

To create a report, follow these steps:

1. Input the From and To dates to choose the date range and click on Run Report to execute the query.
2. Click on a product name to see more details about the product's invoice.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction List: Invoice

To create a report, follow these steps:

1. Input the From and To dates to choose the date range and click on Run Report to execute the query.
2. Click on a product name to see more details about the product's invoice.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Overview

To view more information about the account, follow these steps:

1. Click on any underlined title of transaction summary to see more details.
2. Click on account number to see more details about the account.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction List: Order

To create a report, follow these steps:

1. Input the From and To dates to choose the date range and click on Run Report to execute the query.
2. Click on an order number to see more details about the order.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.

3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction Detail: Sales Quote

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Account Transaction List: Sales Quote

To create a report, follow these steps:

1. Input the From and To dates to choose the date range and click on Run Report to execute the query.
2. Click on a quote number to see more details about the sales quote.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

Using Customer Satisfaction Report

To create a report, use the following steps:

1. Enter starting and ending values.
2. Enter a segment dimension value or enter **All** for Market Segment, Customer Category, and/or Operating Unit.
3. Enter a geography dimension value or **All**.
4. Enter a **View By** dimension value
5. Click **Run Report** button to execute the query.

You can click **Save to Favorites** to save the report to user's favorite report list; or, you can click on **Print** to send the result to the printer.

To navigate, follow these steps:

1. Click on the Home icon at the main title bar to navigate back to the home page.
2. Clink on the Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on Related Report icon at the main title bar to move to the Related Reports area on the same page. You can click on any related report to drill-across to other related reports.

You can search a for customer by entering customer's name (partial with wildcard or full name) and click on the find button; or, select Advanced Search Link or Alpha-Search bar. A new page with list of customers will be displayed for more information.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

You can click the Related Report icon at the main title bar to move to the Related Reports area on the same page. If a related report exists, you can click on its hyper-link to drill-across to other related reports.

To search for a customer or customers, enter customer's name (partial name with wildcard or the full name) and click on the Find button; or, to view a list of customers or a customer page, select the Advanced Search link or Alpha-Search bar.

To navigate, follow these steps:

1. Click on the Home icon at the main title bar to navigate back to the home page.
2. Clink on the Parameter icon at the main title bar to navigate back to the main menu page.

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Using Customer Satisfaction by Quality Report

The report displays the results from the Quality sub measure for a selected segment selected, by clicking on its hyper-link from the previous report, which is the Customer Satisfaction Decomposition Report, displays chart and data for the measures used to analyze the Quality satisfaction.

Measurements include:

- total return units (selling price multiplied by the total quantity returned)
- percentage of units returned (total return sales divided by the new sales of all deliveries multiplied by 100: net sales=shipped quantity multiplied by selling price and shipped quantity = total quantity ordered * total quality cancelled) % of sales returned is calculated as (total return sales / net sales of all deliveries(* 100, where net sales = shipped quantity * selling price, and shipped quantity = total quantity ordered * total quantity cancelled)
- percentage of sales returned
- number of service requests

No parameter values can be selected on this report.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.Þ Navigate

You can click the Related Report icon at the main title bar to move to the Related Reports area on the same page. If a related report exists, you can click on its hyper-link to drill across to other related reports.

To search for a customer or customers, enter customer's name (partial name with wildcard or the full name) and click on the Find button; or, to view a list of customers or a customer page, select the Advanced Search link or Alpha-Search bar.

Using Customer Satisfaction by Service Report

The report displays the result from the Service sub measure for a selected segment. By clicking on its hyper-link from the previous report, which is the Customer Satisfaction Decomposition Report, the report displays a chart with data for the measures for you to analyze Service satisfaction: average daily requests logged, average daily requests outstanding, percentage requests escalated, percentage requests reworked, average resolution time, average response time, average interactions per service request, and average transfers per service request.

No parameter values can be selected on this report.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.Þ Navigate

You can click the Related Report icon at the main title bar to move to the Related Reports area on the same page. If a related report exists, you can click on its hyper-link to drill across to other related reports.

To search for a customer or customers, enter customer's name (partial name with wildcard or the full name) and click on the Find button; or, to view a list of customers or a customer page, select the Advanced Search link or Alpha-Search bar.

