

Oracle® Sales Intelligence

Implementation Guide

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Oracle Sales Intelligence Implementation Guide, Release 11i

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Sales Intelligence Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Sales Intelligence

If you have never used Oracle Sales Intelligence, Oracle suggests you attend one or more of the Oracle Sales Intelligence training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See *Other Information Sources* for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Sales Intelligence.

- Chapter 1 provides procedures to implement Oracle Sales Intelligence.
- Appendix A provides tables that list the reports available for different Sales Intelligence categories with a description of each report and its content.

- Appendix B provides tables that list the database tables for the Sales Intelligence reports.
- Appendix C provides tables that list performance measures in Oracle Sales Intelligence.
- Appendix D provides a list of products dependencies for Oracle Sales Intelligence.

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Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Sales Intelligence.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Sales Intelligence shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Sales Intelligence.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Sales Intelligence (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides

information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Sales Intelligence. This manual details additional steps and setup considerations for implementing Oracle Sales Intelligence with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Sales Intelligence with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Sales Intelligence.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Sales Intelligence implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Sales Intelligence and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Sales Intelligence working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle[®] server, and your hardware and software environment.

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Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus[®], Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Implementing Oracle Sales Intelligence

Use the following procedures to implement Oracle Sales Intelligence:

- [Granting User Access Through Responsibilities](#)
- [Implementation Steps](#)
- [Setting Profile Options](#)
- [Setting Up the System Counts Bin](#)
- [Setting Up Collection Programs](#)
- [Purge Territory Assignment Interface Tables](#)
- [Materialized Views](#)
- [Defining Favorites on the Home Page](#)

1.1 Granting User Access Through Responsibilities

We provide the following Business Intelligence responsibilities as templates to control user access:

- **Sales Intelligence or Sales Intelligence Reporting Manager:** Access to all Sales Intelligence reports
- **Sales Intelligence (Short Menu):** Access to key Sales Intelligence reports (for example, Weighted Overall Rank reports)
- **Sales Intelligence Online Reports:** Access to the real time reports (Pipeline Analysis Reports)
- **Sales Intelligence Preferences:** Access to maintain all Sales Intelligence Performance Measure Alerts

- **Sales Intelligence Collection Manager:** Access to schedule the data collection concurrent programs to load data into summary tables
- **Performance Management Framework (Targets Access):** Provided by BIS to maintain Target Levels and Targets

One or more responsibilities can be added to an existing user, or a new user can be created with these responsibilities.

1.2 Implementation Steps

This section contains the tasks required to setup and customize Oracle Sales Intelligence reports, Performance Measures, and Alerts.

The following are setup requirements that must be complete prior to running Sales Intelligence reports:

1. Set up CRM BIS profile options for Reporting Calendar, Period Type, Currency Code (reporting currency) and GL conversion type (see below).
2. Set up OE profile option for Oracle Manufacturing Organization: Item Validation Organization (see below).
3. Run the Oracle Bills of Material concurrent program, BIS Margin Analysis Load Run (with Sales Intelligence Collection Manager responsibility), to load `cst_bis_margin_summary` table, which is the source for margin analysis information in the Sales Intelligence application (See BOM product implementation guide for use of `CSTBISLD.sql`). The `cst_bis_margin_summary` table needs to be refreshed before running the Sales Intelligence summary table load programs.
4. Set up the Territories for “Oracle Sales and Telesales” using the responsibility CRM Administrator. The Territories should be setup for Transaction type “Leads”.
5. Run the CRM foundation concurrent program “Generate Territory Packages” for all transaction types.
6. Set up inventory categories to be used for reporting. An AS (Oracle Sales) concurrent program pushes Oracle Sales interest types and codes to Inventory as categories. Customers must run the Load Interest Types and Codes to Inventory Categories concurrent program in Oracle Sales in order to use product within the Sales Intelligence.

Reference: *Oracle Sales Implementation Guide* for setup and run instructions

7. Run the Marketing Intelligence concurrent program `bim_sales_categories_pkg` (with Marketing Intelligence responsibility) to initialize the `bim_sales_category_hier` table which is the source for the `bil_dimv_prod_lov` view.

Reference: *Oracle Marketing Intelligence Implementation Guide* for setup and run instructions

8. Perform prerequisite steps to configure measures if necessary, and then run the Customer Intelligence concurrent program “Extract Customer Summary” (with Sales Intelligence Collection Manager responsibility) to load the `bic_customer_summary_all` table, which is the source for customer satisfaction information in the Sales Intelligence application. The `bic_customer_summary_all` table needs to be refreshed before running the Sales Intelligence summary table load programs.

Reference: For complete instruction on this concurrent program, please refer to the *Oracle Customer Intelligence Implementation Guide*.

9. Run the Sales Intelligence concurrent program Load Daily Activity Table For System Counts Bin. (Refer to the section on System Counts Bin).
10. Run the Sales Intelligence concurrent program Refresh Materialized View For Pipeline Analysis OLTP Reports. (Refer to the section on Materialized views).
11. Run the Sales Intelligence concurrent programs using the request set Sales Intelligence OLTP Collection Set which has two stages:
 - a. Load Territory assignment interface tables for orders, quotes, and customers.
 - b. Load Summary Tables to prepare summarized data for the reports.
12. Subsequent to the load, ANALYZE the summary tables in order to keep table statistics up to date for use by the Oracle optimizer when resolving report queries against the tables.
13. Set up and customize Performance Measures and Alerts. This is necessary if the customer chooses to enable performance measures.

Note: Steps 1-12 must be completed before you start using Sales Intelligence reports.

1.3 Setting Profile Options

Set the following profile options when implementing Oracle Sales Intelligence. See the *Oracle Applications System Administrator's Guide* for details on setting profile options.

- CRMBIS:PERIOD_SET_NAME: This profile option is used to setup the Accounting Calendar (Period_Set_Name)
- CRMBIS:PERIOD_TYPE: This profile option is used to setup the Period Type.
- CRMBIS: Currency_Code: This profile option is used to setup the reporting Currency, as shown in the reports.
- CRMBIS: GL_Conversion_Type: This profile option is used to setup the type of GL conversion to use for rate conversion of source data transaction amounts.
- BIL: Display message-No Data to Report: This profile option is used to enable or disable the message 'No Data found to report'. Allowed values are NO to disable and YES to enable the message. Default is 'NO' which disables the message and displays an empty graph/report when there is no data for the selected parameters.
- ICX_CLIENT_IANA_ENCODING: This profile option is used to determine the character set of the text displayed by Java Server pages. This profile option must be set to the correct character set (that is, the character set of the Apache server on the Web tier) for the online help system to support character sets other than American English. The default setting is the US character set (ISO-8859-1).
- ICX_DISCOVERER_LAUNCHER, ICX_FORMS_LAUNCHER, ICX_REPORT_LAUNCHER: These profile options are used by the Oracle Applications Personal Homepage. Set the site level value of each of these profile options to the base URL for launching each application. The profile option value should be sufficient to launch the application, but should not include any additional parameters which may be supplied by the Personal Homepage.
- ICX_LIMIT_CONNECT: This profile option determines the maximum number of connection requests a user can make in a single session.
- ICX_LIMIT_TIME: This profile option determines the absolute maximum duration (in hours) of a user's session, regardless of activity.
- ICX_SESSION_TIMEOUT: This profile option determines the length of time (in minutes) of inactivity in a user's session before the session is disabled. If the user does not perform any operation in Oracle Applications for longer than this value, the session is disabled. The user is provided the opportunity to

re-authenticate and re-enable a timed-out session. If re-authentication is successful, the session is re-enabled and no work is lost. Otherwise, Oracle Applications exit without saving pending work. If this profile option is 0 or NULL, then user sessions will never time out due to inactivity.

