Oracle® Customer Intelligence

Implementation Guide

Release 11*i*

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Oracle Customer Intelligence Implementation Guide, Release 11*i*

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Contents

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Preface

Intended Audience

This document is intended for IT professionals who are tasked with implementing Oracle Customer Intelligence, Release 11*i*.

Related Documents

Additional information on installing and setting up dependencies is available in the following documents:

- *Release Notes, Oracle Applications Release 11i* (Part #A83528-01)
- *Oracle Applications Release 11i Concepts* (Part #A82932-01)
- *Installing Oracle Applications Release 11i* (Part #A69409-01)
- *Oracle Applications System Administrator's Guide Release 11i*
- *Implementing Oracle CRM:ERP Functional Checklist* (available on Oracle MetaLink)

For additional information on Customer Intelligence, as well as other related products, refer to Metalink and www.oracle.com.

Implementing Oracle Customer Intelligence

Purpose for Implementing Customer Intelligence

A company's understanding of their customers is important in many aspects. It provides companies with abilities to create better forecasting model, better cross/up selling opportunities, retention plans (to expand the customers life cycle), customize care and service plans, and to simply know their customers.

Overview of Customer Intelligence

Customer Intelligence is a customer information viewer that enables you to access enterprise-wide (360-degree) view of customer information. OCI provides you with information viewing tool, so you can search for and view detailed enterprise-wide customer information. You can search for a specific customer through simple, advanced search features, or alpha (A to Z) listing of customers.

Customer Intelligence is also an analytical tool that enables you to manage your customers by measuring customer profitability, acquisition, retention, satisfaction, lifecycle and loyalty, and analyzing impacts of these measurements on customer retention to maximize profitability. OCI provides graphical representation of results from analytics for customer acquisition, customer profitability, customer retention, customer satisfaction, customer loyalty and customer lifecycle that you can view at a high level. You can get detailed information by drilling down to group of customer for a specific period and eventually to an individual customer. The analytical data can help you plan for better retention strategies, more efficient cross (or up) selling, and for streamlining your company's supply chain process.

For companies operating in today's competitive environment, having a comprehensive customer-oriented strategy is the key for your success. To maintain stability and growth of the business, companies need to have the following strategies: grow the customer base (acquisition); retain customers (retention); get current customers to stay longer and spend more (profitability). To achieve the latter two, companies you must also ensure your current customers are loyal and satisfied with the services and products you offer (loyalty and satisfaction).

To grow the revenue (top line) and maximize the profit (bottom line), you need to answer the following questions:

- How many customers have we acquired in the past?
- Where do they come from (customer category, region, Market Segment, campaign, etc.)?
- What have they been buying?
- When did they buy?
- How often did they buy?
- How much did they buy?
- How profitable are they?
- Are they still buying from us? If so, why? If not, why not?
- How satisfied are our customers with our products and services?
- If they are not 100% satisfied, what has gone wrong?
- Among our customers, who is spending more, who is spending less, and who has defected?
- Considering customers as our most valuable asset, do we know the value of them?
- Among customers, who are the most valuable and who are the least valuable ones?
- What are the buying patterns, habits, and demographics of our customers?
- How can we leverage these information to recruit new customers and predict/influence customers' behaviors?
- Can we retrieve all the information and transaction history about a customer?

Customer Intelligence's End-Users

Customer Intelligence is designed for the following users:

Senior Executives

View the performance of the entire enterprise, and search for any customer to gain insight for making strategic decisions.

Middle Management

Monitor the performance of their responsible operating units, and monitor the performance measures for identifying areas of improvement.

Business Analyst

Perform customer portfolio analysis to understand cause and effect relationship among measures, and gain an overview of typical business processes.

Definitions of Various Customer Types

New Customer

Account created for the first time during the attrition period.

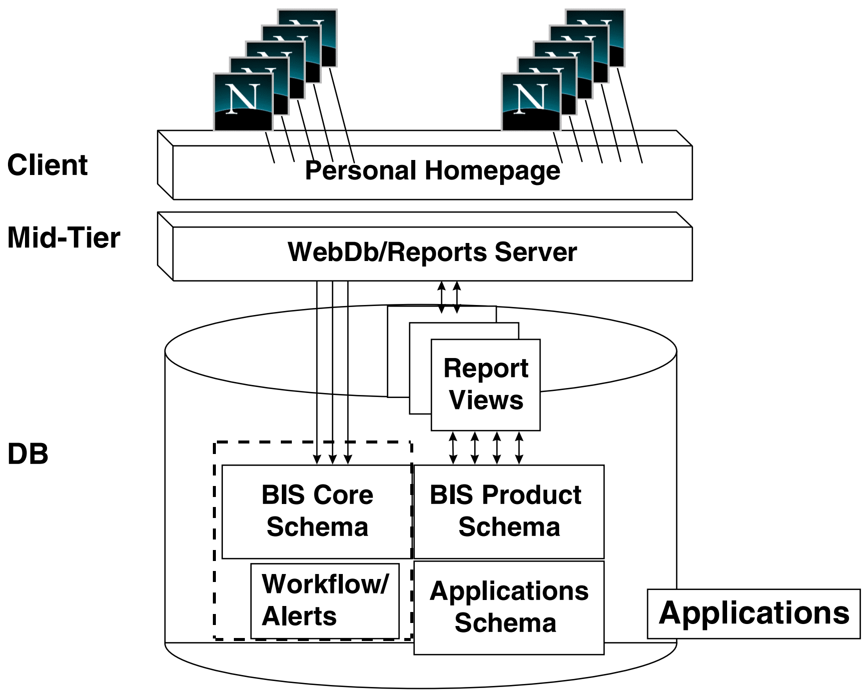
Reactivated Customer

Account had at least one order during the attrition period; account acquired before the previous attrition period; and, an account that had no orders in previous attrition period.

