Oracle® Sales Intelligence

User Guide

Release 11*i* (11.5.8)

Part No. B10098-02

March 2003

ORACLE®

Oracle Sales Intelligence User Guide, Release 11*i*

Part No. B10098-02

Contents

Send Us Your Comments

Oracle Sales Intelligence User Guide, Release 11*i*

Part No. B10098-02

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us via the postal service.

Oracle Corporation
CRM Content Development Manager
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Sales Intelligence User 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 an overview of the application and its components, and explains key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.
- Chapter 2 provides procedures for using the application to perform essential business tasks.

- 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.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

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

Oracle Sales Intelligence Implementation Guide

This guide explains the steps necessary to implement the application.

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 6*i* 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 Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracl*eMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracl*eMetaLin*k, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracl*eMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows:

Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

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.

1 Understanding Oracle Sales Intelligence

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

Use the following links to find information about these topics:

- Using Oracle Sales Intelligence
- Selecting Report Parameter Values
- Creating a Printable Version of your Report
- Saving a Favorite Report
- Running Reports with Different View by Column
- Navigating through Report Navigator

1.1 Oracle Sales Intelligence Reports

The following reports are available:

- Rank Your Top and Bottom Sales Perfomers
- Calculate the Return on Compensation
- Tracking the Length of Sales Cycles
- Monitor and Track Win/Loss Ratio
- Analyze Average Revenue Per Order
- Analyze Gross Margin
- Analyze Revenue Growth

- Track Top/Bottom Customer Activity
- Track Top/Bottom Customers
- Identify Critical Customers
- Assess Top/Bottom Product Lines
- Assess Top/Bottom Product Groups
- Assess Top/Bottom Product Families
- Determine the Most and Least Effective Sales Channels
- Determine the Valuable Revenue Generating Opportunities
- Determine the Risky Opportunities
- Pipeline Summary by Sales Channel
- Pipeline Detail
- Pipeline Salesperson Summary by Sales Channel
- Opportunity Detail
- Pipeline Summary by Sales Status
- Pipeline Salesperson Summary by Sales Status
- Pipeline Summary by Sales Stage
- Pipeline Salesperson Summary by Sales Stage

1.2 Rank Your Top and Bottom Sales Performers

With this report, you can identify your top and bottom sales performers across seven key measures:

- Gross Margin
- Close Ratio
- Sales Cycle Time
- Compensation and Bonus Amount
- Sales Revenue
- Revenue Credits
- Units Sold

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report that focuses on specific measures. You can view the results by sales representative.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.3 Calculate the Return on Compensation

By selecting the parameters or data filters, you can calculate the return on compensation. Use the View Bys to compare data and change the dimensions graphed on the dependent axis.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates.

On the report, you will notice a graph and table.

You can view the results by compensation plan, role, and sales representative. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.4 Tracking the Length of Sales Cycles

By selecting the parameters or data filters, you can track the Sale Cycle Time. Use the View Bys to compare data and change the dimensions graphed on the dependent axis.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates.

On the report, you will notice a graph and table.

You can view the results by product category, sales channel, territory, and sales representative. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.5 Monitor and Track Win/Loss Ratio

By selecting the parameters or data filters, you can track and monitor your Win/Loss Ratio. Use the View Bys to compare data and change the dimensions graphed on the dependent axis.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates.

On the report, you will notice a graph and table.

You can view the results by product category, territory, and sales representative. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.6 Analyze Average Revenue Per Order

By selecting the parameters or data filters, you can analyze the average revenue per order. Use the View Bys to compare data and change the dimensions graphed on the dependent axis.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates.

On the report, you will notice a graph and table.

You can view the results by time, territory, product category, sales channel, and customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.7 Analyze Gross Margin

By selecting the parameters or data filters, you can analyze gross margin. Use the View Bys to compare data and change the dimensions graphed on the dependent axis.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates.

On the report, you will notice a graph and table.

