Oracle® Customer Intelligence

Concepts and Procedures

Release 11*i*

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Oracle Customer Intelligence Concepts and Procedures, Release 11*i*

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Oracle Customer Intelligence Concepts and Procedures, Release 11*i*

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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?
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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.

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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

Audience for This Guide

Welcome to Release 11*i* of the Oracle Customer Intelligence Concepts and Procedures.

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

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

  If you have never used Oracle Customer Intelligence, Oracle suggests you attend one or more of the Oracle Customer 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.

This Implementation Guide provides information and instructions to help you implement Oracle Customer Intelligence effectively.

This preface explains how this guide is organized and introduces other sources of information that can help you.

This guide is aimed at the following users:

- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility

Structure

This Oracle Customer Intelligence Concepts and Procedures guide consists of three chapters, provides overviews of the Oracle Customer Intelligence implementation and its components, as well as the application's relationship to other Oracle or third-party applications. It also provides process-oriented, task-based procedures for setting up the application.

Chapter 1, "Introduction to Oracle Customer Intelligence"

This section provides an overview of Oracle Customer Intelligence and its components. It explains the key concepts, features, and functions of this application.

Chapter 2, "Understanding Oracle Customer Intelligence"

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

Chapter 3, "Using Customer Intelligence"

This section presents process-oriented, task-based procedures for using the application to perform essential business tasks.

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.

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 Customer 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 Customer 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 Customer 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 Customer 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 online Help file.

Documents Related to This Product

Oracle Customer Intelligence Implementation Guide

This guide provides information required for implementing and setting up Oracle Customer Intelligence.

Oracle Support Concepts and Procedures

This guide provides information required for using Oracle Support.

Oracle Support Implementation Guide

This guide provides information required for implementing and setting up Oracle Support.

Oracle Customer Care Concepts and Procedures

This guide describes how to use Oracle Customer Care. Oracle Customer Care provides the functionality for using the Contact Center, Relationship Plans and tracking critical customers.

Oracle Customer Care Implementation Guide

This guide provides information required for implementing and setting up Oracle Customer Care.

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.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

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

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Customer 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 Customer 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 Customer 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

Oracle MetaLink 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 Oracle MetaLink, 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 Oracle MetaLink 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

Introduction to Oracle Customer Intelligence

This chapter provides an overview of Oracle Customer Intelligence. A summary of both new and obsolete features is also discussed.

1.1 Overview of Oracle Customer Intelligence

A company's understanding of their customers is important in many respects. It provides companies with the ability to create a better forecasting model, better selling opportunities, retention plans (to expand the customers' life cycle), customized care and service plans, and to simply increase the level to which they know their customers.

Oracle Customer Intelligence is a customer information viewer that enables you to access an enterprise-wide view of customer information. Customer Intelligence provides you with an information viewing tool which allows you to search for and view detailed enterprise-wide customer information. With this tool you can search for a specific customer, or a group of customers, through the Customer Search feature.

Customer Intelligence is also an analytical tool that enables you to manage your customers by measuring customer profitability, acquisition, retention, satisfaction, lifecycle and loyalty, and analyzing the impacts of these measurements on customer retention to maximize profitability. This product provides graphical representations of results from analysis of customer acquisition, customer profitability, customer retention, customer satisfaction, customer loyalty, and customer lifecycle. These graphics can be viewed at a high level, or you can get detailed information by drilling down to a group of customers for a specific period, and eventually to an individual customer. This analytical data can help you plan for better retention strategies, more efficient selling, and for streamlining your company's supply chain process.

For companies operating in today's competitive environment, having a comprehensive and customer-oriented strategy is the key for success. To maintain a business' stability and growth, companies need to utilize the following strategies.

- grow the customer base (acquisition)
- retain customers (retention)
- get current customers to stay longer and spend more (profitability

To achieve the latter two strategies, you must also ensure your current customers are loyal and satisfied with the services and products you offer (loyalty and satisfaction).

To increase revenue and maximize profit, you need to answer the following questions.

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

1.1.1 Oracle Customer Intelligence End-Users

Customer Intelligence is designed for the following users.

Senior Executives

Company executives can view the performance of the entire enterprise, and search for any customer to gain insight for making strategic decisions.

Middle Management

Managers can monitor the performance of their respective operating units, and monitor various performance measures to identify possible areas of improvement.

Business Analyst

A company's business analysts can examine a customer's portfolio to understand the cause-and-effect relationship among performance measures to gain an overview of typical business processes.

1.1.1.1 Definitions of Various Customer Types

New Customer

An account created for the first time during the attrition period.

Re-activated Customer

An account for which the following three conditions are true.