The following profile sets the organization that is going to be used for sales product hierarchy. Set one of the following profile options:

- **OE: Item Validation Organization:** If Oracle Order Entry (OE) is an installed product, this profile option is used to setup the Oracle Manufacturing organization id, which will be the organization used for the Product Hierarchy for Sales.
- **OM: Item Validation Organization:** If Oracle Order Management (OM) is an installed product, this profile option is used to setup the Oracle Manufacturing organization id, which will be the organization used for the Product Hierarchy for Sales.
- **MO: Operating unit:** This is the default profile option to be used to setup the Oracle Manufacturing organization id, which will be the organization used for the Product Hierarchy for Sales, when OE: Item Validation Organization and OM: Item Validation Organization are not set.

1.4 Setting Up the System Counts Bin

This section contains the tasks required to setup System Counts Bin.

Post Installation steps of System Counts Bin

1. Run the Collection Program that populates the summary tables from which the System Counts Bin and Detail Report source data. The data is collected at day level up to or for the previous day depending on the input parameters provided for the date.

Recommendation: Schedule this concurrent program to collect data to run once every day.

- a. In Oracle Forms Applications, attach the “Sales Intelligence Collection Manager” responsibility to the user who will run the collection program.

- b.** Run the “Load Daily Activity Table For System Counts Bin” concurrent program to populate the summary tables.

Note: The System Counts Bin displays the last 7 days by default.

The parameters for this concurrent program:

Start date: start date of collection period. If start date is blank, it is defaulted to yesterday's date at run time.

End date: end date of collection period. If end date is blank, it is defaulted to yesterday's date at run time.

Debug: Default 'No'. If debug mode is 'Yes', a detailed log file will be generated.

Trace: Default 'No'. If set to 'Yes', SQL trace file will be generated.

Purge: Default 'No'. If set to 'Yes', the data in activity tables will be deleted prior to data collection to perform a complete refresh of data.

Parallel Degree: Default '2'. Determines the degree of parallelism to be used for analyzing the summary table. Enter an optimum number to minimize processing time and maximize performance.

Note: For the first time, run the concurrent program with a start date as the beginning of previous month, end date as yesterday's date and 'Purge' = 'Yes'. This is to ensure that data is collected for previous month and current month. Subsequently, run the concurrent program for one day with 'Purge' = 'No' to perform incremental load.

- 2.** One time setup to add the System Counts Bin to the home page.
 - a.** Login to HTML applications.
 - b.** Click on Profile icon available at the upper right corner of the home page.
 - c.** Go to Sales Online > Home Page

- d. In the “Bin Preferences” section, enter the following parameters:

Bin number: position of bin

Bin Name: choose the System Counts Bin from the drop down list.

1.5 Setting Up Collection Programs

After setting up the profile options, run the extraction programs before using the reports because all Sales Intelligence reports are generated from 1 of 7 summary tables. These tables will need to be initialized prior to running first time reports. Run the concurrent request set “Sales Intelligence OLTP Collection Set”. The concurrent request has two stages: Load Territory Assignment Interface Tables and Load Summary Tables.

To ensure that your BIS users always have up-to-date information for their reports, we suggest that you schedule the concurrent programs to run at regular intervals at off hours.

Subsequent to each table load, the tables should be analyzed in order to keep table statistics up to date for use by the Oracle optimizer when resolving report queries against the tables.

Setting up Territories is not mandatory. When there is no territory, the data collection process assigns a dummy territory.

1. Load Territory Assignment Interface Tables

Territory assignment programs are used to establish territory assignments for orders, customers, and quotes. These programs make calls to the CRM Territory Assignment Engine to associate appropriate territories with each order, quote, and invoice being loaded into Sales Intelligence Application summary tables.

These programs load interface tables (see [Territory Assignment Tables and Programs](#)) used during the loading of Sales Intelligence summary tables. Territory assignment programs should be run prior to scheduling Summary Table Load programs in order to ensure that all orders, quotes, and customers being loaded into Sales Intelligence summary tables are associated with a territory.

The territory assignment interface tables are used only to load data into the summary tables and can be purged periodically. Details on purging are given below in a later section. See [Purge Territory Assignment Interface Tables](#).

These are the three modes in which Territory Assignment Programs are run:

- A' - All mode: The interface table is completely refreshed, after being truncated. Use of this mode would be recommended for initial interface table setup on the customer site.
- I' - Incremental mode: The interface table is loaded only with new id, territory combinations.
- R' - Range mode: A start and end number should be entered. The program will delete any existing records for these id's in the interface table, then insert new records for id's in the range entered. If only a single id is entered, no end id, only 1 row in the table is affected.

The following 3 parameters are used for each territory assignment package:

- Run Mode: 'A' All insert, 'I' New records only, and 'R' Range insert
- Start...Number: For range mode ('R'), first quote or order number or customers id in range to insert
- End...Number: For range mode ('R'), last quote or order number or customers id in range to insert

Table 1–1 Territory Assignment Tables and Programs

Concurrent Program	Interface Table Name	Load Program Name
Load Territory Assignments Interface Table for Quotes	BIL_QUOTE_TERR_INTF	BIL_QUOTE_TERR_ASSIGN_PKG
Load Territory Assignments Interface Table for Orders	BIL_ORD_TERR_INTF	BIL_ORD_TERR_ASSIGN_PKG
Load Territory Assignments Interface Table for Customers	BIL_CUST_TERR_INTF	BIL_CUST_TERR_ASSIGN_PKG

2. Load Summary Tables

There is one collection package for each Sales Intelligence summary table. A single global package is used to perform common load processing for all of the seven collection packages. Each collection package is scheduled and run through use of the Oracle Applications Concurrent Manager (see [Summary Tables and Load Programs](#)).

Data collections are driven by calendar periods within a calendar year. Each extraction can collect data for one or more specified period. For any specified period, or range of periods, the collection packages have the facility to insert rows in the summary table. Scheduling for a period that was previously loaded in order to refresh data is implemented through delete and insert processing for the specified period.

Sales Intelligence load programs allow for inserting from “1” to “n” periods of data within a fiscal year in any of the seven summary tables. For multiple period loads, the load programs load by individual periods within the range of periods being loaded.

The following 3 parameters are used for each collection package:

- Load Period Year: Fiscal Year for period(s) being extracted
- Start Period Number: Calendar Period (see profile options) to collect from
- End Period Number: Calendar Period (see profile options) to collect through (Optional)

Table 1–2 Summary Tables and Load Programs

Concurrent Program	Summary Table Name	Load Program Name	Dependent Applications
Load Compensation Summary Table	BIL_ROC_SUM	BIL_ROC_SUMM_PKG	Oracle Incentive Compensation
Load Customer Performance and Revenue Management Summary Table	BIL_REV_CUST_SUMM	BIL_REV_CUST_SUMM_PKG	Oracle Sales, Oracle Order Entry, Oracle Order Capture, Oracle Bills of Material
Load Important Customer Summary Table	BIL_IMP_CUST_SUMM	BIL_IMP_CUST_SUMM_PKG	Oracle Sales, Oracle Bills of Material, Oracle Service
Load Opportunity Performance Summary Table	BIL_OPTY_PERF_SUMM	BIL_OPTY_SUMM_PKG	Oracle Sales, Oracle Bills of Material, Oracle Customer Intelligence
Load Product Performance, Sales Cycle, Win Loss Ratio Summary Table	BIL_PROD_SCT_WL_SUMM	BIL_PROD_SCT_WL_SUMM_PKG	Oracle Sales, Oracle Bills of Material

Concurrent Program	Summary Table Name	Load Program Name	Dependent Applications
Load Sales Channel Performance Summary Table	BIL_SLS_CHNL_PERF_SUMM	BIL_SLS_CHNL_PERF_SUMM_PKG	Oracle Sales, Oracle Order Entry, Oracle Order Capture, Oracle Bills of Material, Oracle Customer Intelligence.
Load Salesrep Performance Summary Table	BIL_SREP_PERF_SUMM	BIL_SREP_PERF_SUMM_PKG	Oracle Sales, Oracle Bills of Material, Oracle Incentive Compensation

Note: The concurrent program Load Sales Channel Performance Summary is dependent on the concurrent program Load Revenue Management and Customer Performance Table. It is now in the third stage of the Sales Intelligence OLTP Collection Set.