You can view the results by time, territory, product category, sales channel, and customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.8 Analyze Revenue Growth

By selecting the parameters or data filters, you can analyze revenue growth. Use the View Bys to compare data and change the dimensions graphed on the dependent axis.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates.

On the report, you will notice a graph and table.

You can view the results by territory, product category, sales channel, and customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.9 Track Top/Bottom Customer Activity

By selecting the parameters or data filters, you can track your top/bottom customer activity across four key measures:

- Number of Lead Lines
- Number of Quote Lines
- Number of Order Lines
- Number of Opportunity Lines

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling you the flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select a top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.10 Track Top/Bottom Customers

By selecting the parameters or data filters, you can track your top/bottom customer activity across four key measures:

- Forecasted Revenue
- Sales Revenue
- Average Amount/Order
- Retention Rate

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select a top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.11 Identify Critical Customers

By selecting the parameters or data filters, you can track your top/bottom customer activity across four key measures:

- Forecasted Revenue
- Sales Revenue
- Customer Satisfaction
- Service Requests

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select a top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.12 Assess Top/Bottom Product Lines

By selecting the parameters or data filters, you can track your top/bottom product lines across six key measures:

- Gross Margin
- Forecasted Revenue
- Sales Cycle Time
- Sales Revenue
- Close Ratio
- Number of Units Sold

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select a top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by product line. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.13 Assess Top/Bottom Product Groups

By selecting the parameters or data filters, you can track your top/bottom product groups across six key measures:

- Gross Margin
- Forecasted Revenue
- Sales Cycle Time
- Sales Revenue
- Close Ratio
- Number of Units Sold

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select a top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by product group. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.14 Assess Top/Bottom Product Families

By selecting the parameters or data filters, you can track your top/bottom product families across six key measures:

- Gross Margin
- Forecasted Revenue
- Sales Cycle Time
- Sales Revenue
- Close Ratio
- Number of Units Sold

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select a top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by product families. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.15 Determine the Most and Least Effective Sales Channels

By selecting the parameters or data filters, you can track your top/bottom sales channels across six key measures:

- Gross Margin
- Sales Revenue
- Win Ratio
- Number of Units Sold
- Customer Satisfaction
- Number of Lead Lines per Order

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select a top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by sales channel. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.16 Determine the Valuable Revenue Generating Opportunities

By selecting the parameters or data filters, you can determine your top opportunities using two key measures:

- Opportunity Amount
- Win Probability

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select the opportunity amount cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.17 Determine the Risky Opportunities

By selecting the parameters or data filters, you can determine your top opportunities using two key measures:

- Opportunity Amount
- Customer Satisfaction

After selecting the data filters, select your rating factors.

Rating factors use a five point scale: 1 is the lowest rating, and 5 is the highest rating. Rating factors give you the flexibility to rank various measures, enabling flexibility and customization of reports.

To make your data filtering easier, select dates that correspond with key events in your company, such as quarters and HR calendar dates, and select the top/bottom cut-off.

On the report, you will notice a graph and table. The table contains various links that correspond to the measures on the graph. You can create a more detailed report, which focuses on specific measures, from the links.

You can view the results by customer. Also, you have the control of making your reports specific or broad.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.18 Pipeline Summary by Sales Channel

This report is used to look at pipeline amounts by channel and also to view the total percentage by sales channel. You can further drill down to view the pipeline amount detail for each reported channel by clicking on the channel hyperlink. The pie chart displays the amount in the pipeline for each channel as a percentage. The tabular data lists the Sales Channel and the amount in the pipeline for each channel. Parameter selections available are: Start Date, End Date, Sales Group, Salesperson, Customer, Product Category, Currency, and Report by.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.19 Pipeline Detail

This report is used to look at opportunities and revenue credits by customer. You can further drill down to view the opportunity details for any customer. The report displays a bar graph which shows the pipeline amount. The tabular data displays the Customer Name, Site, Opportunity Name, Pipeline Amount, and Close Date.