Using Customer Satisfaction by Shipment Report

The report displays the result from the Shipment sub measure for a selected segment, by clicking on its hyper-link from the previous report, which is the Customer Satisfaction Decomposition Report. The report displays a chart with data of the measurements for you to analyze the Shipment satisfaction: on-time shipment rate by unit and on-time shipment rate by sales value.

On-time shipment rate by unit is the percentage of order lines shipped where shipped date is on or before the order request date.

On-time shipment rate by sales value is calculated as (total on-time shipment sales / net sales of all shipments) * 100, where net sales = shipped quantity * selling price, and shipped quantity = total quantity ordered - total quantity cancelled).

No parameter values can be selected on this report.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

You can click the Related Report icon at the main title bar to move to the Related Reports area on the same page. If a related report exists, you can click on its hyper-link to drill across to other related reports.

To search for a customer or customers, enter customer's name (partial name with wildcard or the full name) and click on the Find button; or, to view a list of customers or a customer page, select the Advanced Search link or Alpha-Search bar.

Using Customer Acquisition Analysis: Year-Over-Year

To create a report, follow these steps:

1) Select the parameters you would like to show your report.

2) For "View by" parameter, choose "Year over Year."

3) Click the "Run Report" button.

Also, you can select another View by dimension value to see the report through another dimension. You can further drill down to account level information by clicking on the hyper-links under any number below the Selected Periods and Previous Year columns.

Using Customer Acquisition Analysis: Dimension

To create a report, follow these steps:

1. Select the parameters you would like to show your report.
2. For the View by parameter, choose a dimension value (for example, Customer Category).
3. Click the Run Report button.

To analyze customer trends Year-Over-Year, select Year-Oover-Year for the View by parameter. In addition, by clicking on the hyper-links under any number below the Selected Periods and Previous Year columns, you can drill down to account level information.

Using Customer Activation Analysis: Year over Year

To run a report, follow these steps:

1. Select the parameters you would like to show your report.
2. For View by parameter, choose Year-Over-Year.
3. Click the Run Report button.

To see the report through another dimension, you can change the View by dimension value . By clicking on the hyper-links under any number below the Selected Periods and Previsous Periods, you can drill down to account level information.

Using Customer Activation Analysis: Dimension

To create a report, follow these steps:

1. Select the parameters you would like to show your report.
2. For the View by parameter, choose a dimension value (for example, Customer Category).
3. Click the Run Report button.

To see the report through another dimension, you can change the View by dimension value . By clicking on the hyper-links under any number below the Selected Periods and Previsous Periods, you can drill down to account level information.

Using Customer Profitability Analysis: Year-Over-Year

To run a report, follow these steps:

1. Select the parameters you would like to show your report.
2. For"View by parameter, choose Year-Over-Year.

3. Click the Run Report button.

To see the report through another dimension, you can change the View by dimension value . By clicking on the hyper-links under any number below the Selected Periods and Previsous Periods, you can drill down to account level information.

Using Customer Profitability Analysis: Dimension

To create a report, follow these steps:

To create a report, follow these steps:

1. Select the parameters you would like to show your report.
2. For the View by parameter, choose a dimension value (for example, Customer Category).
3. Click the Run Report button.

To analyze customer profitability trends year-over-year, select Year-Over-Year for the View by parameter.

Using Customer Revenue Analysis: Year-Over-Year

To create a report, follow these steps:

1. Select the parameters you would like to show your report.
2. For View by parameter, choose Year over Year.
3. Click the Run Report button.

To see the report through a different dimension, select a different View by.

Using Customer Revenue Analysis: Dimension

To create a report, follow these steps:

1. Select the parameters you would like to show on your report.
2. For the View by parameter, choose a dimension value (for example, Customer Category).
3. Click the Run Report button.

To analyze customer revenue trends year-over-year, select Year-Over-Year for the View by parameter.

Using Customer Retention Analysis: Year-Over-Year

To create are report, follow these steps:

1. Select the parameters you would like to show your report.
2. For View by parameter, choose Year-Over-Year.
3. Click the Run Report button.

To see the report through a different dimension, select a different View by dimension value. You can also click on any hyper-link customer cell in the table to drill down and view four analytic graphs:

- Revenue
- Profitability
- Loyalty
- Satisfaction

Using Customer Retention Analysis: Dimension

To create a report, follow these steps:

1. Select the parameters you would like to show your report.
2. For the View by parameter, choose a dimension value (for example, Customer Category).
3. Click the Run Report button.