1.6 Purge Territory Assignment Interface Tables

Run the concurrent program Purge Territory Assignments Interface Tables to delete the data in the interface tables for quotes, orders, and customers. There are no parameters for this concurrent program. The interface tables are used to assign territories when loading data into the summary tables. The purge process can be scheduled to run periodically after all the collection programs to load summary tables are completed.

1.7 Materialized Views

Materialized views are created to improve runtime performance. To display the latest information in the reports, these views have to be refreshed by running the concurrent programs periodically.

Run the concurrent program "Refresh Materialized View For Pipeline Analysis OLTP Reports". This concurrent program refreshes the data for Pipeline Analysis reports. These are online reports based on the denormalized tables of Oracle Sales Application. If these reports do not return the new data, you must first run the concurrent program "Refresh of as_sales_credits_denorm" of Oracle Sales Application.

For further details, please refer to *Oracle Sales Application Implementation Guide*.

1.8 Defining Favorites on the Home Page

To customize the Favorites region, click Customize on the title bar of the Favorites region.

This displays the Favorites page where you can select what to display in the Favorites region on your home page.

1. To add a new Favorite, browse through the Responsibility (functional grouping) list to find the Option you want, then select it and click the right arrow.

For Sales Intelligence, the user needs the responsibility "Sales Intelligence Preferences".

2. Setup the default page 'My Home Page' to display 'BIL Favorite' region.

Now reports can be saved as favorite reports.

To select reports

Select a responsibility from the Responsibility list to view the reports related to that responsibility. They are listed in the Options box.

1. Select an option to appear under the Favorites region and click the right arrow to move it to the Selections box.
2. Optionally you can remove a report, order a report, and rename a report.

For more information, please refer to the *Oracle Business Intelligence Systems User's Guide*, section on "Customizing Favorites".

Summary of Oracle Sales Intelligence Report Content

The following tables list the reports available for different categories with a brief description of the report and the content.

Table A-1 Customer Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Customer Activity Weighted Overall Rank	Provides most active or least active customers using the overall score calculated based on number of leads, opportunities, quotes and orders.	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Customer, Top/Bottom, Display Rows / Display Ranks, Weights for each measure	Customer, Rank, Score, Number of Order Lines, Number of Opportunity Lines, Number of Lead Lines, Number of Quote Lines		OSO, OM, ASO
Customer Activity Number of Leads Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights Note that Start Period and End Period refer to dates rather than date periods like weeks or months.	Customer, Rank, Number of Lead Lines		OSO
Customer Activity Number of Opportunities Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Number of Opportunity Lines		OSO

Table A-1 Customer Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Customer Activity Number of Orders Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Number of Order Lines		OM
Customer Activity Number of Quotes Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Number of Quote Lines		ASO
Customers at Risk Weighted Overall Rank	Provides a list of customers with a potential of being no longer our customers. The risky customer list is derived using the overall score calculated based on Forecasted Revenue, Sales Revenue, Percentage of Customer Satisfaction and Number of Service requests.	Start Date, End Date, Territory, Customer, Service Request, Top/Bottom, Display Rows / Display Ranks, Weights for each measure	Customer, Rank, Score, Forecasted Revenue, Sales Revenue, Percentage of Customer Satisfaction, Number of Service requests		OSO, CS, BIC, BOM
Customers at Risk Customer Satisfaction Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Percentage of Customer Satisfaction		BIC
Customers at Risk Forecasted Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Forecasted Revenue		OSO
Customers at Risk Sales Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Sales Revenue		BOM
Customers at Risk Service Requests Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Number of Service Requests		CS

Table A-1 Customer Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Customers Weighted Overall Rank	Provides the Top or Bottom Customers using the overall score calculated based on Sales Revenue, Average Amount per Order, Percentage of Retention Rate.	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Customer, Top/Bottom, Display Rows / Display Ranks, Weights for each measure	Customer, Rank, Score Forecasted Revenue, Sales Revenue, Average Amount per Order, Percentage of Retention Rate		OSO, BOM, OM
Top/Bottom Customers Average Amount per Order Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Average Amount per Order		OM, AR
Top/Bottom Customers Forecasted Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Forecasted Revenue		OSO
Top/Bottom Customers Low Return Rate Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Low Return Rate		AR (HZ_PARTIES)
Top/Bottom Customers Sales Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Sales Revenue		BOM

Table A-2 Pipeline Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Risky Opportunities Weighted Overall Rank	Provides a list of opportunities with a potential of being lost and not converted to orders. The risky opportunities list is derived using the overall score calculated based on opportunity amount and customer satisfaction.	Start Date, End Date, Opportunity Amount cut-off, Territory, Product, Sales Channel, Sales Group, Salesperson, Customer, Top/Bottom, Display Rows / Display Ranks, Weights for each measure	Customer, Rank, Score, Opportunity Amount, Customer Satisfaction		BIC, OSO
Risky Opportunities Customer Satisfaction Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Customer Satisfaction		BIC
Valuable Opportunities Weighted Overall Rank	Provides a list of opportunities with a potential to become orders. The valuable opportunities list is derived using overall score calculated based on opportunity amount and win probability.	Start Date, End Date, Opportunity Amount cut-off, Territory, Product, Sales Channel, Sales Group, Salesperson, Customer, Top/Bottom, Display Rows / Display Ranks, Weights for each measure	Customer, Rank, Score, Opportunity Amount, Win Probability		OSO, BOM
Valuable Opportunities Opportunity Amount Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Opportunity Amount		OSO
Valuable Opportunities Sales Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Sales Revenue		OSO, BOM
Valuable Opportunities Win Probability Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Customer, Rank, Win Probability		OSO

Table A-3 Pipeline Analysis Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Opportunity Detail	Provides details for an opportunity.	Start Date, End Date, Product, Sales Channel, Sales Group, Salesperson, Customer, Currency, Report By, Sales Status, Sales Stage	Customer, Opportunity Name, Product Line, Product Family, Quantity, UOM, Opportunity Amount, Sales Stage, Win Probability, Sales Status, Close Date, Marketing Code		OSO
Pipeline Detail	Provides pipeline amount for each opportunity of the customer. Hyperlink on the opportunity name drills down to the Opportunity Detail report.	Start Date, End Date, Product, Sales Channel, Sales Group, Salesperson, Customer, Currency, Report By, Sales Status, Sales Stage	Customer, Site, Opportunity Name, Pipeline Amount, Close Date		OSO
Pipeline Salesperson Summary by Channel	For each Salesperson, provides the pipeline amount in each sales channel.	Start Date, End Date, Product, Salesperson, Sales Group, Customer, Currency, Report By, View By	Sales Channel, Salesperson, Pipeline Amount		OSO
Pipelines Salesperson Summary by Stage	For each Salesperson, provides the pipeline amount in each sales stage.	Same as above	Sales Stage, Salesperson, Pipeline Amount		OSO
Pipeline Salesperson Summary by Status	For each Salesperson, provides the pipeline amount in each sales status.	Same as above	Sales Status, Salesperson, Pipeline Amount		OSO

Table A-3 Pipeline Analysis Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Pipeline Summary by Channel	Provides pipeline amount for each sales channel. The hyperlink on the sales status drills down to pipeline detail.	Start Date, End Date, Product, Sales Group, Salesperson, Customer, Currency, Report By, View By	Sales Channel, Pipeline Amount		OSO
Pipeline Summary by Stage	Provides pipeline amount for each sales stage. The hyperlink on the sales stage drills down to pipeline detail.	Same as above	Sales Stage, Pipeline Amount		OSO
Pipeline Summary by Status	Provides pipeline amount for each sales status. The hyperlink on the sales status drills down to pipeline detail.	Same as above	Sales Status, Pipeline Amount		OSO