Parameter selections available are: Start Date, End Date, Sales Group, Salesperson, Sales Channel, Customer, Product Category, Currency, Report by, Sales Status, and Sales Stage.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.20 Pipeline Salesperson Summary by Sales Channel

This report is used to view the total pipeline amount broken down across different sales channels for all sales representatives. Each of the channel columns is totaled. The report displays a bar graph showing the channel amount for each salesperson. The tabular data displays the Salesperson, Sales Channels, and the total amount in each pipeline for each salesperson.

Parameter selections available are: Start Date, End Date, Sales Group, Salesperson, Customer, Product Category, Currency, and Report by.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.21 Opportunity Detail

This report enables you to view the details of all opportunities for a selected customer. Details of an opportunity in terms of Sales Stage, Sales Status, Win Probability, Quantity, Product Line, Product Family, Close Date, etc., enable you to forecast efficiently. The tabular data chart should have columns displaying the following information: Customer Name, Product Line, Product Family, Quantity, Unit of Measure, Amount, Sales Stage, Win Probability, Close Date, Marketing Code, Sales Status, and Opportunity Name.

Parameters for the report are: Start Period, End Period, Sales Group, Customer, Sales Status, Sales Channel, Report by, Sales Stage, Salesperson, Product Category, and Currency.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.22 Pipeline Summary by Sales Status

This report is used to look at pipeline amounts by status and also to view the total percentage by sales status. You can further drill down to view the pipeline amount detail for each reported sales status by clicking the Sales Status hyperlink. The pie chart displays the amount in the pipeline for each status as a percentage. The tabular data lists the sales status and the amount in the pipeline for each status.

Parameter selections available are: Start Date, End Date, Sales Group, Salesperson, Customer, Product Category, Currency, and Report by.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.23 Pipeline Salesperson Summary by Sales Status

This report is used to view the total pipeline amount broken down across different sales statuses for all sales representatives. Each of the sales status columns is totaled. The report displays a bar graph showing the status amount for each salesperson. The tabular data displays the salesperson and the total amount in the pipeline for each salesperson.

Parameter selections available are: Start Date, End Date, Sales Group, Salesperson, Customer, Product Category, Currency, and Report by.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.24 Pipeline Summary by Sales Stage

This report is used to look at pipeline amounts by sales stage and also to view the total percentage by sales stage. You can further drill down to view the pipeline amount detail for each reported sales stage by clicking the Sales Stage hyperlink. The pie chart displays the amount in the pipeline for each sales stage as a percentage. The tabular data lists the sales stage and the amount in pipeline for each stage.

Parameter selections available are: Start Date, End Date, Sales Group, Salesperson, Customer, Product Category, Currency, and Report by.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

1.25 Pipeline Salesperson Summary by Sales Stage

This report is used to view the total pipeline amount broken down across different sales stages for all sales representatives. Each of the stage columns is totaled. The report displays a bar graph showing the stage amount for each salesperson. The tabular data displays the Salesperson, Sales Stage, and the total amount in the pipeline for each salesperson.

Parameter selections available are: Start Date, End Date, Sales Group, Salesperson, Customer, Product Category, Currency, and Report by.

See also:

Selecting Report Parameter Values

Creating a Printable Version of your Report

Saving a Favorite Report

Running Reports with Different View by Column

Navigating through Report Navigator

2

Using Oracle Sales Intelligence

2.1 Using Oracle Sales Intelligence

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

2.2 Selecting Report Parameter Values

You can use any of the following four methods to select report parameter values:

Text box: Enter the desired values in the field.

Drop down: Select the parameter from the drop down menu. The value you select is displayed in the box.

Calendar Date Picker: Select the Calendar icon. Select from the calendar that opens. The dates you select are displayed in the calendar text box. The Start and End Date ranges are required parameters in Sales Intelligence reports.

List of Values (LOV): Select the up arrow button. A list of values pop up window opens. You can access the standard Oracle Application’s LOV search feature. It is recommended that you use the LOV for the parameters that have dependencies, such as Product Line, Product Family, Product Group, or with parameter values that exceed 100 possible choices.