Retained Customer

Account that had at least one order during the attrition period and an account you acquired, or had at least one order, in the previous attrition period.

Architectural Overview of Customer Intelligence



Customer Intelligence's is based upon a summary table driven architecture; in addition, customer intelligence uses a web-enabled front-end applications for complex analysis.

The summary tables store key measures of customer acquisition, retention, profitability, satisfaction, loyalty, lifecycle, and information from other CRM and ERP databases using collection programs to ensure timely retrieval of data.

You can use the information in the summary tables to refresh collection programs at any frequency that you set up, but the minimum granularity of data stored will be monthly.

For security and logging into Customer Intelligence, you must access the PHP (Personal Home Page) architecture. You can configure the Homepage and allow users to view the information that you consider most important. Each user will be given a PHP to access all Oracle BIS applications. Included in the Homepage are the Performance Measures area, Navigator (to access other BIS products), Favorites (for a list of reports and/or URL links user favorites), and Trend region (displays graphs from different BIS products).

Customer Intelligence uses Oracle Reports 6.0 to build reports, which are web enabled. You can view the reports using a standard browser.

Dependencies for Customer Intelligence

Customer Intelligence's dependencies relates to other products and components. Its dependencies affect the product's implementation and ongoing operations; hence, you must install and set up all of Customer Intelligence's dependent components.

In order to implement Customer Intelligence, you must activate its required dependencies from different libraries, modules, engines, and applications.

Definition of Required Dependencies

- FND - FND forms are used to setup form functions, concurrent programs, menus and responsibilities.
- AK - AK forms are used to enter parameters, graph titles, and report column headings.
- AX - The accounting periods and currency codes are used from AX.
- BIS - BIS are integrated and can be drilled across through extensible hyper-links.
- JTF - JTF stores the interaction history data which is used in Customer Intelligence.
- ASO - BIC uses ASO to report order transactions and to calculate key measures such as acquisition, activation, retention, etc.
- CS - BIC uses CS to report service related transactions and to calculate key measures such as satisfaction and loyalty.
- AMS - BIC uses AMS to report campaign related information. AMS should have Market Segment properly set up as a dimension to be used by BIC.
- AS - BIC uses AS to report sales related information (quotes and opportunities).
- AR - BIC uses HZ (TCA) to source customer related information. HZ should have Customer Category properly set up as a dimension to be used by BIC. BIC also uses AR to report invoice related information.

- BOM - BIC uses BOM's table (CST_BIS_MARGIN_SUMMARY) to source revenue, and costs information.
- GL - BIC uses a predefined currency and calendar in GL to convert and display our revenue and cost numbers. An currency conversion API created by GL is also used by BIC to convert transactions.
- OKS - BIC uses OKS to report contract related information and to calculate key measures such as loyalty and satisfaction.

CSC - BIC retrieves customer profile information from a pre-seeded profile group in CSC.

List of Customer Intelligence Dependencies

- FND - Application Object Library
- AK - Oracle Common Modules
- AX - Global Accounting Engine
- AZ - Application Implementation
- JTF - CRM Foundation
- ASO - Oracle Order Capture

Shared Installed Products:

- CS - Oracle Service
- AMS - Oracle Marketing
- AS - Oracle Sales
- AR - Oracle Receivables
- BOM - Oracle Bills of Material
- HR - Oracle Human Resources
- GL - Oracle General Ledger
- OKS - Oracle Contracts Service
- CSC - Oracle Customer Care

Consequences for Dependencies:

- FND - Always installed
- AK - Always installed
- AX - Always installed
- AZ - Always installed
- BIS - Users will not be able to drill across to a report in a missing module.
- JTF - Always installed
- ASO - BIC will miss all order transactions and fail to calculate key measures such as acquisition, activation, retention, etc.
- CS - BIC will miss all service related transactions and may fail to calculate key measures such as satisfaction and loyalty.
- AMS - BIC will miss all campaign related information and fail to use Market Segment properly as a dimension.
- AS - BIC will miss all sales related information (quotes and opportunities).
- AR - BIC will not function without HZ (TCA). BIC will miss all invoice related information and may fail to calculate key measures such as loyalty and satisfaction. If the Customer Category is not properly set up, BIC will fail to use it as a dimension.
- BOM - BIC will miss revenue, costs, and profitability information without the table (CST_BIS_MARGIN_SUMMARY) from BOM.
- GL - GL should have been set up properly at Oracle. No issues expected.
- OKS - BIC will miss contract related information and fail to calculate key measures such as loyalty and satisfaction.
- CSC - BIC will not be able to display customer profile information without CSC.

Resolution for Consequences Pertaining to Dependencies:

- FND - FND should be properly installed and set up.
- AK - AK should be properly installed and set up.
- AX - AX should be properly installed and set up.
- AZ - AZ should be properly installed and set up.
- BIS - BIS modules should all be properly installed and set up.

- JTF - JTF should be properly installed and set up.
- ASO - ASO should be properly installed and set up.
- CS - CS should be properly installed and set up.
- AMS - AMS should be properly installed and set up (Market Segment).
- AS - AS should be properly installed and set up.
- AR - AR and HZ should be properly installed and set up (Customer Category).
- BOM - BOM should be properly installed and set up.
- GL - GL should have been set up properly at Oracle. No issues expected.
- OKS - OKS should be properly installed and set up.
- CSC - CSC should be properly installed and set up (Customer Profile).