Table A-4 Product Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Selling Product Families Weighted Overall Rank	Provides the Top or Bottom selling product families using the overall score calculated based on Sales Revenue, Percentage of Gross Margin, Forecasted Revenue, Number of Units Sold, Sales Cycle Time, Percentage of Close Ratio.	Start Date, End Date, Territory, Sales Channel, Sales Group, Salesperson, Weights, Top/Bottom, Display Rows / Display Ranks for each measure	Product Family, Rank, Score, Percentage of Gross Margin, Forecasted Revenue, Sales Cycle Time, Sales Revenue, Close Ratio, Number of Units Sold		BOM, OSO
Top/Bottom Selling Products Families Close Ratio Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Family, Rank, Score, Close Ratio		OSO
Top/Bottom Selling Product Families Forecasted Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Family, Rank, Score, Forecasted Revenue		OSO
Top/Bottom Selling Product Families Gross Margin Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Family, Rank, Score, Percentage of Gross Margin		BOM, OSO
Top/Bottom Selling Product Families Sales Cycle Time Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Family, Rank, Score, Sales Cycle Time		OSO
Top/Bottom Selling Product Families Sales Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Family, Rank, Score, Sales Revenue		OSO, BOM

Table A-4 Product Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Selling Product Families Units Sold Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Family, Rank, Score, Units Sold		OSO, BOM
Top/Bottom Selling Product Lines Weighted Overall Rank	Provides the Top or Bottom selling product lines using the overall score calculated based on Sales Revenue, Percentage of Gross Margin, Forecasted Revenue, Number of Units Sold, sales Cycle Time, Percentage of Close Ratio.	Start Date, End Date, Territory, Sales Channel, Sales Group, Salesperson, Weights, Top/Bottom, Display Rows / Display Ranks for each measure	Product Line, Rank, Score, Percentage of Gross Margin, Forecasted Revenue, Sales Cycle Time, Sales Revenue, Close Ratio, Number of Units Sold		BOM, OSO
Top/Bottom Selling Products Lines Close Ratio Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Line, Rank, Score, Close Ratio		OSO
Top/Bottom Selling Product Lines Forecasted Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Line, Rank, Score, Forecasted Revenue		OSO
Top/Bottom Selling Product Lines Gross Margin Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Line, Rank, Score, Percentage of Gross Margin		BOM, OSO
Top/Bottom Selling Product Lines Sales Cycle Time Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Line, Rank, Score, Sales Cycle Time		OSO
Top/Bottom Selling Product Lines Sales Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Line, Rank, Score, Sales Revenue		OSO, BOM

Table A-4 Product Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Selling Product Lines Units Sold Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Line, Rank, Score, Units Sold		OSO, BOM
Top/Bottom Selling Product Groups Weighted Overall Rank	Provides the Top or Bottom selling product groups using the overall score calculated based on Sales Revenue, Percentage of Gross Margin, Forecasted Revenue, Number of Units Sold, Sales Cycle Time, Percentage of Close Ratio.	Start Date, End Date, Territory, Sales Channel, Sales Group, Salesperson, Weights, Top/Bottom, Display Rows / Display Ranks for each measure	Product Group, Rank, Score, Percentage of Gross Margin, Forecasted Revenue, Sales Cycle Time, Sales Revenue, Close Ratio, Number of Units Sold		BOM, OSO
Top/Bottom Selling Products Groups Close Ratio Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Group, Rank, Score, Close Ratio		OSO
Top/Bottom Selling Product Groups Forecasted Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Group, Rank, Score, Forecasted Revenue		OSO
Top/Bottom Selling Product Groups Gross Margin Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Group, Rank, Score, Percentage of Gross Margin		BOM, OSO

Table A-4 Product Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Selling Product Groups Sales Cycle Time Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Group, Rank, Stressless Cycle Time		OSO
Top/Bottom Selling Product Groups Sales Revenue Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Group, Rank, Score, Sales Revenue		OSO, BOM
Top/Bottom Selling Product Groups Units Sold Detail	Provides similar information as the weighted overall rank based on one measure only.	Same as above except weights	Product Group, Rank, Score, Units Sold		OSO, BOM

Table A-5 Revenue Management Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Average Revenue Per Order by Customer	Provides average revenue per order for each customer (Average revenue=total sales revenue divided by total number of order lines)	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Customer, View By, Top/Bottom, Display Rows / Display Ranks	Customer, Number of Units Sold, Number of Total Orders, Order Amount, Avg Revenue per Order	Customer, Period Type, Product, Sales Channel, Territory	OM, BOM
Average Revenue Per Order by Period	Provides average revenue per order in each Period	Start Date, End Date, Period Type, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Customer, View By, Top/Bottom, Display Rows / Display Ranks	Period, Number of Units Sold, Number of Total Orders, Order Amount, Avg Revenue per Order	Same as above	OM, BOM
Average Revenue Per Order by Product Family	Provides average revenue per order for each product family	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Customer, View By, Top/Bottom, Display Rows / Display Ranks	Product Family, Number of Units Sold, Number of Total Orders, Order Amount, Avg Revenue per Order	Same as above	OM, BOM, OSO
Average Revenue Per Order by Product Line	Provides average revenue per order for each product line	Same as above	Product Line, Number of Units Sold, Number of Total Orders, Order Amount, Avg Revenue per Order	Same as above	OM, AR, BOM, OSO

Table A-5 Revenue Management Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Average Revenue Per Order by Product Group	Provides average revenue per order for each product group	Same as above	Product Group, Number of Units Sold, Number of Total Orders, Order Amount, Avg Revenue per Order	Same as above	OM, AR, BOM, OSO
Average Revenue Per Order by Sales Channel	Provides average revenue per order for each sales channel	Same as above	Sales Channel, Number of Units Sold, Number of Total Orders, Order Amount, Avg Revenue per Order	Same as above	OM, AR, BOM, OSO
Average Revenue Per Order by Territory	Provides average revenue per order for each territory	Same as above	Territory, Number of Units Sold, Number of Total Orders, Order Amount, Avg Revenue per Order	Same as above	OM, AR, BOM, OSO
Gross Margins by Customer	Provide gross margin information for each customer, where gross margin is calculated as: (sales revenue - cost of goods) / cost of goods.	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Customer, View By, Top/Bottom, Display Rows / Display Ranks	Customer, Percentage of Gross Margins	Customer, Period Type, Product, Sales Channel, Territory	BOM

Table A-5 Revenue Management Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Gross Margins by Period	Same as above with a different View by	Start Date, End Date, Period Type, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Customer, View By, Top/Bottom, Display Rows / Display Ranks	Period, Percentage of Gross Margins	Same as above	BOM
Gross Margins by Product Family	Same as above with a different View by	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Customer, View By, Display Rows / Display Ranks	Product Family, Percentage of Gross Margins	Same as above	BOM, OSO
Gross Margins by Product Line	Same as above with a different View by	Same as above	Product Line, Percentage of Gross Margins	Same as above	BOM, OSO
Gross Margins by Product Group	Same as above with a different View by	Same as above	Product Group, Percentage of Gross Margins	Same as above	BOM, OSO
Gross Margins by Sales Channel	Same as above with a different View by	Same as above	Sales Channel, Percentage of Gross Margins	Same as above	OSO, BOM
Gross Margins by Territory	Same as above with a different View by	Same as above	Territory, Percentage of Gross Margins	Same as above	OSO, BOM

Table A-5 Revenue Management Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Revenue Growth by Customer	Compare sales revenue between selected period and previous period, where previous period is derived based on selected period and it cannot be chosen by user at run time; e.g if selected period is Q1-00, previous period will be Q4-99.	Start Date, End Date, Period Type, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Customer, View By, Top/Bottom, Display Rows / Display Ranks	Customer, Selected Period, Selected Period Sales Revenue, Previous Period, Previous Period Sales Revenue, Percentage of Growth Revenue	Customer, Product, Sales Channel, Territory	BOM
Revenue Growth by Product Family	Same as above with a different View by	Same as above	Product Family, Selected Period, Selected Period Sales Revenue, Previous Period, Previous Period Sales Revenue, Percentage of Growth Revenue	Same as above	BOM, OSO
Revenue Growth by Product Line	Same as above with a different View by	Same as above	Product Line, Selected Period, Selected Period Sales Revenue, Previous Period, Previous Period Sales Revenue, Percentage of Growth Revenue	Same as above	BOM, OSO

