Oracle® Cloud
Oracle Sales Cloud Reporting and Analytics for Business Users
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Explains how to use Oracle Sales Cloud reports and dashboards to answer common business questions.
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Oracle Sales Cloud is a complete set of applications for performing business tasks across your enterprise. These applications are based on business process models. Many of the common features and functionality are available to all users, while others are available in select pages or flows.

Part of the Oracle Sales Cloud offering is an ad-hoc query and self-service reporting solution that provides an easy to use interface for business users to answer common business questions.

**Audience**

This document is intended for business users who want to use Oracle Sales Cloud reports and dashboards to answer common business questions.

**Documentation Accessibility**

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

**Related Documents**

For more information, see the following documents in the Oracle Fusion Applications documentation set:

- *Oracle Fusion Transactional Business Intelligence User’s Guide*
- *Oracle Fusion Applications Common User Guide*

**Conventions**

The following text conventions are used in this document:
<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
Part I

Key Accounts and Products

This Part describes how to answer business questions related to key accounts and products.
How Do I Find the Top 10 Accounts by Revenue?

This tutorial shows you how to find the top 10 accounts by revenue. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to find the 10 opportunities that can bring in the most revenue if they close. You use the "Top 10 Accounts by Revenue" report to focus your attention on your potential revenue opportunities and to help you develop and move your open opportunities to closed opportunities.

This potential revenue is referred to as Open Opportunity Revenue in this tutorial, that is potential sales revenue. You can also use Closed Opportunity Revenue, which is revenue from closed opportunities for a customer, or Expected Opportunity Revenue, which is the revenue amount multiplied by the win probability from opportunities for a customer.

How to Find the Top 10 Accounts by Revenue

To create the "Top 10 Accounts by Revenue" report:

1. From the Navigator menu, select **Reports and Analytics**.

![Navigator Menu](image)
How to Find the Top 10 Accounts by Revenue

1. Click the down-arrow button to the right of Create, and then select Analysis.

The Reports and Analytics page is displayed.

2. Click the down-arrow button to the right of Create, and then select Analysis.

The Select Subject Area list is displayed.

3. Select the Sales - CRM Customer Overview subject area.

4. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:
   - From the Customer folder: Customer Name
   - From the Customer folder: Party Type Code
   - From the Facts > Pipeline Facts folder: # of Opportunities
   - From the Facts > Pipeline Facts folder: Open Opportunity Revenue

   For each column that you want to add:
   a. Select the column in the Subject Areas list.
   b. Click the Add button (the right-arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.
5. Click Next.

6. Specify the views to include in the analysis as follows. Click the Table box, and then select Table (recommended).

7. In the Title field, enter Top 10 Accounts by Revenue.

8. Click Next.

9. To further define the table to include only related account information, exclude Party Type Code. Select Party Type Code, click Move To, and then select Excluded.

10. Click Next.

11. You can add a filter to show only the "organization" party type by performing the following steps:
   a. Click Add Filter, and then select Party Type Code.
   b. In the Operator column, accept the default value, is equal to.
   c. In the Value column, enter O.

12. You can add a filter to show only the 10 accounts with the highest amount of revenue by performing the following steps:
   a. Click Add Filter, and then select Open Opportunity Revenue.
   b. In the Operator column, select is ranked last.
   c. In the Value column, enter 10.
13. You can sort Open Opportunity Revenue from high to low by performing the following steps:
   a. Click **Add Sort**, and then select **Open Opportunity Revenue**.
   b. Select **High to Low**.

14. Click **Next**.

15. Accept the default settings on the Highlight page, and then click **Next**.

16. Save the analysis as follows:
   a. In the **Analysis Name** field, specify a name for the analysis (for example, Top 10 Accounts by Revenue).
   b. In the **Save In** list, select the folder where you want to save the analysis.
      The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
      If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
   c. Click **Submit**, and then click **OK** in the Confirmation dialog.

   The final report is saved in the specified folder. You can now navigate to the analysis.

**How do I read the "Top 10 Accounts by Revenue" report?**

The "Top 10 Accounts by Revenue" report contains the following metrics:

- **Customer Name** — The name of your customer.
- **Party Type Code** — A unique identifier that describes your customer (for example, O (organization) or P (person)).
■ **# of Opportunities** — The number of potential wins for the specific customer.

■ **Open Opportunity Revenue** — The amount of potential wins for the specific customer.

The following image shows an example of the "Top 10 Accounts by Revenue" report.
This tutorial shows you how to find the product categories that are ranked in the top 10 by closed revenue. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to find the product categories that are ranked in the top 10 by closed revenue. Closed revenue is derived from won opportunities. You use the "Top 10 Product Categories Ranked by Closed Revenue" report to analyze the revenue won for each high-level sales category.

How to Identify the Top 10 Product Categories by Closed Revenue

To create the "Top 10 Product Categories by Closed Revenue" report:

1. From the Navigator menu, select Reports and Analytics.

The Reports and Analytics page is displayed.

2. Click the down-arrow button to the right of Create, and then select Analysis.
The Select Subject Area list is displayed.

3. Select the **Sales - CRM Opportunities and Products Real Time** subject area.

4. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:
   - From the Product folder: **Sales Catalog Hierarchy Base Level Name**
   - From the Pipeline Detail Facts folder: **Closed Opportunity Line Revenue**

For each column that you want to add:
   a. Select the column in the Subject Areas list.
   b. Click the **Add** button (the right-arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.

5. Click **Next**.

6. Specify the views to include in the analysis as follows:
   a. Click the **Table** box, and then select **Table (recommended)**.
   b. Click the **Graph** box, and then select **Bar (recommended)**.

7. In the **Title** field, enter **Top 10 Product Categories by Closed Revenue** as the title of the analysis.
8. Select the **Preview** box to preview the analysis. The view is displayed with data.