Note: The More or Less button in the parameter section will display or hide the parameter region beyond the first five sections. In Oracle Applications, the standard for selecting all values is to leave the parameter sections blank or with no data. A percentage sign (%) acts as a wild card for selecting values like those you entered.

To run reports with your parameter selections, follow these steps:

1. Select the desired parameter values for the report.
2. Click the **Run Report** button.

The results of the parameters you selected will show on your web browser. If no data exists for the parameters you selected, you will see an empty graph region and table on your browser.

2.3 Creating a Printable Version of your Report

Click the **Print** button to print your report.

A printed version of your report will show in the new browser window. After you run the report, the standard browser print dialog box opens.

2.4 Saving a Favorite Report

Before saving a Favorite Report, you must define the Favorites region on you personal Home Page.

1. Run a report with your desired parameter values.
2. Click the **Save as Favorite** button.

The report, along with its parameter values, is saved to the Favorites region as a link to your personal Home Page.

3. From the Favorite region, customize the name of your report by selecting the **Customize** link. The link is located in the title bar.
4. Click **Save**.

To save default parameter values, follow these steps:

1. Run a report with your desired parameter values.

   When you run a report from the Report Navigator region, you are executing and saving your values from the last successful report execution.

   If you want to change your default parameter values, you must enter new parameter values and run the report with the new parameter values. After running the report, you can save the new parameter values as your default parameter values.

2. Click the **Save Default** button.

2.5 Running Reports with Different View by Column

Some reports in Oracle's Business Intelligence include the "View by" feature. For those reports that include this feature, follow these steps to run reports with different View by columns.

1. Before running the report, select **View by**.
2. Click the parameter option.
3. Click **Run Report**.

The left hand column of the report displays the View by values. The title of the report also changes for the View by value.

2.6 Navigating through Report Navigator

The Report Navigator is a tab within the personal Home Page. You can navigate to the tab by selecting a responsibility in the Navigate region, or you can select the Menu icon located on the title bar of the report.

By using the Report Navigator tab, you can list all reports available to you. You can categorize the report by subject matter content, and by selecting a report link you can submit and display your reports within the browser.

Located at the bottom of the report is the Related Information section. Using the Related Information section you can select reports that are related to the current report. Selecting the link enables you to run the new report with any common parameters from the current report.

To add related information or to remove reports from the Related Information section, follow these steps:

1. Click **Customize**.
2. Select related reports based on the responsibilities available to you.
3. Click **OK**.

   Reload the page to display the new links on the report.

Some reports have links in the table rows which allow you to execute report drill downs. By selecting the value, you submit a report for drill down detail.

By selecting the Home icon within the title bar of the report, you can navigate to the personal Home Page. Also, you can receive on line help by selecting the question mark icon in the title bar of the report. The question mark icon takes you to the help content specific to the report.

A

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	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 **Note:** The opportunities displayed in the Customer Activity Number of Opportunities Detail Report are filtered by the Win/Loss indicator for each opportunity. Opportunities with the Win/Loss indicator set to "N" will not be listed in the report.	Customer, Rank, Number of Opportunity Lines		OSO
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

Table A–1 Customer Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
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
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

Table A–1 Customer Reports

Report Name	Report Description	Parameters	Reported Columns	View By's or Report By	Dependent OLTP Application
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	Custome r, 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	Custome r, 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, Salespers on, 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_SSUM_PIA_MV
Pipeline Summary by Status	BILPIA01	BIL_PIA_SMST	BIL_SSUM_PIA_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_ 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_ VTERR	BIL_REV_CUST_SUMM
Gross Margins by Customer	BILTPL02	BIL_RM_GM_ 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_ VTERR	BIL_REV_CUST_SUMM
Revenue Growth by Customer	BILTPL06	BIL_RM_RG_ 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_ 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	

C

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_TLSO_ 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

D

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