- The account had at least one order during the current attrition period.
- The account was acquired before the previous attrition period.
- The account had no orders in the previous attrition period.

Retained Customer

An account for which the following two conditions are true.

- The account had at least one order during the current attrition period.
- The account was acquired, or had at least one order, in the previous attrition period.

1.1.2 Architectural Overview of Oracle Customer Intelligence

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

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

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

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

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

1.1.3 Dependencies for Oracle Customer Intelligence

Oracle Customer Intelligence (BIC) dependencies relate to other products and components. Its dependencies affect the product’s implementation and ongoing operations. Because of this, you must install and set up all of the dependent components for Customer Intelligence.

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

1.1.3.1 Dependencies for a Full Installation of Oracle Customer Intelligence

- FND - Application Object Library
- AK - Oracle Common Modules
- AX - Global Accounting Engine
- AZ - Application Implementation

- BIS - Oracle Applications Business Intelligence Systems (BIS)
- JTF - CRM Foundation

1.1.3.2 Shared Installed Products

- AMS - Oracle Marketing
- AR - Oracle Receivables
- AS - Oracle Sales
- ASO - Oracle Order Capture
- BOM - Oracle Bills of Material
- CS - Oracle Service (TeleService)
- CSC - Oracle Customer Care
- HR - Oracle Human Resources
- GL - Oracle General Ledger
- OKS - Oracle Contracts Service
- OM - Oracle Order Management
- TCA - Trading Community Architecture

1.1.3.3 Definition of Required Dependencies

- FND - FND forms are used to setup form functions, concurrent programs, menus, and responsibilities.
- AK - AK forms are used to enter parameters, graph titles, and report column headings.
- AMS - BIC uses AMS to report campaign related information. AMS should have Market Segment properly set up as a dimension to be used by BIC.
- AR - BIC uses HZ (Trading Community Architecture) to source customer-related information. HZ should have Customer Category properly set up as a dimension to be used by BIC. BIC also uses AR to report invoice-related information.
- AS - BIC uses AS to report sales related information (quotes and opportunities).
- ASO - BIC uses ASO to report order transactions and to calculate key measures such as acquisition, activation, retention, etc.

- AX - The accounting periods and currency codes are used from AX.
- BIS - BIS are integrated and can be drilled across through extensible hyper-links.
- BOM - BIC uses BOM's table (CST_BIS_MARGIN_SUMMARY) to source revenue, and costs information.
- CS - BIC uses CS to report service related transactions and to calculate key measures such as satisfaction and loyalty.
- CSC - BIC retrieves customer profile information from a pre-seeded profile group in CSC.
- GL - BIC uses a predefined currency and calendar in GL to convert and display our revenue and cost numbers. A currency-conversion API created by GL is also used by BIC to convert transactions.
- JTF - JTF stores the interaction history data which is used in Customer Intelligence.
- OKS - BIC uses OKS to report contract related information and to calculate key measures such as loyalty and satisfaction.

1.1.3.4 Consequences for Dependencies

- FND - Always installed
- AK - Always installed
- AMS - BIC will miss all campaign related information and fail to use Market Segment properly as a dimension.
- AR - BIC will not function without HZ (TCA). BIC will miss all invoice related information and may fail to calculate key measures such as loyalty and satisfaction. If the Customer Category is not properly set up, BIC will fail to use it as a dimension.
- AS - BIC will miss all sales related information (quotes and opportunities).
- ASO - BIC will miss all order transactions and fail to calculate key measures such as acquisition, activation, retention, etc.
- AX - Always installed
- AZ - Always installed
- BIS - Users will not be able to drill across to a report in a missing module.

- BOM - BIC will miss revenue, costs, and profitability information without the table (CST_BIS_MARGIN_SUMMARY) from BOM.
- CS - BIC will miss all service related transactions and may fail to calculate key measures such as satisfaction and loyalty.
- CSC - BIC will not be able to display customer profile information without CSC.
- GL - GL should have been set up properly at Oracle. No issues expected.
- JTF - Always installed
- OKS - BIC will miss contract related information and fail to calculate key measures such as loyalty and satisfaction.

1.1.3.5 Resolution for Consequences Pertaining to Dependencies

- FND - FND should be properly installed and set up.
- AK - AK should be properly installed and set up.
- AMS - AMS should be properly installed and set up (Market Segment, geography).
- AR - AR and HZ should be properly installed and set up (Customer Category).
- AS - AS should be properly installed and set up.
- ASO - ASO should be properly installed and set up.
- AX - AX should be properly installed and set up.
- AZ - AZ should be properly installed and set up.
- BIS - BIS modules should all be properly installed and set up.
- BOM - BOM should be properly installed and set up.
- CS - CS should be properly installed and set up.
- CSC - CSC should be properly installed and set up (Customer Profile).
- GL - GL should have been set up properly at Oracle. No issues expected.
- JTF - JTF should be properly installed and set up.
- OKS - OKS should be properly installed and set up.