![Preview](image)

<table>
<thead>
<tr>
<th>Sales Catalog Hierarchy Base Level Name</th>
<th>Closed Opportunity Line Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Hub E2C</td>
<td></td>
</tr>
<tr>
<td>OMW - World Applications - Certified Partner</td>
<td></td>
</tr>
<tr>
<td>Oracle Utilities Contract Management</td>
<td></td>
</tr>
<tr>
<td>SIEC EAM Application Bundles Collaboration Management</td>
<td></td>
</tr>
<tr>
<td>041830.11-2-Dec</td>
<td></td>
</tr>
<tr>
<td>1 Category under GCM Total Unspecified</td>
<td></td>
</tr>
<tr>
<td>10000 - Human Resources</td>
<td></td>
</tr>
<tr>
<td>1234567890 - 123</td>
<td>1,000</td>
</tr>
<tr>
<td>500VR Servers</td>
<td></td>
</tr>
<tr>
<td>6500RT Servers</td>
<td></td>
</tr>
<tr>
<td>750VR Servers</td>
<td></td>
</tr>
<tr>
<td>8500RT Servers</td>
<td></td>
</tr>
<tr>
<td>AIA Foundation Pack</td>
<td></td>
</tr>
<tr>
<td>Access Management Suite</td>
<td>1,477,566</td>
</tr>
<tr>
<td>Access Manager</td>
<td>7,392</td>
</tr>
<tr>
<td>Accessories</td>
<td></td>
</tr>
<tr>
<td>Acquired Retail Application - Unobstructed</td>
<td>14,445</td>
</tr>
<tr>
<td>Active Data Guard</td>
<td>11,537,851,852</td>
</tr>
<tr>
<td>Active Retail Intelligence - NIDM</td>
<td>723,950.098</td>
</tr>
<tr>
<td>Activity Based Management</td>
<td></td>
</tr>
<tr>
<td>Advanced Benefits</td>
<td>10,914</td>
</tr>
<tr>
<td>Advanced Compression</td>
<td>2,179,835,208</td>
</tr>
<tr>
<td>Advanced Customer Services</td>
<td>144,550</td>
</tr>
</tbody>
</table>

9. Click **Next**, and then click **Next** again in the Edit Table and Edit Graph pages to accept the default table and graph layouts.

10. In the Sort and Filter page, click **Add Sort**, and then select the **Closed Opportunity Line Revenue** measure.
11. Add a filter to show only the top 10 product categories by closed opportunity line revenue by performing the following steps:
   a. Click Add Filter, and then select Closed Opportunity Line Revenue.
   b. In the Operator column, select is ranked last.
   c. In the Value column, enter 10.

12. Click Submit to save the analysis.

13. Save the analysis as follows:
   a. In the Analysis Name field, specify a name for the analysis (for example, Top 10 Product Categories by Closed Revenue).
   b. In the Save In list, select the folder in which you want to save the analysis.
      The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
      If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
   c. Click Submit, and then OK in the Confirmation dialog.

The final report is saved in the specified folder. You can now navigate to the analysis.

How do I read the "Top 10 Product Categories by Closed Revenue" report?
The "Top 10 Product Categories by Closed Revenue" report contains the following metrics:

- Sales Catalog Hierarchy Base Level Name — The name of the high-level product category.
- Closed Opportunity Line Revenue — The revenue that has already been won.

The following image shows an example of the "Top 10 Product Categories by Closed Revenue" report. The report shows a table and a bar chart.
How to Identify the Top 10 Product Categories by Closed Revenue

<table>
<thead>
<tr>
<th>Sales Catalog Hierarchy Base Level Name</th>
<th>Closed Opportunity Line Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>C_OBC1 Database</td>
<td>270,076,606.862</td>
</tr>
<tr>
<td>Business Intelligence Suite Enterprise Edition Plus</td>
<td>282,619,189.455</td>
</tr>
<tr>
<td>Partitioning</td>
<td>317,451,642.634</td>
</tr>
<tr>
<td>Vision Catalog</td>
<td>523,577,269.005</td>
</tr>
<tr>
<td>Assisted Services</td>
<td>223,809,545.474</td>
</tr>
<tr>
<td>C_EBI Financials</td>
<td>366,512,881.283</td>
</tr>
<tr>
<td>C_EDT Enterprise - RH5</td>
<td>417,213,219.375</td>
</tr>
<tr>
<td>C_EBI Supply Chain Management</td>
<td>426,960,381.032</td>
</tr>
<tr>
<td>Corv HRMC</td>
<td>485,674,120.500</td>
</tr>
<tr>
<td>Internet Applications Server Enterprise Edition</td>
<td>793,857,855.272</td>
</tr>
</tbody>
</table>

Closed Opportunity Line Revenue

<table>
<thead>
<tr>
<th>Sales Catalog Hierarchy Base Level Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>C_OBC1 Database</td>
</tr>
<tr>
<td>Business Intelligence Suite Enterprise Edition Plus</td>
</tr>
<tr>
<td>Partitioning</td>
</tr>
<tr>
<td>Vision Catalog</td>
</tr>
<tr>
<td>Assisted Services</td>
</tr>
<tr>
<td>C_EBI Financials</td>
</tr>
<tr>
<td>C_EDT Enterprise - RH5</td>
</tr>
<tr>
<td>C_EBI Supply Chain Management</td>
</tr>
<tr>
<td>Corv HRMC</td>
</tr>
<tr>
<td>Internet Applications Server Enterprise Edition</td>
</tr>
</tbody>
</table>
Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months?

This tutorial shows you how to find the active customers who have not had a touch point in the last three months or more. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to find the active customers who have not had a touch point in the last three months or more. You use the "Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months" report to focus your attention on those customers with whom you have not had contact, thereby potentially missing opportunities for revenue.

How to Determine the Active Customers That Have Not Had a Touch Point in the Last 3 Months or More

To create the "Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months" report:

1. From the Navigator menu, select Reports and Analytics.

The Reports and Analytics page is displayed.
2. Click the down-arrow button to the right of Create, and then select Analysis.