The following is a table of Customer Intelligence's report dependencies:

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer Intelligence Overview - Year Over Year	BICOVERY.rdf		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_satisfaction, bic_sumv_retention, bic_sumv_acquisition, bic_sumv_profitability
Customer Intelligence Overview by Dimension	BICOVERS.rdf		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_satisfaction, bic_sumv_retention, bic_sumv_acquisition, bic_sumv_profitability
Customer Retention Analysis - Year over Year	BICRTYOY.rdf		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_retention

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer Retention Analysis by Dimension	BICRTSEG.rdf		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_sumv_retention
Customer Retention Portfolio Analysis	BICRTDRL.rdf		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_sumv_retention
Profitability analysis for ALL (bar chart)	BICTMYOY		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_sumv_profitability
Profitability analysis by segment	BICTMSEG		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_sumv_profitability
Customer Revenue for ALL	BICTMYOY		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_sumv_revenue

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer Revenue by segment	BICTMSEG		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_revenue
COGS for ALL	BICTMYOY		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_cogs
COGS by segment	BICTMSEG		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_cogs
Satisfaction summary for ALL (bar chart)	BICSTYOY			hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_satisfaction
Satisfaction summary by Segment	BICSTSEG		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_satisfaction

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer Satisfaction Analysis by Satisfaction Index	BICSDYOY		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_customer_summary_v
Customer Satisfaction Analysis - Service	BICSTSER		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_customer_summary_v
Customer Satisfaction Analysis - Shipment	BICSTSHP		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_customer_summary_v
Customer Satisfaction Analysis - Billing	BICSTBIL		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_customer_summary_v
Customer Satisfaction Analysis - Contract	BICSTCNT		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_sites_all, hz_party_sites, hz_locations, hz_cust_accounts_all, hz_parties, ams_party_market_segments, gl_periods	bic_customer_summary_all	bic_customer_summary_v

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer Satisfaction Analysis - Quality	BICSTQLT		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_customer_ summary_v
Loyalty analysis for ALL (bar chart)	BICTMYOY		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_loyalty
Loyalty analysis by segment	BICTMSEG		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_loyalty
Customer Loyalty Analysis by Loyalty Index	BICLINDS		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_customer_ summary_v
LifeCycle Analysis Distribution & Trend	BICLCYOY.rdf		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods		bic_sumv_lifecycle

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
LifeCycle Analysis Distribution	BICLCSEG.rdf		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods		bic_sumv_lifecycle
Acquisition for ALL (bar chart)	BICTMYOY		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_acquisition
Acquisition by segment	BICTMSEG		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods	bic_customer_ summary_all	bic_sumv_acquisition
Customer Activation Analysis - Year Over Year	BICTMYOY		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods		bic_sumv_activation
Customer Activation Analysis by Dimension	BICTMSEG		Customer Summary Extraction (BICCSUMM)	hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods		bic_sumv_activation

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer List	BICCLIST			hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods		bic_cuslist_v bic_ cuslist_summary_v
Customer Account Information	BICADASH.rd f			hz_cust_acct_ sites_all, hz_ party_sites, hz_ locations, hz_ cust_accounts_ all, hz_parties, ams_party_ market_ segments, gl_ periods		bic_sumv_satisfaction, bic_sumv_loyalty, bic_ sumv_acquisition, bic_ sumv_profitability
Customer Account Orders List	BICLORDS			oe_order_lines_ all hz_parties hz_cust_site_ uses_all hz_cust_acct_ sites_all hz_party_sites oe_transaction_ types_tl mtl_system_ items		bic_orders_summary_ v bic_orders_detail_v
Customer Account Order Detail	BICDORDS			oe_order_lines_ all hz_parties hz_cust_site_ uses_all hz_cust_acct_ sites_all hz_party_sites oe_transaction_ types_tl mtl_system_ items		bic_orders_summary_ v bic_orders_detail_v

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer Account Installed Base List	BICLINSB			cs_customer_ products_all mtl_system_ items cs_cp_revisions cs_customer_ products_ statuses hz_ cust_site_uses_ all hz_ cust_acct_sites_ all hz_ party_sites hz_ cust_site_uses_ all		bic_installed_base_ summary_v
Customer Account Installed Base Detail	BICDINSB			cs_customer_ products_all mtl_system_ items cs_cp_ revisions cs_ customer_ products_ statuses hz_ cust_site_uses_ all hz_ cust_acct_sites_ all hz_party_ sites hz_cust_ site_uses_all mtl_units_of_ measure hz_ cust_accounts_ all hz_parties cs_ contacts		bic_installed_base_ summary_v bic_ installed_base_detail_ v bic_site_address_v
Customer Account Interactions List	BICLINAC			hz_parties hz_ cust_accounts_ all jtf_ih_ interactions jtf_ ih_activities jtf_ ih_outcomes_tl jtf_ih_reasons_tl jtf_ih_results_tl		bic_parties_v bic_interactions_v
Customer Account Interaction Detail	BICDINAC			hz_parties hz_ cust_accounts_ all jtf_ih_ interactions jtf_ ih_activities jtf_ ih_outcomes_tl jtf_ih_reasons_tl jtf_ih_results_tl jtf_note_contexts		bic_parties_v bic_interactions_v bic_activities_v jtf_note_contexts_v
Customer transaction summary-- sales quotes	BICLSLQT			hz_parties hz_ cust_accounts_ all as_quotes_all		bic_parties_v bic_ sales_quotes_ summary_v