Table A-5 Revenue Management Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Revenue Growth by Product Group	Same as above with a different View by	Same as above	Product Group, Selected Period, Selected Period Sales Revenue, Previous Period, Previous Period Sales Revenue, Percentage of Growth Revenue	Same as above	BOM, OSO
Revenue Growth by Sales Channel	Same as above with a different View by	Same as above	Sales Channel, Selected Period, Selected Period Sales Revenue, Previous Period, Previous Period Sales Revenue, Percentage of Growth Revenue	Same as above	BOM, OSO
Revenue Growth by Territory	Same as above with a different View by	Same as above	Territory, Selected Period, Selected Period Sales Revenue, Previous Period, Previous Period Sales Revenue, Percentage of Growth Revenue	Same as above	BOM, OSO

Table A-6 Sales Channel Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Sales Channels Weighted Overall Rank	Provides Top or Bottom Sales Channels. The list of sales channels is derived using the overall score calculated based on sales revenue, percentage of gross margin, win ratio, number of lead lines per order, customer satisfaction, units sold.	Start Date, End Date, Territory, Product, Weights, Top/Bottom, Display Rows / Display Ranks for each measure	Sales Channel, Rank, Score, Sales Revenue, Percentage of Gross Margin, Win Ratio, Percentage of Customer Satisfaction, Number of Lead Lines per Order, Units Sold		BIC, BOM, OSO
Top/Bottom Sales Channels Customer Satisfaction Detail	Detail report provides similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Sales Channel, Rank, Percentage of Customer Satisfaction		OSO, BIC
Top/Bottom Sales Channels Gross Margin Detail	Same as above	Same as above but no weights	Sales Channel, Rank, Percentage of Gross Margin		OSO, BOM
Top/Bottom Sales Channels Ratio of Leads to Order Detail	Same as above	Same as above but no weights	Sales Channel, Rank, Number of Lead Lines per Order		OSO, BOM

Table A-6 Sales Channel Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Sales Channels Sales Revenue Detail	Same as above	Same as above but no weights	Sales Channel, Rank, Sales Revenue		OSO, BOM
Top/Bottom Sales Channels Units Sold Detail	Same as above	Same as above but no weights	Sales Channel, Rank, Number of Units Sold		OSO, BOM
Top/Bottom Sales Channels Win/Loss Ratio Detail	Same as above	Same as above but no weights	Sales Channel, Rank, Win Ratio		OSO

Table A-7 Sales Effectiveness Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Return on Compensation by Comp Plan	Provides information on sales revenue to total compensation ratio for each Compensation Plan.	Start Date, End Date, Sales Group, Salesperson, Job Title, Compensation Plan, Plan Element, View By, Top/Bottom, Display Rows / Display Ranks	Compensation Plan, Sales Revenue, Commission, Bonus, Return on Compensation Ratios	Compensation Plan, Job Title / Role, Salesperson	CN, OSO, BOM
Return on Compensation by Role	Same as above with a different View by	Same as above	Role, Sales Revenue, Commission, Bonus, Return on Compensation Ratios	Same as above	CN, BOM, OSO
Return on Compensation by Salesperson	Same as above with a different View by	Same as above	Salesperson, Sales Revenue, Commission, Bonus, Return on Compensation Ratios	Same as above	CN, BOM, OSO
Sales Cycle Length by Product Family	Provides average sales cycle time for each Product family.	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, View By, Top/Bottom, Display Rows / Display Ranks	Product Family, Average Sales Cycle Time (in Days)	Product, Sales Channel, Salesperson, Territory	OSO
Sales Cycle Length by Product Line	Same as above with a different View by	Same as above	Product Line, Average Sales Cycle Time (in Days)	Same as above	OSO
Sales Cycle Length by Product Group	Same as above with a different View by	Same as above	Product Group, Average Sales Cycle Time (in Days)	Same as above	OSO

Table A-7 Sales Effectiveness Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Sales Cycle Length by Sales Channel	Same as above with a different View by	Same as above	Sales Channel, Average Sales Cycle Time (in Days)	Same as above	OSO
Sales Cycle Length by Salesperson	Same as above with a different View by	Same as above	Salesperson, Average Sales Cycle Time (in Days)	Same as above	OSO
Sales Cycle Length by Territory	Same as above with a different View by.	Same as above	Territory, Average Sales Cycle Time (in Days)	Same as above	OSO
Win/Loss Analysis by Product Family	Provides the ratio of number of opportunities won to number of opportunities lost for each product family	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, View By, Top/Bottom, Display Rows / Display Ranks	Product Family, Number of Wins, Number of Losses, Percentage of Win Ratio	Product, Salesperson, Territory	OSO
Win/Loss Analysis by Product Line	Same as above with a different View by	Same as above	Product Line, Number of Wins, Number of Losses, Percentage of Win Ratio	Same as above	OSO

Table A-7 Sales Effectiveness Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Win/Loss Analysis by Product Group	Same as above with a different View by	Same as above	Product Group, Number of Wins, Number of Losses, Percentage of Win Ratio	Same as above	OSO, BOM
Win/Loss Analysis by Salesperson	Same as above with a different View by	Same as above	Salesperson, Number of Wins, Number of Losses, Percentage of Win Ratio	Same as above	OSO, BOM
Win/Loss Analysis by Territory	Same as above with a different View by	Same as above	Territory, Number of Wins, Number of Losses, Percentage of Win Ratio	Same as above	BOM

Table A-8 Sales Force Performance Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Performers Weighted Overall Rank	Provides Top or Bottom performing sales person(s). The list of sales person is derived using an overall score calculated based on percentage of close ratio, percentage of gross margin, sales cycle time, commission amount, sales revenue, revenue credit and units sold.	Start Date, End Date, Territory, Product, Sales Channel, Sales Group, Salesperson, Job Title, Compensation Plan, Weights, Top/Bottom, Display Rows / Display Ranks for each measure	Salesperson, Rank, Score, Close Ratio, Percentage of Gross Margin, Sales Cycle Time, Commission Amount, Sales Revenue, Revenue Credit, Number of Units Sold		CN, BOM, OSO
Top/Bottom Performers Close Ratio Detail	Detail reports provide similar information as the weighted overall rank based on one measure only.	Same as above but no weights	Salesperson, Rank, Close Ratio		OSO
Top/Bottom Performers Compensation Amount Detail	Same as above	Same as above but no weights	Salesperson, Rank, Commission Amount		OSO, CN
Top/Bottom Performers Gross Margins Detail	Same as above	Same as above but no weights	Salesperson, Rank, Percentage of Gross Margin		OSO, BOM
Top/Bottom Performers Revenue Credit Detail	Same as above	Same as above but no weights	Salesperson, Rank, Revenue Credit		OSO

Table A–8 Sales Force Performance Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
Top/Bottom Performers Sales Cycle Time Detail	Same as above	Same as above but no weights	Salesperson, Rank, Sales Cycle Time (in Days)		OSO
Top/Bottom Performers Sales Revenue Detail	Same as above	Same as above but no weights	Salesperson, Rank, Sales Revenue		OSO, BOM
Top/Bottom Performers Units Sold Detail	Same as above	Same as above but no weights	Salesperson, Rank, Units Sold		OSO, BOM

Table A–9 PHP Charts

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
PHP: Gross Margins by Period	Chart to display on home page. Data content same as report for Gross Margins by Period.	Same as Gross Margins by Period report			
PHP: Top/Bottom Performers Weighted Overall Rank	Chart to display on home page. Data content same as corresponding report.	Same as Top/Bottom Performers Weighted Overall Rank report			
PHP: Top/Bottom Customers Weighted Overall Rank	Chart to display on home page. Data content same as corresponding report.	Same as Top/Bottom Customers Weighted Overall Rank report			
PHP: Valuable Opportunities Weighted Overall Rank	Chart to display on home page. Data content same as corresponding report.	Same as Valuable Opportunities Weighted Overall Rank report			

Modules abbreviations

GL: GL_PERIODS used for periods in all reports

AR: HZ_PARTIES used for Customers in all reports

JTF: JTF tables used for resources, sales groups

OM: OE tables

OSO: AS tables

BOM: CST_BIS_MARGIN_SUMMARY table

Parameter *Product* implies 3 parameters

Product Line

Product Family

Product Group

Parameter *Display Rows*

If Top/Bottom is not selected (is blank), this parameter represents the number of rows to be displayed.