The Select Subject Area list is displayed.

3. Select the Sales - CRM Interactions and Customers Real Time subject area.

4. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:
   - From the Customer folder: Name
   - From the Customer > Customer Additional Attributes folder: Status
   - From the Interaction Facts folder: Days Since Last Interaction

For each column that you want to add:

a. Select the column in the Subject Areas list.

b. Click the Add button (the right-arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.
How to Determine the Active Customers That Have Not Had a Touch Point in the Last 3 Months or More

Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months?

5. Click Next.

6. Specify the views to include in the analysis. Click the Table box, and then select Table (recommended).

7. In the Title field, enter Customers with No Touch Point in Last 3 Months.

**Note:** The new column label applies only to the current analysis and user.
How to Determine the Active Customers That Have Not Had a Touch Point in the Last 3 Months or More

8. Click Next.

9. In the Create Analysis: Edit Table page, click Next.

10. Add a filter to show the number of days since the last interaction:
   a. Click Add Filter, and then select Days Since Last Interaction.
   b. In the Operator column, select is greater than or equal to.
   c. In the Value field, enter 90.
   d. Click anywhere outside the Value field to apply the filter.

11. Click Submit to save the analysis.

12. Save the analysis as follows:
   a. In the Analysis Name field, specify a file name for the analysis.
   b. In the Save In list, select the folder in which you want to save the analysis.
      The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
      If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
   c. Click Submit, and then click OK in the Confirmation dialog.

   The final report is saved in the specified folder. You can now navigate to the analysis.

How do I read the "Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months" report?

The "Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months" report contains the following metrics:
How to Determine the Active Customers That Have Not Had a Touch Point in the Last 3 Months or More

- **Name** — The name of your customer.
- **Status** — The status of your customer (for example, A (active) or I (inactive)).
- **Days Since Last Interaction** — The number of days since you last communicated or had an interaction with your customer.

The following image shows an example of the "Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months" report.

![Image of the report](image-url)
What Are My Team's Most Active Accounts?

This tutorial shows you how to determine your team’s most active accounts.

In this tutorial you need to find your team’s most active accounts. The "My Team Customers Real Time" report provides you with a list of customers assigned to you, your subordinates, or your descendent territories, and relevant metrics for each customer, such as number of opportunities and open revenue. You use the "My Team Customers Real Time" report to identify potential revenue and opportunities within your team’s active accounts.

This tutorial is aimed at sales managers and sales vice presidents.

How to View My Team's Most Active Accounts

To view the "My Team Customers Real Time" report:

1. From the Navigator menu, select Reports and Analytics.

   ![Navigator Menu Screenshot]

   The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):

   - Shared Folders
   - Sales

What Are My Team's Most Active Accounts? 4-1
3. Click **My Team Customers Real Time**, and then select **View**.

The "My Team Customers Real Time" report is displayed.

**How do I read the "My Team Customers Real Time" report?**

The "My Team Customers Real Time" report contains the following metrics:

- **Name** — The name of the customer.
- **Number of Open Opportunities** — The number of potential or open opportunities for that customer.
- **Open Revenue** — The revenue amount that is available to close based on the number of open opportunities for that customer.
- **Number of Opportunities Created** — The number of potential or open opportunities created for that customer. This count differs from the Number of Open Opportunities as it is forward-looking and based on the current opportunity date plus three months.
- **Revenue Closed** — Opportunity revenue that you have already closed for that customer.

The following image shows an example of the "My Team Customers Real Time" report.
Part II
Sales Quota and Performance

This Part describes how to answer business questions related to sales quota and performance.
How Near or Far Am I in Meeting My Sales Quota for the Quarter and Year?

This tutorial shows you how to determine current and past sales quota achievement.

In this tutorial you need to evaluate sales quota performance for the quarter. Knowing how you are doing enables you to see if you are not meeting your revenue goals, or if you are hitting or surpassing your revenue goals. Knowing how you are doing also allows you to take corrective action against shortfalls. You use the "Current Period Performance" report to review and assess your quota and attained revenue.

How to Determine How Near or Far I Am in Meeting My Sales Quota for the Quarter

To view the "Current Period Performance" report:

1. From the Navigator menu, select Reports and Analytics.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
   - Sales

   The Reports and Analytics page is displayed.
How to Determine How Near or Far I Am in Meeting My Sales Quota for the Quarter

3. Click **Current Period Performance**, and then select **View**.

The "Current Period Performance" report is displayed.

**How do I read the "Current Period Performance" report?**

You use the "Current Period Performance" report to evaluate your sales quota attained for the current forecast period. Your sales quota is the revenue target assigned to your territory for a given forecast period.

- The "Current Period Performance" report contains the following metrics:
  - **Target Quota** — The revenue amount that you are expected to sell for the quarter.
  - **Closed Revenue** — The closed (won) opportunity line revenue assigned to you with a close date that falls within the quarter. This is the sales credit assignments for the revenue lines.
  - **Difference** — The difference between your target quota and closed revenue.
  - **Open Revenue** — The open opportunity line revenue assigned to you and scheduled to close within the quarter.
  - **Quota Attained** — The percent of the target quota that you already attained for the quarter. In this tutorial, you have reached 34 percent of your target quota for the quarter.

The following image, which displays both a gauge and pivot table, shows an example of the "Current Period Performance" report.
How to Determine How Near or Far I Am in Meeting My Sales Quota for the Year

In this tutorial you need to evaluate sales quota performance for the year. Knowing how you are doing enables you to see if you are not meeting your revenue goals, or if you are hitting or surpassing your revenue goals. Knowing how you are doing also allows you to take corrective action against shortfalls. You use the "Past Period Performance" report to review and assess your quota and attained revenue.

To view the "Past Period Performance" report:

1. From the Navigator menu, and then select Reports and Analytics.

   The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):

   Shared Folders
   Sales
   Analytic Library
   Embedded Content
   Opportunity and Revenue Management
3. Click Past Period Performance, and then select View.