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer transaction detail-- sales quotes	BICDSLQT			hz_parties hz_ cust_accounts_ all as_quotes_all as_quote_lines_ all oe_ transaction_ types_all hz_ cust_site_uses_ all _hz_cust_ acct_sites_all_ hz_party_sites hz_locations		bic_parties_v bic_ sales_quotes_detail_v oe_order_types_v bic_ site_address_v bic_ contacts_v bic_ address_v
Customer transaction summary--reve nue	BICLREVE			hz_parties hz_ cust_accounts_ all ra_customer_ trx_all ra_ customer_trx_ lines_all ra_cust_ trx_line_gl_dist_ all		bic_parties_v bic_ revenue_trx_ summary_v
Customer transaction detail--revenue	BICDREVE			hz_parties hz_ cust_accounts_ all ra_customer_ trx_lines_all mtl_ system_items		bic_parties_v bic_ revenue_trx_detail_v
Customer Account Invoices List	BICLINVS.rdf			ra_customer_ trx_all, ra_ customer_trx_ lines_all, ra_ terms, ra_ salesreps_all		bic_invlist_v,bic_ invline_v
Customer Account Invoice Details	BICDINVS.rdf			ra_customer_ trx_all, ra_ customer_trx_ lines_all, ra_ terms, ra_ salesreps_all		bic_invlist_v,bic_ invline_v
Customer Contacts	BICLCONT.rdf			hz_cust_ accounts_all , hz_parties , hz_ party_ relationships , hz_org_contacts , hz_party_sites, hz_locations, hz_ contact_points		bic_contacts_detail_v, bic_address_v
Customer Account Campaigns List	BICLCAMP.rdf			hz_parties, hz_ cust_accounts_ all, jtf_ih_ activities, ams_ source_codes, bic_dimv_ operating_units		bic_parties_v, bic_ campaign_list_v, ams_ campaigns_vl, ams_ channels_vl, ams_ media_vl

Report Name	Report Rdf File Name	OLTP Applications Required	Concurrent Processes Required for Report	OLTP Tables Accessed	Summary Tables Accessed	Views Accessed
Customer Account Campaign Details	BICDCAMP.rdf			hz_parties, hz_cust_accounts_all, ams_act_offers, ams_act_products		bic_parties_v, bic_campaign_list_v
Customer transaction summary--service requests	BICLSRQS			cs_incidents_all, cs_incident_severities, cs_incident_statuses, cs_tasks	None	bic_service_request_summary_v, bic_parties_v
Customer transaction detail-- service requests	BICDSRQS			cs_incidents_all, cs_incident_severities, cs_incident_statuses, cs_tasks	None	bic_service_request_detail_v, jtf_tasks_v, cs_interactions_v
Customer transaction summary--contracts	BICLCNTR			okc_k_headers_b, okc_k_headers_tl, okc_k_party_roles_b	None	bic_contracts_summary_v
Customer transaction detail--contracts	BICDCNTR			okc_k_headers_b, okc_k_headers_tl, okc_k_party_roles_b	None	bic_contracts_detail_v
Customer Account Oppurtunities List	BICLOPPU.rdf			as_promotions_all		bic_opty_summary_v,_bic_parties_v,_as_statuses_vl, bic_contacts_detail_v
Customer Account Oppurtunity Details	BICDOPPU.rdf			as_promotions_all		bic_opty_summary_v, bic_opty_detail_v, bic_contacts_detail_v

Performance Measures for Customer Intelligence

Customer Intelligence Performance Measures Table

Display Name	Internal Name	Description	Dimensions
BIC Loyalty Measure	BIC_LOYALTY_MEASURE	Measure for Loyalty	Organization, Time, Customer Category, Market Segment, Geography
BIC Profitability Measure	BIC_PROFITABILITY_ MEASURE	Measure for Profitability	Organization, Time, Customer Category, Market Segment, Geography
BIC Retention Measure	BIC_RETENTION_ MEASURE	Measure for Retention	Organization, Time, Customer Category, Market Segment, Geography
BIC Satisfaction Measure	BIC_SATISFACTION_ MEASURE	Measure for Satisfaction	Organization, Time, Customer Category, Market Segment, Geography

Customer Intelligence Dimensions, Dimension Levels, PMF Views and Referred Tables

Dimension Name (Internal Name)	Dimension Level (Internal Name)	Level View	Tables used by the View
GEOGRAPHY	CITY, STATE	BIC_CITIES_V, BIC_STATES_V	BIM_GEOGRAPHY
CUSTOMER CATEGORY	TOTAL CUSTOMER CATEGORY, CUSTOMER CATEGORY	BIC_TOTAL_CUST_CATEGORY_V, BIC_CUST_CATEGORY_V	BIS_LEVELS, BIS_LEVELS_TL FND_LOOKUP_VALUES
MARKET SEGMENT	TOTAL MARKET SEGMENT, MARKET SEGMENT	BIC_TOTAL_MARKET_SEGMENT_V, BIC_MARKET_SEGMENT_V	BIS_LEVELS, BIS_LEVELS_TL AMS_CELLS_ALL_TL, AMS_CELLS_ALL_B

Customer Intelligence Target Levels, Reports, Workflow, and Alerts

Target Level Display Name	Target Level Internal Name	Alert	Process	Tables Workflow
BIC Loyalty Total	BIC_LOYALTY_ TOTAL	BIC PMF LOYALTY ALERT	BIC Send Notification	BIC Corrective Action
BIC Profitability Total, BIC Profitability Customer	BIC_PROFITABILITY_ TOTAL BIC_PROFITABILITY_ CUSTOMER	BIC PMF PROFITABILITY ALERT	BIC Send Notification	BIC Corrective Action
BIC Retention Total	BIC_RETENTION_ TOTAL	BIC PMF RETENTION ALERT	BIC Send Notification	BIC Corrective Action
BIC Satisfaction Total	BIC_SATISFACTION_ TOTAL	BIC PMF SATISFACTION ALERT	BIC Send Notification	BIC Corrective Action

Performance Issues

Reports using Summary Tables

Summary tables are used in Customer Intelligence to enhance performance of reports. Any report for a measure (stored in bic_measures table), will use the data from bic_customer_summary. These reports would first populate a temporary table with the data for the report. This would be done by calling a stored package. The report itself will use a simple query to show the data from the temporary table. This is expected to result in acceptable performance.

