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Operations Manager's Workbench User Guide

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Oracle Financial Services Revenue Management and Billing Operations Manager's Workbench User Guide

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Preface

About This Document

This guide aims to act as a reference guide to an administrator user and helps him with day-to-day tasks, as well as provides some pointers on how to handle some commonly seen change requests. The document is organized in the form of a comprehensive questionnaire and covers most of the administrative tasks.

Intended Audience

This document is intended for the following audience:

- End-Users
- Consulting Team

Organization of the Document

The information in this document is organized into following sections:

Section No.	Section Name	Description
Section 1	Introduction	About the product and the types of analyses included.
Section 2	Dashboards	Explanation of each dashboard.

Related Documents

You can refer to the following documents for more information:

Document	Description
<i>Oracle Revenue Management and Billing Analytics Install Guide</i>	Lists the pre-requisites, supported platforms, and hardware and software requirements for installing the Oracle Revenue Management and Billing Analytics application. It also explains how to install the Oracle Revenue Management and Billing Analytics application.

Change Log

Revision	Last Update	Updated Section	Comments
1.0	July 2017	All	New document

Contents

1. Introduction to OFSRMB Operations Manager's Workbench	10
1.1 OFSRMB Operations Manager's Workbench	12
1.1.1 Dashboard Security	13
1.1.2 Dashboard Structure	14
1.1.3 Dashboard Filter	14
1.1.4 Common Elements	15
1.2 Types of Analyses	15
1.2.1 Top N Lists	15
1.2.2 Share Analyses	16
1.2.3 Trend Analyses	16
1.2.4 Interactive Analyses	17
1.2.5 Printable Reports	17
1.3 List of Dashboards	17
2. Executive Summary	18
2.1 Overview of the dashboard	18
2.1.1 Top Ratings	18
2.1.2 Most Prominent	19
2.1.3 Performance Metrics	19
2.1.4 Variations From Last Month	20
2.1.5 Billable Charges	20
2.1.6 Financial Transactions	21
2.1.7 Billing	21
2.1.8 To-Do	22
2.1.9 Feeds/Transactions	22
2.1.10 Contracts	23
3. Financial Transactions Dashboard	24
3.1 Overview of the Dashboard	24
3.2 Summary Page	24
3.2.1 KPIs	24
3.2.2 Receivables By Divisions	25
3.2.3 Payments By Divisions	26
3.2.4 Adjustments By Divisions	26
3.3 Receivables Page	27
3.3.1 KPIs	28
3.3.2 Receivables By Age	29
3.3.3 Top N Customers	30

3.3.4	Receivables By Customer Segments	30
3.3.5	Receivables By Currency	31
3.3.6	Receivables Trend	31
3.3.7	Top N Products	32
3.3.8	Bottom N Products	32
3.3.9	Accrued Vs Actuals	33
3.3.10	Accruals Override Report	33
3.3.11	Revenue Recognition Report	33
3.3.12	Receivables Printable Report	34
3.3.13	Integration with Oracle Spatial	34
3.4	Adjustments Page	35
3.4.1	KPIs	35
3.4.2	Break Down By Customer Segments	35
3.4.3	Top N Adjustments	36
3.4.4	Adjustments Trend	37
3.4.5	Break Down By Adjustment Types	37
3.4.6	Adjustments Printable Report	38
3.5	Payments Page	38
3.5.1	KPIs	39
3.5.2	Top N Payments	39
3.5.3	Payments By Customer Segments	40
3.5.4	Payments By Currency	40
3.5.5	Payments Trend	41
3.5.6	Payments Printable Report	41
3.6	General Ledger Page	42
3.6.1	Breakdown By Distributions	42
3.6.2	Breakdown By GL Accounts	42
3.6.3	Trend By Distribution Id	43
3.6.4	Trend By GL Account	43
3.6.5	GL Printable Report	44
4.	Billing Dashboard	45
4.1	Overview of the Dashboard	45
4.2	Summary Page	45
4.2.1	KPIs	45
4.2.2	Bills By Division	46
4.2.3	Write Offs By Division	47
4.2.4	Refunds By Division	48
4.2.5	Cancellations By Division	48
4.3	Billing Page	49

4.3.1	KPIs	50
4.3.2	Billing Printable Report	50
4.4	Effectiveness Page	51
4.4.1	KPIs	51
4.4.2	Best N Bill Cycles	51
4.4.3	Worst N Bill Cycles.....	52
4.4.4	Effectiveness Trend	53
4.4.5	Bill Cycle Effectiveness	53
4.4.6	#Segments Frozen Each Day	54
4.5	Errors Page	54
4.5.1	KPIs	54
4.5.2	Bill Errors By Reason.....	55
4.5.3	#Errors Each Day	56
4.5.4	#Errors Trend.....	56
4.6	Write Off Page.....	57
4.6.1	KPIs	57
4.6.2	Top N Write Offs.....	58
4.6.3	Write Off Trend	58
4.6.4	Write Off By Type	59
4.6.5	Write Off By Status.....	60
4.6.6	Write-Off Printable Report.....	60
4.7	Refund Page	61
4.7.1	KPIs	61
4.7.2	Top N Refunds	61
4.7.3	Refund Trend.....	62
4.7.4	Refund By Reason.....	63
4.7.5	Refund By Status	63
4.7.6	Refund Printable Report.....	65
4.8	Cancellations Page	65
4.8.1	KPIs	65
4.8.2	Cancellations Trend.....	66
4.8.3	Top 10 Cancellations	66
4.8.4	Cancellations Printable Report.....	67
5.	Contracts Dashboard	68
5.1	Overview of the dashboard	68
5.2	Summary Page	68
5.2.1	KPIs	68
5.2.2	Top N Contracts.....	69
5.2.3	Bottom N Contracts.....	69

5.2.4	Breakdown By Segments.....	70
5.2.5	Breakdown By Divisions	71
5.2.6	Breakdown By Contract Types	71
5.2.7	Printable Report	71
5.3	Trends Page.....	72
5.3.1	Win/Loss Trend	72
5.3.2	Revenue Trend – Projection vs Actual	73
5.3.3	Contract Trend	73
5.3.4	Inactive Contracts.....	74
6.	To-Do Dashboard.....	76
6.1	Overview of the dashboard	76
6.2	Summary Page	76
6.2.1	Metrics For Current Month	76
6.2.2	Metrics As On Start Of The Month.....	77
6.2.3	Breakdown By Role	77
6.2.4	Breakdown By Type.....	78
6.2.5	Breakdown By Priority.....	79
6.2.6	Breakdown By Division.....	79
6.2.7	To-Do Entries By Day Of Week.....	80
6.2.8	To-Do Printable Report	81
6.3	Trends Page.....	81
6.3.1	Average Completion Duration.....	81
6.3.2	Aging Analysis.....	82
6.3.3	To Do Type Trend	83
6.3.4	Priority Trend	84
6.4	Ranking Page.....	86
6.4.1	Top N Tasks with Highest Completed To-Do Entries.....	86
6.4.2	Top N Tasks with Highest Completion Duration	86
6.4.3	Most Productive Staffs	87
6.4.4	Least Productive Staffs	87
7.	Transaction Feeds Dashboard	89
7.1	Overview of the dashboard	89
7.2	Summary Page	89
7.2.1	KPIs.....	89
7.2.2	Transaction Status.....	90
7.2.3	Variations From Last Month.....	90
7.2.4	Feed Status	91
7.2.5	Activity Across Divisions	91
7.2.6	Successful / Unsuccessful Transactions Across Sources	92

7.3	Transaction Page.....	92
7.3.1	Successful/Unsuccessful Transactions over Last Months	92
7.3.2	Unrealized Revenue	93
7.3.3	Manual Transaction Trend	94
7.3.4	Transactions Printable Report.....	94
7.4	Feed Page.....	95
7.4.1	Valid / Invalid Feeds Over Last Months.....	95
7.4.2	Feeds Printable Report.....	95
7.5	Error Page.....	96
7.5.1	Errors By Reasons.....	96
8.	Customer Contact Dashboard	97
8.1	Overview of the dashboard	97
8.2	Summary Page	97
8.2.1	KPIs	97
8.2.2	Breakdown By Contact Type	97
8.2.3	Contacts By Day of Week	98
8.2.4	Preferred Contact Method	98
8.2.5	Customer Contact Printable Report.....	99
8.3	Ranking Page.....	100
8.3.1	Top N Divisions.....	100
8.3.2	Top N States	100
8.3.3	Top N Customers	100
8.3.4	Most Successful Contact Types	101
8.4	Trend Page	101
8.4.1	Preferred Contact Method Trend	101
8.4.2	Distribution Status Trend	102
8.4.3	Division Trend.....	103
8.4.4	Contact Type Trend	103

1. Introduction to OFSRMB Operations Manager's Workbench

Oracle Revenue Management and Billing Analytics (ORMBA) follow a layered architecture, which consists of the following four logical layers:

- Source
- Replication
- Transformation
- Presentation and Access

The Source layer represents the source system, which is Oracle Revenue Management and Billing (ORMB). Oracle Revenue Management and Billing Extractors and Schema delivers functionality of the Replication and Transformation layers. Oracle Revenue Management and Billing Analytics (ORMBA) delivers the functionality of the Presentation and Access layer.

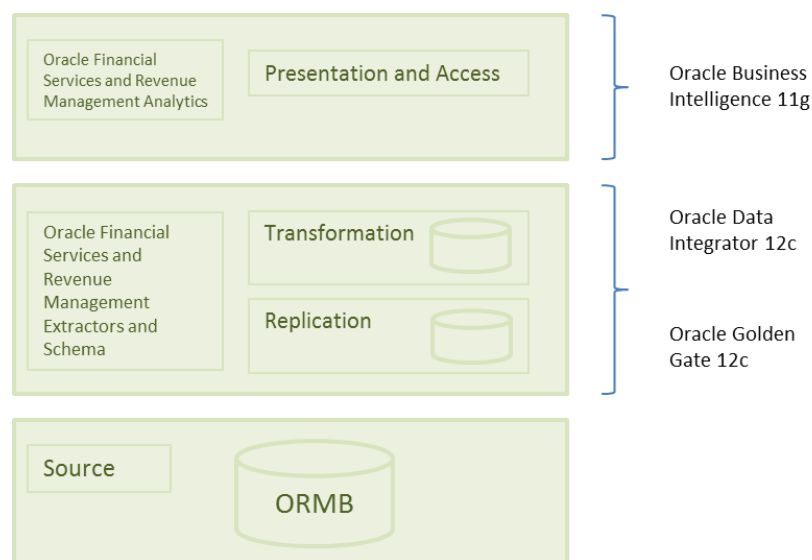


Figure 1: ORMB Analytics Topology

The Presentation and Access Layer of ORMBA is called the ORMBA Dashboards and is powered by Oracle Business Intelligence Enterprise Edition (OBIEE) tool. Currently there are three workbenches available for Financial Services / Banking domain:

- OFSRMB Relationship Manager's Workbench
- OFSRMB Product Manager's Workbench
- OFSRMB Operations Manager's Workbench

The dashboards available within each workbench vary as shown in the table below:

Workbench	Available Dashboards
Relationship Manager's Workbench	<ul style="list-style-type: none">• Relationship Manager• Deal Management
Product Manager's Workbench	<ul style="list-style-type: none">• Product Pricing• Modeller• Billable Charges
Operations Manager's Workbench	<ul style="list-style-type: none">• Financial Transactions• Billing Operations• Transaction Feed Management• Contracts• Tasks• Executive Summary• Customer Contact

You can purchase either one or a combination of the workbenches, based on the dashboards you want to use. This user guide is exclusively for users of Operations Manager's workbench.

Note: For customizing the analyses in ORMBA dashboards, you would need a minimum working knowledge of OBIEE. The ORMBA Admin Guide lists some of the common tasks done in ORMBA dashboards and explains how to perform them. For more information, refer to the *ORMBA Admin Guide*.

1.1 OFSRMB Operations Manager's Workbench

You can log on to OFSRMB Operations Manager's Workbench with your user credentials (either as an Operations Manager or as a Management user) through the login page.

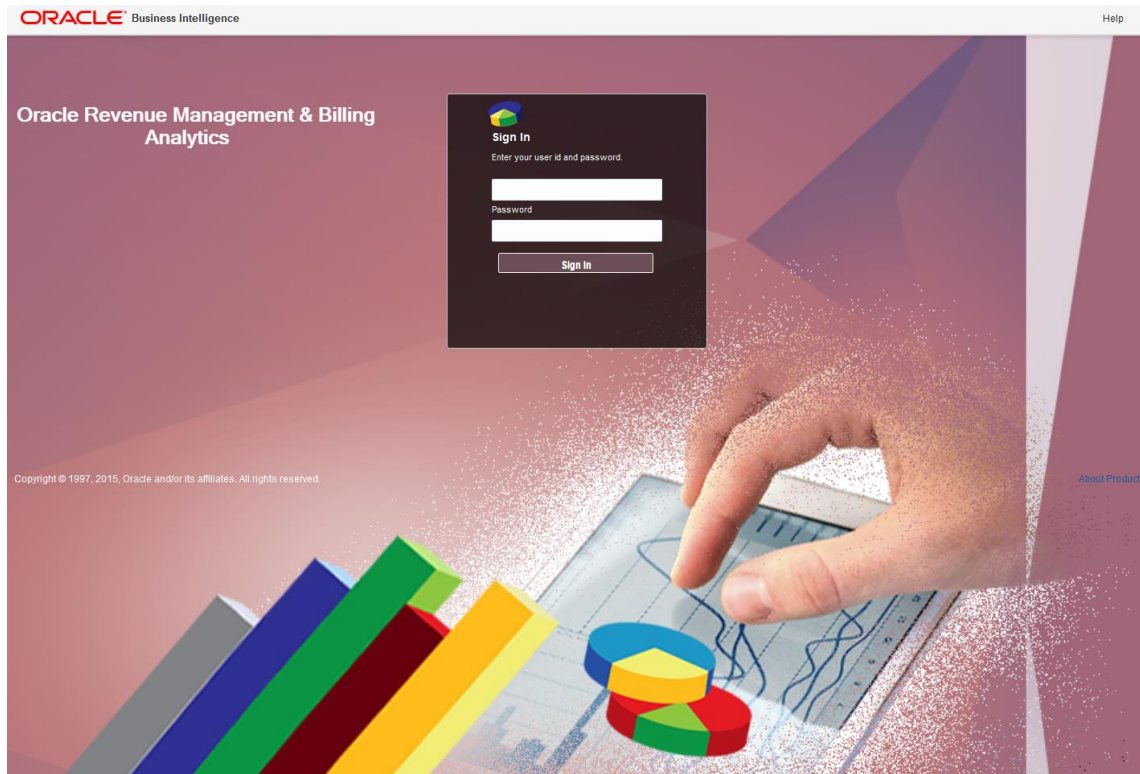


Figure 2: ORMBA Login Page

Once logged in, you will see the ORMBA Home Page that graphically represents all dashboards available within the product, irrespective of whether you have access to them or not. However, dashboards corresponding to your login alone appear highlighted and are accessible.



Figure 3: Operations Manager's Home Page



Figure 4: Management User's Home Page

Note: While you can view all dashboards in the Home page, access to dashboards is based on the user role mapped to your login. If you are unable to navigate to a dashboard, it could be because your role does not provide access to that particular dashboard.

1.1.1 Dashboard Security

Access to a workbench is based on the software license you have purchased and the user role assigned to the user. If you have applied the license key for a workbench and logs in as an administrator user, you would be able to access all dashboards associated with it. To restrict access to specific dashboards, you can either use the default application roles available in the product, or create custom roles.

By default, the Operations Manager's Workbench comes with two application roles:

- **ORMBAITOperations:** Users of this role can access the following dashboards:
 - Transaction Feeds
 - To-Do
 - Billing
 - Contracts
 - Customer Contact
- **ORMBAManagement :** Users of this role can access only the following dashboards:
 - Financial Transactions
 - Executive Summary

Note: Users of this role can access the Executive Summary dashboard using ORMBA Mobile App also.

In addition to the above out-of-the-box application roles that are delivered with the product, you can create custom roles that restrict access to specific dashboards within the workbench and assign them to individual users.

To know more about how to create and assign application roles to users, see ORMBA Security Guide and ORMBA Admin Guide.

1.1.2 Dashboard Structure

OFSRMB Operations Manager's Workbench is a collection of seven dashboards:

- Financial Transactions
- Billing
- Transaction Feed Management
- To Do
- Executive Summary
- Contracts
- Customer Contact

Each dashboard consists of one or more pages, organized into different tabs within. For example, the Financial Transactions dashboard contains six pages: Summary, Receivables, Adjustments, Payments, Payment Tenders, and General Ledger.

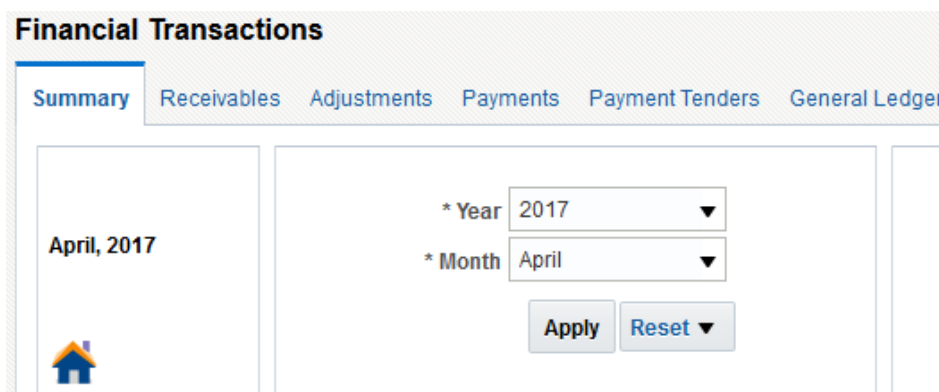


Figure 5: Dashboard Tabs

1.1.3 Dashboard Filter

Each dashboard contains some filter fields on the top-left corner of the page. The common dashboard filters are Year and Month. Some dashboards have additional filter fields like Division or Contract Type.

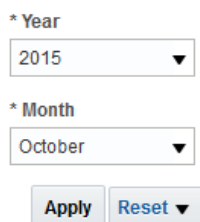






Figure 6: Dashboard Filters

The data included in the analyses depends on the dashboard filters applied. The default year and month available in the filter fields depends on the configurations in Global Settings page of ORMBA Admin Tool.

1.1.4 Common Elements

The Summary page of most dashboards contains the following common elements:

- Home icon (): Click this icon to navigate to the ORMBA Dashboards Home page.
- Printable Report icon (): Click this icon to open the printable report of the dashboard.
- Page Options button (): Click this button to edit the dashboard, or export the dashboard contents to excel sheet.
- Help button (): Click this button to access the online help for OBIEE.

1.2 Types of Analyses

The ORMBA dashboards contain several analyses and most of them fall under one of the categories below:

- Top N Lists
- Share Analyses
- Trend Analyses
- Interactive Analyses
- Printable Reports

Each of the above type of analyses is explained in detail below.

1.2.1 Top N Lists

These are table lists that show you a list of objects (dimensions) sorted in either ascending or descending order of a measure. The main purpose of this type of analysis is to quickly highlight your best performing attributes, like products or customers.

An example list is shown below:

Top 10 Contracts

Rank	Customer	Amount
1	CUST09	\$2,023,341.67
2	CUST07	\$2,015,442.60
3	CUST02	\$2,014,723.75
4	CUST08	\$2,013,549.00
5	CUST10	\$2,011,682.83
6	CUST06	\$2,010,335.31
7	CUST01	\$1,994,173.46
8	CUST05	\$1,974,959.67
9	CUST03	\$1,799,428.29
10	CUST04	\$1,774,419.36
Grand Total		\$19,632,055.94

Figure 7: Example of Top N Lists

1.2.2 Share Analyses

The Share analyses of ORMBA Dashboards illustrate how a measure is spread across different dimensions. A share analysis can be a pie chart or a bar chart. The chart indicates the value and / or percentage of each share and includes a legend.

The pie charts usually includes percentage share of the attributes.

An example pie chart is shown below:

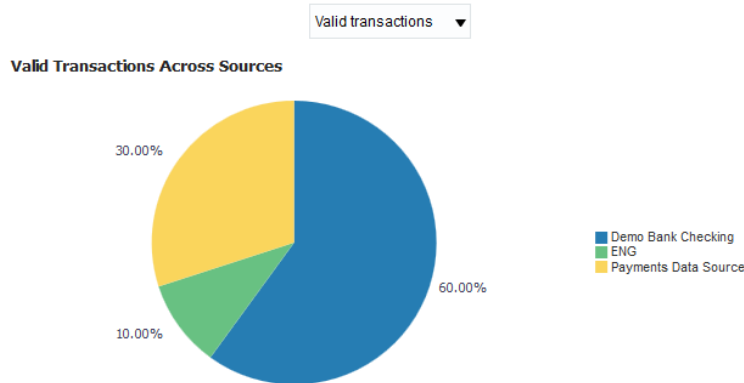


Figure 8: Example of Share Analysis

1.2.3 Trend Analyses

ORMBA Dashboards contains several Trend analyses to indicate the trend of different measures. The two different types of trend analyses available in ORMBA dashboards are:

- Line Charts
- Bar Charts

All trend analyses in ORMBA dashboards indicate the trend of a measure for the last **12 months**, starting from a selected month and year.

In case the analysis contains trend of more than one measure, the chart includes separate lines (in case of line charts) or stacked bars (in case of bar charts) to indicate the trend of each measure.

An example trend chart is shown below:

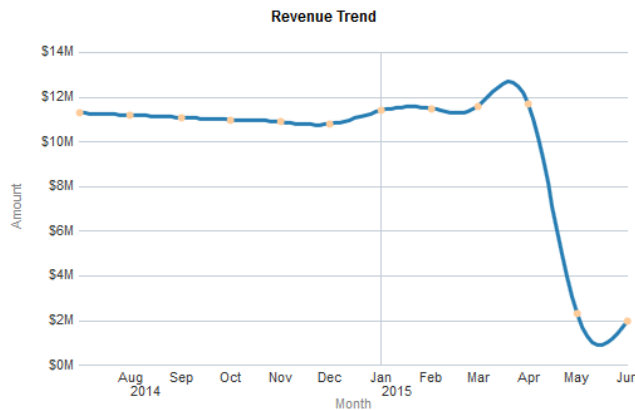


Figure 9: Example of Trend Analysis

1.2.4 Interactive Analyses

The interactive analyses can be charts/tables that give a high-level view of data, which can be drilled down to offer a detailed view. Currently, all analyses in all dashboards are interactive, except trend analyses.