The "Past Period Performance" report is displayed.

How do I read the "Past Period Performance" report?

You use the "Past Period Performance" analysis to view your sales quota performance for the year.

The "Past Period Performance" report contains the following metrics:

- **Target Quota** — The revenue amount you are expected to sell for the year.
- **Closed Revenue** — The closed (won) opportunity line revenue assigned to you with a close date that falls within the year.
- **Difference** — The difference between your target quota and closed revenue.
- **Quota Attained** — The percent of the target quota you already attained for the year. In this tutorial, you have reached 70% of your target quota for the year.

The following image shows an example of the "Past Period Performance" report. This report shows a gauge and a pivot table.
This Part describes how to answer business questions related to the sales pipeline.
How Much Current Quarter Pipeline Revenue Is Under Competitive Threat?

This tutorial shows you how to find out how much of the pipeline revenue expected to close in the current quarter is under competitive threat. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to determine which opportunities are in jeopardy of being lost to competition. You use the "Current Quarter Pipeline Revenue Under Competitive Threat" report to focus your attention on opportunities under competitive threat and help you move your open opportunities to won opportunities.

How to Determine the Current Quarter Pipeline Revenue Under Competitive Threat

To create the "Current Quarter Pipeline Revenue Under Competitive Threat" report:

1. From the Navigator menu, select Reports and Analytics.

The Reports and Analytics page is displayed.

2. Click the down-arrow button to the right of Create, and then select Analysis.
3. Select the **Sales - CRM Opportunities and Competitors Real Time** subject area.

4. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:

   - From the Time folder: **Enterprise Quarter**
   - From the Customer folder: **Customer**
   - From the Competitor folder: **Name**
   - From the Competitor folder: **Meaning** (Note that this column is the threat level of the competitor.)
   - From the Pipeline Facts folder: **Expected Opportunity Revenue**
   - From the Pipeline Facts folder: **# of Days to Close**
   - From the Pipeline Facts folder: **# of Opportunities**

   For each column that you want to add:

   a. Select the column in the Subject Areas list.
   b. Click the **Add** button (the right arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.
5. Click Next.

6. Specify the views to include in the analysis. Click the Table box, and then select Pivot (recommended).

7. In the Title field, enter Current Quarter Pipeline Revenue Under Competitive Threat.

8. Click Next.

9. To further define the pivot table, move the competitive threat level from the Rows list to the Columns list in the Table Layout area. In the Edit table page, perform the following steps:
   a. In the Rows list, select Meaning.
   b. Select Move To, and then select Columns.

The competitive threat level is moved from the Rows to Columns list.
10. Click Next.

11. Add a filter to show only the pipeline revenue under competitive threat. Select the following values for the competitive threat level (Meaning):
   a. Click Add Filter, and then select **Meaning**.
   b. In the Operator column, select **is not null**.

12. Add a filter to show only the expected revenue in the current quarter. Select the following values for the sales stages:
   a. Click Add Filter, and then select **Enterprise Quarter**.
   b. In the Operator column, select **is equal to**.
   c. In the Value column, enter the quarter of interest (for example, **2010 Q 1**).

13. Click Submit to save the analysis.

14. Save the analysis as follows:
   a. In the Analysis Name field, enter **Current Quarter Pipeline Revenue Under Competitive Threat**.
   b. In the Save In list, select the folder in which you want to save the analysis.
      The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.

c. Click **Submit**, and then **OK** in the Confirmation dialog.
The final report is saved in the specified folder. You can now navigate to the analysis.

**How do I read the "Current Quarter Pipeline Revenue Under Competitive Threat" report?**

The "Current Quarter Pipeline Revenue Under Competitive Threat" report contains the following metrics:

- **Enterprise Quarter** — A specific quarter specified by the enterprise (for example, 2010 Q 1).
- **Customer** — The name of your customer.
- **Name** — The name of your competitor.
- **High, Low, Medium** — The competitive threat level.
- **Expected Opportunity Revenue** — The amount of potential revenue for this customer opportunity.
- **# of Days to Close** — The number of days to close the opportunity for this customer.
- **# of Opportunities** — The number of potential wins for this customer.

The following image shows an example of the "Current Quarter Pipeline Revenue Under Competitive Threat" report.
This Part describes how to answer business questions related to sales opportunities.
What Are the Top 10 Open Opportunities? What Are Their Days to Close and Total Revenue?

This tutorial shows you how to analyze open opportunities.

In this tutorial you need to identify the top 10 open opportunities, the number of days to close these opportunities, and their respective potential revenue. You use the "Opportunity Watch Real Time" report to identify the top 10 potential revenue opportunities.

How to Find the Top 10 Opportunities, Their Days to Close, and Total Revenue

To view the "Opportunity Watch Real Time" report:

1. From the Navigator menu, select Reports and Analytics.

   The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):

   Shared Folders
How to Find the Top 10 Opportunities, Their Days to Close, and Total Revenue

3. Click **Opportunity Watch Real Time**, and then select **View**.

   The "Opportunity Watch Real Time" report is displayed.

**How do I read the "Opportunity Watch Real Time" report?**

The "Opportunity Watch Real Time" report displays the top 10 open opportunities for the current quarter. These opportunities are sorted by the highest value or total potential revenue).

This report contains the following metrics:

- **Opportunity** — The name of the opportunity.
- **Sales Account** — The name of the customer.
- **Value** — The potential revenue amount for the opportunity. This is the sum of all revenue lines on the opportunity.
- **Days to Close** — The number of days before the opportunity is set to close.
- **Win Probability (%)** — The win probability percent for each opportunity.