The reports related to Profitability will use the table bic_profitability_summary. This table stores profitability with an extra dimension which is the item category.

If you do not want data from the summary table bic_customer_summary for past periods, you must purge the data from the summary table. Currently, no utility is available; and, to purge the data from the table, you must use SQL Plus.

Reports using OLTP Tables

All reports that show transaction level information (e.g., order detail and customer lookup) will use data directly from the OLTP tables. Since these reports show one transaction at a time, performance should be good.

Reports related to service requests will directly use the OLTP tables because the additional dimensions, such as request type, severity, and employee assigned, might be a performance issue for these reports.

Matrix Reports

Matrix reports showing charts will have to run the same query twice - once for the report and once for the chart. The reason behind the two queries is a technical obstacle of not being able to pass the data from a matrix report to a chart. The following reports will take double the time to run:

- Organizational
- Multi-organizational
- Language and currency

Queries

When running queries for each month, tag your customers as New (1) , Reactivated (2), or Retained (3) each month using attrition period.

Set up Customer Intelligence

There are five main tasks involved in setting up Customer Intelligence in the Oracle Business Intelligence System. This section guides you to:

- Set Up Profile Options
- Define Setup Data Using Setup Forms
- Execute Concurrent Programs
- Set Up Users
- Set Up and Customize Performance Measures and Alerts

Set Up Profile Options

It is necessary to set up Profile Options specific to Customer Intelligence. These are set up using the System Administration responsibility.

Summary Extraction Date (BIC_SMRY_EXTRACTION_DATE)

This profile option indicates the last date when you ran the extraction program. When you install the Customer product, set this date as the earliest one for which the various measures need to be calculated. You can set the profile option at the site level. During the execution of the Summary Extraction program, if the start date is not specified, the value of this profile option is used instead. If you do not set the profile option and the start date parameter, the Summary Extraction program will fail.

Number of records in Customer reports (BIC_CUSTREP_NUM)

This profile option indicates the number of records shown in the customer transaction summary reports (e.g. Orders List and Invoices List). You can set to any level. If you do not set the profile option and date range, the transaction summary reports will show all transactions.

Debug (BIC_DEBUG)

This profile option is used to log debug messages in the BIC_DEBUG table. The possible values are Y (Yes) and N (No). If you set the value to Y, the system logs debug messages in BIC_DEBUG table when you run the reports. You can set at any level. When you install Customer Intelligence, you should set the profile option to N.

CRMBIS:Currency Code

This profile option is used to setup the currency used to display all revenue and cost information in reports. All revenue and cost transactions are converted to the specified currency.

CRMBIS:GL Conversion Type

This profile option designates the conversion type to be used while converting to the currency specified in the profile option CRMBIS:Currency Code.

CRMBIS:Period Set Name

This profile option designates the type of Accounting Calendar used in concurrent programs to populate summary tables and the time dimension of reports. The calendar refers to the GL period set, for which different periods are defined. Refer to the *Oracle General Ledger User Guide* for the Accounting Calendar.

CRMBIS:Period Type

This profile option defines the lowest granularity of time at which you can collect and view data. This refers to the Period Types setup in the Accounting Calendar.

Define Setup Data Using Setup Forms

There are five setup forms for Customer Intelligence:

- Acquisition and Retention
- Lifecycle
- Satisfaction Benchmark
- Satisfaction
- Loyalty Setup
- Relationship Types

All forms are accessible from the CRM Administrator Console. Choose the CI System Administrator responsibility to access the forms.

Acquisition and Retention

This form allows System Administrators to specify the values which determine Customer Acquisition and Retention.

1. Set up Activation Period.

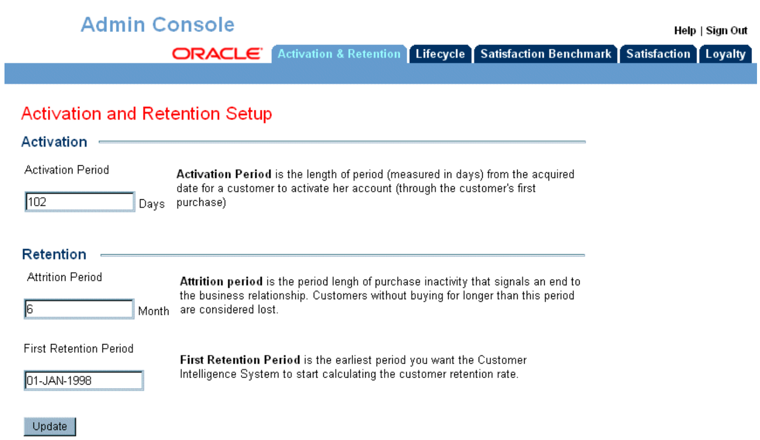
Activation Period is the length of period (measured in days) from the acquired date for a customer to activate his or her account (through the customer's first purchase).

2. Set up Attrition Period.

   Attrition Period is the period (measured in days) of purchase inactivity that signals an end to the business relationship. Customers who do not buy anything for longer than this period are considered lost.

3. Set up First Retention Period.

   First Retention Period is the earliest period you want the Customer Intelligence System to start calculating the customer retention rate.