1.1.4 Performance Issues

Reports using Summary Tables

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

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

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

Reports using OLTP Tables

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

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

Matrix Reports

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

- Organizational
- Multi-organizational
- Language and currency

Queries

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

2

Understanding Oracle Customer Intelligence

2.1 Understanding Oracle Customer Intelligence

This chapter 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.

2.1.1 Customer List

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

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

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

2.1.1.1 Customer Account Transaction Detail: Campaign

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

2.1.1.2 Customer Account Transaction List: Campaign

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

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

2.1.1.3 Customer Account Transaction Detail: Contact

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

2.1.1.4 Customer Account Transaction Detail: Contract

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

2.1.1.5 Customer Account Transaction Detail: Installed Base

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

2.1.1.6 Customer Account Transaction Detail: Interaction

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

2.1.1.7 Customer Account Transaction Detail: Invoice

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

2.1.1.8 Customer Account Transaction List: Invoice

This report displays list of invoices for a customer account.

2.1.1.9 Customer Account Transaction Detail: Order

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

2.1.1.10 Customer Account Transaction Detail: Sales Quote

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

2.1.1.11 Customer Account Transaction Detail: Service Request

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

2.1.2 Customer Satisfaction Report

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

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

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

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

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

2.1.2.1 Customer Satisfaction by Billing Report

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

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

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

You cannont select any parameter values for this report.

2.1.2.2 Customer Satisfaction by Quality Report

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

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

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

2.1.2.3 Customer Satisfaction by Contract Report

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

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

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

You cannont select any parameter values for this report.

2.1.2.4 Customer Satisfaction by Service Report

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

2.1.2.5 Customer Satisfaction By Shipment Report

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

2.1.2.6 Customer Acquisition Analysis: Year-Over-Year

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

- Market Segment
- Customer Category
- Geography

2.1.2.7 Customer Acquisition Analysis: Dimension

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

- Market Segment
- Customer Category
- Geography

2.1.2.8 Customer Profitability Analysis: Year-Over-Year

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

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

2.1.2.9 Customer Activation Analysis: Year-Over-Year

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

- Market Segment
- Customer Category
- Geography

2.1.2.10 Customer Profitability Analysis: Dimension

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

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

2.1.2.11 Customer Activation Analysis: Dimension

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

- Market Segment
- Customer Category
- Geography

2.1.2.12 Customer Revenue Analysis: Year-Over-Year

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

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

2.1.2.13 Customer Revenue Analysis: Dimension

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

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

2.1.2.14 Customer Retention Analysis: Year-Over-Year

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

- Market Segment
- Customer Category
- Geography

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

2.1.2.15 Customer Retention Portfolio Analysis

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

- Revenue, Profitability
- Loyalty
- Satisfaction

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

2.1.3 Customer Lifecycle Analysis

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

- Market Segment

- Customer Category
- Geography

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

2.1.3.1 Customer Loyalty Analysis: Year-Over-Year

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

2.1.3.2 Customer Loyalty Analysis: Dimension

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

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

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

2.1.3.3 Customer Loyalty Analysis: Index Decomposition

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

3

Using Customer Intelligence

3.1 Using Customer Intelligence

This section presents process-oriented, task-based procedures for using the application to perform essential business tasks.

3.1.1 Using the Customer List

To create a report, follow these steps:

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

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

3.1.1.1 Using Customer Account Transaction Detail: Campaign

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

To Navigate, to other reports, follow these steps:

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

3.1.1.2 Using Customer Account Transaction List: Campaign

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

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

To Navigate to other reports, follow these steps:

1. Click on Home icon at the main title bar to navigate back to the home page.
2. Click on Parameter icon at the main title bar to navigate back to the main menu page.
3. Click on your browser's Back button to navigate back to the customer account overview on the previous page.

3.1.1.3 Using Customer Account Transaction Detail: Contact

To generate this report, follow these steps:

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

To navigate to other reports, follow these steps:

To navigate, follow these steps:

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

3.1.1.4 Using Customer Account Transaction Detail: Contract

To create a report, follow these steps:

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

To navigate to other reports, follow these steps:

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

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

3.1.1.5 Using Customer Account Transaction List: Contract

To create a report, follow these steps:

1. Input From and To date to choose the date range.
2. Click Run Report to execute the query.
3. Click on a Contract Number to see more details about the contract.