1.2.5 Printable Reports

Most of the ORMBA dashboards contain one or several printable reports. The printable reports are detailed reports that show the data corresponding to the analyses available in a dashboard or page.

You can generate a printable report by filtering the data using any of the filter fields available for the report. After generating the report, click on the Export link towards the bottom of the report to export the data.

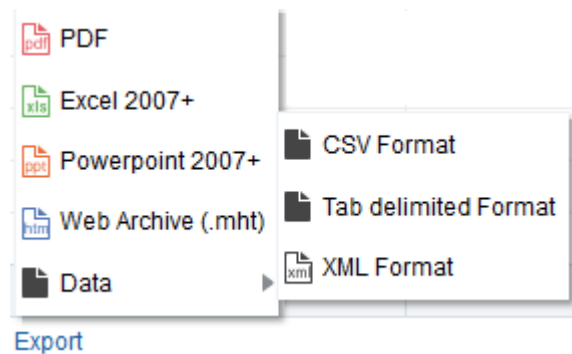


Figure 10: Export Options

You can export data in any of the following formats:

- PDF
- Excel
- PPT
- Web Archive (.mht)
- Data (CSV, Tab delimited, XML)

1.3 List of Dashboards

The dashboards currently available within OFSRMB Operations Manager's Workbench are:

- Financial Transactions
- Billing
- Transaction Feed Management
- To-Do
- Executive Summary
- Contracts
- Customer Contacts

2. Executive Summary

2.1 Overview of the dashboard

Executive Summary dashboard provides a consolidated view of the Pricing and Billing organization within the enterprise and is primarily targeted at Senior Business Managers. The dashboard includes information on key financial metrics including Revenue, Payments, Adjustments, and Cancellations as well as Operational information including To-Do Service Tasks, Transaction Feeds and Staff productivity. Summary of Billing and Contractual information for a selected period is also provided within the dashboard. Some of the key business insights that can be derived from this dashboard include:

- Business performance in terms of key financial metrics like Revenue, Payments and Cancellations and their corresponding variations from the previous period
- What is the net customer churn for the period and what is the level of inactivity across Customer contracts?
- How efficient is my deal management mechanism in terms of number of proposals won vs. number of proposals lost?
- Which is the most problematic product processor? Which is the most common cause of Feed error?
- What is the backlog of To-Do Service tasks and what is the number of incomplete tasks over the last three months

The Executive Summary dashboard is also available as a mobile application. You can browse to the URL below in your mobile device and access the Executive Summary dashboard:

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Note: OFSRMB Operations Manager's Workbench is accessible from both Android and iOS mobile devices.

2.1.1 Top Ratings

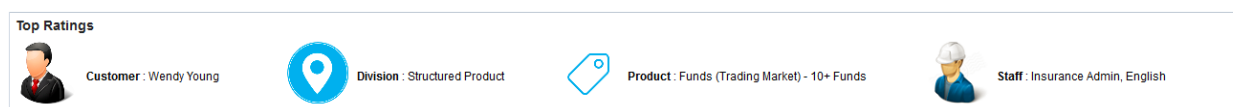


Figure 11: Top Ratings

The Top Ratings section contains the following information:

KPI	Definition
Customer	Top customer under the RM, based on the revenue generated
Division	Top division under the RM, based on the revenue generated
Product	Top product under the RM, based on revenue generated
Staff	Top staff under the RM, based on productivity

2.1.2 Most Prominent

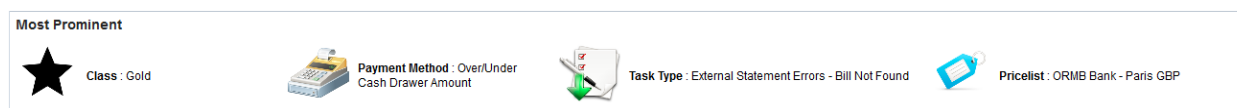


Figure 12: Most Prominent

The Most Prominent section contains the following information:

KPI	Definition
Class	Customer segment that generated highest revenue
Payment Method	Payment method through which we received maximum payment
Task Type	Type of task with highest occurrence
Pricelist	Pricelist that generated highest billable charges

2.1.3 Performance Metrics



Figure 13: Performance Metrics

The Performance Metrics section contains the following KPIs:

KPI	Definition
Revenue	Total revenue received
Payments	Total amount received as payments
Adjustments	Total amount received as adjustments
Cancellations	Total cancellation amount
#Billable Charges	Total number of billable charges
#Unbilled Billable Charges	Number of unbilled billable charges
#Transactions Processed	Total number of transactions received
Transaction Leakage	Number of transactions that we were unable to process (error transactions)
Productivity	Productivity is computed as: [(Priority level/100) × completed hours]/Number of To Do entries created.
Commitment Variation	Percentage of customers in the system who have met the committed revenue

2.1.4 Variations From Last Month

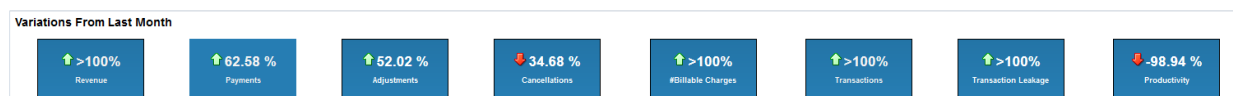


Figure 14: Variations From Last Month

The Variations From Last Month section contains the following KPIs:

KPI	Definition
Revenue	Percentage variation of the revenue from that of last month
Payments	Percentage variation of the payment amount from that of last month
Adjustments	Percentage variation of the adjustment amount from that of last month
Cancellations	Percentage variation of the cancellation amount from that of last month
Billable Charges	Percentage variation of the billable charges (count) from that of last month
Transactions	Percentage variation of the transaction count from that of last month
Transaction Leakage	Percentage variation of the transaction leakage from that of last month
Productivity	Percentage variation of the productivity from that of last month

Note: Against each tile, you can see or icons that indicate if the KPI has a positive variation or a negative variation from the previous month.

2.1.5 Billable Charges

Billable Charges analyses shows:

- Percentage distribution of billable charges across Agreed and Standard pricelists
- Percentage distribution of billable charges across volume-based pricing and value-based pricing

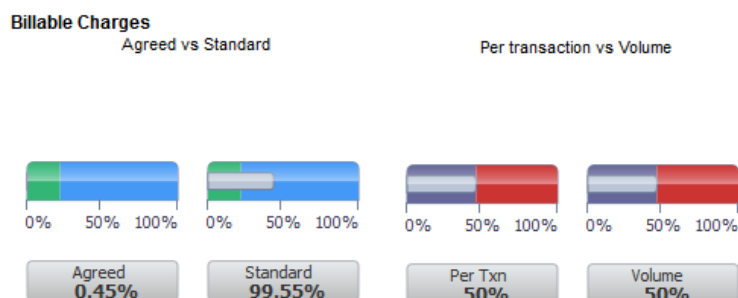


Figure 15: Billable Charges

2.1.6 Financial Transactions

The Financial Transactions analysis is a stacked bar chart that shows the percentage contribution of receivables, payments and adjustments.

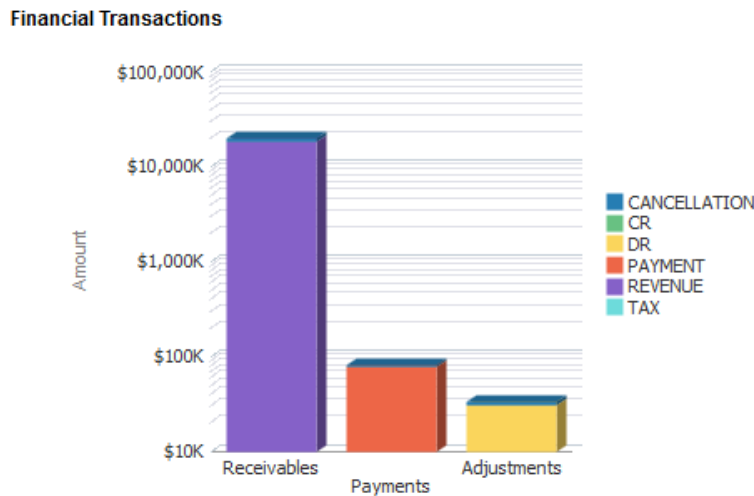


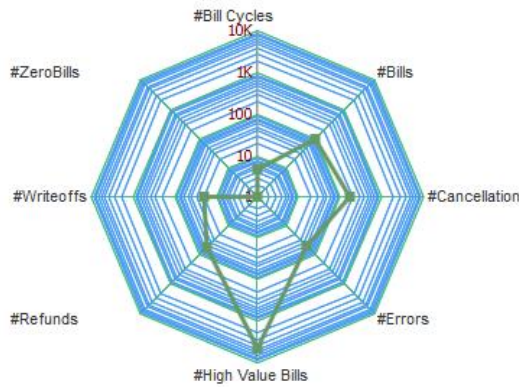
Figure 16: Financial Transactions

Axes	What it shows?
X axis	<ul style="list-style-type: none"> • Receivables • Payments • Adjustments
Y axis	Amount

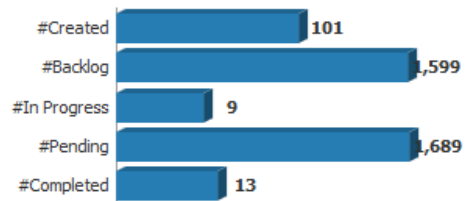
2.1.7 Billing

The Billing analysis is a chart that shows the operational statistics of billing in a logarithmic scale. The analysis includes:

- Number of Bill Cycles
- Number of Bills
- Number of Cancellations
- Number of Errors
- Number of High Value Bills
- Number of Refunds
- Number of Write Offs
- Number of Zero valued Bills

Billing**Figure 17: Billing****2.1.8 To-Do**

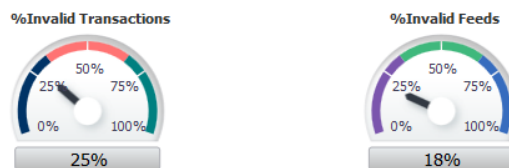
The To-Do analysis is a horizontal bar chart that shows the count of tasks in various status. The analysis also includes the number of incomplete To-Do's for the last three months.

To-Do

Incomplete To-Do's for last three months : 92

Figure 18: To-Do**2.1.9 Feeds/Transactions**

The Invalid Transactions/ Feeds analysis is a gauge chart that shows the percentage of invalid transactions and feeds. It also shows the transaction source from where the most number of invalid feeds or transactions are received. The analysis also displays the most commonly occurred error.

Feeds/Transactions

Most Problematic Source : Demo Bank Checking

Most Common Error : 'The system failed to convert the UOM/Sub-UOM specified using a Register Rule.' (Occurred 12 times)

Figure 19: Feeds/Transactions

2.1.10 Contracts

The Contracts analysis is a stacked bar chart that shows the count of contracts and proposals under various status.

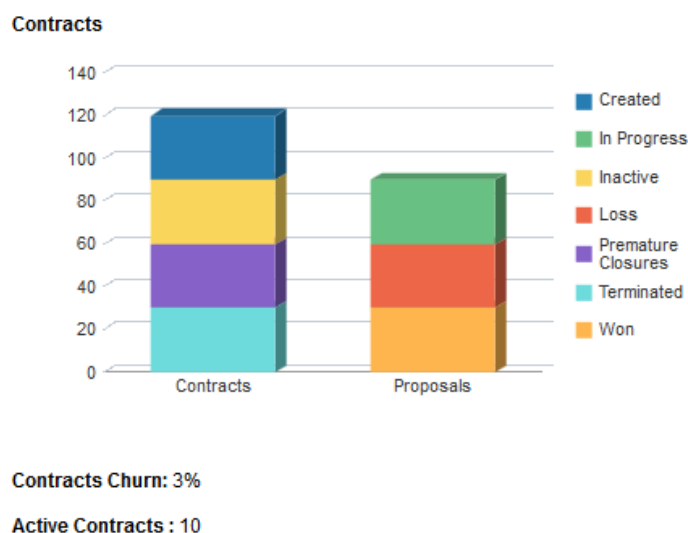


Figure 20: Contracts

The possible status includes:

- Created
- In Progress
- Inactive
- Loss
- Premature Closures
- Terminated
- Won

The analysis also shows the churn percentage and the number of active contracts in the system.

Axes	What it shows?
X axis	<ul style="list-style-type: none"> • Contracts • Proposals
Y axis	<ul style="list-style-type: none"> • Number of contracts in each status • Number of proposals in each status

3. Financial Transactions Dashboard

3.1 Overview of the Dashboard

The Financial Transactions dashboard showcases all important details relating to Revenue, Invoices, Adjustments and Payments over a period of time. The dashboard offers the flexibility to view the details at a consolidated level across each of the business divisions as well as for a specific contract or product type. Some of the common business queries that can be answered with this dashboard include:

- What is the total value of Receivables, Adjustment and Payments? What is the variation from the last month?
- What is the Net Revenue after Cancellations at a Division/Product Level?
- Who are the top customers by Revenue share? Which Customer Segment contributes most to the Net revenue?
- What is the efficiency of the Collections process? Does the Receivable Ageing analysis show an increase in receivables over 180 days?
- Which are the best performing products? Which products in the overall portfolio would need to be re-evaluated?
- Which is the most commonly used Payment Currency and Payment Tender?

The Financial Transactions dashboard is organized into six pages – Summary, Receivables, Adjustments, Payments, Payment Tenders, and General Ledger.

3.2 Summary Page

The Financial Transactions – Summary page provides an overview of Net Receivables and Payments across the various divisions. The dashboard filters available for Summary page of Financial Transactions Dashboard are:

- Year
- Month

3.2.1 KPIs



Figure 21: FT Summary KPIs

Note: Click on each of these tiles to move directly to the respective pages within the FT dashboard.

The KPIs available for Financial Transactions dashboard are:

KPI	Definition
#Bill Segments	Total number of bill segments
#Payment Segments	Total number of payment segments
#Adjustment Segments	Total number of adjustment segments
Net Receivables	Total receivables amount
Net Payments	Total payment amount
Net Adjustments	Total adjustments amount

3.2.2 Receivables By Divisions

The Receivables By Division analysis is a chart that shows the spread of net receivables amount across divisions. You can choose the type of chart you want to view – either Bar Graph or Pie Chart.

Receivables By Divisions

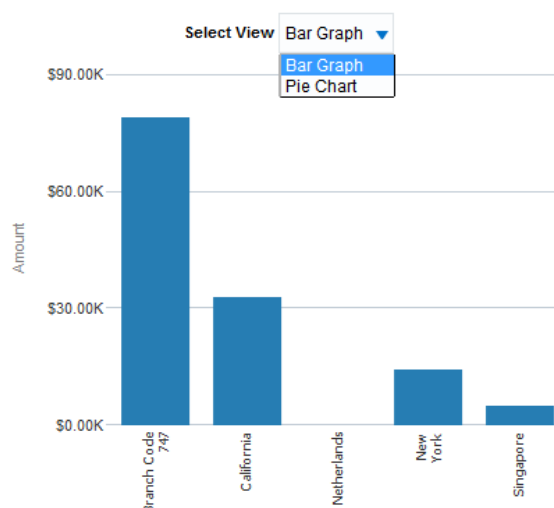


Figure 22: Receivables By Divisions

Axes	What it shows?
X axis	Divisions
Y axis	Receivables amount against each division

Note: Click on the chart to see the drilled-down details of a division. This opens the Receivables Printable Report filtered to display a division's receivables details. You can further drill down this report to display receivables details from a selected product. Subsequently, it is possible to further drill down to view receivable details of a selected customer.

3.2.3 Payments By Divisions

The Payments By Division analysis is a chart that shows the payment amount across divisions. You can choose the type of chart you want to view – either Bar Graph or Pie Chart.

Payments By Divisions

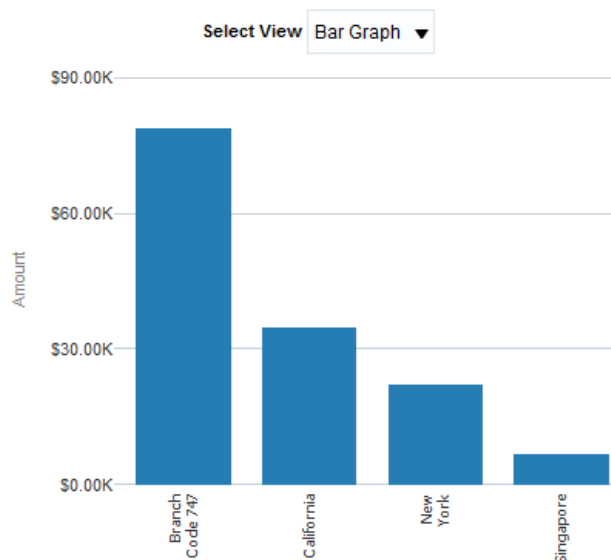


Figure 23: Payments By Divisions

Axes	What it shows?
X axis	Division
Y axis	Payment amount against each division

Note: Click on the chart to see the drilled-down details of a division. This opens the Payments Printable Report filtered to display a division's payment details. You can further drill down this report to display payment details from a selected product. Subsequently, it is possible to further drill down to view payment details of a selected customer.

3.2.4 Adjustments By Divisions

The Adjustments By Division analysis is a chart that shows the adjustment amount across divisions. You can choose the type of chart you want to view – either Bar Graph or Pie Chart.

Adjustments By Divisions

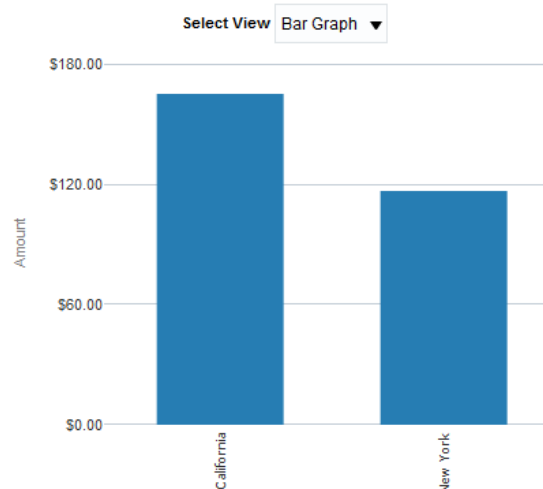


Figure 24: Adjustments By Divisions

Axes	What it shows?
X axis	Division
Y axis	Adjustment amount against each division

Note: Click on the chart to see the drilled-down details of a division. This opens the Adjustments Printable Report filtered to display a division's adjustment details. You can further drill down this report to display adjustment details from a selected product. Subsequently, it is possible to further drill down to view adjustment details of a selected customer.

3.3 Receivables Page

The Financial Transactions – Receivables Page provides information on the Net Receivables over a period. The dashboard offers a view of both the Customer and the Product with respect to contributions to the overall revenue. Some of the key business insights that can be derived from this dashboard page include:

- Which are the Customers and Products that have performed well over a period?
- Which Customer Segment contributes most to the Net Revenue? Is there a need to introduce new Products within the portfolio to improve revenues from any of the underperforming segments?
- Is there an unusual dip in the Net Receivables observed over the past period? Does the dip in revenue indicate a potential Revenue Leakage over the same period?
- Which segment contributes most to the outstanding debts from the 30/60/90 days bucket? Within a segment which are the Customers who have an outstanding debt?

The dashboard filters available for Receivables page of Financial Transactions Dashboard are:

- Year
- Month

- Division
- Contract Type
- Product Description

The Receivables page also includes a printable report called Receivables Printable Report.

3.3.1 KPIs





Figure 25: Receivables KPIs

Note: Click on each tile to view the Receivables printable report that shows the details.

The KPIs available for the Receivables page of Financial Transactions dashboard are:

KPI	Definition
Net Receivables	Total receivables amount
#Receivables	Total number of receivables
Total Revenue	Total revenue
Tax	Total tax amount
Cancellations	Total cancellations amount
Variation From Last Month	Percentage variation of receivables amount from the previous month

The Variation from Last Month field includes  or  icon to indicate if the variation is positive or negative.

3.3.2 Receivables By Age

The Receivables By Age analysis is a bar chart that shows the receivables amount against different age buckets.

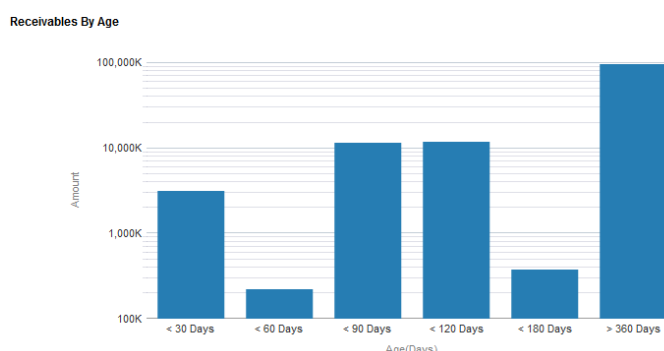


Figure 26: Receivables By Age

Axes	What it shows?
X axis	Age (Days) <ul style="list-style-type: none"> • < 30 Days • < 60 Days • < 90 Days • < 120 Days • < 180 Days • > 360 Days
Y axis	Receivables amount within each age bucket

Note: Click on the chart to see the drilled-down details of an age bucket. This opens the Ageing Printable Report that displays the various divisions that falls under the selected age bucket. You can drill down this report to up to three levels – Division, Customer, and Bill.

3.3.3 Top N Customers

The Top N Customers analysis is a table list that shows the list of N customers with highest revenue. Customers are listed in the descending order of the total revenue amount.

Top 10 Customers

Rank	Customer Name	Total Revenue
1	ABC Canberra	\$2,023,341.67
2	ABC Munich	\$2,015,442.60
3	ITC Frankfurt	\$2,014,723.75
4	ABC Melbourne	\$2,013,549.00
5	ITC Wellington	\$2,011,682.83
6	ITC Sydney	\$2,010,335.31
7	Amanda Berry	\$1,994,173.46
8	CBA Newyork	\$1,974,959.67
9	ITC California	\$1,799,428.29
10	ITC Trivandrum	\$1,774,419.36
Grand Total		\$19,632,055.94

Figure 27: Top N Customers

Note: Click on a customer to see their drilled-down details. This opens the Receivables Printable Report filtered to display the customer's details. You can further drill down the report to Product and Account levels.