If Top/Bottom is selected, it represents the top/bottom ranks to be displayed.

Parameter *Weights*

Rating factors on a five point scale with the lowest value 1 and highest 5 are accepted for each measure displayed in the report. Used in combination with the measure values to calculate the **score** and **rank**.

B

Summary of Oracle Sales Intelligence Tables Used in Reports

The following tables list the database tables used in reports.

Table B-1 Customer Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Customer Activity Weighted Overall Rank	BILTPL04	BIL_CACT	BIL_REV_CUST_SUMM
Customer Activity Number of Leads Detail	BILTPL01	BIL_CACT_LD	BIL_REV_CUST_SUMM
Customer Activity Number of Opportunities Detail	BILTPL01	BIL_CACT_OPPD	BIL_REV_CUST_SUMM
Customer Activity Number of Orders Detail	BILTPL01	BIL_CACT_ORD	BIL_REV_CUST_SUMM
Customer Activity Number of Quotes Detail	BILTPL01	BIL_CACT_QD	BIL_REV_CUST_SUMM
Customers at Risk Weighted Overall Rank	BILTPL04	BIL_BCAR	BIL_IMP_CUST_SUMM
Customers at Risk Customer Satisfaction Detail	BILTPL01	BIL_BCAR_CSD	BIL_IMP_CUST_SUMM
Customers at Risk Forecasted Revenue Detail	BILTPL01	BIL_BCAR_FRD	BIL_IMP_CUST_SUMM
Customers at Risk Sales Revenue Detail	BILTPL01	BIL_BCAR_SRD	BIL_IMP_CUST_SUMM
Customers at Risk Service Requests Detail	BILTPL01	BIL_BCAR_SRVRD	BIL_IMP_CUST_SUMM

Table B-1 Customer Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Top/Bottom Customers Weighted Overall Rank	BILTPL04	BIL_TBC	BIL_REV_CUST_SUMM
Top/Bottom Customers Average Amount per Order Detail	BILTPL01	BIL_TBC_AAPOD	BIL_REV_CUST_SUMM
Top/Bottom Customers Forecasted Revenue Detail	BILTPL01	BIL_TBC_FRD	BIL_REV_CUST_SUMM
Top/Bottom Customers Low Return Rate Detail	BILTPL01	BIL_TBC_LRRD	BIL_REV_CUST_SUMM
Top/Bottom Customers Sales Revenue Detail	BILTPL01	BIL_TBC_SRD	BIL_REV_CUST_SUMM

Table B-2 Pipeline Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Risky Opportunities Weighted Overall Rank	BILTPL04	BIL_RISKY_OPTY	BIL_OPTY_PERF_SUMM
Risky Opportunities Customer Satisfaction Detail	BILTPL01	BIL_RISKY_CSD	BIL_OPTY_PERF_SUMM
Valuable Opportunities Weighted Overall Rank	BILTPL04	BIL_TOP_OPPORTUNITIES	BIL_OPTY_PERF_SUMM
Valuable Opportunities Opportunity Amount Detail	BILTPL01	BIL_TOPOP_OPAD	BIL_OPTY_PERF_SUMM
Valuable Opportunities Sales Revenue Detail	BILTPL01	BIL_TOPOP_SRD	BIL_OPTY_PERF_SUMM
Valuable Opportunities Win Probability Detail	BILTPL01	BIL_TOPOP_WPD	BIL_OPTY_PERF_SUMM

Table B-3 Pipeline Analysis Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Opportunity Detail	BILPIA04	BIL_PIA_OPP	BIL_SSUM_PIA_MV
Pipeline Detail	BILPIA02	BIL_PIA_DET	BIL_SSUM_PIA_MV
Pipeline Salesperson Summary by Channel	BILPIA03	BIL_PIA_SSCH	BIL_SSUM_PIA_MV
Pipelines Salesperson Summary by Stage	BILPIA03	BIL_PIA_SSSG	BIL_SSUM_PIA_MV
Pipeline Salesperson Summary by Status	BILPIA03	BIL_PIA_SSST	BIL_SSUM_PIA_MV\
Pipeline Summary by Channel	BILPIA01	BIL_PIA_SMCH	BIL_SSUM_PIA_MV
Pipeline Summary by Stage	BILPIA01	BIL_PIA_SMSG	BIL_PIA_SSUM_MV
Pipeline Summary by Status	BILPIA01	BIL_PIA_SMST	BIL_PIA_SSUM_MV

Table B-4 Product Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Top/Bottom Selling Product Families Weighted Overall Rank	BILTPL05	BIL_TB_PROD_FAMILIES	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Products Families Close Ratio Detail	BILTPL01	BIL_TBPF_CRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Families Forecasted Revenue Detail	BILTPL01	BIL_TBPF_FRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Families Gross Margin Detail	BILTPL01	BIL_TBPF_GMD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Families Sales Cycle Time Detail	BILTPL01	BIL_TBPF_SCTD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Families Sales Revenue Detail	BILTPL01	BIL_TBPF_SRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Families Units Sold Detail	BILTPL01	BIL_TBPF_USD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Lines Weighted Overall Rank	BILTPL05	BIL_TB_PROD_LINES	BIL_PROD_SCT_WL_SUMM

Table B-4 Product Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Top/Bottom Selling Products Lines Close Ratio Detail	BILTPL01	BIL_TBPL_CRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Lines Forecasted Revenue Detail	BILTPL01	BIL_TBPL_FRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Lines Gross Margin Detail	BILTPL01	BIL_TBPL_GMD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Lines Sales Cycle Time Detail	BILTPL01	BIL_TBPL_SCTD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Lines Sales Revenue Detail	BILTPL01	BIL_TBPL_SRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Lines Units Sold Detail	BILTPL01	BIL_TBPL_USD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Groups Weighted Overall Rank	BILTPL05	BIL_TB_PROD_GROUPS	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Products Groups Close Ratio Detail	BILTPL01	BIL_TBPG_CRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Groups Forecasted Revenue Detail	BILTPL01	BIL_TBPG_FRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Groups Gross Margin Detail	BILTPL01	BIL_TBPG_GMD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Groups Sales Cycle Time Detail	BILTPL01	BIL_TBPG_SCTD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Groups Sales Revenue Detail	BILTPL01	BIL_TBPG_SRD	BIL_PROD_SCT_WL_SUMM
Top/Bottom Selling Product Groups Units Sold Detail	BILTPL01	BIL_TBPG_USD	BIL_PROD_SCT_WL_SUMM