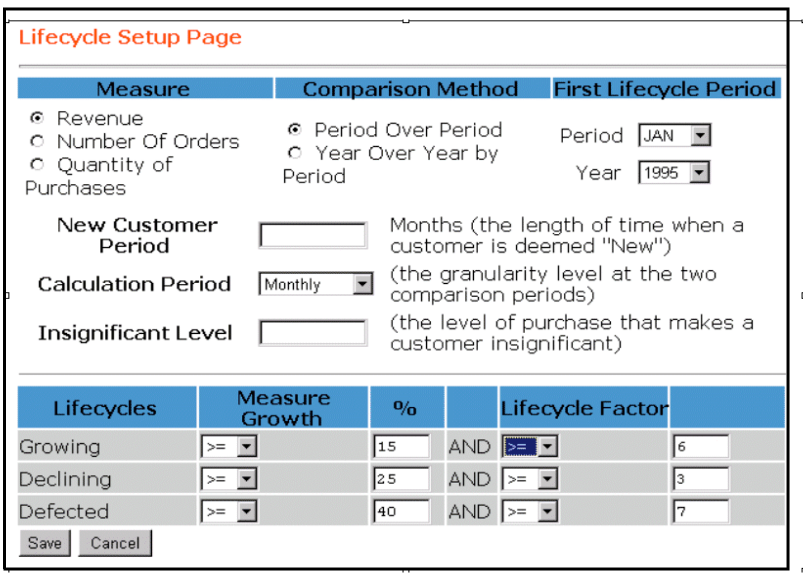


Activation and Retention Setup Screen

Lifecycle

As customers are acquired, they start their business relationship with a company as New customers. Over time, as customers are no longer deemed new, they begin to show one of the following patterns: spending more, remaining the same, greatly reducing spending, spending very little, or defecting to competitors. In other words, they are migrating through a customer lifecycle, which can be defined by the following stages:

- New
- Growing
- Stable
- Declining
- Defected
- Insignificant



Lifecycle Setup Page

1. Choose the Measure used for categorizing customers into different lifecycles:
   - **Revenue**: Total money received through sales of products and/or services
   - **Number of Orders**: The total number of orders placed
   - **Quantity of Purchase**: The total number of items purchased (one order can contain many items)
2. Determine the Lifecycle Calculation Period.

   Customer Lifecycle is determined by comparing the same measures from two periods. Users can decide what granularity level to use for the two comparison periods (Lifecycle Calculation Period).
3. Select one of the following Comparison Methods to be used to calculate lifecycles:
   - **Period over Period**, for example, Q2-99 vs. Q1-99, Mar-99 vs. Feb-99, etc.
   - **Year over Year by Period**, for example, Q2-99 vs. Q2-98, Mar-99 vs. Mar-98, etc.
4. Select First Lifecycle Period for which you want a lifecycle calculation to be computed.
5. Set up New Customer Period.

   The New Customer Period is the length of time when a customer is deemed to be New after being acquired. Valid values are:
   - Month
   - Quarter
   - 6 Months
   - 1 Year
6. Set up Insignificant Level.

   The Insignificant Level is the level of purchases (revenue, number of orders, or quantity of purchases) that makes a customer insignificant to a company in both Comparison Periods.
7. Set up Lifecycle Thresholds.
   - Lifecycle Factor (LCF)

Lifecycle Factor is defined as the formula below over two comparison periods:

Lifecycle Factor = (Absolute Measure Difference) * (Percentage Measure Growth)

- Lifecycle Thresholds

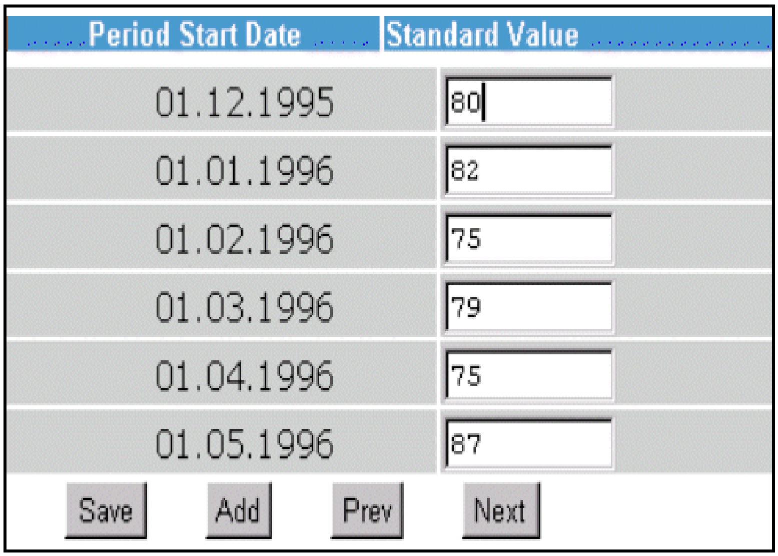
  The table below provides examples of how users can combine parameters such as Account Creation Date, Revenue, Revenue Growth and Lifecycle Factor to determine a customer's stage in the lifecycle.

Lifecycle Threshold Setup Examples

Cohorts	Criteria	Number of Customers
New	Accounts Created After 4/1/2000	705,417
Insignificant	P1 Revenue < 5 and P2 Revenue < 5	736,936
Growing	LCF >= 6 and Revenue Growth >= 10%	915,843
Defected	LCF <= (7) and Revenue Growth <= (40%)	423,120
Declining	LCF <= (3) and Revenue Growth <= (10%)	473,498
Stable	All Other Accounts	996,853