3.3.4 Receivables By Customer Segments

The Receivables By Customer Segments analysis is a bar chart that shows the receivables amount against each customer segment.

Receivables By Customer Segments

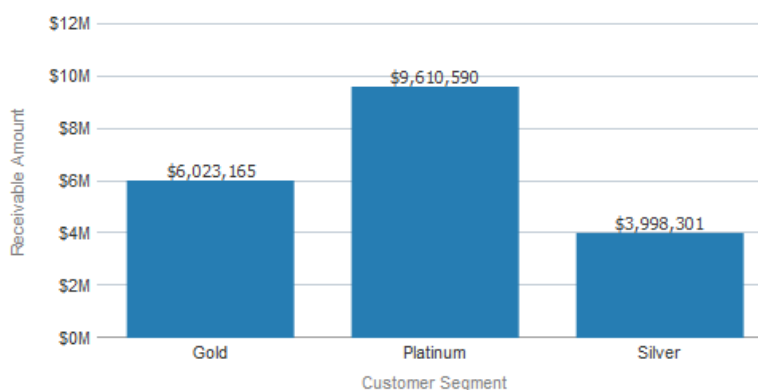


Figure 28: Receivables By Customer Segments

Axes	What it shows?
X axis	Customer Segment
Y axis	Shows the receivables amount (in corporate currency) against each customer segment

Note: Click on the chart to see the drilled-down details of a customer segment. This opens the Receivables Printable Report filtered to display the selected Customer Segment's receivables details. You can further drill down the report to Product and Customer levels.

3.3.5 Receivables By Currency

The Receivables By Currency analysis is a horizontal bar chart that shows the receivables amount against each division in various currencies.

Note: You can change this analysis into a pie chart by changing the view.

Receivables By Currency

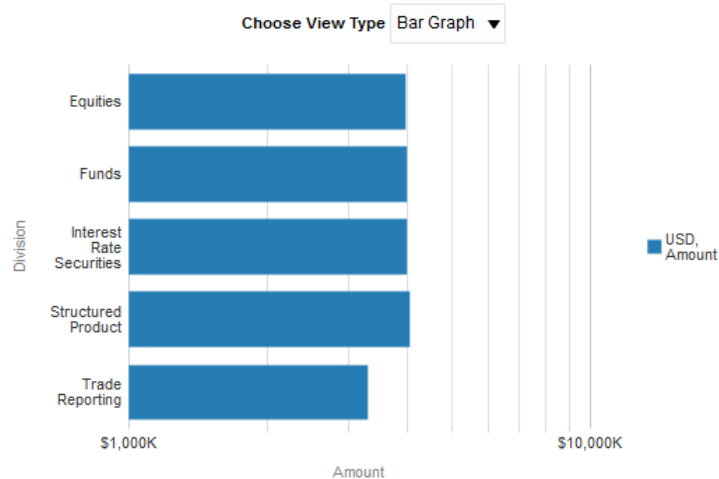


Figure 29: Receivables By Currency

Note: Click on the chart to open the Receivables Printable Report filtered to display the selected division's receivables details. You can further drill down the report to Product and Customer levels.

3.3.6 Receivables Trend

The Receivables Trend analysis is a line chart that shows the trend of receivables amount during the last 12 months.

Receivables Trend



Figure 30: Receivables Trend

Axes	What it shows?
X axis	Shows the last 12 months
Y axis	Shows the receivables amount of each month

3.3.7 Top N Products

The Top N Products analysis is a table list that shows the list of N products with highest revenue. Products are listed in the descending order of the net revenue.

Top 10 Products

Rank	Product	Total Revenue
1	02900040 - Equities Trade Fee	\$8,114,466
2	06250012 - Funds Trading Market 1_4 Fund	\$6,386,832
3	02900043 - Equities Auction Trade Fee	\$1,091,708
4	06250011 - Funds Trading Market 5_9 Fund	\$719,538
5	06250009 - Funds Quote Display Board	\$391,372
6	02900046 - Equities Centre Point Trade Fee	\$317,951
7	02900044 - Equities Undisclosed Trade Fee	\$305,391
8	02900240 - Structured Product Trade Fee	\$303,287
9	02900345 - Interest Rate Securities Centre Point Trade Fee	\$291,105
10	06250010 - Funds Trading Market 10 Funds	\$284,808
Grand Total		\$18,206,459

Figure 31: Top N Products

Note: Click on a product to open the Receivables Printable Report filtered to display the selected product's receivables details against various customers. You can further drill down to Customer and Account levels.

3.3.8 Bottom N Products

The Bottom N Products analysis is a table list that shows the list of N products with lowest revenue. Products are listed in the ascending order of the total revenue amount.

Bottom 10 Products

Rank	Product	Total Revenue
1	02900141 - Trade Reporting Facility Warrants Fee	\$92,225
2	02900242 - Trade Reporting Facility Structured Products Fee	\$124,023
3	02900243 - Structured Products Auction Trade Fee	\$127,606
4	02900344 - Interest Rate Securities Undisclosed Trade Fee	\$135,865
5	02900341 - TradeReportingFacilityInterestRateSecuritiesFee	\$139,319
6	02900340 - Interest Rate Security Trade Fee	\$179,319
7	02900244 - Structured Products Iceberg Trade Fee	\$181,509
8	02900343 - Interest Rate Securities Auction Trade Fee	\$201,952
9	02900042 - Trade Reporting Facility Off-mkt Equities Fee	\$243,781
10	06250010 - Funds Trading Market 10 Funds	\$284,808
Grand Total		\$1,710,405

Figure 32: Bottom N Products

Note: Click on a product to open the Receivables Printable Report filtered to display the selected product's receivables details against various customers. You can further drill down to Customer and Account levels.

3.3.9 Accrued Vs Actuals

The Accrued Vs Actuals analysis is a table list that shows the list of divisions with their accrual revenue, actual revenue, and their variations.

Accrued Vs Actuals

Division	Accrual Revenue	Receivables Revenue	Variation
Illinois	\$550.00	\$2,000.00	↓ 264%
Times Division	\$405.58	\$0.00	↑ 100%

Figure 33: Accrued Vs Actuals

Note: Click on a division to view the drilled down details of all products within that division. You can further drill down to view the customer level details.

3.3.10 Accruals Override Report

The Accruals Override Report is a table list that shows the list of divisions with their accrual revenue spread across various accrual override reasons.

Accruals Override Report

Division	Override Reason	Accrual Revenue
Illinois		\$550.00
Times Division		\$405.58

Figure 34: Accruals Override Report

Note: Click on a division to view the drilled down details of all products within that division. You can further drill down to view the customer level details.

3.3.11 Revenue Recognition Report

The Revenue Recognition Report is a table list that shows the list of divisions with their total revenue and recognized revenue.

Revenue Recognition Report

Division	Total Amount	Recognized Amount
02 - England	\$26,803,960.60	\$144,461.68

Figure 35: Revenue Recognition Report

Note: Click on a division to view the drilled down details of all products within that division. You can further drill down to view the customer level details.


3.3.12 Receivables Printable Report

The Receivables Printable Report is an interactive report and you can drill-down to view the details of a product.

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Customer Segment • Contract Type • Product
Fields	<ul style="list-style-type: none"> • Division • Customer Segment • Product • Amount (Click here to further drill-down.) • Cancelled Amount

3.3.13 Integration with Oracle Spatial

Oracle spatial and Graph supports a full range of geospatial data and analytics for different services including location enabled Business Intelligence and Sales territory management. The Receivables Page of FT dashboard is pre-integrated with Oracle Spatial to provide a location enabled perspective of the organization's business.

Click on the Spatial Icon  on the top-left corner of the page. The map shows the region-wise distribution of revenue, along with pie charts to show segment-wise distribution within each region. This additional feature provides the relevant location intelligence to the Receivables data and you can use it to compare the business performance across various geographies.

Revenue By Segment

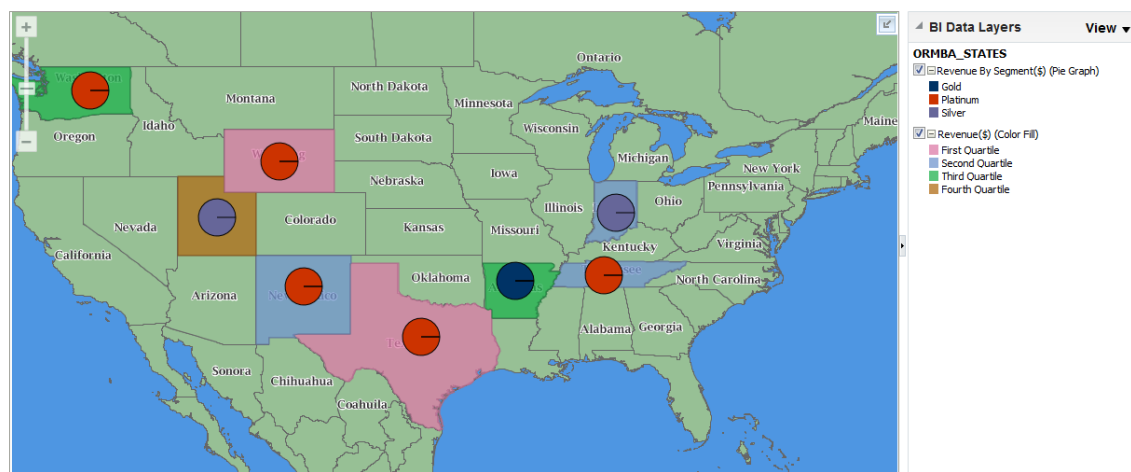


Figure 36: Revenue By Customer Segment

3.4 Adjustments Page

The Financial Transactions - Adjustment page provides a summary of all Adjustment transactions made over a period. Some of the key questions answered as part of this analysis are:

- Which are the Customers/ Contract Types that have witnessed large adjustments?
- Does the Adjustments trend show any unusual spike over a period?
- What are the top Adjustment types by volume?

This dashboard can be filtered based on the following parameters:

- Year
- Month
- Division
- Contract Type
- Credit/Debit

The Adjustments page also includes a printable report called Adjustments Printable Report.



3.4.1 KPIs



Figure 37: Adjustments KPIs

The KPIs available for the Adjustments page of Financial Transactions dashboard are:

KPI	Definition
#Adjustments	Total number of adjustments
#Cancellation	Total number of cancellations
Cancellation	Total cancellations amount
Variation From Last Month	Percentage variation of adjustment amount from the previous month

The Variation from Last Month field includes  or  icon to indicate if the variation is positive or negative.

3.4.2 Break Down By Customer Segments

The Break Down By Customer Segments analysis is a pie chart that shows the percentage distribution of adjustments amount across various customer segments.

Break Down By Customer Segments

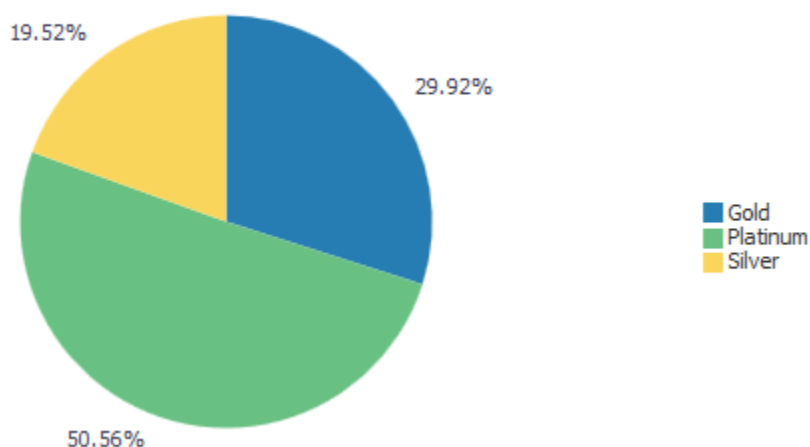


Figure 38: Breakdown By Customer Segments

Note: Click on the chart to see the drilled-down details of a customer segment. This opens the Adjustments Printable Report filtered to display a customer segment's adjustment details. You can further drill-down this report up to three levels.

3.4.3 Top N Adjustments

The Top N Adjustments analysis is a table list that shows the list of N customers with highest adjustments. Customers are listed in the descending order of adjustments amount.

Note: You can select Credit or Debit from the drop-down to view the list.

Top 10 Adjustments

Credit/Debit ▼

Rank	Customer Name	Contract Type	Amount
1	ITC Sydney	Service Fees	\$3,621.44
2	ITC Trivandrum	Account Services	\$3,203.29
3	Amanda Berry	Global Clearing USD	\$3,192.05
4	ABC Canberra	Service Fees	\$3,152.17
5	ABC Munich	Service Fees	\$3,044.53
6	ABC Melbourne	Service Fees	\$3,003.94
7	ITC Wellington	Service Fees	\$2,958.30
8	ITC Frankfurt	Global Clearing USD	\$2,923.02
9	ITC California	Account Services	\$2,909.16
10	CBA Newyork	Service Fees	\$2,877.78
Grand Total			\$30,885.68

Figure 39: Top N Adjustments

Note: Click on a customer to see their drilled-down details. This opens the Adjustments Printable Report filtered to display the customer's details.

3.4.4 Adjustments Trend

The Adjustments Trend analysis is a line chart that shows the trend of adjustments amount over the last 12 months.

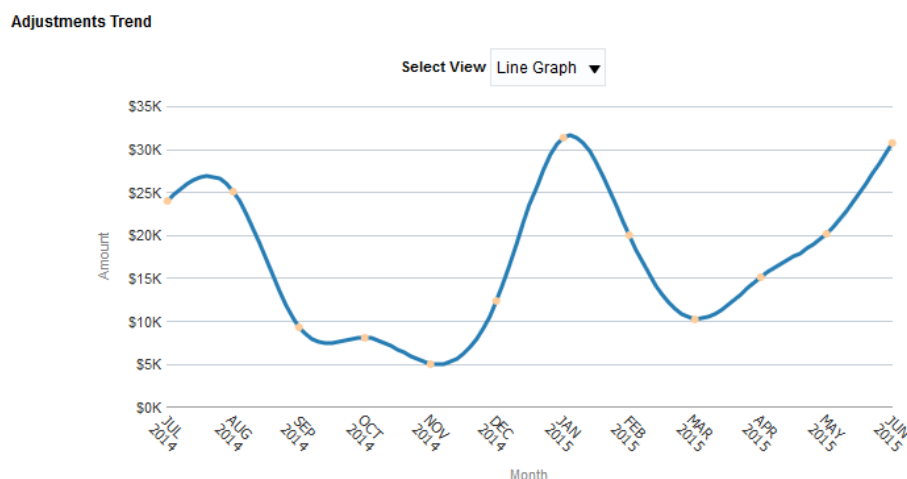


Figure 40: Adjustments Trend

Note: You can view this chart as a Line Graph or Bar Graph by changing the value in Select View drop-down.

3.4.5 Break Down By Adjustment Types

The Break Down By Adjustment Types analysis is a pie chart that shows the percentage break down of adjustment amount across various adjustment types.

Break Down By Adjustment Types

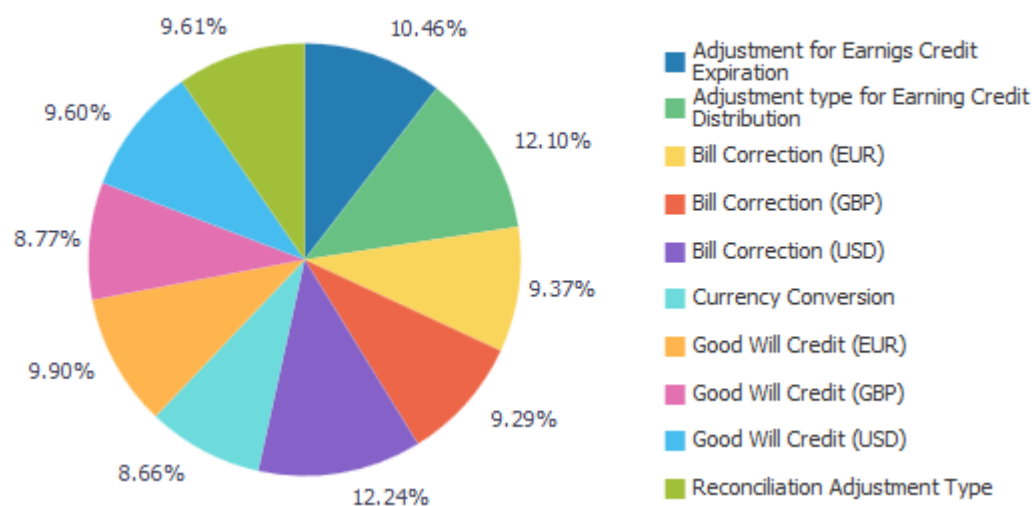


Figure 41: Breakdown By Adjustment Types

Note: Click on the chart to see the drilled-down details of an Adjustment Type. This opens the Adjustments Printable Report filtered to display the adjustment type's details. You can drill down the report for up to three levels.

3.4.6 Adjustments Printable Report

The Adjustments Printable Report is an interactive report and you can drill-down up to three levels.

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Customer Segment • Contract Type • Adjustment Type • Credit/Debit
Fields	<ul style="list-style-type: none"> • Division • Credit/Debit • Customer Segment • Adjustment Type • Contract Type • Amount (Click here to further drill-down.) • Cancelled Amount

3.5 Payments Page

The Financial Transactions – Payment page provides an overview of all Payments that were made over a period of time. This dashboard provides answers to the following key payments related questions:

- Which are the Customers who have made the highest payments in a period?
- Which is the most commonly used payment currency?
- Is there a trend observed across Payments made over a period of time?

The dashboard filters available for Payments page of Financial Transactions Dashboard are:

- Year
- Month
- Division
- Contract Type

The Payments page also includes a printable report called Payments Printable Report.

3.5.1 KPIs

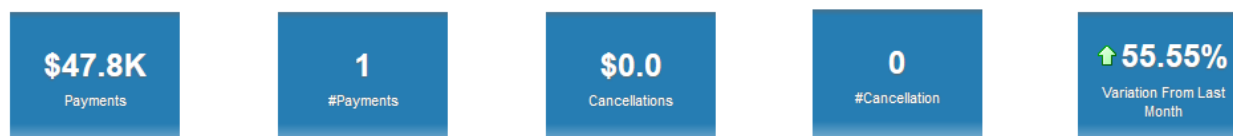




Figure 42: Payments KPIs

The KPIs available for the Payments page of Financial Transactions dashboard are:

KPI	Definition
Net Payments	Total payments amount
#Payments	Total number of adjustments
Cancellations	Total number of cancellations
#Cancellations	Total cancellations amount
Variation From Last Month	Percentage variation of payments amount from the previous month

The Variation from Last Month field includes  or  icon to indicate if the variation is positive or negative.

3.5.2 Top N Payments

The Top N Payments analysis is a table list that shows the list of N customers with highest payments. Customers are listed in the descending order of payment amount.

Top 10 Payments

Rank	Customer name	Amount
1	ABC Melbourne	\$8,720
2	CBA Newyork	\$8,042
3	ITC Trivandrum	\$7,921
4	ITC Sydney	\$7,896
5	ABC Canberra	\$7,873
6	ABC Munich	\$7,807
7	Amanda Berry	\$7,654
8	ITC California	\$7,478
9	ITC Wellington	\$7,470
10	ITC Frankfurt	\$6,903
Grand Total		\$77,765

Figure 43: Top N Payments

Note: Click on a customer to see their drilled-down details. This opens the Payments Printable Report filtered to display the customer's details.

3.5.3 Payments By Customer Segments

The Payments By Customer Segments analysis is a pie chart that shows the percentage distribution of payment amount across various customer segments.

Payments By Customer Segments

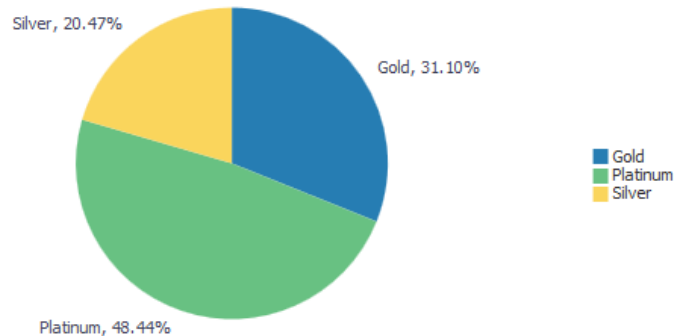


Figure 44: Payments By Customer Segments

Note: Click on the chart to see the drilled-down details of a customer segment. This opens the Payments Printable Report filtered to display a customer segment's payment details. You can further drill-down this report up to three levels.

3.5.4 Payments By Currency

The Payments By Currency analysis is a pie chart that shows the percentage distribution of payment amount across various currencies.

Payments By Currency

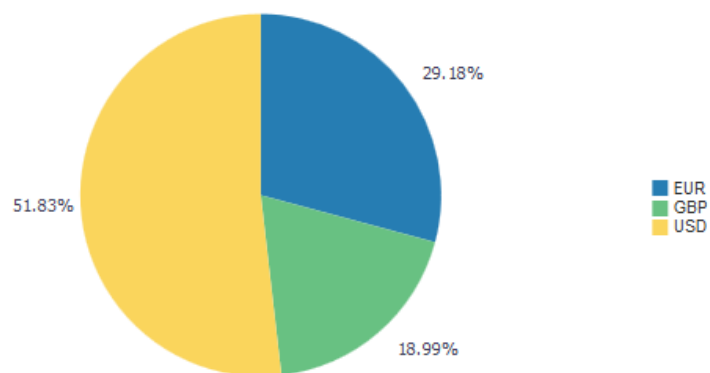


Figure 45: Payments By Currency

Note: Click on the chart to see the drilled-down details of a currency. This opens the Payments Printable Report filtered to display the payment details in the currency. You can further drill-down this report up to three levels.

3.5.5 Payments Trend

The Payments Trend analysis is a line chart that shows the trend of payment amount over the last 12 months.