Table B-5 Revenue Management Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Average Revenue Per Order by Customer	BILTPL03	BIL_ARPO_V VCUST	BIL_REV_CUST_SUMM
Average Revenue Per Order by Period	BILTPL03	BIL_ARPO	BIL_REV_CUST_SUMM
Average Revenue Per Order by Product Family	BILTPL03	BIL_ARPO_VPF	BIL_REV_CUST_SUMM
Average Revenue Per Order by Product Line	BILTPL03	BIL_ARPO_VPL	BIL_REV_CUST_SUMM
Average Revenue Per Order by Product Group	BILTPL03	BIL_ARPO_VPG	BIL_REV_CUST_SUMM
Average Revenue Per Order by Sales Channel	BILTPL03	BIL_ARPO_VSC	BIL_REV_CUST_SUMM
Average Revenue Per Order by Territory	BILTPL03	BIL_ARPO_V VTERR	BIL_REV_CUST_SUMM
Gross Margins by Customer	BILTPL02	BIL_RM_GM_V VCUST	BIL_REV_CUST_SUMM
Gross Margins by Period	BILTPL02	BIL_RM_GM	BIL_REV_CUST_SUMM
Gross Margins by Product Family	BILTPL02	BIL_RM_GM_VPF	BIL_REV_CUST_SUMM
Gross Margins by Product Line	BILTPL02	BIL_RM_GM_VPL	BIL_REV_CUST_SUMM
Gross Margins by Product Group	BILTPL02	BIL_RM_GM_VPG	BIL_REV_CUST_SUMM
Gross Margins by Sales Channel	BILTPL02	BIL_RM_GM_VSC	BIL_REV_CUST_SUMM
Gross Margins by Territory	BILTPL02	BIL_RM_GM_V VTERR	BIL_REV_CUST_SUMM
Revenue Growth by Customer	BILTPL06	BIL_RM_RG_V VCUST	BIL_REV_CUST_SUMM
Revenue Growth by Product Family	BILTPL06	BIL_RM_RG_VPF	BIL_REV_CUST_SUMM
Revenue Growth by Product Line	BILTPL06	BIL_RM_RG_VPL	BIL_REV_CUST_SUMM
Revenue Growth by Product Group	BILTPL06	BIL_RM_RG_VPG	BIL_REV_CUST_SUMM
Revenue Growth by Sales Channel	BILTPL06	BIL_RM_RG_VSC	BIL_REV_CUST_SUMM
Revenue Growth by Territory	BILTPL06	BIL_RM_RG_V VTERR	BIL_REV_CUST_SUMM

Table B-6 Sales Channel Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Top/Bottom Sales Channels Weighted Overall Rank	BILTPL05	BIL_TB_SC	BIL_SLS_CHNL_PERF_SUMM
Top/Bottom Sales Channels Customer Satisfaction Detail	BILTPL01	BIL_TBSC_CSD	BIL_SLS_CHNL_PERF_SUMM
Top/Bottom Sales Channels Gross Margin Detail	BILTPL01	BIL_TBSC_GMD	BIL_SLS_CHNL_PERF_SUMM
Top/Bottom Sales Channels Ratio of Leads to Order Detail	BILTPL01	BIL_TBSC_RLOD	BIL_SLS_CHNL_PERF_SUMM
Top/Bottom Sales Channels Sales Revenue Detail	BILTPL01	BIL_TBSC_SRD	BIL_SLS_CHNL_PERF_SUMM
Top/Bottom Sales Channels Units Sold Detail	BILTPL01	BIL_TBSC_USD	BIL_SLS_CHNL_PERF_SUMM
Top/Bottom Sales Channels Win/Loss Ratio Detail	BILTPL01	BIL_TBSC_WLRD	BIL_SLS_CHNL_PERF_SUMM

Table B-7 Sales Effectiveness Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Return on Compensation by Comp Plan	BILTPL03	BIL_ROC	BIL_ROC_SUMM
Return on Compensation by Role	BILTPL03	BIL_ROC_VSJOB	BIL_ROC_SUMM
Return on Compensation by Salesperson	BILTPL03	BIL_ROC_VSREP	BIL_ROC_SUMM
Sales Cycle Length by Product Family	BILTPL02	BIL_SCT_VPF	BIL_PROD_SCT_WL_SUMM
Sales Cycle Length by Product Line	BILTPL02	BIL_SCT_VPL	BIL_PROD_SCT_WL_SUMM
Sales Cycle Length by Product Group	BILTPL02	BIL_SCT_VPG	BIL_PROD_SCT_WL_SUMM
Sales Cycle Length by Sales Channel	BILTPL02	BIL_SCT_VSC	BIL_PROD_SCT_WL_SUMM
Sales Cycle Length by Salesperson	BILTPL02	BIL_SCT	BIL_PROD_SCT_WL_SUMM
Sales Cycle Length by Territory	BILTPL02	BIL_SCT_VTERR	BIL_PROD_SCT_WL_SUMM
Win/Loss Analysis by Product Family	BILTPL03	BIL_WLA_VPF	BIL_PROD_SCT_WL_SUMM

Table B-7 Sales Effectiveness Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Win/Loss Analysis by Product Line	BILTPL03	BIL_WLA_VPL	BIL_PROD_SCT_WL_SUMM
Win/Loss Analysis by Product Group	BILTPL03	BIL_WLA_VPG	BIL_PROD_SCT_WL_SUMM
Win/Loss Analysis by Salesperson	BILTPL03	BIL_WLA	BIL_PROD_SCT_WL_SUMM
Win/Loss Analysis by Territory	BILTPL03	BIL_WLA_VTERR	BIL_PROD_SCT_WL_SUMM

Table B-8 Sales Force Performance Reports

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
Top/Bottom Performers Weighted Overall Rank	BILTPL05	BIL_SFTBP	BIL_SREP_PERF_SUMM
Top/Bottom Performers Close Ratio Detail	BILTPL01	BIL_SFTBP_CRD	BIL_SREP_PERF_SUMM
Top/Bottom Performers Compensation Amount Detail	BILTPL01	BIL_SFTBP_CBAD	BIL_SREP_PERF_SUMM
Top/Bottom Performers Gross Margins Detail	BILTPL01	BIL_SFTBP_GMD	BIL_SREP_PERF_SUMM
Top/Bottom Performers Revenue Credit Detail	BILTPL01	BIL_SFTBP_RCD	BIL_SREP_PERF_SUMM
Top/Bottom Performers Sales Cycle Time Detail	BILTPL01	BIL_SFTBP_SCTD	BIL_SREP_PERF_SUMM
Top/Bottom Performers Sales Revenue Detail	BILTPL01	BIL_SFTBP_SRD	BIL_SREP_PERF_SUMM
Top/Bottom Performers Units Sold Detail	BILTPL01	BIL_SFTBP_USD	BIL_SREP_PERF_SUMM

Table B-9 PHP Charts

Report Name	File Name (.rdf)	Report Function Name/Region	Summary Table
PHP: Gross Margins by Period	BILPHP01	BIL_PHP_RM_GM	
PHP: Top/Bottom Performers Weighted Overall Rank	BILPHP01	BIL_PHP_SFTBP	
PHP: Top/Bottom Customers Weighted Overall Rank	BILPHP01	BIL_PHP_TBA	
PHP: Most valuable Opportunities Weighted Overall Rank	BILPHP01	BIL_PHP_TOPOP	

Performance Measures

The following table lists performance measures in Oracle Sales Intelligence.