The following image shows an example of the "Opportunity Watch Real Time" report.
### How to Find the Top 10 Opportunities, Their Days to Close, and Total Revenue

<table>
<thead>
<tr>
<th>Action</th>
<th>Opportunity</th>
<th>Sales Account</th>
<th>Value</th>
<th>Days to Close</th>
<th>Win Probability</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NikonFcyeb23306409</td>
<td>Pinnacle Technologies (SEATTLE, US)</td>
<td>$1,754,486,576.00</td>
<td>5</td>
<td>40</td>
</tr>
<tr>
<td></td>
<td>CanonBC9a223503943</td>
<td>Automotive, 1015333331 (Pavlur, US)</td>
<td>$405,831,829.00</td>
<td>8</td>
<td>90</td>
</tr>
<tr>
<td></td>
<td>CanonBCS180287753731</td>
<td>iSource, Cita (03) (Irving, US)</td>
<td>$176,067,829.00</td>
<td>8</td>
<td>80</td>
</tr>
<tr>
<td></td>
<td>20 Green Servers</td>
<td>RRFL (PORT BYRON, US)</td>
<td>$32,554,476.00</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>SEAW</td>
<td>SALEA/ACC1720 (Pavlur, US)</td>
<td>$27,777,949.00</td>
<td>8</td>
<td>70</td>
</tr>
<tr>
<td></td>
<td>HP G30 #1246929</td>
<td>CRM/NEVETI/608 (CASTELFRANCO, IT)</td>
<td>$20,533,804.00</td>
<td>7</td>
<td>80</td>
</tr>
<tr>
<td></td>
<td>MobNMS110747110</td>
<td>Norway (MOLOE, NO)</td>
<td>$20,823,023.00</td>
<td>13</td>
<td>70</td>
</tr>
<tr>
<td></td>
<td>MobNMS110747110</td>
<td>Norway (MOLOE, NO)</td>
<td>$19,598,104.00</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>NikonS36498583925</td>
<td>CUST_58096204 (Columbus, US)</td>
<td>$11,639,629.00</td>
<td>1</td>
<td>98</td>
</tr>
<tr>
<td></td>
<td>CFQCDT</td>
<td>Automotive, 101340348</td>
<td>$9,500,000.00</td>
<td>1</td>
<td>100</td>
</tr>
</tbody>
</table>

---

What Are the Top 10 Open Opportunities? What Are Their Days to Close and Total Revenue? 7-3
How Many Leads Do Not Result in Conversion to Opportunity?

This tutorial shows you how to determine the number of leads that are not converted to opportunities. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to find the leads that are not converted to opportunities (wins). You use the "Leads Not Converted" report to focus your attention on your lost opportunities.

How to Determine the Number of Leads That Do Not Result in Conversion to Opportunities

To create the "Leads Not Converted" report:

1. From the Navigator menu, select Reports and Analytics.

   The Reports and Analytics page is displayed.

2. Click the down-arrow button to the right of Create, and then select Analysis.
The Select Subject Area list is displayed.

3. Select the **Sales - CRM Pipeline** subject area.

4. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select the following columns to include in the analysis:
   - From the Time folder: **Year**
   - From the Time folder: **Quarter**
   - From the Facts > Lead Facts folder: **# of Rejected Leads**
   - From the Facts > Lead Facts folder: **# of Leads**

For each column that you want to add:

a. Select the column in the Subject Areas list.

b. Click the **Add** button (the right arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.
To accurately assess the number of leads that are not converted to opportunities, you need to include the # of Retired Leads column. This column is not in the Sales - CRM Pipeline subject area. To add a second subject area and this column, perform the following steps:

a. Click the Add/Remove Subject Areas button.

b. In the Add/Remove Subject Areas dialog, select Marketing - CRM Campaigns and Leads Real Time, and then click OK.

c. Expand the Marketing - CRM Campaigns and Leads Real Time Subject Areas folder (by clicking the arrow next to the folder), and then select # of Retired Leads from the Lead Facts folder.
6. Click Next.

7. Specify the views to include in the analysis. Click the Table box, and then select Table (recommended).

8. In the Title field, enter Leads Not Converted.

9. Click Submit to save the analysis.

10. Save the analysis as follows:
    a. In the Analysis Name field, specify a name for the analysis.
    b. In the Save In list, select the folder in which you want to save the analysis.
       The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
       If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
    c. Click Submit, then OK in the Confirmation dialog.

The final report is saved in the specified folder. You can now navigate to the analysis.

**How do I read the "Leads Not Converted" report?**

The "Leads Not Converted" report contains the following metrics:

- **Year** — The time frame (year) that the leads were not converted.
- **Quarter** — The time frame (quarters) that the leads were not converted.
# of Leads — The total amount of leads for the specified time period.

# of Rejected Leads — The amount of the leads that were rejected for the specified time period.

# of Retired Leads — The amount of the leads that had no likelihood of being converted to an opportunity for the specified time period.

The following image shows an example of the "Leads Not Converted" report.
Who is the Primary Sales Resource Associated With Each Opportunity For This Customer?

This tutorial shows you how to determine who is the primary sales resource with each opportunity for a selected customer. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to determine who the primary sales resource is for a customer and the associated opportunity. Each customer may have one or more sales resources and one or more opportunities. You use the "Primary Sales Resource Associated With Each Opportunity For This Customer" report to evaluate and review a specific targeted opportunity.

How to Determine Who is the Primary Sales Resource Associated With Each Opportunity For This Customer

To create the "Primary Sales Resource Associated With Each Opportunity For This Customer" report:

1. From the Navigator menu, select Reports and Analytics.
How to Determine Who is the Primary Sales Resource Associated With Each Opportunity For This Customer

1. In the Contents pane, click **Browse Catalog**.

2. In the Oracle BI Catalog page, click **New**, and then click **Analysis**.

3. In the Select Subject Area list, select **Sales - CRM Pipeline**.
5. In the Subject Areas pane, expand the Opportunity folder, and then double-click **Opportunity Name** to add the column to the Selected Columns pane.