To Navigate, follow these steps:

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

To Navigate, follow these steps:

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

3.1.1.6 Using Customer Account Transaction List: Installed Base

To create a report, follow these steps:

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

To Navigate, follow these steps:

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

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

3.1.1.7 Using Customer Account Transaction Detail: Interaction

To Navigate, follow these steps:

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

3.1.1.8 Using Customer Account Transaction List: Interaction

To create a report, follow these steps:

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

To Navigate, follow these steps:

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

3.1.1.9 Using Customer Account Transaction Detail: Invoice

To create a report, follow these steps:

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

To Navigate, follow these steps:

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

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

3.1.1.10 Using Customer Account Transaction List: Invoice

To create a report, follow these steps:

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

To Navigate, follow these steps:

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

3.1.1.11 Using Customer Account Overview

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

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

To Navigate, follow these steps:

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

3.1.1.12 Using Customer Account Transaction List: Order

To create a report, follow these steps:

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

To Navigate, follow these steps:

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

3.1.1.13 Using Customer Account Transaction Detail: Sales Quote

To Navigate, follow these steps:

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

3.1.1.14 Using Customer Account Transaction List: Sales Quote

To create a report, follow these steps:

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

To Navigate, follow these steps:

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

3.1.2 Using the Customer Satisfaction Report

To create a report, use the following steps:

1. Enter starting and ending values.
2. Enter a segment dimension value or enter **All** for Market Segment, Customer Category, and / or Operating Unit.
3. Enter a geography dimension value or **All**.

4. Enter a **View By** dimension value
5. Click **Run Report** button to execute the query.

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

To navigate, follow these steps:

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

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

To Navigate, follow these steps:

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

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

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

To navigate, follow these steps:

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

Click on Related Report icon at the main title bar to move to the Related Reports area on the same page. You can click on any related report to drill across to other related reports.

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

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

3.1.2.1 Using Customer Satisfaction by Quality Report

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

Measurements include:

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

No parameter values can be selected on this report.

To Navigate, follow these steps:

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

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

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

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

3.1.2.2 Using Customer Satisfaction by Service Report

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

No parameter values can be selected on this report.

To Navigate, follow these steps:

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

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

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

3.1.2.3 Using Customer Satisfaction by Shipment Report

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

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

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

No parameter values can be selected on this report.

To Navigate, follow these steps:

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

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

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

3.1.2.4 Using Customer Acquisition Analysis: Year-Over-Year

To create a report, follow these steps:

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

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

3) Click the "Run Report" button.

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

3.1.2.5 Using Customer Acquisition Analysis: Dimension

To create a report, follow these steps:

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

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

3.1.2.6 Using Customer Activation Analysis: Year over Year

To run a report, follow these steps:

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

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

3.1.2.7 Using Customer Activation Analysis: Dimension

To create a report, follow these steps:

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

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

3.1.2.8 Using Customer Profitability Analysis: Year-Over-Year

To run a report, follow these steps:

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

2. For"View by parameter, choose Year-Over-Year.
3. Click the Run Report button.

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

3.1.2.9 Using Customer Profitability Analysis: Dimension

To create a report, follow these steps:

To create a report, follow these steps:

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

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

3.1.2.10 Using Customer Revenue Analysis: Year-Over-Year

To create a report, follow these steps:

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

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

3.1.2.11 Using Customer Revenue Analysis: Dimension

To create a report, follow these steps:

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

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

3.1.2.12 Using Customer Retention Analysis: Year-Over-Year

To create are report, follow these steps:

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

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

- Revenue
- Profitability
- Loyalty
- Satisfaction

3.1.2.13 Using Customer Retention Analysis: Dimension

To create a report, follow these steps:

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

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

- Revenue
- Profitability
- Loyalty
- Satisfaction

3.1.2.14 Using Customer Retention Portfolio Analysis

To create a report, use the following steps:

1. From the Customer Retention Analysis: Year over Year report or the Customer Retention Analysis: Dimension report, click on any hyper-link customer cell in the table under the New, Retained, Reactivated, and Churned columns.
2. The Customer Retention Portfolio Analysis report appears.
3. Click on another cell or a customer name or account number for more information.

3.1.3 Using Customer Lifecycle Analysis

To create a report, follow these steps:

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

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

3.1.3.1 Using Customer Loyalty Analysis: Year-Over-Year

To create a report, follow these steps:

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

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

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

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

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

To Navigate, follow these steps:

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

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

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

3.1.3.2 Using Customer Loyalty Analysis: Dimension

To create a report, follow these steps:

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

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

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

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

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

To Navigate, follow these steps:

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

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

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

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

3.1.3.3 Using Customer Loyalty Analysis: Index Decomposition

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

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

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

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

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

To Navigate, follow these steps:

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

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

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

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