Table C-1 Performance Measures

Display Name	Internal Name	Description	Dimensions
BIL Sales Cycle	BIL_SALES_CYCLE	Measure for Sales Cycle	Organization, Time, Sales Territory, Sales Product, Sales Channel, Sales force, Sales Job Title
BIL Sales Revenue	BIL_SALES_REVENUE	Measure for Sales Revenue	Organization, Time, Sales Territory, Sales Product, Sales Channel, Sales force, Sales Compensation Plan
BIL Win/Loss Ratio	BIL_WIN_LOSS_RATIO	Measure for Win / Loss Ratio	Organization, Time, Sales Territory, Sales Product, Sales Channel, Sales force, Sales Job Title
BIL Gross Margin	BIL_GROSS_MARGIN	Measure for Gross Margin	Organization, Time, Sales Territory, Sales Product, Sales Channel, Sales force, Sales Job Title
BIL Percentage Growth in Sales Revenue	BIL_PCTGROWTH_REVENUE	Measure for Percentage Growth in Sales Revenue	Organization, Time, Sales Territory, Sales Product, Sales Channel, Sales force, Sales Compensation Plan
BIL Percentage Sales Force Below Quota	BIL_SLSFQUOTA_BELOWTG	Measure for Percentage Sales Force Below Quota	Organization, Time, Sales force, Sales Compensation Plan

Table C-1 Performance Measures

Display Name	Internal Name	Description	Dimensions
BIL Percentage Sales Force Above or At Quota	BIL_SLSFQUOTA_ABOVETG	Measure for Percentage Sales Force Above or At Quota	Organization, Time, Sales force, Sales Compensation Plan
BIL Commission	BIL_COMMISSION	Measure for Commission amount	Organization, Time, Sales Territory, Sales Product, Sales Channel, Sales force, Sales Compensation Plan
BIL Bonus	BIL_BONUS	Measure for Bonus amount	Organization, Time, Sales force, Sales Compensation Plan

Table C-2 Sales Intelligence Dimensions, Dimension Levels, PMF Views and Referred Tables

Display Name (Internal Name)	Dimension Level (Internal Name)	Level View	Tables Used by the View
TIME	TOTAL_TIME, YEAR, QUARTER, MONTH	BIS_TOTAL_TIMES_V, BIS_YEARS_V, BIS_QUARTERS_V, BIS_MONTHS_V	BIS_LEVELS, BIS_LEVELS_TLGL_PERIODS, GL_SETS_OF_BOOKS
SALES CHANNEL	TOTAL SALES CHANNELS, SALES CHANNEL	BIS_TOTAL_SALES_CHANNELS_V, BIS_SALES_CHANNELS_V	BIS_LEVELS, BIS_LEVELS_TLISO_LOOKUPS
SALES TERRITORY	TOTAL SALES TERRITORIES, SALES TERRITORY	BIL_DIMV_TOT_TERRITORY, BIL_DIMV_TERRITORIES	BIS_LEVELS, BIS_LEVELS_TLJTF_TERR_ALL

Table C-2 Sales Intelligence Dimensions, Dimension Levels, PMF Views and Referred Tables

Display Name (Internal Name)	Dimension Level (Internal Name)	Level View	Tables Used by the View
SALESFORCE	TOTAL SALESFORCE, SALES GROUPS, SALESREP	BIL_DIMV_TOT_ SLSFORCE, BIL_DIMV_SALES_ GROUPS, BIL_DIMV_ SALESFORCE	BIS_LEVELS, BIS_LEVELS_TLJTF_RS_ GROUPS_B, JTF_RS_GROUPS_TL, JTF_RS_REP_MANAGERS ,JTF_RS_RESOURCE_EXTNS, JTF_RS_SALESREPS, PER_ALL_PEOPLE_F, PER_ALL_ASSIGNMENTS_F
SALES PRODUCT	TOTAL SALES PRODUCTS, SALES INTEREST TYPE, PRIMARY INTEREST CODE, SECONDARY INTEREST CODE	BIL_DIMV_TOT_ SLSPRODS, BIL_DIMV_ INTEREST_TYPES, BIL_DIMV_PRIM_ INT_CODES, BIL_DIMV_SEC_ INT_CODES	BIS_LEVELS, BIS_LEVELS_TLAS_ INTEREST_TYPES_B, AS_INTEREST_TYPES_TL, AS_INTEREST_TYPES_ALL, AS_INTEREST_CODES_B, AS_INTEREST_CODES_TL, AS_INTEREST_CODES_ALL
SALES COMP PLAN	TOTAL SALES COMP PLANS, COMP PLAN, PLAN ELEMENT	BIL_DIMV_TOT_ COMP_PLANS, BIL_DIMV_COMP_ PLANS, BIL_DIMV_PLAN_ ELEMENTS	BIS_LEVELS, BIS_LEVELS_TLCN_QUOTA_ ASSIGNS_ALL, CN_QUOTAS_ALL, CN_COMP_PLANS_ALL, CN_INTERVAL_TYPES_ALL, CN_INTERVAL_TYPES_ALL_ TL
SALES JOB TITLE	TOTAL SALES JOB TITLES, 'SALES JOB TITLE	BIL_DIMV_TOT_ JOB_TITLES, BIL_DIMV_JOB_ TITLE	BIS_LEVELS, BIS_LEVELS_TLPER_ALL_ ASSIGNMENTS_F

Table C-3

Target Level Display Name	Target Level Internal Name	Report	Alert	Process	Workflow
Sales Cycle by Product Line, Sales Group	BIL_SALES_CYCLE_TG1	Top/Bottom Performers Sales Cycle Time Detail	BIL PMF SALES CYCLE	BIL Send Notification	BIL Corrective Action
Sales Cycle by Product Category	BIL_SALES_CYCLE_TG2	"	BIL PMF SALES CYCLE	BIL Send Notification	BIL Corrective Action
Sales Cycle by Quarter	BIL_SALES_CYCLE_TG3	"	BIL PMF SALES CYCLE	BIL Send Notification	BIL Corrective Action
Sales Cycle by Year	BIL_SALES_CYCLE_TG4	"	BIL PMF SALES CYCLE	BIL Send Notification	BIL Corrective Action
Total Sales Cycle	BIL_SALES_CYCLE_TG_TOTAL	"	BIL PMF SALES CYCLE	BIL Send Notification	BIL Corrective Action
Sales Revenue by Product Line, Sales Group	BIL_SALES_REVENUE_TG1	Top/Bottom Performers Sales Revenue Detail	BIL PMF SALES REVENUE	BIL Send Notification	BIL Corrective Action
Win/Loss Ratio by Product Line, Sales Group	BIL_WIN_LOSS_RATIO	Top/Bottom Performers Close Ratio Detail	BIL PMF WIN LOSS RATIO	BIL Send Notification	BIL Corrective Action
Gross Margin by Product Line, Sales Group	BIL_GROSS_MARGIN_TG1	Top/Bottom Performers Gross Margins Detail	BIL PMF GROSS MARGIN	BIL Send Notification	BIL Corrective Action
Percentage Growth in Sales Revenue by Month	BIL_PCTGROWTH_REVENUE_TG1	Revenue Growth by Period	BIL PMF PCTGROWTH REVENUE	BIL Send Notification	BIL Corrective Action
Percentage Sales Force Below Quota by Month	BIL_SLSFQUOTA_BELOWTG_TG1	-	BIL PMF SLSFQUOTA BELOWTG	BIL Send Notification	BIL Corrective Action

Table C-3

Target Level Display Name	Target Level Internal Name	Report	Alert	Process	Workflow
Percentage Sales Force Above or at Quota by Month	BIL_SLSFQUOTA_ABOVETG_TG1	-	BIL PMF SLSFQUOTA ABOVETG	BIL Send Notification	BIL Corrective Action
Sales Commission by Month	BIL_COMMISSION_TG1	Top/Bottom Performers Compensation Amount Detail	BIL PMF COMMISSION	BIL Send Notification	BIL Corrective Action
Sales Bonus by Month	BIL_BONUS_TG1	Top/Bottom Performers Compensation Amount Detail	BIL PMF BONUS	BIL Send Notification	BIL Corrective Action

Oracle Sales Intelligence Product Dependency

Oracle Sales Intelligence depends upon the following fully installed products:

AK	Oracle Common Modules
ALR	Oracle Alert
BIS	Oracle Applications BIS
FND	Oracle Applications Object Library
ICX	Oracle Self-Service Web Applications
JTF	Oracle CRM Foundation

Oracle Sales Intelligence depends upon the following shared installed products:

AS	Oracle Sales
ASO	Oracle Quoting
AR	Oracle Receivables
BIC	Oracle Customer Intelligence
BIM	Oracle Marketing Intelligence
BOM	Oracle Bill of Materials
CN	Oracle Incentive Compensation
CS	Oracle Service
GL	Oracle General Ledger
INV	Oracle Inventory

OE	Oracle Order Entry
PER	Oracle Human Resources