PeopleSoft

®

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SP1 Sales Applications Reports

---

August 2005

Contents

Contents

About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

• Related documentation.

• Comments and suggestions.

Documentation Updates and Printed Documentation

This section discusses how to:

• Obtain documentation updates.

• Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

• Web

• Telephone

• Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

PeopleSoft EnterpriseOne CRM Sales Application Reports

This appendix provides an overview of CRM Sales application reports and allows you to:

• View summary tables of all reports.

• View detail information about selected reports.

PeopleSoft EnterpriseOne CRM Sales Application Reports: A to Z

These tables list the CRM Sales application reports, sorted alphanumerically by report ID. The report tables are broken down into these categories:

• Lead

• Opportunity

• Forecast

• Action Plan/Activity

• Competitor

• Customer

• Employee

• Partner

• Contact

• Product Catalog

Lead

These reports are available for sales leads:

Report ID and Report Name	Description	Navigation
R90CB010A Lead Tracking Report	This report includes all leads that have been entered during the specified date range, organized by lead status.	Leads (G90CA0201), select Lead Tracking

Report ID and Report Name	Description	Navigation
R90CB010B Lead By Product Category Report	This report includes a list of leads for each product line. The report includes the lead name, company, city, and qualification score.	Leads (G90CA0201), select Lead By Product
R90CB010C Lead By Lead Source Report	This report includes a list of leads, organized by lead source. The report includes each lead's name, company, city, state, and phone number. The report also includes the total number of leads per lead source.	Leads (G90CA0201), select Lead By Lead Source
R90CB5161, Version XJDE5160 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5160 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5160)
R90CB5161, Version XJDE5161 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5161 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5161)
R90CB5161, Version XJDE5163 Lead Address Avery Report	This report produces shipping labels for each active lead in the system in Avery 5163 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Shipping Address (Avery 5163)
R90CB5161, Version XJDE5389 Lead Address Avery Report	This report produces index post card labels for each active lead in the system in Avery 5389 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Index Post Card (Avery 5389)
R90CB5161, Version XJDE5663 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5663 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Clear Address (Avery 5663)

Opportunity

These reports are available for sales opportunities:

Report ID and Report Name	Description	Navigation
R90CB020A Opportunities by Channels Report	This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel
R90CB020B Opportunities by Probability Report	This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability
R90CB020C Opportunities by Probability for a Sales Rep Report	This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability For Selected Sales Representatives
R90CB020D Opportunities by Territories Report	This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potrial of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Territory

Report ID and Report Name	Description	Navigation
R90CB020E Opportunities by Channels for a Sales Rep Report	This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel For Selected Sales Representatives
R90CB020I Opportunity Summary Report	This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.	Opportunity (G90CA0202), select Opportunity Summary

Forecast

These reports are available for sales forecasts:

Report ID and Report Name	Description	Navigation
R90CB06A Forecast - Frozen Forecast Status Report	This report displays a frozen forecast with all of the forecast's associated opportunities as of the current date. The report enables users to review the change, if any, in the dollar amounts for opportunities between the current date and the date the forecast was frozen.	Forecast (G90CA0203), select Frozen Forecast Status
R90CB020F Opportunity Pipeline Review by Close Date Report	This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.	Forecast (G90CA0203), select Pipeline Review By Close Date

Action Plan/Activity

These reports are available for activities and action plans:

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List Report	This report includes summary information about all action plans, such as the description of the plan, and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CA0204), select Action Plan Listing

Report ID and Report Name	Description	Navigation
R90CA1301B Activities for a Customer Contact Report	This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CA0204), select Activities By Customer
R90CA13D Periodic Planner Report	This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.	Action Plan/Activity (G90CA0204), select Activity - Periodic Planner

Competitor

These reports are available for competitors:

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail Report	This report includes all information about a competitor and their products. You can use this report to compare the products from your organization with those of the competitors.	Competitor (G90CA0205), select Competitor Product Selected

Customer

These reports are available for customers:

Report ID and Report Name	Description	Navigation
R90CA080B Customer/Contact Summary Report	This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CA0206), select Customer Contact Summary
R90CA080G Customer Summary - Selected Report	This report includes summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CA0206), select Customer Summary
R90CA0111A Contacts for a Customer Report	This report lists each contact, along with the associated contact information for each selected customer.	Customer (G90CA0206), select Contacts by Customer

Employee

These reports are available for employees:

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List Report	This report includes all active employees in the system, along with their titles and phone numbers.	Employee (G90CA0207), select Employee Phone List

Partner

These reports are available for partners:

Report ID and Report Name	Description	Navigation
R90CA01B Partner Listing Report	This report includes all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CA0208), select Partner List

Contact

These reports are available for contacts:

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Summary Shipping - Avery 5163 Report	This report produces shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address Shipping (Avery 5163)
R90CA070B Contact Summary Shipping - Avery 5160 Report	This report produces mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5160)
R90CA070C Contact Avery 5161 Report	This report produces mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5161)

Product Catalog

These reports are available for product catalogs:

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List Report	This report includes all product catalogs, along with the available products associated with each catalog.	Product Catalog (G90CA02010), select Product Catalog List

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

Competitor: Office Supply Outlet

Address:	300 Lake Street	Number Of Employees	25
		Annual Revenues	500,000.00
	Boston MA US		

Phone:	617 555-1000
Fax:	617 555-1100
url:	www.officesupplyoutlet.com

Competitive Information

Competitor Item:	Tape Dispenser	
Our Item:	SRM1300	Tape Dispenser
Extended Description:		

Competitor Item:	Stapler	
Our Item:	SRM1301	Stapler
Extended Description:		

Forecast: Frozen Forecast Report

Id: 42

Customer	Opportunity Description	Owner	Close Date	Probability%	Potential Amount	Weighted Potential Amount	Currency Code
Capital Company	Marketing Upgrade	Allen, Ray	03/01/05	10%	100.00	10.00	U.S. Dollar
Capital Company	Equipment Upgrade	Allen, Ray	09/01/04	75%	200.00	150.00	U.S. Dollar

Opportunity Status as of: 07/14/05   7:51:02

Customer	Opportunity Description	Owner	Close Date	Probability%	Potential Amount	Weighted Potential Amount	Currency Code
Capital Company	Marketing Upgrade AAAAAAAAAAA	Allen, Ray	02/28/05	10%	50000.00	5,000.00	U.S. Dollar
Capital Company	Equipment Upgrade	Allen, Ray	08/31/04	75%	82500.00	61,875.00	U.S. Dollar

Lead Source   CAC

California Conference

Name	Company	City	State	Phone
Cindy Drake	Drake Supplies	Boston	MA	()
Larry Sanders	L Sanders Inc	Providence	RI	(401) 561-8752
MS-Cindy Drake	Drake Supplies	Boston	MA	()
Nancy Lincoln	Lead Company	Denver	CO	(404) 334-4000

Number of Leads: 4

Product Category: Touring Bikes

Date Received	Lead Name	Company	Location	Status Description	Qualification Goal	Qualification Score
07/26/04	Larson, MS-David	Delete Company	Lincoln NE	Active	75	100
05/01/04	Larson, David	Delete Company	Lincoln NE US	Active	75	100

Count of Leads: 2

PeopleSoft, Inc.