Payments Trend

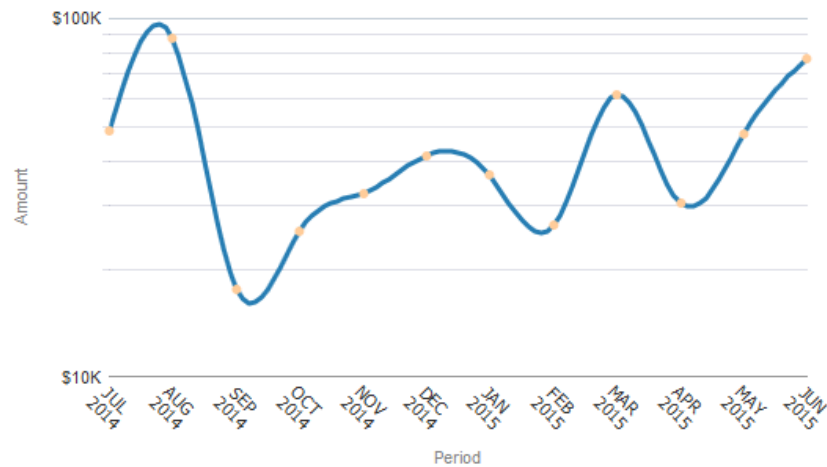


Figure 46: Payments Trend

3.5.6 Payments Printable Report

The Payments Printable Report is an interactive report and you can further drill down up to three levels.

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Customer Segment • Contract Type
Fields	<ul style="list-style-type: none"> • Division • Customer Segment • Contract Type • Amount (Click here to further drill-down.) • Cancelled Amount

3.6 General Ledger Page

The Financial Transactions – General Ledger page offers details of the various General Ledger transactions across the following dimensions:

- Transactions by GL accounts
- Transactions by Distribution ID's
- Trend by GL Accounts
- Trend by Distribution IDs

The dashboard filters available for General Ledger page of Financial Transactions Dashboard are:

- Year
- Month
- Division
- Contract Type

The General Ledger page also includes a printable report called GL Printable Report.

3.6.1 Breakdown By Distributions

The Breakdown By Distributions analysis is a pie chart that shows the percentage distribution of revenue across different GL.

Breakdown By Distributions

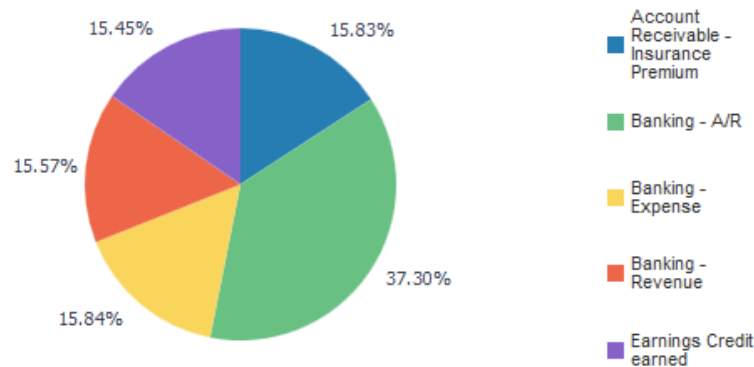


Figure 47: Breakdown By Distributions

Note: Click on the chart to see the drilled-down details of a distribution ID. This opens the GL Printable Report filtered to display the GL details of the selected distribution. You can further drill-down this report up to three levels.

3.6.2 Breakdown By GL Accounts

The Breakdown By GL Accounts analysis is a pie chart that shows the percentage distribution of revenue across different GL accounts.

Breakdown By GL Accounts

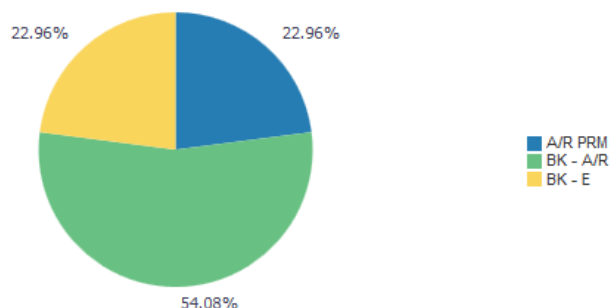


Figure 48: Breakdown By GL Accounts

Note: Click on the chart to see the drilled-down details of a GL account. This opens the GL Printable Report filtered to display the GL details of the selected account. You can further drill-down this report up to three levels.

3.6.3 Trend By Distribution Id

The Trend By Distribution ID analysis is a bar chart that shows the trend of revenue from selected (or all) distributions over the last 12 months.

Note: Select one or more Distributions from the drop-down list. If you select more than one distribution, the chart includes multiple bars against each month.



Figure 49: Trend By Distribution Id

3.6.4 Trend By GL Account

The Trend By GL Account analysis is a bar chart that shows the trend of revenue from selected (or all) GL accounts over the last 12 months.

Note: Select one or more GL Accounts from the drop-down list. If you select more than one GL accounts, the chart includes multiple bars against each month.

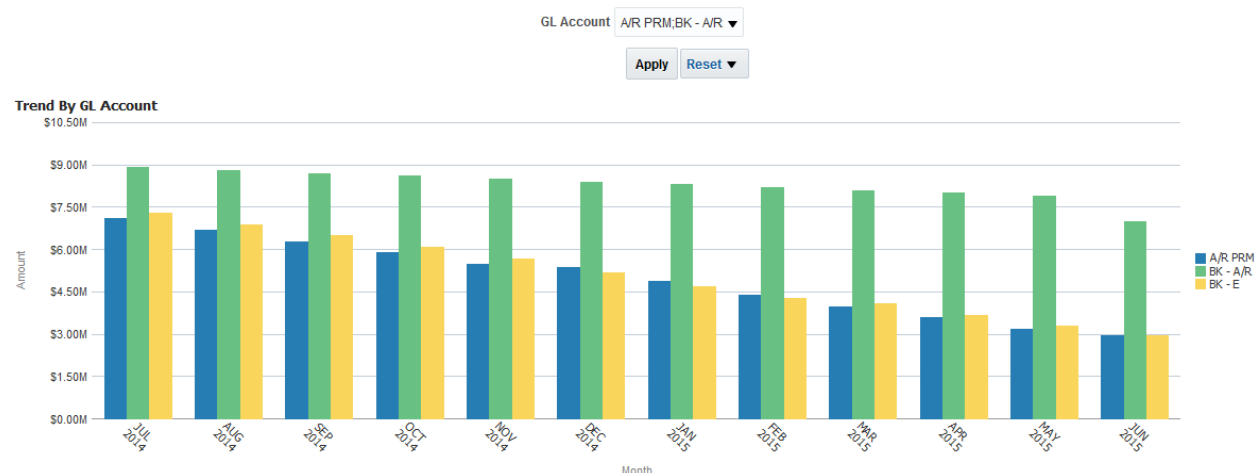


Figure 50: Trend By GL Account

3.6.5 GL Printable Report

The GL Printable Report is an interactive report and you can drill-down up to three levels to view the details.

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Contract Type • Distribution • GL Account
Fields	<ul style="list-style-type: none"> • Division • Contract Type • Distribution • GL Account • Amount (Click here to further drill-down.) • Contra Amount in Division Currency • Net Amount in Division Currency • Credit/Debit

4. Billing Dashboard

4.1 Overview of the Dashboard

The Billing dashboard provides a summary of all Billing operations within the enterprise. It provides a gamut of information including Billing related statistics like Number of Bills, Cancellations and Refunds along with an insight into the effectiveness of the overall Billing operations through analyses like Bill Cycle effectiveness and Billing Error summaries. This dashboard will enable the Billing Analysts and Billing Operations Managers to derive answers to the following key questions:

- Which Business Divisions contribute most to Billing Write-Offs and Refunds?
- What is the effectiveness of the overall Billing Operations in terms of timely Bill processing? Is there a drop in effectiveness over a certain business cycle?
- Is there an observable trend in Bill Write-Offs? What are the top reasons for a Bill Write-Off?
- What are the top reasons for a Bill Refund? What is the % of Bill Refunds that have been approved?
- Which are the Customers that have witnessed the highest number of Bill Cancellations?
- What are the most commonly seen Billing Errors?

The Billing dashboard is organized into seven pages – Summary, Billing, Effectiveness, Errors, Write Off, Refund and Cancellations.

4.2 Summary Page

The Billing Dashboard Summary page provides an overview of key billing related statistics across the organization. Some of the details provided as part of this dashboard includes:

- Number of Bills, Write-Offs, Refunds and Errors for a month
- Division wise attribution to overall Bill Generation function
- Divisions that contribute most to Write-Offs and Refunds

The dashboard filters available for Summary page of Billing Dashboard are:

- Year
- Month

4.2.1 KPIs

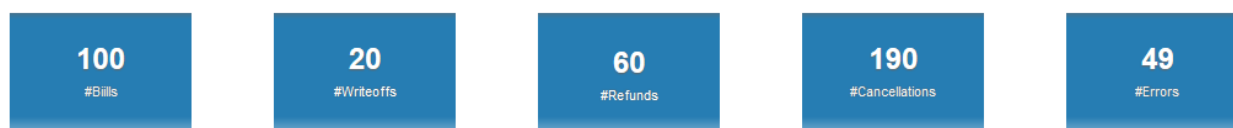


Figure 51: Billing KPIs

The KPIs available on Summary page are:

KPI	Definition
#Bills	Number of bills generated in the selected month and year
#Write offs	Number of write-offs during the selected month and year
#Refunds	Number of refunds during the selected month and year
#Cancellations	Number of cancellations during the selected month and year
#Errors	Number of erroneous transactions during the selected month and year

4.2.2 Bills By Division

The Bills By Division analysis contains a bar chart and a pie chart. The bar chart shows the spread of bills against various divisions, along with the bill amounts. The pie chart shows the percentage distribution of bills across various divisions.

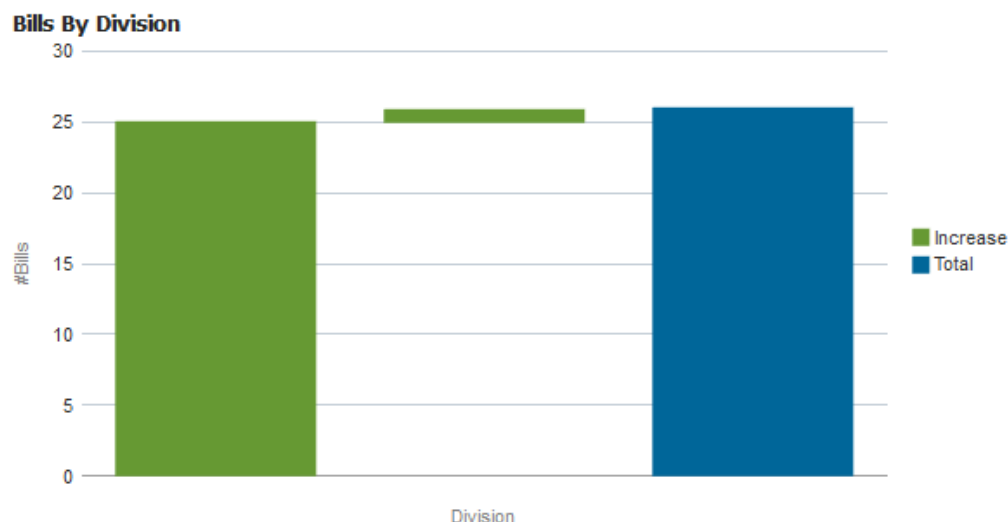
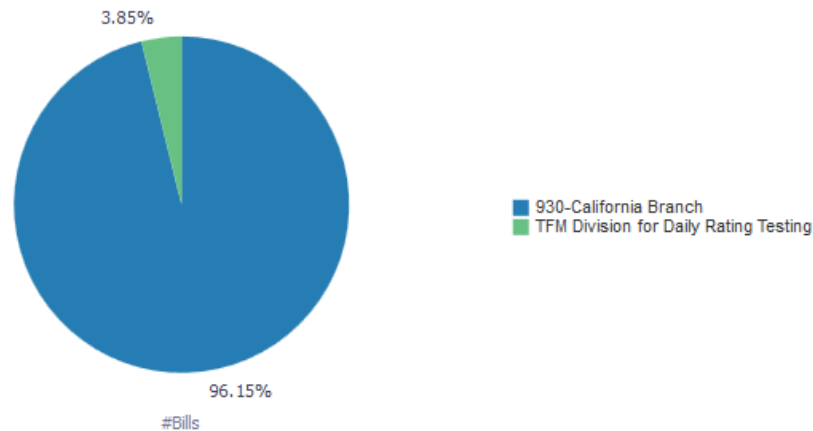


Figure 52: Bills By Division Bar Chart

Axes	What it shows?
X axis	Division
Y axis	<ul style="list-style-type: none"> Number of bills against each division Total bill amount against each division Total number of bills

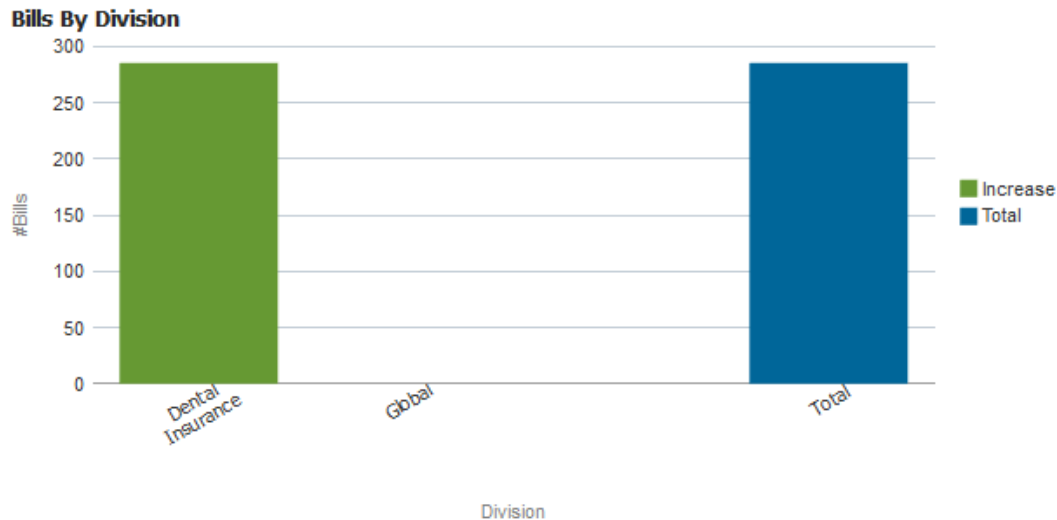
Note: Click on a division to view the drilled-down bill details. This opens the Billing printable report, filtered to display the selected division's details.

Bills By Division**Figure 53: Bills By Division Pie Chart**

Note: Click on the chart to view the drilled-down bill details of a division. This opens the Billing printable report, filtered to display the selected division's details.

4.2.3 Write Offs By Division

The Write offs By Division analysis contains a bar chart and a pie chart. The bar chart shows the spread of write-offs across Divisions, whereas the pie chart shows the percentage distribution of write-offs across various divisions.

**Figure 54: Write Offs By Division Bar Chart**

Axes	What it shows?
X axis	Division
Y axis	<ul style="list-style-type: none"> Number of write-offs against each division Total number of write-offs

Writeoffs By Division

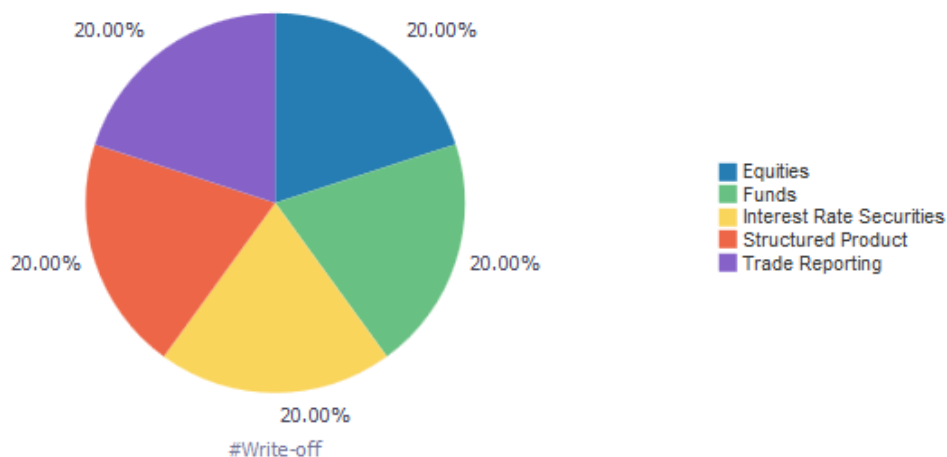


Figure 55: Write Offs By Division Pie Chart

Note: Click on the chart to view the drilled-down write-off details. This opens the Write Off printable report, filtered to display the selected division's details.

4.2.4 Refunds By Division

The Refunds By Division analysis contains a bar chart and a pie chart. Both charts show the refunds across various divisions.

<Image not available currently>

Figure 56: Refunds By Division Bar Chart

Axes	What it shows?
X axis	Division
Y axis	<ul style="list-style-type: none"> Number of refunds against each division Total number of refunds

<Image not available currently>

Figure 57: Refunds By Division Pie Chart

Note: Click on the chart to view the drilled-down refund details. This opens the Refunds printable report, filtered to display the selected division's details.

4.2.5 Cancellations By Division

The Cancellations By Division analysis contains a bar chart and a pie chart. Both charts show the extend of cancellations across various divisions.

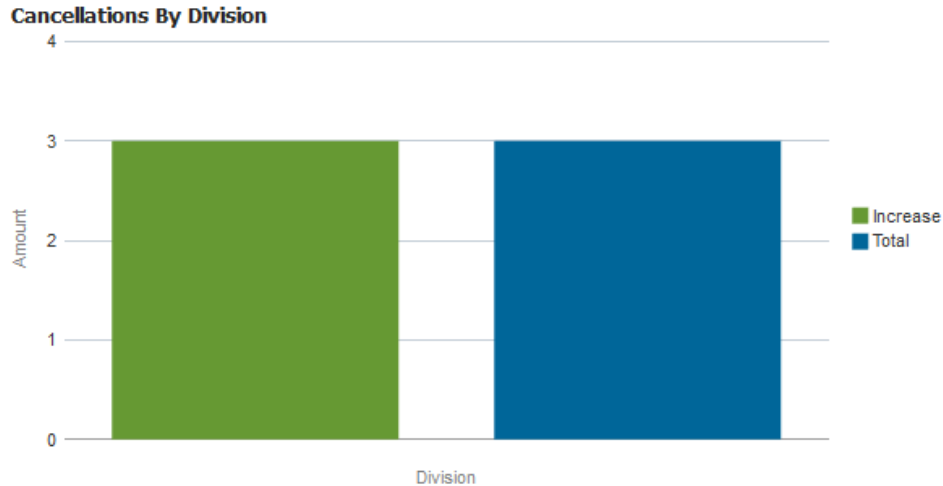


Figure 58: Cancellations By Division Bar Chart

Axes	What it shows?
X axis	Division
Y axis	<ul style="list-style-type: none"> Number of cancellations against each division Total number of cancellations

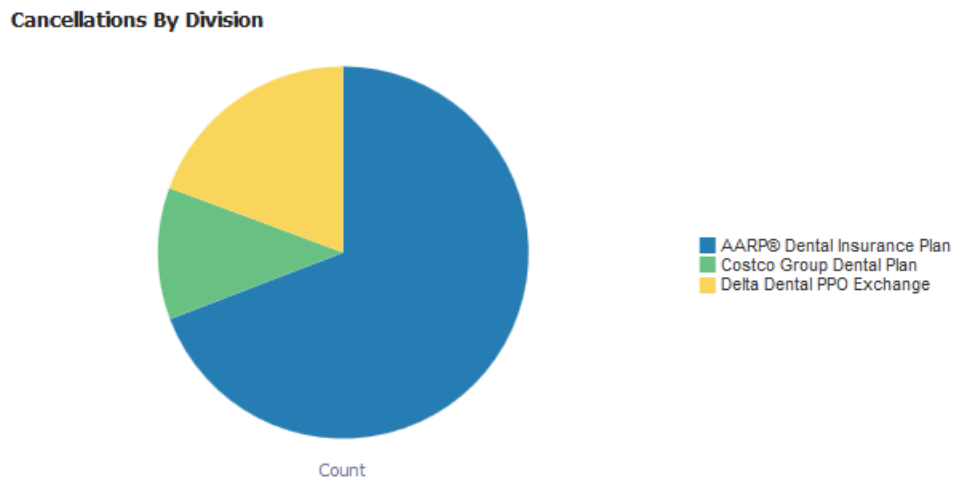


Figure 59: Cancellations By Division Pie Chart

Note: Click on the chart to view the drilled-down cancellation details. This opens the Cancellations printable report, filtered to display the selected division's details.

4.3 Billing Page

The Billing Page provides detailed information on all Bills generated for a certain period. This dashboard page also offers the feature to drill down on a Billed amount to view the range of products across which the billing has been done.

The various filters available for the Billing page of Billing Dashboard are:

- Year

- Month
- Division
- Bill Cycle



4.3.1 KPIs



Figure 60: Billing KPIs

The KPIs available on Billing page are:

KPI	Definition
#Bills	Total number of bills
#Bill Cycles	Total number of bill cycles
#Bill Segments	Total number of bill segments
Variation From Last Month	Percentage variation in #bills from the previous month
Variation From Last Year	Percentage variation in #bills from the same month of previous year

The Variation from Last Month field includes  or  icon to indicate if the variation is positive or negative.

4.3.2 Billing Printable Report

This is an interactive report and you can drill down up to view a division's details.

Fields	
	<ul style="list-style-type: none"> • Division • Bill Cycle • #Customers • #Accounts • #Bills • #Bill Segments • #Generated Bills • #Error Bills • #Negative Bills • #Zero Bills • > Threshold Bills • #Reviewed Bills • Billed Amount (Click on the value to drill-down further.) • Average Bill Amount

	<ul style="list-style-type: none"> Variation From Last Month
--	---

Click on the Billed Amount to drill down the report to see the division-wise spread of the billed amount.

4.4 Effectiveness Page

The Billing Dashboard - Effectiveness page provides an indicator on the effectiveness of the overall Billing operations. It provides a Billing Operations Analyst with the following key information:

- What is the effectiveness of the overall Billing Operations?
- Is there a drop in effectiveness over a specific period in time?
- What is the average count of Bill Segments that are frozen in a day?
- How does Billing Effectiveness vary across different Billing Cycles

The dashboard filters available on Effectiveness page of Billing Dashboard are:

- Year
- Month
- Division
- Bill Cycle

4.4.1 KPIs



Figure 61: Bill Cycle KPIs

The KPIs available on the Effectiveness page are:

KPI	Definition
#Segments	Number of bill segments
#Frozen In Window	Number of bill segments frozen within the window
#Frozen Out Window	Number of bill segments frozen outside the window
Variation from Last Month	Percentage variation in #Segments from previous month

The Variation from Last Month field includes or icon to indicate if the variation is positive or negative.