6. Similarly, add the following columns to the Selected Columns pane:
   - From the Opportunity folder: **Owner First Name**
   - From the Opportunity folder: **Owner Last Name**
   - From the Customer folder: **Customer Name**
7. In the Filters pane, click the **Create a filter for the current Subject Area** button, and then select **Customer Name**.

8. In the New Filter dialog, perform the following steps:
   
   a. Select **is equal to/is in** from the **Operator** list.
   
   b. In the **Value** field, enter **Agile Solutions**. (Note that you can also select one or more values from the Value list, or you can search for a value.)

   c. Click **OK**. The filter is added to the Filters pane.
9. Click Results. Your analysis is displayed.

10. Save the analysis as follows:
   
a. Click Save.
   
   b. The Save As dialog is displayed. In the Name field, enter **Primary Sales Resource Associated With Each Opportunity For This Customer**.
   
c. In the Folders list, select the folder in which you want to save the analysis. The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
   
   If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
   
   d. Click OK.
   
   The final report is saved in the specified folder. You can now navigate to the analysis.
How do I read the "Primary Sales Resource Associated With Each Opportunity For This Customer" report?

The "Primary Sales Resource Associated With Each Opportunity For This Customer" report contains the following metrics:

- **Opportunity Name** — The name of the opportunity associated with the primary resource and the customer.
- **Owner First Name** — The first name of the primary sales representative (resource) who owns this opportunity.
- **Owner Last Name** — The last name of the primary sales representative (resource) who owns this opportunity.
- **Customer Name** — The name of the sales representative's customer.

The following image shows an example of the "Primary Sales Resource Associated With Each Opportunity For This Customer" report.

<table>
<thead>
<tr>
<th>Opportunity Name</th>
<th>Owner First Name</th>
<th>Owner Last Name</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACI</td>
<td>Quinn</td>
<td>Weber</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Almond City</td>
<td>Dan</td>
<td>Foreman</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Agile Solutions</td>
<td>Dana</td>
<td>Foreman</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - BPEL</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - Berkeley DB - Zachary Oliver</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - Decision Support Systems</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - EGM Solutions Group - OEGEE</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - EGM Flight Operations -</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - HR Systems - Database Vault</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - Hyperion Upgrade - Jayleen</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - ODI Bob Robinson - Oracle</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - Global Upgrade - Active Data</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - Australia - RAC / OAS Deep</td>
<td>Timothy</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - BMRM - BPEL - BMS - QM</td>
<td>Charles</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - BMS - BPEL - BMS - QM</td>
<td>Charles</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - BPEL - BMS - BMS - QM</td>
<td>Charles</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - BPEL - BMS - BMS - QM</td>
<td>Charles</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - BPEL - BMS - BMS - QM</td>
<td>Charles</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
<tr>
<td>Boeing - BPEL - BMS - BMS - QM</td>
<td>Charles</td>
<td>Taylor</td>
<td>Agile Solutions</td>
</tr>
</tbody>
</table>
How Well Are Our Sales Representatives Dispositioning Leads?

This tutorial shows you how to determine how well sales representatives are dispositioning leads. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to identify how your sales representatives are managing their leads and opportunities. Knowing how each of your team members are managing their leads and opportunities enables you to evaluate if they are not meeting their revenue goals and allows you to take corrective action immediately. You use the "Leads Dispositioning by Sales Representative" report to evaluate how well your team members are managing their leads and opportunities.

How to Determine How Well Sales Representatives Are Dispositioning Leads

To create the "Leads Dispositioning by Sales Representative" report:

1. From the Navigator menu, select Reports and Analytics.

The Reports and Analytics page is displayed.
2. Click the down-arrow button to the right of Create, and then select Analysis.

The Select Subject Area list is displayed.

3. Select the Sales - CRM Pipeline subject area.

4. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:
   - From the Employee folder: Employee Name
   - From the Facts > Lead Facts folder: # of Leads
   - From the Facts > Lead Facts folder: # of Open Leads
   - From the Facts > Lead Facts folder: # of Qualified Leads
   - From the Facts > Lead Facts folder: # of Rejected Leads
   - From the Facts > Lead Facts folder: Avg Lead Age (Days)

For each column that you want to add:
   a. Select the column in the Subject Areas list.
   b. Click the Add button (the right arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.
5. To accurately assess the dispositioning of leads, you need to include two additional columns: **# of Leads Converted** and **# of Retired Leads**. These columns are not in the **Sales - CRM Pipeline** subject area. To add a second subject area and these columns, perform the following steps:

a. Click the **Add/Remove Subject Areas** button.

b. In the Add/Remove Subject Areas dialog, select **Marketing - CRM Campaigns and Leads Real Time**, and then click **OK**.

c. Expand the **Marketing - CRM Campaigns and Leads Real Time** Subject Areas folder (by clicking the arrow next to the folder), and then select **# of Leads Converted** from the Lead Facts folder.

d. Select **# of Retired Leads** from the Lead Facts folder.
6. Click Next.

7. Specify the views to include in the analysis. Click the Table box, and then select Table (recommended).

8. In the Title field, enter Leads Dispositioning by Sales Representative.

9. Click Submit to save the analysis.

10. Save the analysis as follows:

   a. In the Analysis Name field, specify a name for the analysis.

   b. In the Save In list, select the folder in which you want to save the analysis.

   The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.

   If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.

   c. Click Submit, and then click OK in the Confirmation dialog.

   The final report is saved in the specified folder. You can now navigate to the analysis.
How do I read the "Leads Dispositioning by Sales Representative" report?