Satisfaction Benchmark

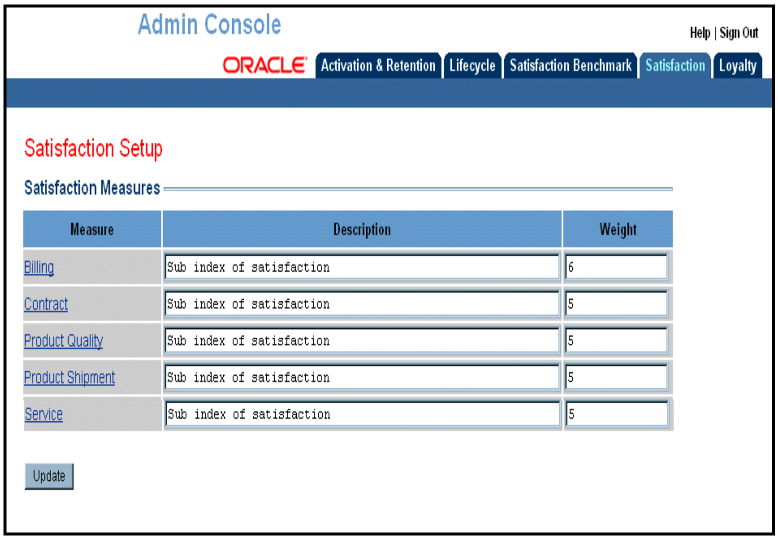
This Form is provided for entering the Customer Satisfaction Index values for the Industry Standard or Benchmark. Values are entered for each period and are shown in Satisfaction reports to compare against the actual values.



Satisfaction Benchmark Screen

Satisfaction

This Form allows System Administrators to specify the weights for the sub-indexes that make up the Overall Satisfaction Index, a weighted average of five sub-indexes.

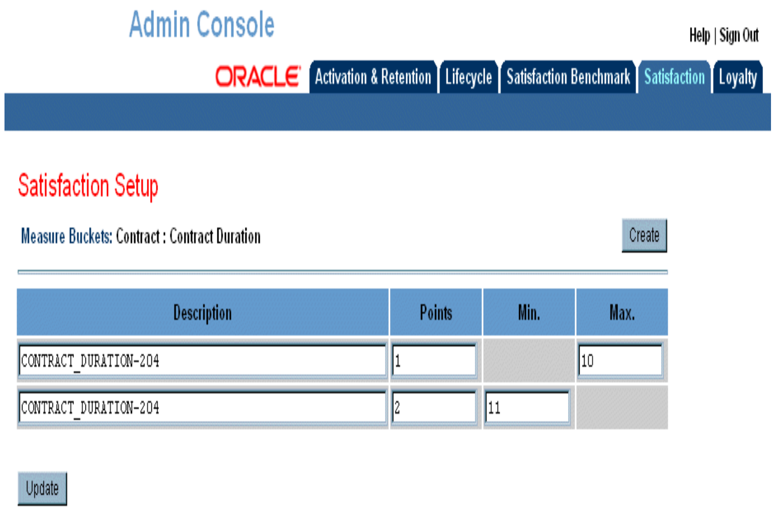


Satisfaction Setup: Sub-Index Weights Screen

A subindex is composed of the weighted average of several measures. For each subindex, you can specify the weight for each measure. For each measure, buckets can be created by specifying value ranges and scale points.

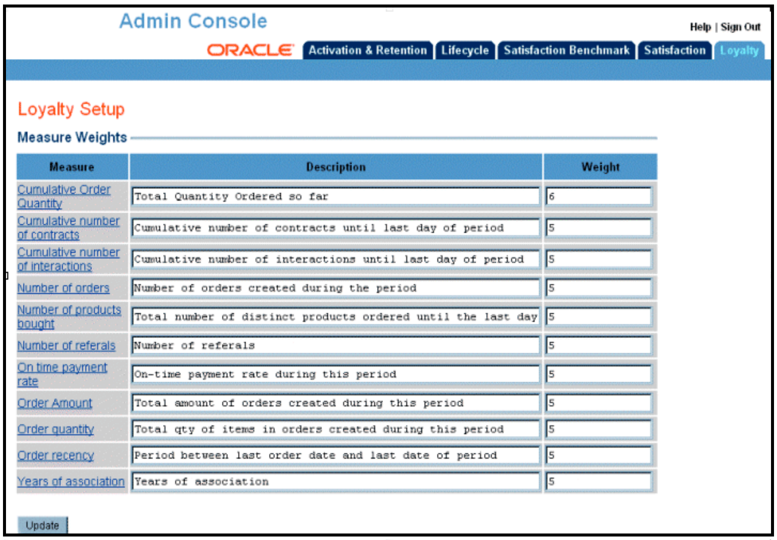
Satisfaction Measures: Contract

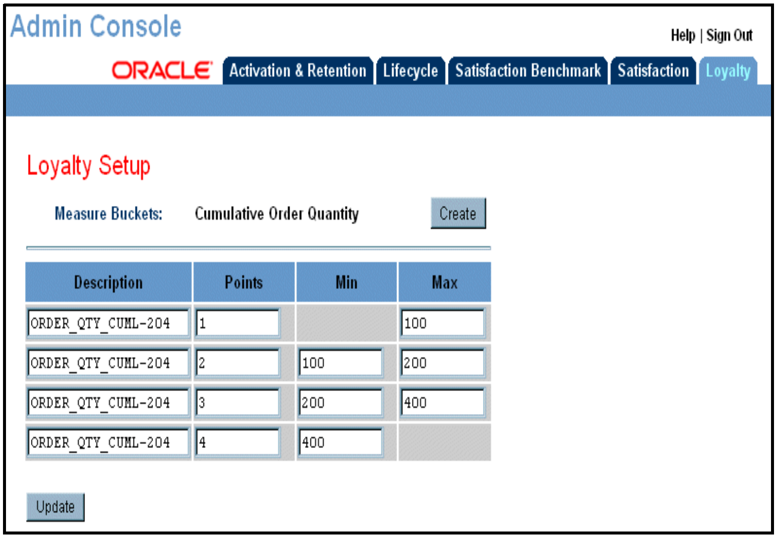
Satisfaction Setup: Contract Duration



Loyalty Setup

This form allows System Administrators to specify the range of values and weights (importance of values) for the seeded Loyalty measures. For each measure, buckets can be created by specifying value ranges and the scale points.