4.4.2 Best N Bill Cycles

The 'Best N Bill Cycles' analysis is a table list that shows the top N bill cycles arranged in the descending order of effectiveness.

Best 10 BillCycles

Rank	Bill Cycle	Total Segments	#Frozen In Window	#Frozen Out Window	Bill Cycle Effectiveness(%)
1	Monthly Schedule 5	418	384	34	92
2	Monthly Schedule 3	418	365	53	87
3	Monthly Schedule 1	418	354	64	85
4	Monthly Schedule 2	418	352	66	84
5	Monthly Schedule 4	418	338	80	81

Figure 62: Best N Bill Cycles

Fields	Explanation
Rank	Ranking based on bill cycle effectiveness
Bill Cycle	Name of the billing cycle
Total Segments	Total number of bill segments
#Frozen In Window	Number of bill segments frozen within the window
#Frozen Out Window	Number of bill segments frozen outside the window
Bill Cycle Effectiveness (%)	Calculated as $[(\text{\#Frozen In Window}) \div (\text{Total Segments})] \times 100$

4.4.3 Worst N Bill Cycles

The 'Worst N Bill Cycles' analysis is a table list that shows the worst N bill cycles arranged in the ascending order of effectiveness.

Worst 10 BillCycles

Rank	Bill Cycle	Total Segments	#Frozen In Window	#Frozen Out Window	Bill Cycle Effectiveness(%)
1	Monthly Schedule 4	418	338	80	81
2	Monthly Schedule 2	418	352	66	84
3	Monthly Schedule 1	418	354	64	85
4	Monthly Schedule 3	418	365	53	87
5	Monthly Schedule 5	418	384	34	92

Figure 63: Worst N Bill Cycles

Fields	Explanation
Rank	Ranking based on bill cycle effectiveness
Bill Cycle	Name of the billing cycle
Total Segments	Total number of bill segments
#Frozen In Window	Number of bill segments frozen within the window
#Frozen Out Window	Number of bill segments frozen outside the window
Bill Cycle Effectiveness (%)	Calculated as $[(\text{\#Frozen In Window}) \div (\text{Total Segments})] \times 100$

4.4.4 Effectiveness Trend

The 'Effectiveness Trend' analysis is a line chart that shows the trend of bill cycle effectiveness over the last 12 months.

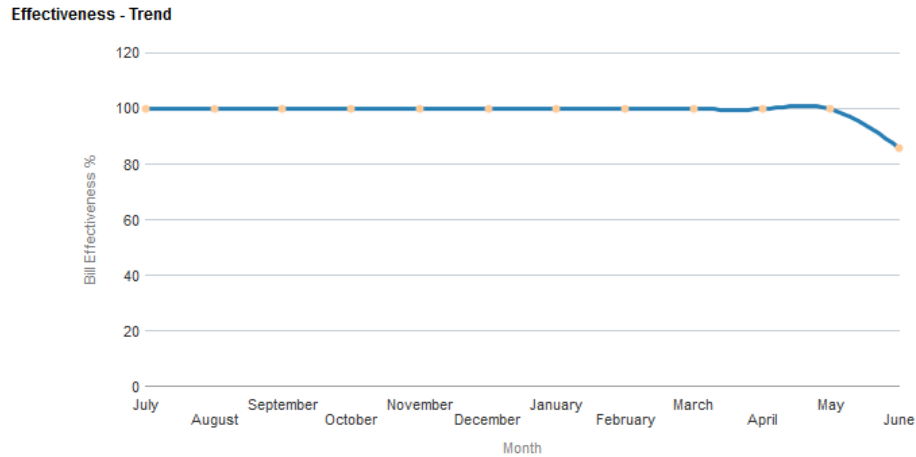


Figure 64: Effectiveness - Trend

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	Bill cycle effectiveness percentage

4.4.5 Bill Cycle Effectiveness

The 'Bill Cycle Effectiveness' analysis is a bar chart that shows the percentage effectiveness of each bill cycle, along with a line showing the count of bill segments in each bill cycle.

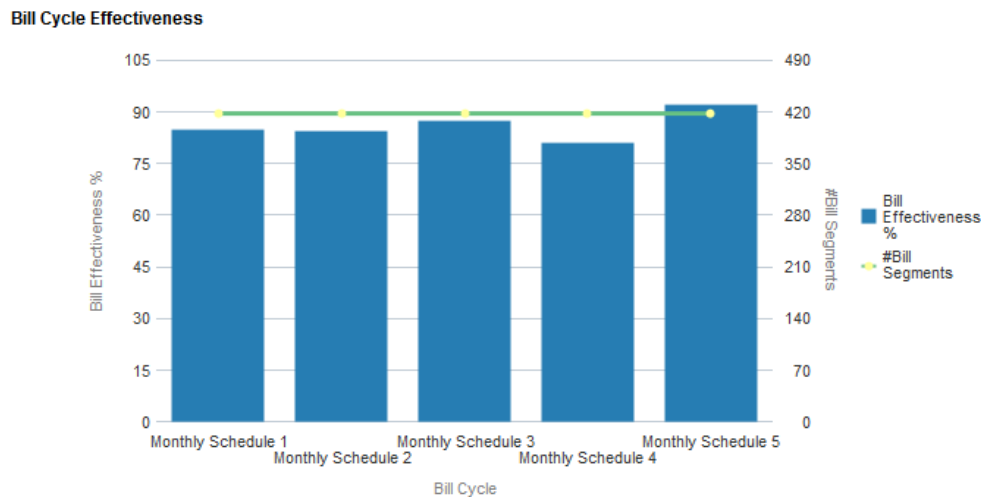


Figure 65: Bill Cycle Effectiveness

Axes	What it shows?
X axis	Bill cycles
Y axis	<ul style="list-style-type: none"> Bill cycle effectiveness of each bill cycle

- Number of bill segments in each bill cycle

4.4.6 #Segments Frozen Each Day

The '#Segments Frozen Each Day' analysis is a bar chart that shows the number of bill segments that are frozen on each day of the month.

#Segments Frozen Each Day

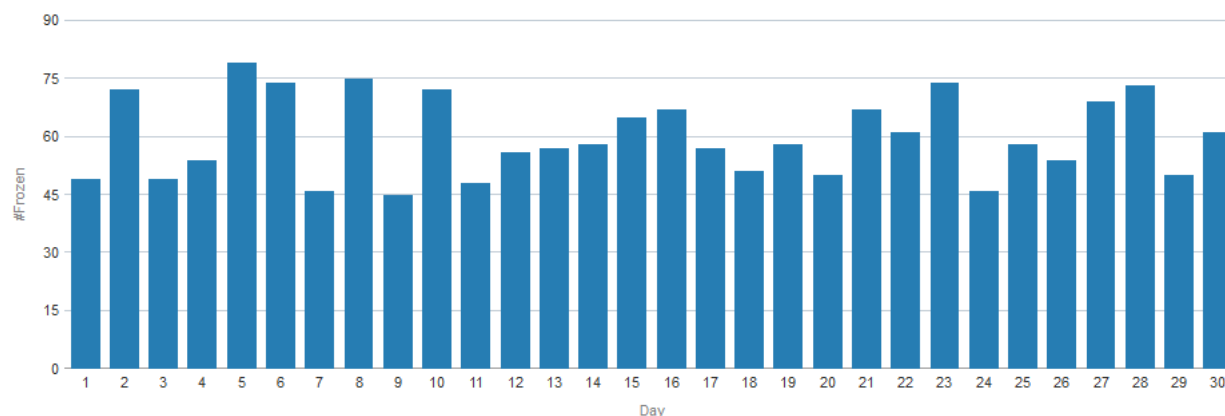


Figure 66: #Segments Frozen Each Day

Axes	What it shows?
X axis	Each day of the selected month
Y axis	Number of bill segments frozen on each day of the month

4.5 Errors Page

The Billing Errors Page provides details on the various Billing related errors over a specific period. It provides some vital business insights including:

- What are the top 20% of reasons which contributes to over 80% of the Billing Errors? Does this mandate a change in the Billing Process?
- Is there a co-relation between Bill Errors to a particular Customer Business cycle?

The dashboard filters available on Errors page of Billing Dashboard are:

- Year
- Month
- Bill Cycle



4.5.1 KPIs



Figure 67: Error KPIs

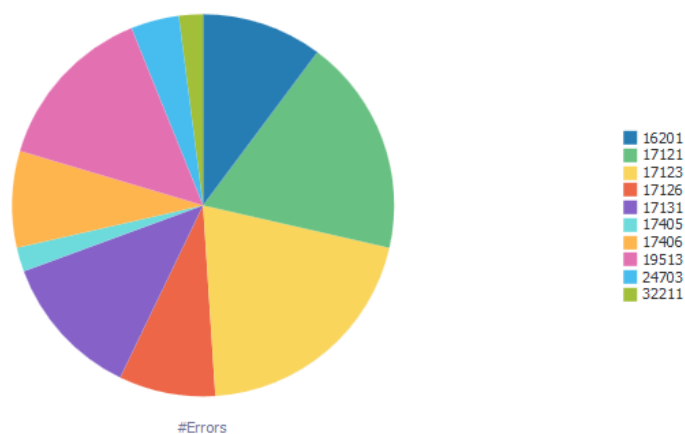
The KPIs available on Errors page are:

KPI	Definition
#Errors	Number of errors reported
#Bill Errors	Number of bills with errors
#Segment Errors	Number of bill segments with errors
Variation From Last Month	Percentage variation of errors from the previous month

The Variation from Last Month field includes  or  icon to indicate if the variation is positive or negative.

4.5.2 Bill Errors By Reason

The Bill Errors By Reason analysis contains a pie chart and a table list. The pie chart shows the spread of errors (count and percentage) across various reasons (error codes), whereas the table lists the errors and the number of occurrences.

Bill Errors By Reason**Figure 68: Bill Errors By Reason Pie Chart**

Error Code	Error	#Errors
16201	Bill is not the latest bill of the account.	5
17121	Bill segment in error was created.	9
17123	Bill segments were deleted.	10
17126	Bill segments were canceled.	4
17131	Bill segments were not successfully re-billed	6
17405	Bill ID is missing.	1
17406	Bill Date is missing.	4
19513	In order to issue a credit note: 1. Bill segment should be frozen and 2. Corresponding bill should be completed	7
24703	Bill date must be on or later than original bill date.	2
32211	Bill Factor Value Type is invalid.	1

Figure 69: Bill Errors By Reason List

Fields	Explanation
Error Code	Unique identifier of the error
Error	Description of the error
#Errors	Number of occurrences of the error

Note: Click on the chart or an error code in the table list to view the drilled-down details. This opens the Billing printable report, filtered to display the selected error code details.

4.5.3 #Errors Each Day

The #Errors Each Day analysis is a line chart that shows the number of errors occurring on each day of the month.

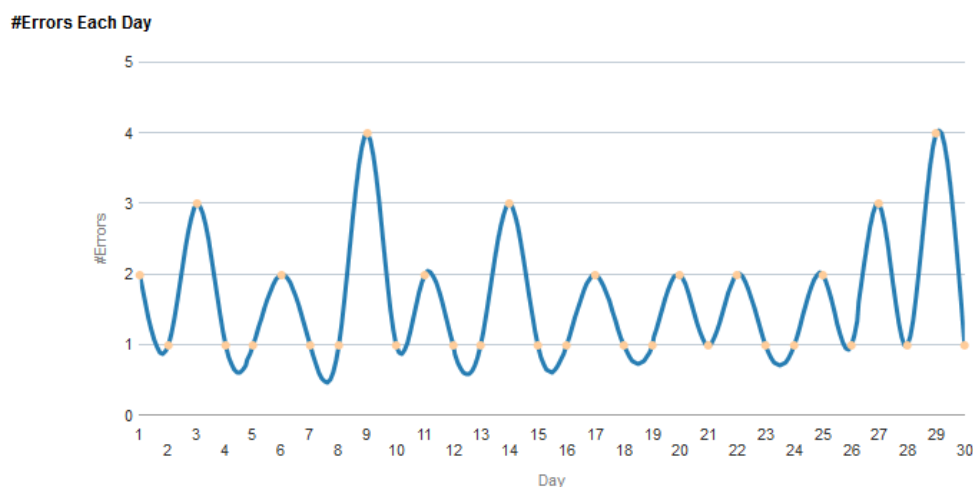


Figure 70: #Errors Each Day

Axes	What it shows?
X axis	Days of the selected month
Y axis	Number of errors on each day

4.5.4 #Errors Trend

The #Errors Trend analysis is a line chart that shows the trend of errors during the last 12 months.

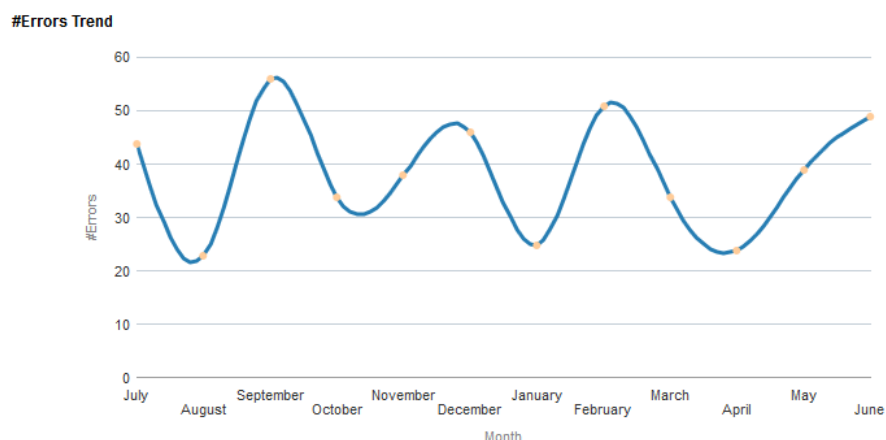


Figure 71: #Errors Trend

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	Number of errors that occurred on each month

4.6 Write Off Page

The Billing Dashboard Write-Off Page provides a summary of the Bill Write-Offs over a certain period. The information provided as part of this dashboard page can be used to derive the following insights:

- Which are the customers that have contributed to the highest number of Write-Offs
- Is there an observable trend in Bill Write-Offs over a period in time
- Which Adjustment and Contract Types have contributed more to the Bill Write-Offs
- What are the top reasons for a Bill Write-Off? How many Write-Offs have been approved in a month?
- Which of the Divisions have witnessed the maximum Bad Debt Write-Offs?

The dashboard filters available on Write-Off page of Billing Dashboard are:

- Month
- Year
- Division

4.6.1 KPIs



Figure 72: Write Offs KPIs

The KPIs available on Write Off page are:

KPI	Definition
#Write Offs	Number of write-offs
Write Off	Total write-off amount
Variation From Last Month	Percentage variation in write-offs from previous month
Variation From Last Year	Percentage variation in write-offs from the same month of previous year

The Variation from Last Month and Year fields include  or  icon to indicate if the variation is positive or negative.

4.6.2 Top N Write Offs

The Top N Write Offs analysis is a table list that shows the customers with highest write-off amount.

Top 10 Writeoffs

Rank	Customer	Amount
1	ABC Munich	\$217.24
2	ITC Wellington	\$216.60
3	ITC Frankfurt	\$211.56
4	ABC Canberra	\$201.44
5	ABC Melbourne	\$199.20
6	Amanda Berry	\$184.16
7	ITC California	\$180.00
8	ITC Trivandrum	\$171.72
9	CBA Newyork	\$96.48
10	ITC Sydney	\$91.08

Figure 73: Top N Writeoffs

Note: Click on a customer to view the drilled-down write-off details. This opens the Write Off printable report, filtered to display the customer's details.

4.6.3 Write Off Trend

The Write-Off Trend analysis is a bar chart that shows the trend of write-offs during the last 12 months. You can see the distribution of write offs across Adjustment Types or Customer Segments or Contract Types as stacked bars for each month.

Write-off Trend

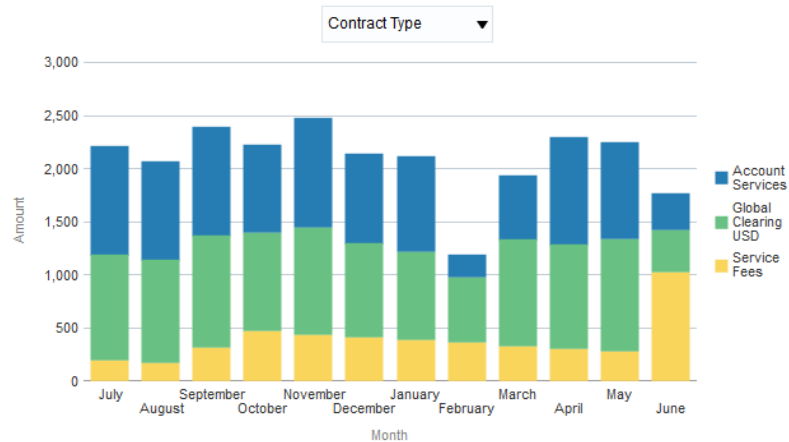


Figure 74: Write Off Trend

Axes	What it shows?
X axis	Month Shows the last 12 months
Y axis	<ul style="list-style-type: none"> Write off amount against each Adjustment Type Write off amount against each Customer Segment Write off amount against each Contract Type

Note:

Select Adjustment Type / Customer Category / Contract Type from the drop-down to view the distribution of write-off amount for a month.

Click on a stacked bar to drill-down and view the details.

4.6.4 Write Off By Type

The Write Off By Type analysis is a table list that shows the write-off amount against each division. Write-offs are categorized into Bad Debt and Petty Write-off.

Write-off By Type

Division	Bad Debt	Petty Writeoff
Equities	\$93.78	\$93.78
Funds	\$197.86	\$197.86
Interest Rate Securities	\$208.22	\$208.22
Structured Product	\$209.02	\$209.02
Trade Reporting	\$175.86	\$175.86
Grand Total	\$884.74	\$884.74

Figure 75: Write Off By Type

Note: Click on the bad debt/petty write-off amount against a division to view the drilled-down details. This opens the Write Off printable report, filtered to display the bad-debt or petty write-off details of the selected division.

4.6.5 Write Off By Status

The Write Off By Status analysis is a table list that shows a division's write-off amount distributed against different status.

Write-off By Status

Division	Approved	Cancelled	Generated	Rejected
Equities	\$91.08		\$96.48	
Funds	\$211.56		\$184.16	
Interest Rate Securities		\$199.20		\$217.24
Structured Product	\$216.60		\$201.44	
Trade Reporting		\$171.72		\$180.00
Grand Total	\$519.24	\$370.92	\$482.08	\$397.24

Figure 76: Write Off By Status

Note: Click on the amount (Approved / Cancelled / Generated / Rejected) to view the drilled-down details. This opens the Write Off printable report, filtered to display the write-off details of the selected division.

4.6.6 Write-Off Printable Report

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Customer Segment • Adjustment Type
Fields	<ul style="list-style-type: none"> • Division • Customer Segment • Customer • Account • Adjustment Type • Request Id • Reason • Type • Status • Entity Id • Remarks

	<ul style="list-style-type: none"> • Currency • Amount
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4.7 Refund Page

The Billing Dashboard – Refund Page offers a summary of Bill Refund related information. It enables the business to keep a track of all Refunds initiated over a certain period and the extent of refunds across each of the customers as well. Some of the key billing insights that can be derived from this page includes:

- Is there any unusual spike in refunds observed over a certain period/for a certain customer?
- Which are the customers that have witnessed the highest number and value of refunds?
- Is there a particular Adjustment type/Contract type that has witnessed higher amounts of refunds?
- What is the division wise spread of refund amounts? Is there a division that has witnessed higher % of refunds?
- What are the top reasons for Bill Refunds?

The dashboard filters available on Refund page of Billing Dashboard are:

- Month
- Year
- Division

4.7.1 KPIs



Figure 77: Refund KPIs

The KPIs available on Refund page are:

KPI	Definition
#Refunds	Number of refunds
Refund Amount	Total refund amount
Variation From Last Month	Percentage variation in refunds from previous month
Variation From Last Year	Percentage variation in refunds from the same month of previous year

The Variation from Last Month and Year fields include  or  icon to indicate if the variation is positive or negative.

4.7.2 Top N Refunds

The Top N Refunds analysis is a table list that shows the customers with highest refund amount.

Top 10 Refunds

Rank	Customer	Amount
1	ABC Munich	\$610.76
2	ABC Canberra	\$597.46
3	ITC Wellington	\$596.74
4	ABC Melbourne	\$595.92
5	ITC Frankfurt	\$593.42
6	Amanda Berry	\$592.10
7	ITC California	\$507.66
8	ITC Trivandrum	\$506.94
9	CBA Newyork	\$270.06
10	ITC Sydney	\$269.34

Figure 78: Top N Refunds

Note: Click on a customer to view the drilled-down refund details. This opens the Refund printable report, filtered to display the customer's details.

4.7.3 Refund Trend

The Refund Trend analysis is a stacked bar chart that shows the trend of refunds during the last 12 months. You can see the distribution of refunds across Adjustment Types or Customer Segments or Contract Types as stacked bars for each month.

Refund Trend

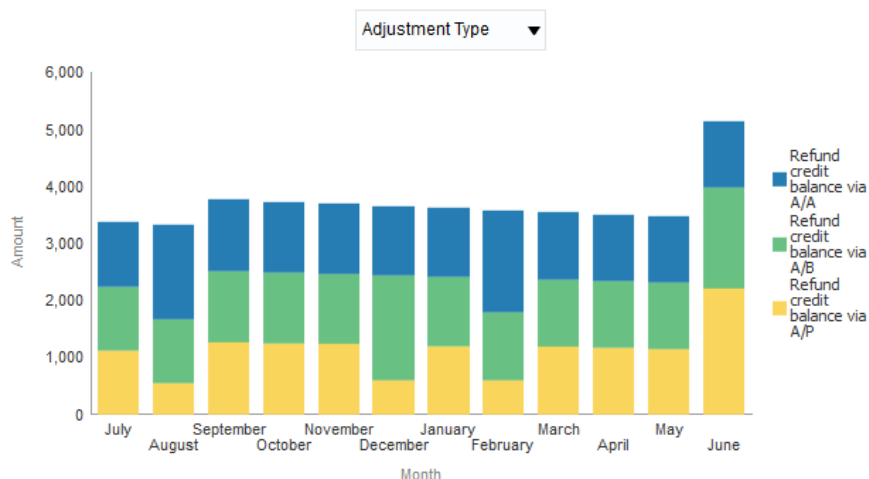


Figure 79: Refund Trend

Axes	What it shows?
X axis	Month Shows the last 12 months
Y axis	<ul style="list-style-type: none"> Refund amount against each Adjustment Type

	<ul style="list-style-type: none"> Refund amount against each Customer Segment Refund amount against each Contract Type
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Note:

Select Adjustment Type / Customer Category / Contract Type from the drop-down to view the distribution of refund amount for a month.