The "Leads Dispositioning by Sales Representative" report contains the following metrics:

- **Employee Name** — The name of your employee.
- **# of Leads** — The amount of the leads owned by the sales representative.
- **# of Open Leads** — The amount of the leads owned by the sales representative that are still open.
- **# of Qualified Leads** — The amount of the leads owned by the sales representative that are qualified.
- **# of Rejected Leads** — The amount of the leads owned by the sales representative that were rejected.
- **Avg Lead Age (Days)** — The average number of days that the sales representative owned the lead from the time the lead was opened and until the lead closed.
- **# of Leads Converted** — The amount of the leads owned by the sales representative that were converted to opportunities.
- **# of Retired Leads** — The amount of the leads that had no likelihood of being converted to an opportunity for the specified time period.

The following image shows an example of the "Leads Dispositioning by Sales Representative" report.
This Part describes how to answer business questions related to competitors.
Who Are My Top Competitors and What Is Our Revenue Exposure to Them?

This tutorial shows you how to analyze your top competitors and your revenue exposure to those competitors for the quarter. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to assess your top competitors and your revenue exposure to those competitors. Knowing who your competition is enables you to evaluate strategies that allow you to win opportunities. You use the "Top Competitors" report to evaluate and review your competition.

How to Identify Your Top Competitors and Your Revenue Exposure to Them

To create the "Top Competitors" report:

1. From the Navigator menu, select Reports and Analytics.

2. In the Contents pane, click Browse Catalog.
How to Identify Your Top Competitors and Your Revenue Exposure to Them

3. In the Oracle BI Catalog page, click New, and then click Analysis.

4. Select the Sales - CRM Pipeline subject area.
5. In the Subject Areas pane, expand the Competitor folder, and then double-click Competitor Name to add the column to the Selected Columns pane.

6. Similarly, add the following columns to the Selected Columns pane:
   - From the Facts > Pipeline Facts folder: Open Opportunity Revenue
From the Time folder: **Quarter**

7. Add a sort to display the highest value revenue first. Click the **Options** button to the right of Open Opportunity Revenue. Select **Sort**, and then select **Sort Descending**.

The sort sequence is added to Open Opportunity Revenue and is indicated by the down-arrow.

8. Add a filter to restrict the analysis for blank competitor names (that is, for opportunities where there are no competitors). In the Filters pane, click the **Create a filter for the current Subject Area** button, and then select **Competitor Name**.

9. In the New Filter dialog, perform the following steps:
   a. Select **is not null** from the **Operator** list.
b. Click OK. The filter is added to the Filters pane.

10. Add a second filter that restricts Open Opportunity Revenue to the top 10 highest revenue values by performing the following steps:

a. Click the Options button to the right of Open Opportunity Revenue, and then select Filter.

b. In the New Filter dialog, select is in top in the Operator list.

c. Accept 10 as the default value in the Value field.
d. Click OK. The second filter is added to the Filters pane.

11. Preview your analysis. Click the Results tab.

12. To enable Open Opportunity Revenue to display local currency values, with no decimal places, perform the following steps:
   a. Click the Criteria tab.
   b. Click the Options button to the right of Open Opportunity Revenue, and then select Column Properties.
c. In the Column Properties dialog, select the **Data Format** tab.

d. Select the **Override Default Data Format** box.

e. In the **Treat Numbers As** list, select **Currency**.

f. In the **Currency Symbol** list, select the currency that you require (for example, $).

g. Accept the default values for **Negative Format** (Minus: -123) and **Decimal Places** (0).

![Column Properties dialog]

h. Click **OK**.

13. Click the **Results** tab to preview your analysis.

![Compound Layout]

14. Click the **Criteria** tab.

15. To display the most recent quarter’s data, you add a filter. In the Filters pane, click the **Create a filter for the current Subject Area** button, and then select **Quarter**.
16. In the New Filter dialog, perform the following steps:
   
a. Select **is equal to / is in** from the **Operator** list.
   
b. Enter the most recent quarter (or the quarter of interest) in the **Value** field. For this example, enter **2013 Q 3**.
   
c. Click **OK**. The filter is added to the Filters pane.

17. Save the analysis as follows:
   
a. Click **Save**.
   
b. The Save As dialog is displayed. In the **Name** field, enter **Top Competitors**.
   
c. In the Folders list, select the folder in which you want to save the analysis.

   The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.

   If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
d. Click OK.

The final report is saved in the specified folder. You can now navigate to the analysis.

How do I read the "Top Competitors" report?

The “Top Competitors” report contains the following metrics:

- **Competitor Name** — The name of your competitor.
- **Open Opportunity Revenue** — The revenue amount of the potential win that is at risk.
- **Quarter** — The time frame (quarter) during which the opportunity would not be converted.

The following image shows an example of the "Top Competitors" report for "2013 Q 3."
Which Were the High-Value Opportunities That We Lost to Our Competitors?

This tutorial shows you how to analyze the high-value opportunities and to which competitors they were lost. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

In this tutorial you need to assess your high-value opportunities and to whom they were lost. Knowing who your competition is enables you to form strategies that allow you to reevaluate your objectives and develop a plan to prevent lost high-value opportunities in the future. You use the "High-Value Lost Opportunities" report to evaluate and review your losses and competition and to find out where your shortfalls have occurred.

How to Identify the High-Value Opportunities Lost to Competitors

To create the "High-Value Lost Opportunities" report:

1. From the Navigator menu, select Reports and Analytics.

   ![Navigator menu with Reports and Analytics highlighted](image)

   The Reports and Analytics page is displayed.

2. In the Contents pane, click Browse Catalog.
3. In the Oracle BI Catalog page, click New, and then click Analysis.

4. Select the Sales - CRM Pipeline subject area.
How to Identify the High-Value Opportunities Lost to Competitors

Which Were the High-Value Opportunities That We Lost to Our Competitors?

5. In the Subject Areas pane, expand the Customer folder, then double-click Customer Name to add the column to the Selected Columns pane.

6. Similarly, add the following columns to the Selected Columns pane:
1. From the Competitor folder: **Competitor Name**
2. From the Opportunity folder: **Opportunity Name**
3. From the Time folder: **Date**
4. From the Facts > Win Loss Facts folder: **Lost Competitive Opportunity Revenue**

7. Add a filter to restrict the analysis for blank competitor names (that is, for opportunities where there are no competitors). In the Filters pane, click the **Create a filter for the current Subject Area** button, and then select **Competitor Name**.