To analyze customer retention trends year-over-year, select Year-Over-Year in the View by parameter. You can click on any hyper-link customer cell in the table to drill down and view four analytic graphs:

- Revenue
- Profitability
- Loyalty
- Satisfaction

Using Customer Retention Portfolio Analysis

To create a report, use the following steps:

1. From the Customer Retention Analysis: Year over Year report or the Customer Retention Analysis: Dimension report, click on any hyper-link customer cell in the table under the New, Retained, Reactivated, and Churned columns.

2. The Customer Retention Portfolio Analysis report appears.
3. Click on another cell or a customer name or account number for more information.

Using Customer Lifecycle Analysis

To create a report, follow these steps:

1. Select the parameters you would like to show your report.
2. Click the Run Report button.

You can click on any period in the table to drill down to Customer Lifecycle Analysis: Period report. Also, you can click on any hyper-link customer cell in the table and drill down to view your list of customers.

Using Customer Loyalty Analysis: Year-Over-Year

To create a report, follow these steps:

The View By parameter controls the display measurements. All other parameters have a default value of All. You can change the parameter value to other dimensions, such as Market Segment, Customer Category, Operating Unit, and click the Run Report button to execute the query. Once you perform the execution, the graph will change and will reflect your value selection.

Your column titles and hyper-links will display your segment codes, and you can click on any of the links to see segment details by the loyalty measures.

To achieve and entirely different results, use the following steps:

1. Input a period type and its starting and ending values.
2. Input a segment dimension value or All for Market Segment, Customer Category and/or Operating Unit.
3. Input a geography dimension value or enter All.
4. Input a View By dimension value.
5. Click on Run Report button to execute the query.

If you want to save the report to your favorite list of reports, click the Save to Favorites button; or, if you want to print your results, click the Print button.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

You can click the Related Report icon at the main title bar to move to the Related Reports area on the same page. If a related report exists, you can click on its hyper-link to drill across to other related reports.

To search for a customer or customers, enter customer's name (partial name with wildcard or the full name) and click on the Find button; or, to view a list of customers or a customer page, select the Advanced Search link or Alpha-Search bar.

Using Customer Loyalty Analysis: Dimension

To create a report, follow these steps:

The View By parameter controls the display measurements. All other parameters have a default value of All. You can change the parameter value to other dimensions, such as Market Segment, Customer Category, Operating Unit, and click the Run Report button to execute the query. Once you perform the execution, the graph will change and will reflect your value selection.

Your column titles and hyper-links will display your segment codes, and you can click on any of the links to see segment details by the loyalty measures.

To achieve and entirely different results, use the following steps:

1. Input a period type and its starting and ending values.
2. Input a segment dimension value or All for Market Segment, Customer Category and/or Operating Unit.
3. Input a geography dimension value or enter All.
4. Input a View By dimension value.
5. Click on Run Report button to execute the query.

If you want to save the report to your favorite list of reports, click the Save to Favorites button; or, if you want to print your results, click the Print button.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

You can click the Related Report icon at the main title bar to move to the Related Reports area on the same page. If a related report exists, you can click on its hyper-link to drill across to other related reports.

To search for a customer or customers, enter customer's name (partial name with wildcard or the full name) and click on the Find button; or, to view a list of customers or a customer page, select the Advanced Search link or Alpha-Search bar.

Using Customer Loyalty Analysis: Index Decomposition

The View By parameter controls the display measurements. All other parameters have a default value of All. You can change the parameter value to other dimensions, such as Market Segment, Customer Category, Operating Unit, and click the Run Report button to execute the query. Once you perform the execution, the graph will change and will reflect your value selection.

Your column titles and hyper-links will display your segment codes, and you can click on any of the links to see segment details by the loyalty measures.

To achieve and entirely different results, use the following steps:

1. Input a period type and its starting and ending values.
2. Input a segment dimension value or All for Market Segment, Customer Category and/or Operating Unit.
3. Input a geography dimension value or enter All.
4. Input a View By dimension value.
5. Click on Run Report button to execute the query.

If you want to save the report to your favorite list of reports, click the Save to Favorites button; or, if you want to print your results, click the Print button.

To Navigate, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.

2. Clink on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on browser's Back button to navigate back to the campaign list on the previous page.

You can click the Related Report icon at the main title bar to move to the Related Reports area on the same page. If a related report exists, you can click on its hyper-link to drill across to other related reports.

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