Click on a stacked bar to drill-down and view the details.

4.7.4 Refund By Reason

The Refund By Reason analysis is a table list that shows the refund amount against each division. Refunds are categorized into various reasons.

Refund By Reason

Division	Credit Adjustments	Credit Bill Segments	Credit Bills	Excess Payment	Others	Suspended Payment
Equities	\$93.78	\$83.46	\$74.10	\$117.30	\$105.06	\$65.70
Funds	\$197.86	\$193.14	\$209.38	\$195.02	\$203.54	\$186.58
Interest Rate Securities	\$208.22	\$204.78	\$202.30	\$197.98	\$192.62	\$200.78
Structured Product	\$209.02	\$199.82	\$191.58	\$190.30	\$199.18	\$204.30
Trade Reporting	\$175.86	\$159.78	\$144.66	\$210.90	\$192.90	\$130.50
Grand Total	\$884.74	\$840.98	\$822.02	\$911.50	\$893.30	\$787.86

Figure 80: Refund By Reason

Note: Click on the refund amount against a division to view the drilled-down details. This opens the Refund printable report, filtered to display the refund details of the selected division, under the selected reason.

4.7.5 Refund By Status

The Refund By Status analysis is a table list that shows a division's refund amount distributed against different status.

Refund By Status

Division	Approved	Cancelled	Rejected	Settled
Equities	\$270.06		\$269.34	
Funds	\$592.10		\$593.42	
Interest Rate Securities		\$595.92		\$610.76
Structured Product	\$1,194.20			
Trade Reporting		\$506.94		\$507.66
Grand Total	\$2,056.36	\$1,102.86	\$862.76	\$1,118.42

Figure 81: Refund By Status

Note: Click on the amount (Approved / Cancelled / Rejected / Settled) to view the drilled-down details. This opens the Refund printable report, filtered to display the refund details of the selected division.

4.7.6 Refund Printable Report

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Customer Segment • Adjustment Type
Fields	<ul style="list-style-type: none"> • Division • Customer Segment • Customer • Account • Adjustment Type • Request ID • Refund Reason • Entity Id • Status • Currency • Refund Amount

4.8 Cancellations Page

The Billing Dashboard – Cancellations Page offers a summary of Bill cancellation related information. A list of key data points provided as part of this dashboard page is given below:

- Number of cancellations and corresponding value for a certain month/division
- Trend of Bill Cancellations over a twelve month period
- Customers with the highest level of cancellations

The dashboard filters available on Cancellations page of Billing Dashboard are:

- Month
- Year
- Division

4.8.1 KPIs

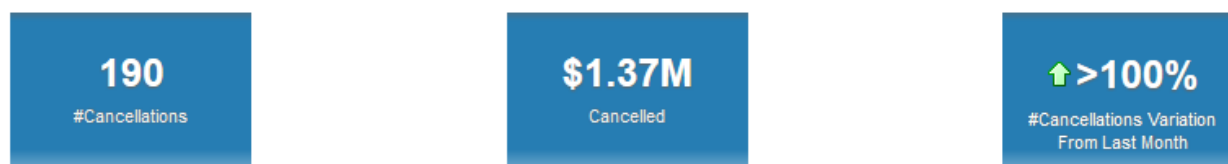




Figure 82: Cancellations KPIs

The KPIs available on Cancellations page are:

KPI	Definition
#Cancellations	Number of cancellations
Cancelled	Total cancelled amount
#Cancellations Variation From Last Month	Percentage variation of cancellation from previous month

The Variation from Last Month field includes  or  icon to indicate if the variation is positive or negative.

4.8.2 Cancellations Trend

The Cancellations Trend analysis is a line chart that shows the trend of cancellation amount for the last 12 months.

Cancellations Trend

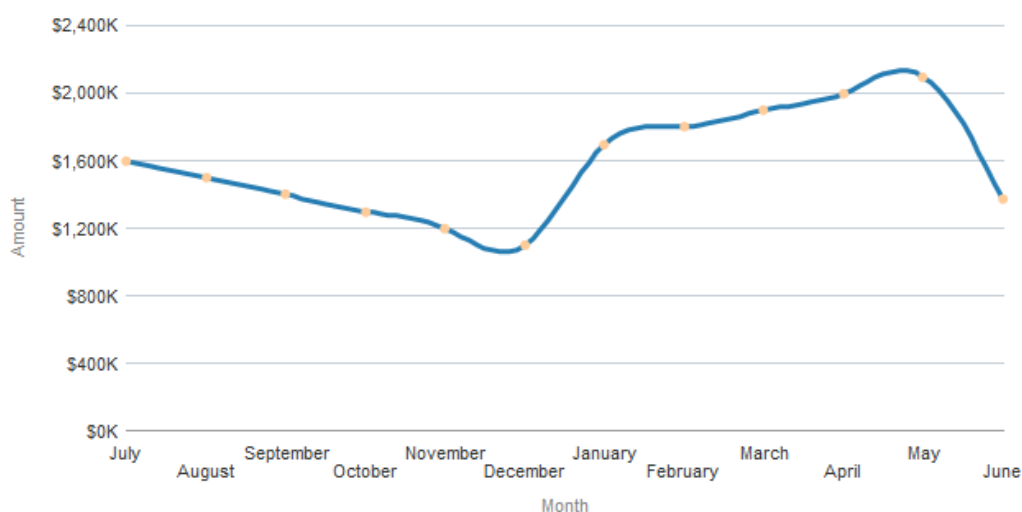


Figure 83: Cancellations Trend

Axes	What it shows?
X axis	Month Shows the last 12 months
Y axis	Amount Shows the cancellation amount of each month

4.8.3 Top 10 Cancellations

The Top 10 Cancellations analysis is a table list that shows the customers with highest cancellation amount.

Top 10 Cancellations

Rank	Customer	Amount
1	ITC Frankfurt	\$161,132.70
2	ITC California	\$157,150.82
3	ABC Melbourne	\$151,659.75
4	ABC Munich	\$137,841.00
5	ITC Wellington	\$136,771.18
6	Amanda Berry	\$134,265.46
7	ITC Sydney	\$133,992.31
8	ABC Canberra	\$128,014.67
9	ITC Trivandrum	\$125,342.76
10	CBA Newyork	\$106,982.77

Figure 84: Top N Cancellations

Note: Click on a customer to view the drilled-down details. This opens the Cancellations printable report, filtered to display the selected customer's cancellation details.

4.8.4 Cancellations Printable Report

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Product
Fields	<ul style="list-style-type: none"> • Division • Contract Type • Customer Segment • Customer • Product • Account • Bill Id • Bill Segment Id • Amount in Corporate Currency • Last Month Amount • Variation From Last Month

5. Contracts Dashboard

5.1 Overview of the dashboard

Contracts dashboard provides an overview of the various customer service contracts including various performance measures like proposal win/loss ratios, revenue projections vs actuals and inactive contracts. This dashboard is typically aimed at Business Managers within the Sales and Contracts organizations.

The Contracts dashboard contains two pages – Summary and Trends.

5.2 Summary Page

The Contracts Summary page provides a snapshot of contractual performance across the enterprise and provides a Business User with the following valuable insights:

- Net Contractual Churn
- Incremental Contract additions from Previous Month as a %
- Which are the Top/Bottom 10 Contracts by revenue share?
- Which Division has witnessed maximum New Contract additions?
- Which Customer Segment contributes more in terms of New Contract additions?
- Which Contract types have witnessed the maximum uptake over a period?

5.2.1 KPIs

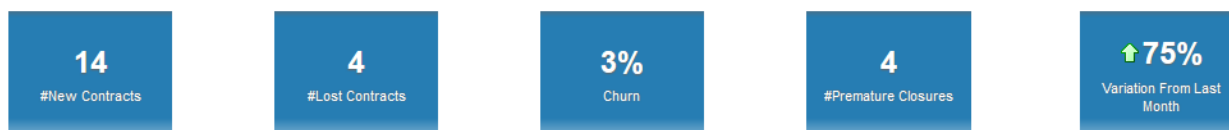




Figure 85: Contracts KPIs

The KPIs available on the Summary page are:

KPI	Definition
#New Contracts	Number of contracts opened in the selected month and year
#Lost Contracts	Number of contracts terminated in the selected month and year
Churn	Attrition of contracts in the selected month and year Churn % = (Number of contracts lost ÷ Total number of active contracts) × 100
#Premature Closures	Number of contracts opened and closed within the selected month
Variation From Last Month	Percentage variation of new contracts from the previous month

Note: You can see  or  icons to indicate if the KPI has a positive variation or a negative variation from the previous month.

5.2.2 Top N Contracts

The 'Top N Contracts' analysis is a table list that shows you the top N contracts who bring in the highest revenue.

Top 10 Contracts

Rank	Customer	Amount
1	CUST09	\$2,023,341.67
2	CUST07	\$2,015,442.60
3	CUST02	\$2,014,723.75
4	CUST08	\$2,013,549.00
5	CUST10	\$2,011,682.83
6	CUST06	\$2,010,335.31
7	CUST01	\$1,994,173.46
8	CUST05	\$1,974,959.67
9	CUST03	\$1,799,428.29
10	CUST04	\$1,774,419.36
Grand Total		\$19,632,055.94

Figure 86: Top N Contracts

The table list shows the following fields:

Fields	Explanation
Rank	Rank based on the revenue
Customer	Name of the customer
Amount	Revenue of the customer in the selected month and year, displayed in corporate currency
Grand Total	The total revenue received from the listed N customers during the selected month and year, displayed in corporate currency.

5.2.3 Bottom N Contracts

The 'Bottom N Contracts' analysis is a table list that shows you the bottom N customers who bring in the least revenue.

Bottom 10 Contracts

Rank	Customer	Amount
1	CUST04	\$1,774,419.36
2	CUST03	\$1,799,428.29
3	CUST05	\$1,974,959.67
4	CUST01	\$1,994,173.46
5	CUST06	\$2,010,335.31
6	CUST10	\$2,011,682.83
7	CUST08	\$2,013,549.00
8	CUST02	\$2,014,723.75
9	CUST07	\$2,015,442.60
10	CUST09	\$2,023,341.67
Grand Total		\$19,632,055.94

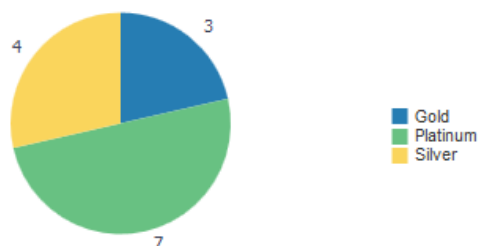
Figure 87: Bottom N Contracts

The table list shows the following fields:

Fields	Explanation
Rank	Rank based on the revenue
Customer	Name of the customer
Amount	Revenue of the customer in the selected month and year, displayed in corporate currency
Grand Total	The total revenue received from the listed N customers during the selected month and year, displayed in corporate currency.

5.2.4 Breakdown By Segments

The 'Breakdown By Segments' analysis is a pie chart that shows you the distribution of new contracts across different customer segments.

Breakdown By Segments**Figure 88: Breakdown By Segments**

The pie chart shows the number of active contracts against each customer segment.

5.2.5 Breakdown By Divisions

The 'Breakdown By Divisions' analysis is a pie chart that shows you the distribution of new contracts across different divisions of business.

Breakdown By Divisions

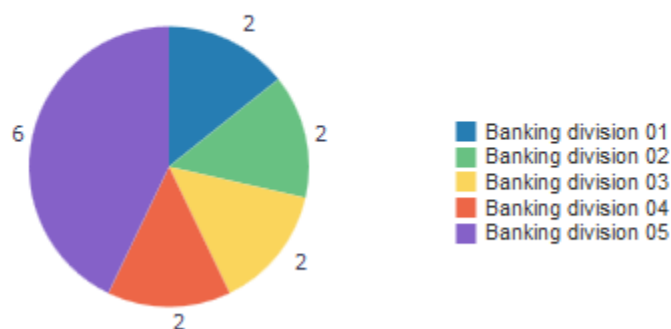


Figure 89: Breakdown By Divisions

The pie chart shows the number of active contracts against each division.

Note: The 'division' filter on the page does not apply on this analysis.

5.2.6 Breakdown By Contract Types

The 'Breakdown by Contract Types' analysis is a pie chart that shows you the distribution of new contracts across different types of contracts.

Breakdown By Contract Types

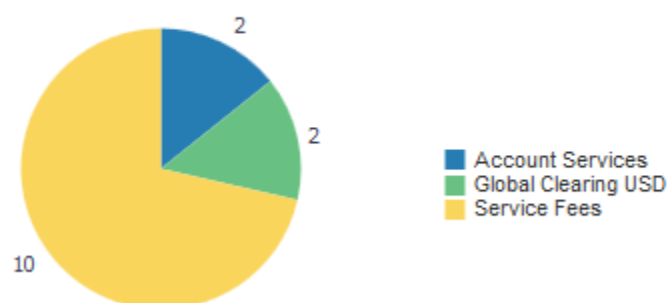


Figure 90: Breakdown By Contract Types

The pie chart shows the number of active contracts against each contract type.

5.2.7 Printable Report

The Summary page also includes a printable report called Contracts Printable Report. The various fields provided within the Printable Report include the following:

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Customer Segment • Contract Type
Fields	<ul style="list-style-type: none"> • Division • Contract Type • New Contracts • Lost Contracts • Open Contracts • Premature Closures • Accepted Proposals • Open Proposals • Declined Proposals • Inactive Contracts (Since 3 Months)

5.3 Trends Page

The Contracts Trends page provides a snapshot of historical performance and provides information on some of the following key aspects:

- Proposal Conversion efficiency
- Projected Revenue against actuals
- Trend of Net Churn over a period
- Inactive contracts by 30/60/90/180/180+ buckets

5.3.1 Win/Loss Trend

The 'Win/Loss Trend' analysis is a stacked bar chart that shows you the number of accepted proposals and declined proposals of each month, for a period of last 12 months.

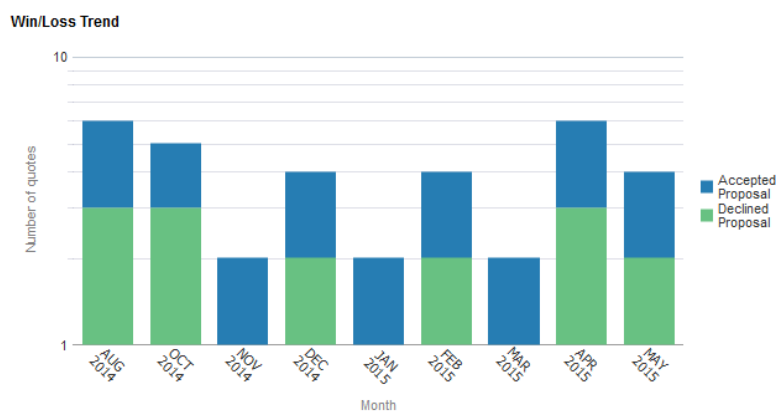


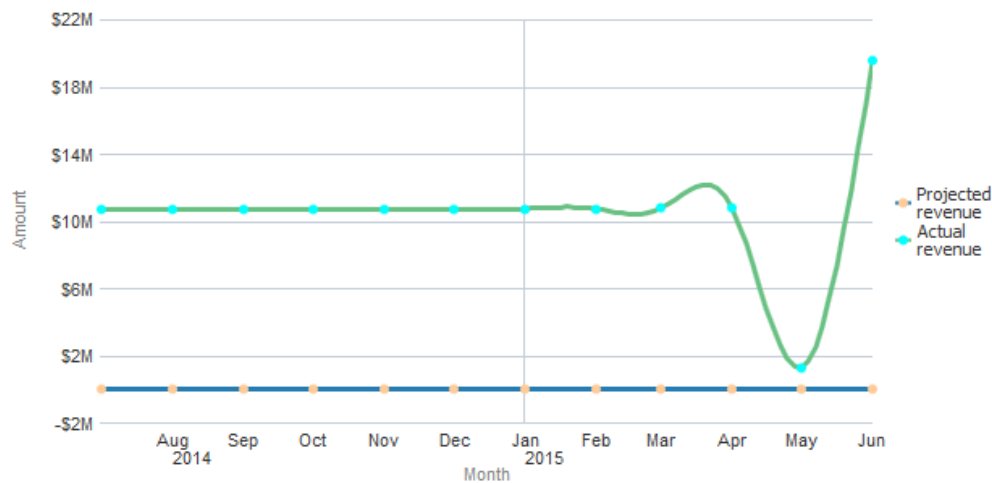
Figure 91: Win/Loss Trend

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	Number of proposals The stack bars indicate: <ul style="list-style-type: none"> Number of accepted proposals in the month Number of declined proposals in the month

Hovering over the bars in the graph, you can see the number of proposals (accepted or declined, depending on the line) during the month.

5.3.2 Revenue Trend – Projection vs Actual

The 'Revenue Trend – Projection vs Actual' analysis is a line graph that shows you the trend of projected revenue and actual revenue over the last 12 months.

Revenue Trend - Projection vs Actual**Figure 92: Revenue Trend – Projection vs Actual**

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	Amount (in corporate currency) indicating: <ul style="list-style-type: none"> Projected revenue Actual revenue

Hovering over the points in the graph, you can see the revenue (projected or actual, depending on the line) during the month.

5.3.3 Contract Trend

The 'Contract Trend' analysis is a line graph that shows you the trend of new contracts and lost contracts over the last 12 months.

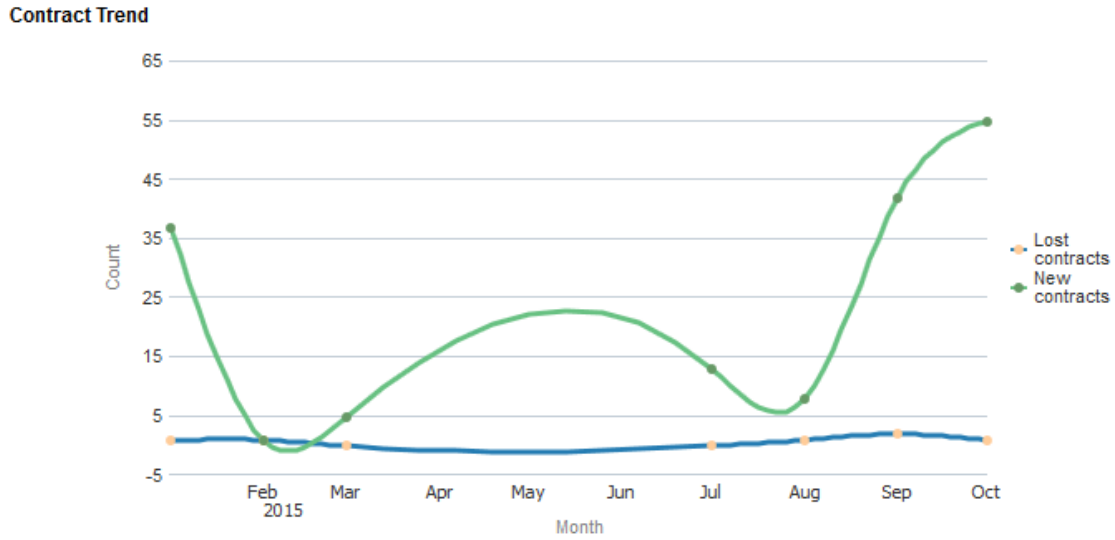


Figure 93: Contract Trend

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	Count of: <ul style="list-style-type: none"> Lost contracts New contracts

Hovering over the points in the graph, you can see the number of contracts (lost or created, depending on the line) during the month.

5.3.4 Inactive Contracts

The 'Inactive Contracts' analysis is a bar chart that shows you the number of contracts falling under different periods of inactivity.

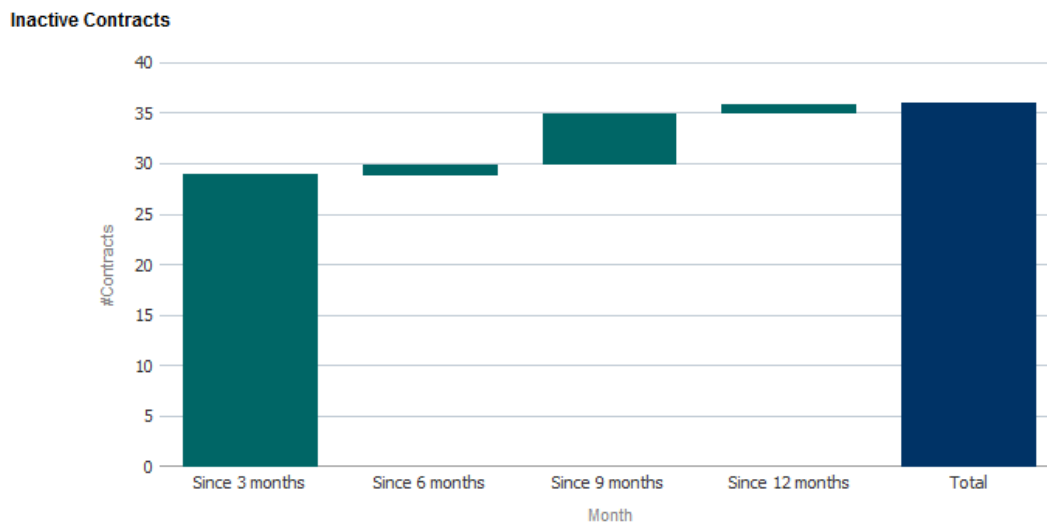


Figure 94: Inactive Contracts

Axes	What it shows?
X axis	<p>Period of inactivity:</p> <ul style="list-style-type: none">• Since 3 months• Since 6 months• Since 9 months• Since 12 months• Total <p>Period of inactivity is the duration for which there were no activities for the contract in the system.</p>
Y axis	<p>Number of inactive contracts in each period</p> <p>That is, if the analysis is done for April 2016, all contracts inactive since January will fall under 'Since 3 months' period.</p>

6. To-Do Dashboard

6.1 Overview of the dashboard

To-Do dashboard gives you an overview of the various To-Do task requests that were created within the source system. The dashboard provides details including the number of tasks created, tasks in progress, tasks in pending status, along with the overall backlog. It also provides a snapshot of the distribution of various to-do tasks by effort requirement, priority, type, days of the week and ageing.