Lead Tracking Report

From Date: 01/01/00   Through Date: 01/01/10

NEL   New Lead

Company	Name	Lead Owner	Lead Source	Date Received	Qualification	Qualification Goal	Qualification Score
Shipping Plus	Gibson, Cheryl	Samantha Smart	Blank	12/10/03	Wholesale	75.00	0
Shipping Plus	Gibson, MS-Cheryl	Samantha Smart	Blank	12/10/03	Wholesale	75.00	0
Lead Company	Lead, Jeff		New York Expo	07/14/04	Retail	80.00	0
Multiple Locations	Archer, MS-Michael		New York Expo	07/27/04	Retail	80.00	0
Methodology Error	Martin, Sam		Blank	05/15/04		0.00	0
System Default SM	Miller, David		Blank	05/15/04		0.00	0
Wood n Things	Nelson, Robert	Samantha Smart	Blank	05/01/04		0.00	0
Cross Street Specialities	Williams, Paul	Samantha Smart	Blank	05/01/04		0.00	0
Change the Score	Quincy, Carol	Samantha Smart	Blank	05/01/04	Retail	80.00	60
Lead Company	Lincoln, Nancy	Samantha Smart	California Conference	10/26/04	Wholesale	75.00	0
Dillard's	Dillard, Candice	Fred McMillan	Spring Catalog	03/11/04	Retail	80.00	18
Dillards	Dillard, MS-Candice	Fred McMillan	Spring Catalog	03/11/04	Retail	80.00	18
MS-Excel 1	Banks, MS-Ann	James Teller	Spring Catalog	12/15/03	Publishing	50.00	74
From Box to Crate	Robinson, Edward	James Teller	Blank	12/15/03	Wholesale	75.00	0
Excel 1	Banks, Ann	James Teller	Spring Catalog	12/15/03	Publishing	50.00	74
Multiple Locations	Archer, Michael	Fred McMillan	New York Expo	10/26/04	Retail	80.00	0

PeopleSoft, Inc.

Opportunities by Channels Report

All Amounts on the report are displayed in U.S. Dollar

Customer	Opportunity Description	Probability %	Potential Amount	Weighted Potential Amount
Acme Department Stores	Direct Web Opportunity	75%	50,000.00	37,500.00
Capital Company	Equipment Upgrade	75%	82,500.00	61,875.00
Capital System	Opp1- EMP 710002	75%	12,000.00	9,000.00
Number of Opportunities: **163**			Totals: 6,163,339.59	2,294,626.60

R90CB020B

PeopleSoft, Inc.

Opportunities by Probability Report

All Amounts on the report are displayed in U.S. Dollar

07/14/05   8:45:24

Page -   10 of   11

Probability of   70%

Customer	Opportunity Description	Probability %	Potential Amount	Weighted Potential Amount
Burrill Engineering	Edit Opportunity 2	70%	3,000.00	2,100.00
Burrill Foundation	Foreign Hard Drives	70%	2,109.70	1,476.79
Burrill Engineering	Hard Drives	70%	3,000.00	2,100.00
Capital Company	test	70%		

Number of Opportunities: 4   Totals: 8,109.70   5,676.79

PeopleSoft, Inc.

Opportunity Summary Report

All the Currency Amounts displayed in U.S. Dollar

Opportunity Number:	**90**	Owner:	Not Assigned
Description:	**Direct Billing Opportunity**		
Opportunity Type:	Direct	Lead Source:	Blank
Partner:		Partner Contact:	
Sold To Customer:	Acme Department Stores	Sold To Customer Contact:	Not Assigned
Ship To Customer:	Acme Department Stores	Ship To Customer Contact:	Not Assigned
Qualification Id:	Band Ensemble Script	Potential Amount:	250,000.00
Qualification Goal:	65	Budget Amount:	250,000.00
Qualification Score:	15	Line Item Total:	
Sales Methodology:	Rock Climbing Sales	Associated Cost:	
Sales Cycle Name:	Bid	Total Expense:	
Probability:	25%	Total Time (HRS):	
		Date Entered:	09/03/04
		Close Date:	12/30/04

Sales Drivers

Qualifications

Row #	Question	Answer	Comments
1	Do you have an annual budget?	Yes	

Activities

R90CB020E

PeopleSoft, Inc.

07/14/05   8:49:11

Opportunities by Channels for a Sales Rep. Report

Page -   10 of 22

All Amounts on the report are displayed in U.S. Dollar

Sales Rep: Emp # 720003

AB #: 720003

Opportunity Channel Type: Direct   **DIR**

Customer	Opportunity Description	Probability%	Budget Amount	Potential Amount	Weighted Potential Amount
Capital System	Opp1-Emp720003	50%		6,000.00	3,000.00
	Number of Opportunities: 1		**Totals:**	**6,000.00**	**3,000.00**
Total Number of Opportunities for Emp # 720003		**1**	**Totals:**	**6,000.00**	**3,000.00**