8. In the New Filter dialog, perform the following steps:
   a. Select **is not null** from the **Operator** list.
   
   b. Click **OK**. The filter is added to the Filters pane.
9. Add a second filter that restricts Lost Competitive Opportunity Revenue to the top 10 highest revenue values, by performing the following steps:
   a. Click the Options button to the right of Lost Competitive Opportunity Revenue, and then select Filter.
   b. In the New Filter dialog, select is in top in the Operator list.
   c. Accept 10 as the default value in the Value field.
   d. Click OK. The second filter is added to the Filters pane.
10. Add a sort to display the highest value revenue first. Click the **Options** button to the right of Lost Competitive Opportunity Revenue. Select **Sort**, and then select **Sort Descending**.

   ![Sort Descending](image)

   The sort sequence is added to Lost Competitive Opportunity Revenue and is indicated by the down-arrow.

11. To shorten the column heading for Lost Competitive Opportunity Revenue, perform the following steps:
   a. Click the **Options** button to the right of Lost Competitive Opportunity Revenue, and then select **Column Properties**.
   
   ![Column Properties](image)

   b. In the Column Properties dialog, select the **Column Format** tab.

   c. Select the **Custom Headings** box, then enter **Lost Revenue** in the **Column Heading** field. Do not close the Column Properties dialog.
12. To enable Lost Revenue to display local currency values, with no decimal places, perform the following steps:
   a. Select the Data Format tab.
   b. Select the Override Default Data Format box.
   c. In the Treat Numbers As list, select Currency.
   d. For the Currency Symbol, select the currency that you require (for example, $).
   e. Accept the default values for Negative Format (Minus: -123) and Decimal Places (0).
   f. Click OK.

13. Click the Results tab to preview the analysis.

14. Save the analysis as follows:
How to Identify the High-Value Opportunities Lost to Competitors

a. Click Save.

b. The Save As dialog is displayed. In the Name field, enter High-Value Lost Opportunities.

c. In the Folders list, select the folder in which you want to save the analysis. The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.

If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.

d. Click OK.

The final report is saved in the specified folder. You can now navigate to the analysis.

How do I read the "High-Value Lost Opportunities" report?

The "High-Value Lost Opportunities" report contains the following metrics:

- **Customer Name** — The name of your customer.
- **Competitor Name** — The name of your competitor for which the opportunity was lost.
- **Opportunity Name** — The name of the lost high-value opportunity.
- **Date** — The time frame (for example, the year, month, and day) when the high-value opportunity was lost.
- **Lost Revenue** — The revenue amount lost the competition for this opportunity.
The following image shows an example of the "High-Value Lost Opportunities" report.

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Competitor Name</th>
<th>Opportunity Name</th>
<th>Date</th>
<th>Lost Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACustomer_2SWSK</td>
<td>Dell</td>
<td>AGs</td>
<td>12/30/2012</td>
<td>$4,046,828</td>
</tr>
<tr>
<td>CUSTOMER_102319630</td>
<td>NEC</td>
<td>Agile Sentinel Power</td>
<td>11/15/2012</td>
<td>$3,399,035</td>
</tr>
<tr>
<td>Pinnacle Technologies</td>
<td>Dell</td>
<td>EBM Group - RAT</td>
<td>11/15/2013</td>
<td>$2,050,000</td>
</tr>
<tr>
<td>Norway</td>
<td>Dell</td>
<td>Boeing</td>
<td>12/30/2012</td>
<td>$2,988,883</td>
</tr>
<tr>
<td>High Technology_10161071</td>
<td>Dell</td>
<td>Agile Solutions</td>
<td>12/30/2012</td>
<td>$1,657,820</td>
</tr>
<tr>
<td>Communications_102220999</td>
<td>Hewlett-Packard</td>
<td>Boeing - BPEL</td>
<td>11/15/2012</td>
<td>$1,292,312</td>
</tr>
<tr>
<td>Professional Services_101622849</td>
<td>Novell</td>
<td>Ebit#12-BBBBBV</td>
<td>11/15/2012</td>
<td>$1,292,312</td>
</tr>
<tr>
<td>Healthcare_20155300</td>
<td>Hewlett-Packard</td>
<td>Agile Solutions 124</td>
<td>12/30/2012</td>
<td>$405,420</td>
</tr>
<tr>
<td>Public Sector_102591570</td>
<td>Aberdeen LLC</td>
<td>GSD - Orbix</td>
<td>1/5/2013</td>
<td>$394,920</td>
</tr>
<tr>
<td>CUST1_TER</td>
<td>NEC</td>
<td>Boeing - HR</td>
<td>1/5/2013</td>
<td>$104,556</td>
</tr>
</tbody>
</table>
What Are the Most Likely Reasons That We Lose Against Our Competitors?

This tutorial shows you how to determine the most likely reasons that you lose against your competitors.

In this tutorial you need to determine the reasons you lose business to your competitors. You use the "Reason Lost" report to identify the reasons you lost business, the number of losses, and the percent of lost business.

How to Identify the Most Likely Reasons that We Lose Against Our Competitors

To view the "Reason Lost" report:

1. From the Navigator menu, select Reports and Analytics.

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
   - Sales
   - Analytic Library
3. Click **Reason Lost** and select **View**.

The "Reason Lost " report is displayed.

**How do I read the "Reason Lost" report?**

The "Reason Lost" report contains the following metrics:

- **Reason Won or Lost** — The reason an opportunity was lost.
- **# of Losses** — The total number of competitive opportunities lost for the specific reason.
- **% of Losses** — The percent of competitive losses that is calculated as a percent of the total number of competitive losses for each specific reason.

The following image shows an example of the "Reason Lost" report. The report shows a pie chart and a table.