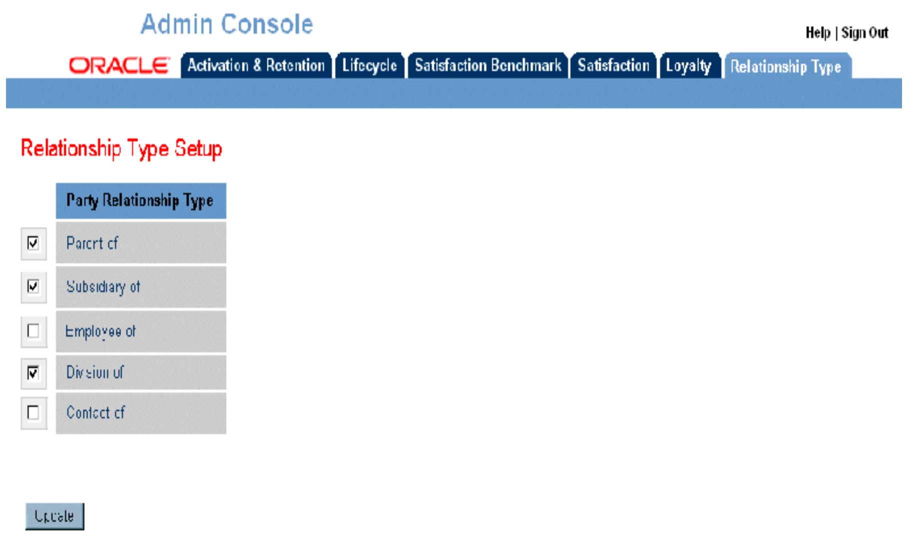


Loyalty Setup Screen

Relationship Types

This form allows you to display party relationships in the Customer List report. If you uncheck the box, you will not see the party relationship in the Customer List report.

Relationship Type Set up Screen



Execute Concurrent Programs

After setting up the profile options and the setup data, the concurrent program for extracting summary data should be run before using the reports. To ensure that the users have up-to-date information for their reports, this program should be run periodically afterwards.

Set Up Users

The responsibility which is predefined for Customer Intelligence is Customer Intelligence User. This responsibility can be added to an existing user or a new user can be created for this responsibility. All Customer Intelligence reports are accessible from this responsibility.

Set Up and Customize Performance Measures and Alerts

The person doing this work must have the appropriate security level in order to accomplish these tasks. Please refer to the *Oracle BIS 11i User Guide Online Help* for additional information about the Performance Measures and the Performance Management Framework.

Viewing Performance Targets

1. Log on to the Business Intelligence System Personal Homepage.
2. Choose BIC Performance Management Framework menu option from the Navigate Region.
3. Choose Performance Targets submenu. The Performance Target Level Selection screen appears.
4. Choose the desired Target Level from the list of values.
5. Choose an Organization from the list of values.
6. Click on Find Targets. The dimensions associated with the chosen measure appear.
7. Choose values for the dimensions. If no values are chosen, all targets for the chosen organization displayed.
8. Click on Retrieve. A table of target data for the Standard business plan is displayed.
9. To view targets for a different business plan (for example, the Industry Benchmark), choose the desired business plan from the List of Values.

10. Click on Refresh. A table of target data for the chosen business plan is displayed. To view the next 10 values, click on Next 10, and so forth.
11. When finished viewing targets, click one button. The Targets screen appears.

Set Up Performance Targets

1. Log on to the Business Intelligence System Personal Homepage.
2. Choose the BIC Performance Management Framework menu option from the Navigate Region.
3. Choose the Performance Targets submenu. The Performance Target Level Selection screen appears.
4. Choose a Target Level from the list of values.
5. Choose an Organization from the list of values.
6. Click on Find Targets. Dimensions associated with the chosen performance measure, target level and organization appear.
7. Choose values for the dimensions. If no values are chosen, then all targets for the chosen organization (of the selected measure) are displayed.
8. Click on Retrieve. A table of target data for the Standard business plan is displayed.
9. To view targets for a different business plan (for example, the Industry Benchmark), choose a Business Plan from the list of values.
10. Click on New. The Performance Target Details screen, with additional regions, appears.
11. Choose a Dimension value from the list of values.

Selecting Business Plans

12. Choose a Business Plan from the list of values in the Targets region.
13. Enter a numeric value in the Target field.

If a function has been set to compute the target, entering a number in the Target Field overrides the computing function.

Filling-in Tolerance Ranges and Selecting Responsibilities

14. Enter the first Tolerance Range percentages for this target.

15. Choose the responsibility to be notified if Actual performance falls outside of the first tolerance range.

16. Repeat steps 14 and 15 for the second and third tolerance ranges.

We recommend notification be escalated as the tolerance range increases.

17. Click on Done to save your work. The target data table with the new targets appears.

18. Click on the Home icon at the top of the window to return to the Personal Homepage.

Now, you can monitor the performance of the actual value compared to the target on the Personal Homepage. At any point, you can click on Save Changes to save immediate work.

Test Customer Intelligence

At this time, Customer Intelligence will not cover testing procedures in this document.

Printing Customer Intelligence Reports from the Web Browser

While printing the report from your web browser, you might experience large font sizes on your printed report. To resolve this problems, follow these steps to change your browser settings:

1. Go to Tools and select Internet Options.

2. Under the General tab, click on the Accessibility button.

3. Check the box, Ignore font sizes specified on the web pages.

It is listed under, Formatting.

4. Save your work.

5. Click Done.

In the PHP, do not define more than one report in the Plug.

If you define more than one report, you will delay displaying the PHP page. Reports defined in the plug area runs sequentially, and the PHP page will be displayed only after you complete defining all the reports in the plug area.

Troubleshooting Customer Intelligence

No troubleshooting issues for this product.