This dashboard is primarily intended for the Operational Managers who can derive key insights required to drive initiatives to improve the overall operational efficiency of the business. The various dashboard pages can be filtered by a combination of Year and Month.

The To-Do dashboard contains three pages – Summary, Trends and Ranking.

6.2 Summary Page

The To-Do Summary page provides an operational snapshot of the Revenue Management and Billing organization and provides responses to the following key operational queries:

- Which are the top tasks (20%) that contribute to more than 80% of the total tasks list, back-logs?
- Where is the bottle-neck in terms of User Roles against which there are large back-logs?
- Task lifecycle statistics – including created, in backlog, pending, work in progress and completed
- Is there a pattern observed in the attribution of tasks by business divisions, priority, day of the week?

6.2.1 Metrics For Current Month

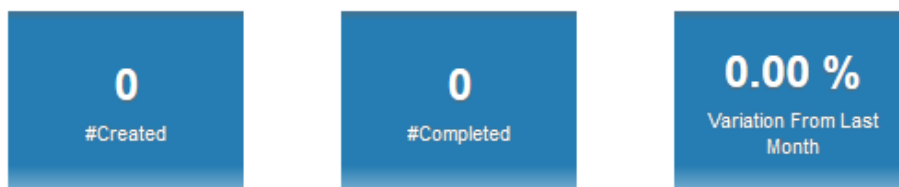




Figure 95: Metrics For Current Month

The metrics available for To-Do dashboard for the current month are:

KPI	Definition
#Created	Number of tasks created in the selected month and year
#Completed	Number of tasks that were completed during the selected month and year
Variation From Last Month	Percentage variation in number of new tasks created on the selected month and the previous month

Note: You can see  or  icons to indicate if the KPI has a positive variation or a negative variation from the previous month.

6.2.2 Metrics As On Start Of The Month

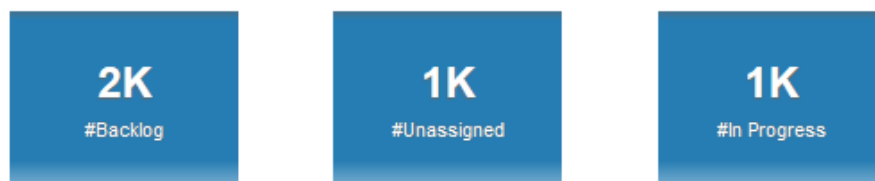


Figure 96: Metrics For Current Month

The metrics available for To-Do dashboard as on the start of the month are:

KPI	Definition
#Backlog	Number of tasks that are open, either assigned or unaassigned (#Unassigned + #In progress)
#Unassigned	Number of open tasks that are not yet assigned to staff
#In Progress	Number of tasks that are assigned to a staff and are in progress

6.2.3 Breakdown By Role

The 'Breakdown By Role' analysis is a table list that shows you the roles available in the system and the count of tasks in various status.

Breakdown By Role

To-Do Role	#Backlog	#Created	#Unassigned	#In Progress	#Completed
Approval workflow-Approver	2	0	2	0	0
Bill Error	1	0	1	0	0
CM PID Mapping Approval To Do Role	60	50	60	0	32
CM PID Mapping Approval To Do Role for Resolve	8	8	4	4	0
Case Management	5	0	5	0	0
Funding Submitter Test	0	1	0	0	1
INS Admin	10	0	7	3	0
In Admin	6	0	6	0	0
Maker for customer Info creation Modification and Resloution	4	0	3	1	0
Manager for Business Customer Level 1 Approvals	14	0	13	1	0
Manager for Individual Customer Level 1 Approvals	9	0	8	1	0
Manager for Pricing Override Level 1 Approvals	41	7	41	0	6
Manager for Standard Pricing Level 1 Approvals	62	14	60	2	4
Manual Reconciliation	3	0	1	2	0
Offset Submitter Role	0	7	0	0	7
Parameter	1	0	1	0	0
Pricing Analyst	4	0	4	0	0
Senior Manager for Business Customer Level 2 Approvals	2	0	2	0	0
System Default Role	1,976	1,005	1,023	953	12
System Role	18	0	12	6	0
Grand Total	2,226	1,092	1,253	973	62

Figure 97: Breakdown By Role

Fields	Explanation
To-Do Role	Role in the system
#Backlog	Number of tasks assigned to a role, that were created in previous months and are still open
#Created	Number of newly created tasks that are assigned to the role
#Unassigned	Number of tasks that are assigned to the role and are currently open
#In Progress	Number of tasks that are assigned to the role and are in progress
#Completed	Number of tasks that are assigned to the role and are completed
Grand Total	Shows the total #Backlog, #Created, #Pending, #In Progress and #Completed for all roles

6.2.4 Breakdown By Type

The 'Breakdown By Type' analysis is a table list that shows the types of tasks available in the system and the count of tasks in various status.

Breakdown By Type

To-Do Type	#Backlog	#Created	#Unassigned	#In Progress	#Completed
Adhoc Bill Errors	43	13	43	0	0
Adhoc Freeze and Complete Bill Errors	4	1	4	0	0
Adjustment Staging Control Errors	2	0	2	0	0
Adjustment Upload Request Approval	5	0	5	0	0
Adjustment Upload Staging Preprocessing Errors	8	0	8	0	0
Approval Work Flow Approver To Do	53	2	53	0	2
Approval Work Flow Resolve To Do	17	8	12	5	0
Approval Workflow-Invoice Construct Approver To Do	2	0	2	0	0
Auto pay amount over limit	8	8	8	0	0
Batch processing errors	1	0	0	1	0

Rows 1 - 10

Figure 98: Breakdown By Type

Fields	Explanation
To-Do Type	Type of tasks available in the system
#Backlog	Number of tasks of the type that were created in previous months and are still open
#Created	Number of newly created tasks that are of the type
#Unassigned	Number of open tasks that are of the type
#In Progress	Number of tasks of the type that are in progress

#Completed	Number of tasks of the type that are completed
------------	--

6.2.5 Breakdown By Priority

The 'Breakdown By Priority' analysis is a pie chart that shows the number of tasks of each priority level, in a selected status.

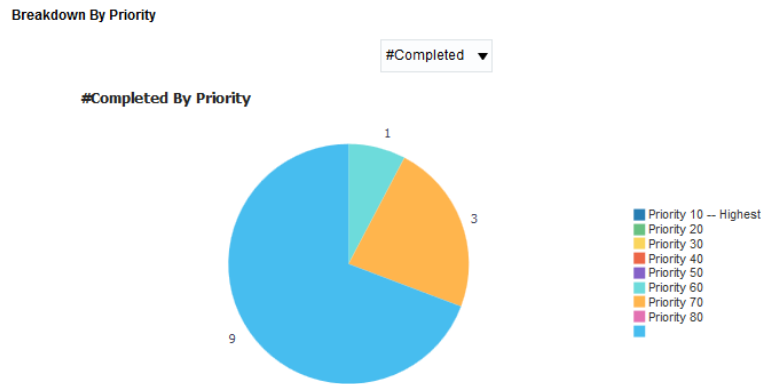


Figure 99: Breakdown By Priority

The pie chart has a drop-down to filter the results by task status. On selecting a status, the chart shows the number of tasks in the selected status, against each priority level.

6.2.6 Breakdown By Division

The 'Breakdown By Division' analysis is a pie chart that shows you the number of tasks created in each division, and is in a selected status.

Breakdown By Division

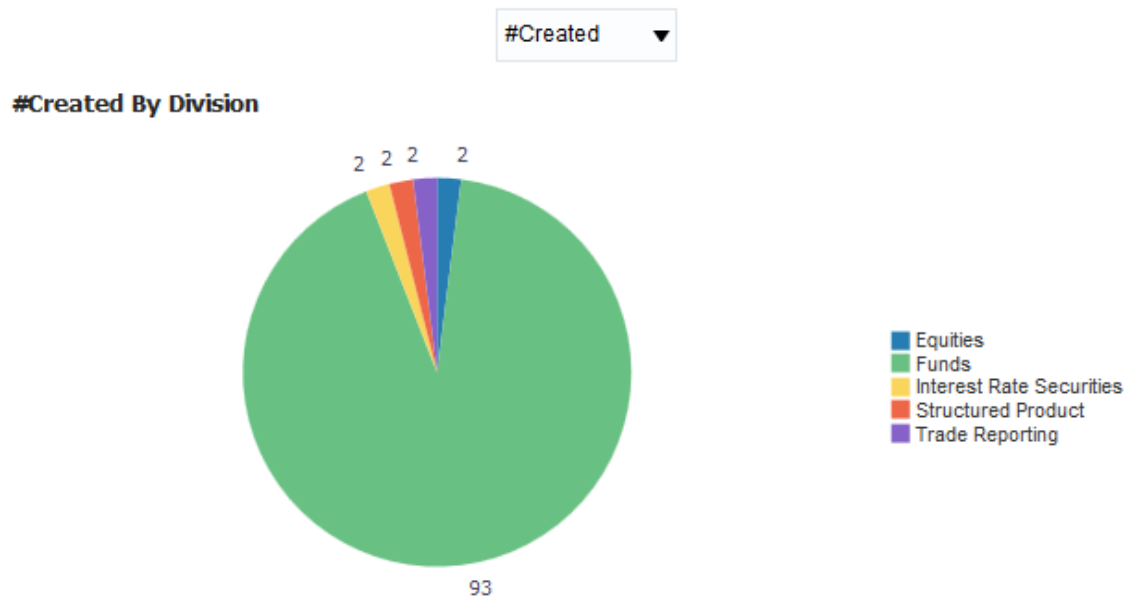


Figure 100: Breakdown By Division

The pie chart has a drop-down to filter the results by task status. On selecting a status, the chart shows the number of tasks in the selected status, against each priority level.

6.2.7 To-Do Entries By Day Of Week

The 'To-Do Entries By Day Of Week' analysis contains a table list and a bar chart that shows you the number of tasks created, assigned and completed on each day of the week.

To-Do Entries By Day Of Week

Day	#Created	#Assigned	#Completed
Sunday	0	0	0
Monday	101	1	0
Tuesday	0	0	10
Wednesday	0	10	0
Thursday	0	0	0
Friday	0	0	0
Saturday	0	0	0

Figure 101: To-Do Entries By Day of Week List

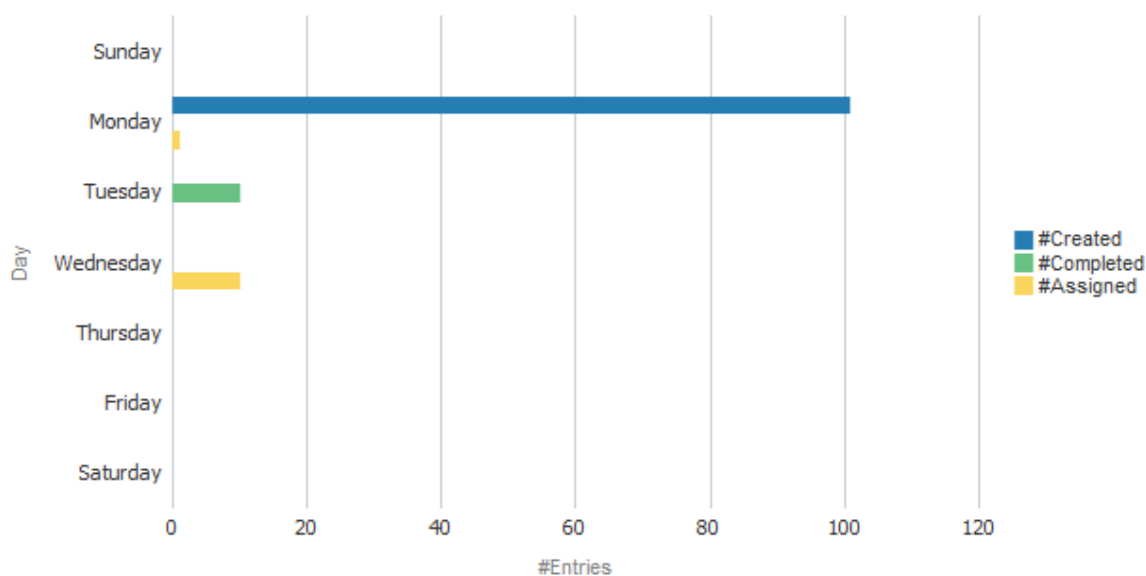


Figure 102: To-Do Entries By Day of Week Chart

Fields	Explanation
Day Of Week	Lists the days of a week
#Created	Number of tasks created on that day of the week
#Assigned	Number of tasks assigned on that day of the week
#Completed	Number of tasks completed on that day of the week

6.2.8 To-Do Printable Report

The Summary page also includes a printable report called To-Do Printable Report. The various fields in the To-Do Printable report are:

Filters	<ul style="list-style-type: none"> • Year • Month • Type • Priority • Role • Division
Fields	<ul style="list-style-type: none"> • Year • Month • Division • To-Do Type • Priority • Role • #Created • #Backlog • #In Progress • #Pending • #Completed

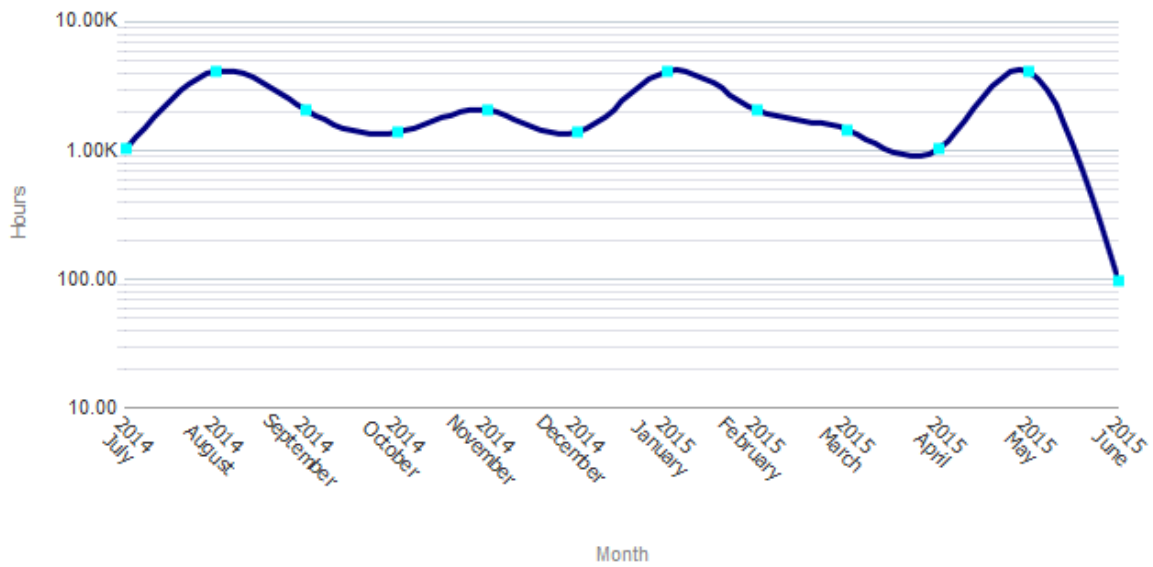
6.3 Trends Page

The To-Do Trends page provides a snapshot of operational performance across a period of time (trailing twelve months) on some of the following key areas:

- Average task resolution effort requirement in hours
- Tasks that contribute most to the backlog distributed by ageing bucket
- Incidence of a particular task (type) over the past 12 months to enable the adoption of a pro-active incident reduction method
- Incidence of a particular task (priority) over the past 12 months including the various lifecycle statistics (Created, Backlog, Pending etc.) to evaluate the efficiency of priority incident resolution workflows

6.3.1 Average Completion Duration

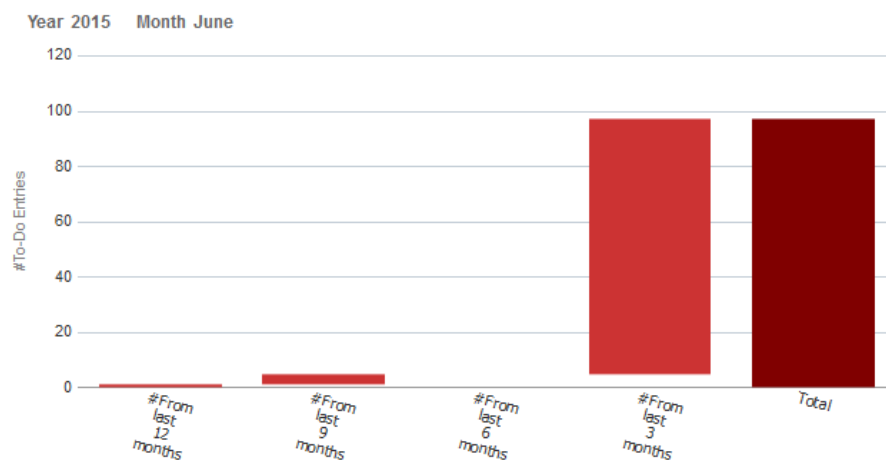
The 'Average completion Duration' analysis is a line chart that shows you the average number of hours taken for completing a task over the last 12 months (from the selected month and year).

Average Completion Duration**Figure 103: Average Completion Duration**

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	Average number of hours taken for completion of a task in the month, computed as: (Total hours spent on tasks in the month / Total number of tasks closed in the month) × 100

6.3.2 Aging Analysis

The 'Aging Analysis' analysis is a bar chart that shows you the number of to do entries that falls into an age group.

Aging Analysis**Figure 104: Aging Analysis**

The age is calculated from the month on which the task is created to the selected month and year.

Axes	What it shows?
X axis	Age groups The age groups available for the analysis are: <ul style="list-style-type: none"> • #From last 12 months • #From last 9 months • #From last 3 months • Total
Y axis	Number of tasks that fall into each age group

6.3.3 To Do Type Trend

The 'To-Do Type Trend' analysis consists of a table list and a bar chart. This gives a tabular and graphical representation of tasks of a selected To-Do Type.

To-Do Type ▼

▼

Figure 105: To-Do Type Filter

The table list displays the count of tasks (of selected task type) in each status along with the total number of hours spent on them. The data is consolidated month-wise.

The chart displays the count of tasks (of selected task type) in each status, stacked over one another, for the last 12 months. The chart also includes the total number of hours spent on tasks in each month.

Year	Month	To-Do type	#Backlog	#Created	#Unassigned	#In Progress	#Completed	Hours Spend
2015	December	Account Debt Monitor 2 Errors						
		Account Debt Monitor Errors						
		Accounts without bill cycle						
		Activate Auto-pay Batch Errors						
		Activate pending start/stop SA Errors						
		Activity Type Monitor Errors						
		Adhoc Bill Errors	22	6	22	0	0	0.00
		Adhoc Freeze and Complete Bill Errors						
		Adjustment Canceled						
		Adjustment Frozen						

Rows 1 - 10

Figure 106: To-Do Type Trend List

Fields	Explanation
To-Do Type (check box)	Select one or more To-Do Type and click Apply. This refreshes both table list and chart to show details of the selected task types.
Year	Year for which data is listed
Month	Month for which data is listed
To-Do Type	Type of task for which the data is listed
#Backlog	Number of tasks in 'backlog' status
#Created	Number of tasks in 'created' status
#Unassigned	Number of tasks that are currently 'open'
#In Progress	Number of tasks in 'in progress' status
#Completed	Number of tasks that are 'completed'
Hours Spent	Total number of hours spent on tasks

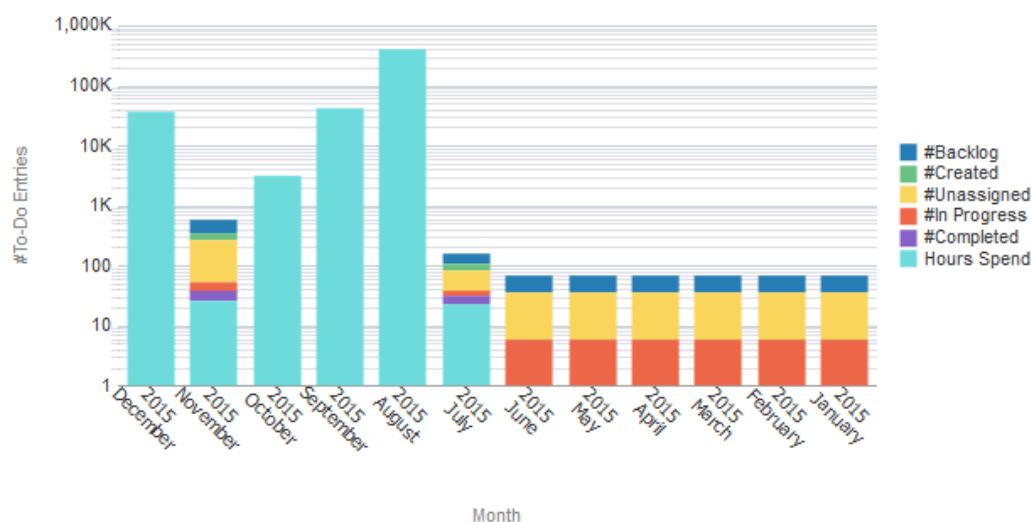


Figure 107: To-Do Trend

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	<ul style="list-style-type: none"> Number of tasks in each status, stacked over one another Total number of hours spent on tasks during the month

6.3.4 Priority Trend

The 'Priority Trend' analysis consists of a table list and a bar chart. This gives a tabular and graphical representation of tasks of a selected priority.

Year	Month	Priority	#Backlog	#Created	#Unassigned	#In Progress	#Completed	Hours Spend
2015	December	Priority 10 -- Highest	254	78	243	11	35	34,625.60
		Priority 20	1	0	1	0	0	0.00
		Priority 30						
		Priority 40	4	0	2	2	0	0.00
		Priority 50	7	4	5	2	2	0.07
		Priority 60						
		Priority 70	5	0	5	0	0	0.00
		Priority 80	744	742	744	0	0	0.00
		Priority 90 -- Lowest						

Rows 1 - 10

Figure 108: To-Do Priority List

The table list displays the count of tasks (of selected priority) in each status along with the total number of hours spent on them. The data is consolidated month-wise.

Fields	Explanation
Priority (check box)	Select one or more priorities and click Apply. This refreshes both table list and chart to show details of the selected priority level.
Year	Year for which data is listed
Month	Month for which data is listed
Priority	Priority of task for which the data is listed
#Backlog	Number of tasks in 'backlog' status
#Created	Number of tasks in 'created' status
#Pending	Number of tasks that are currently 'open'
#In Progress	Number of tasks in 'in progress' status
#Completed	Number of tasks that are 'completed'
Hours Spend	Total number of hours spent on tasks

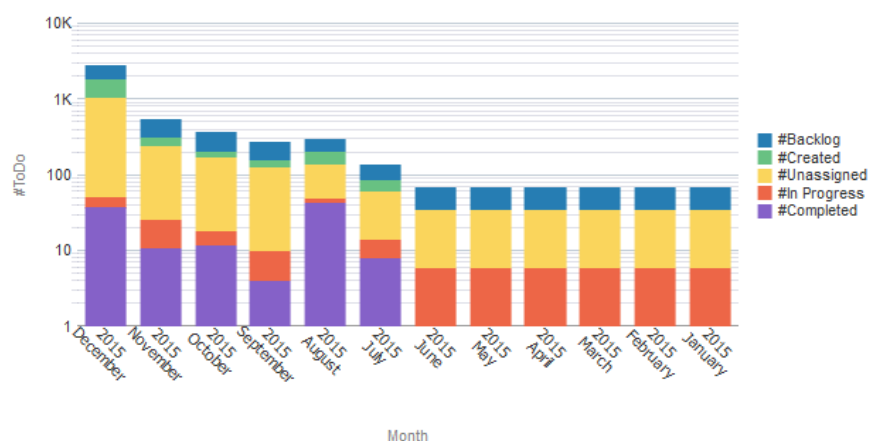


Figure 109: To-Do Priority Chart

The chart displays the count of tasks (of selected priority) in each status, stacked over one another, for the last 12 months. The chart also includes the total number of hours spent on tasks in each month.

Axes	What it shows?
X axis	Last 12 months (counting from the selected month and year)
Y axis	<ul style="list-style-type: none"> Number of tasks in each status, stacked over one another Total number of hours spent on tasks during the month

6.4 Ranking Page

The To-Do Rankings page gives a comparative view of the various tasks and effort requirement with some of the key comparisons including:

- Top Tasks by Completion/Resolution requirement (Hours)
- Top Tasks which have the highest completed To-Do entries
- Most Productive/Least Productive Service staff to arrive at staffing optimization decisions

6.4.1 Top N Tasks with Highest Completed To-Do Entries

The 'Top 10 Tasks with Highest Completed To-Do Entries' analysis is a table list that shows the tasks with highest number of To-Do entries in 'completed' status.

Top 10 Tasks With Highest Completed To-Do Entries

Rank	Task	#Completed
1	Business Object Code is required. Please select a valid Business Object Code.	17
2	Approval Workflow Request for Pricing Override Pending for Level 1 approval.	11
3	Approval Workflow Request for Individual Customer Pending for Level 1 approval.	7
4	Rejected approval transaction pending resolution	2

Figure 110: Top N Tasks With Highest Completed To-Do Entries

Fields	Explanation
Rank	The rank assigned to the task, based on the number of 'completed' To-Do entries.
Task	Description of the task
#Completed	Number of To-Do entries in the task that are in 'completed' status

6.4.2 Top N Tasks with Highest Completion Duration

The 'Top 10 Tasks with Highest Completion Duration' analysis is a table list that shows the tasks with highest duration against completed To-Do entries.

Top 10 Tasks with Highest Completion Duration

Rank	Task	Hours Spend
1	Approval Workflow Request for Pricing Override Pending for Level 1 approval.	26,884.06
2	Business Object Code is required. Please select a valid Business Object Code.	7,741.38

Figure 111: Top N Tasks with Highest Completion Duration

Fields	Explanation
Rank	The rank assigned to the task, based on the hours spent on 'completed' To-Do entries.
Task	Description of the task
Hours Spend	Number of hours spent on 'completed' To-Do entries of the task

6.4.3 Most Productive Staffs

The 'Most Productive Staffs' analysis lists the staff username in the descending order of their productivity, with the most productive staff topping the list.

Productivity is measured as [(Priority level/100)* completed hours]/number of To Do entries created.

Most Productive Staffs

User Name	Productivity
System, English	99.58
Banking, Admin	48.38
Grand Total	147.96

Figure 112: Most Productive Staffs

Fields	Explanation
User Name	Username of the staff
Productivity	Productivity score of the staff

6.4.4 Least Productive Staffs

The 'Least Productive Staffs' analysis lists the staff username in the ascending order of their productivity, with the least productive staff topping the list.

Least Productive Staffs

User Name	Productivity
Banking, Admin	48.38
System, English	99.58
Grand Total	147.96

Figure 113: Least Productive Staffs

Fields	Explanation
User Name	Username of the staff
Productivity	Productivity score of the staff

7. Transaction Feeds Dashboard

7.1 Overview of the dashboard

Transaction Feeds dashboard provides useful insights on the various inbound feeds and transactions on the source pricing and billing system. The dashboard offers a summary of transaction activity across business divisions including key statistics like feed status, number of valid vs invalid transactions and transaction errors. The information provided within the dashboard will help the business to identify and act on problematic product processors and also to estimate potential revenue leakage by way of unrealized transactions. This dashboard will be a key input to the Operational Managers with an aim to improve the efficiency of the overall transaction processing within the Pricing and Billing organization.

The Transaction Feeds dashboard contains four pages – Summary, Transaction, Feed and Error.

7.2 Summary Page

The Transactions Summary page offers a snapshot of all transaction activities over a certain period including key performance statistics like number of feeds and transactions, number of transaction and feed errors and transaction status. The dashboard also provides essential insights into:

- Problematic Product processors
- Summary of transaction activity across various divisions
- % of transaction errors

The dashboard filters available for the Transaction Feeds Dashboard include:

- Year
- Month
- Division

7.2.1 KPIs



Figure 114: Transaction Feeds KPIs

The KPIs available for Transaction Feeds dashboard are:

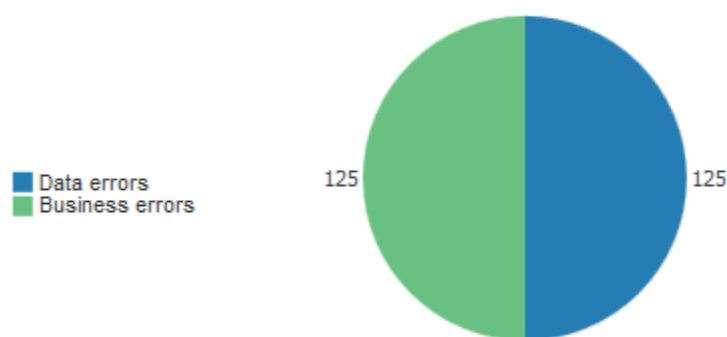
KPI	Definition
#Processed Transactions	Number of transactions generated in the selected month and year
#Unsuccessful Transactions	Number of transactions with error in the selected month and year
%Unsuccessful Transactions	Percentage of erroneous transactions, computed as: (#Error Transactions / #Transactions) × 100

#Feeds	Number of feeds (transaction files) received in the selected month and year
#Invalid Feeds	Number of invalid feeds (transaction files that we were unable to process) in the selected month and year
%Feed Errors	Percentage of erroneous feeds, computed as: $(\text{\#Invalid Feeds} / \text{\#Feeds}) \times 100$

7.2.2 Transaction Status

The 'Transaction Status' analysis is a pie chart that shows the count of data errors and business errors, along with the number of valid transactions.

Transaction Status



Valid transactions : 100

Figure 115: Transaction Status

7.2.3 Variations From Last Month

The 'Variations From Last Month' metrics shows the percentage variation of both errors and transactions in the selected month and year, from the previous month.

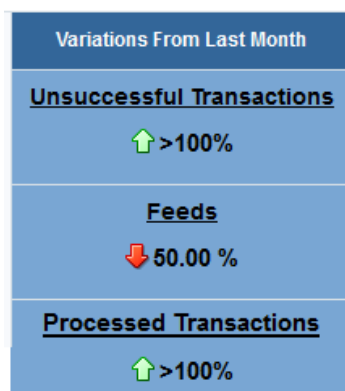


Figure 116: Variations From Last Month

Unsuccessful Transactions = (#Unsuccessful Transactions of selected month / #Unsuccessful Transactions of previous month)*100

Feeds =

Processed Transactions = (#Processed Txns of selected month / #Processed Txns of previous month)*100

The metrics also graphically indicate whether the variation is increasing (↑) or decreasing (↓).

7.2.4 Feed Status

The 'Feed Status' analysis is a pie chart that shows the distribution of cancelled feeds and invalid feeds. The analysis also indicates the number of valid feeds in the selected month and year.

Feed Status

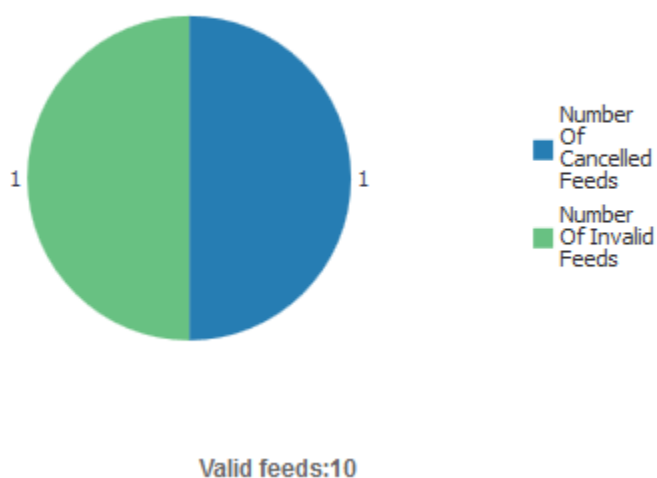


Figure 117: Feed Status

7.2.5 Activity Across Divisions

The 'Activity Across Divisions' analysis is a horizontal bar chart that shows the count of transactions against each division.

Activity Across Divisions

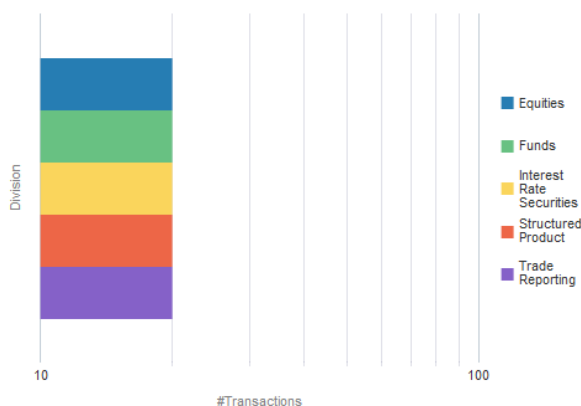


Figure 118: Activity Across Divisions

7.2.6 Successful / Unsuccessful Transactions Across Sources

The 'Valid / Invalid Transactions Across Sources' analysis is a pie chart that shows the percentage distribution of valid or invalid transactions across different transaction sources, depending on the value you select from the drop-down list.



Figure 119: Successful/Unsuccessful Transactions Across Sources

7.3 Transaction Page

The Transaction Page provides a summary view of key transaction processing information including the following key insights:

- Trend of valid transactions over the trailing twelve months
- Estimated extent of revenue leakage
- Trend of manual transactions over the trailing twelve months

7.3.1 Successful/Unsuccessful Transactions over Last Months

The 'Successful / Unsuccessful Transactions Over Last Months' analysis is a line chart that shows the trend of valid or invalid transaction count per month, over the last 12 months. Depending on the value you select from the drop-down list, you can view either the successful transaction trend or unsuccessful transaction trend.



Figure 120: Valid / Invalid Transactions

7.3.2 Unrealized Revenue

The 'Unrealized Revenue' analysis is a line chart that shows the trend of unrealized revenue per month, over the last 12 months.

Unrealized revenue = #Error Transactions × (Average cost per error transaction).

Average cost per error is the value configured against the parameter 'Average value for a transaction in corporate currency - used in unrealized revenue computation' in Global Settings page of ORMBA Administration UI.

Unrealized Revenue



Figure 121: Unrealized Revenue

7.3.3 Manual Transaction Trend

The 'Manual Transaction Trend' analysis is a line chart that shows the trend of manual transaction count per month, over the last 12 months.

Manual Transaction Trend

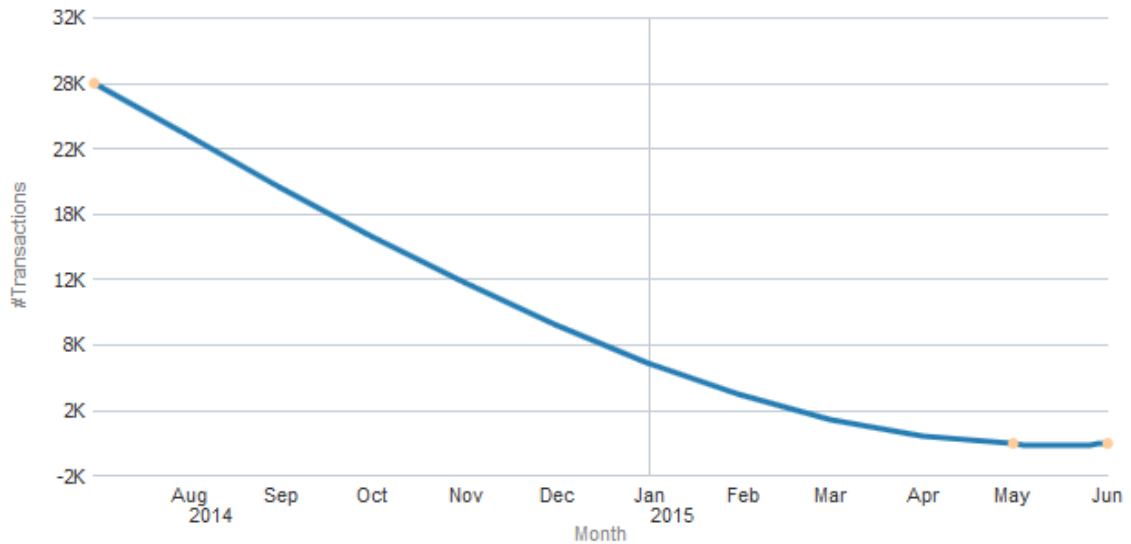


Figure 122: Manual Transaction Trend

7.3.4 Transactions Printable Report

The page also includes a printable report that includes the following fields:

Filters	<ul style="list-style-type: none"> • Year • Month • Division • Transaction Source • Transaction Record Type
Fields	<ul style="list-style-type: none"> • Year • Month • Division • Transaction Source • Transaction Record Type • #Manual Transactions • #Transactions Reprocessed • #Transactions Completed • #Transactions Ignored • #Error Transactions • #Invalid Transactions

7.4 Feed Page

The Feed Page provides a snapshot of valid vs invalid feeds over the past twelve months. The dashboard filters available for Feed page of Transaction dashboard include:

- Year
- Month
- Division

7.4.1 Valid / Invalid Feeds Over Last Months

The 'Valid / Invalid Feeds Over Last Months' is a line chart that shows the trend of valid or invalid feeds per month, over the last 12 months, depending on the value you select from the drop-down list.

The analysis also includes a table that lists the valid / invalid feed count for each month, along with the grand total.

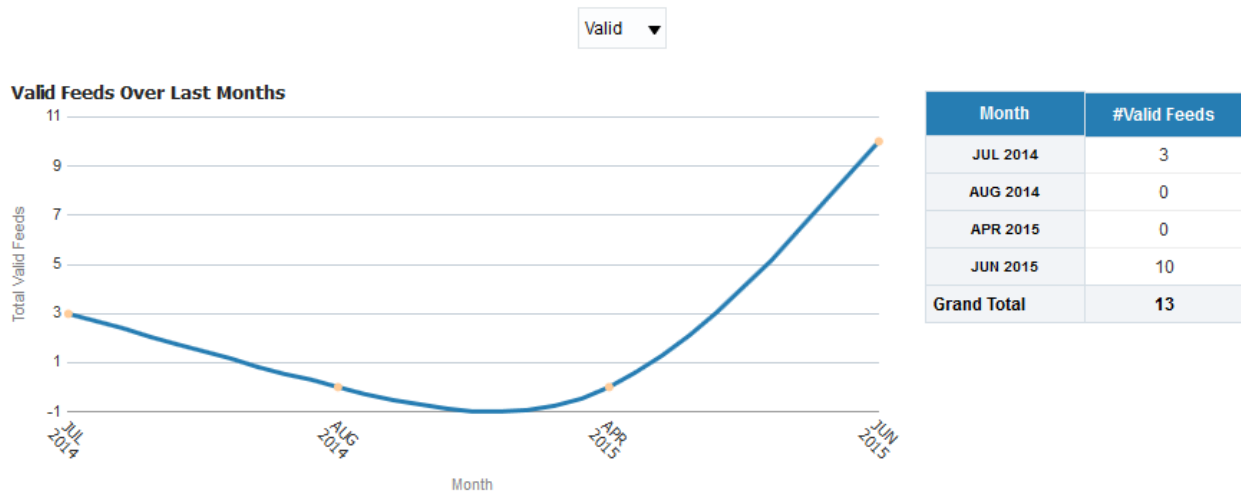


Figure 123: Valid / Invalid Feeds Over Last Months

7.4.2 Feeds Printable Report

The page also includes a printable report called 'Feeds Printable Report' with the following fields:

Filters	<ul style="list-style-type: none"> • Year • Month • Transaction Source
Fields	<ul style="list-style-type: none"> • Year • Month • Transaction Source • #Uploaded Feeds • #Manual Feeds • #Valid Feeds

	<ul style="list-style-type: none"> • #Invalid Feeds • #Error Feeds • #Cancelled Feeds
--	--

7.5 Error Page

The Error page provides information on the various causes of Transaction errors by each of the Transaction sources.

The dashboard filters available for the Error page of Transaction Feeds dashboard are:

- Year
- Month
- Division

7.5.1 Errors By Reasons

The 'Transaction Errors By Reasons' is a pie chart that shows the reasons for transaction errors, for a selected transaction source.

The analysis also includes a table that lists the error messages against each transaction source and the count of its occurrence.

Transaction Errors By Reasons

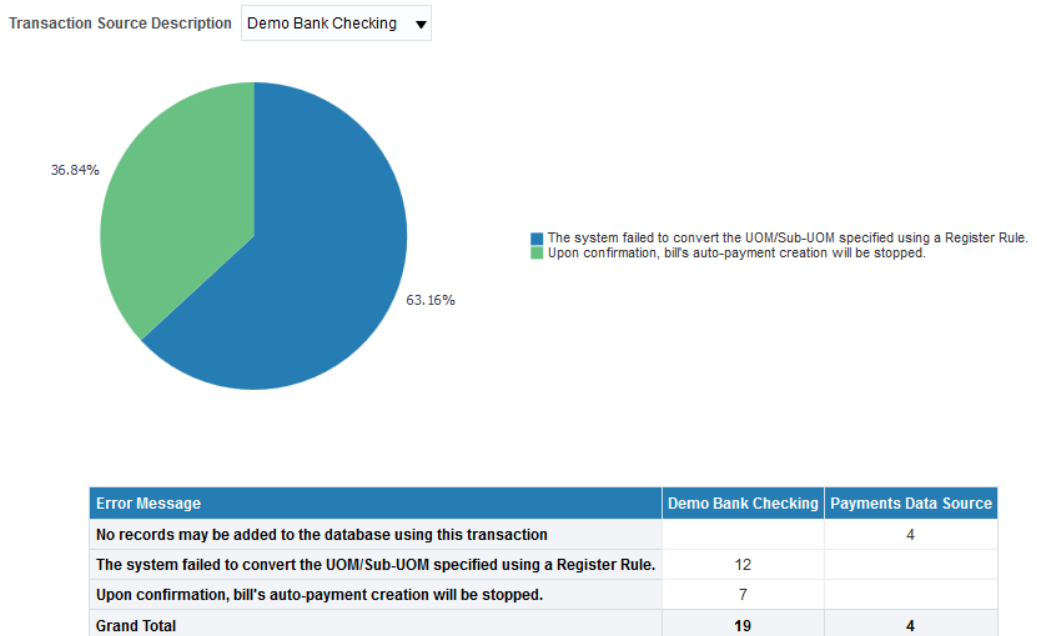


Figure 124: Errors By Reasons

8. Customer Contact Dashboard

8.1 Overview of the dashboard

The Customer Contact dashboard provides details about the contacts made by the customers. The contacts include requests raised by customers as well as issues that require resolution. This dashboard also provides a detailed view of the staff handling the contacts and the customers. The Customer Contact dashboard contains three pages – Summary, Ranking, and Trend.

8.2 Summary Page



The Summary page of Customer Contact dashboard gives you an overview of the contacts made by customers over the selected month. The analyses available are:

- Breakdown By Contact Type
- Contacts By Day of Week
- Preferred Contact Method
- Customer Contact Printable Report

8.2.1 KPIs

The KPIs available on Summary page are:

KPI	Definition
#Created	Number of contacts created
#Error	Number of contacts that failed with error
#Success	Number of successful contacts
Variation From Last Month	Percentage variation of contacts from previous month

The Variation from Last Month field includes  or  icon to indicate if the variation is positive or negative.

8.2.2 Breakdown By Contact Type

The Breakdown By Contact Type analysis is a table list that show distribution of customer contacts across different contact types.

Breakdown By Contact Type

Contact Type	Contact Class	#Created	#Success	#Pending	#In Progress	#Error	#Cancelled	#Unknown
Terminate Subscriber Notification	Customer Management Notifications	21	0	0	0	0	0	21
Renew Subscriber Notification	Customer Management Notifications	6	0	0	0	0	0	6
Add Dependent Notification	Customer Management Notifications	1	0	0	0	1	0	0
Send Update Billing Frequency Notification	Customer Management Notifications	1	0	0	0	1	0	0
Grand Total		29	0	0	0	2	0	27

Figure 125: Breakdown By Contact Type

Note: Click on the count against a status to view the drilled-down details. This opens the Customer Contact printable report, filtered to display the selected.

8.2.3 Contacts By Day of Week

The Contacts By Day of Week analysis is a bar chart that shows the distribution of customer contacts over different days of a week.

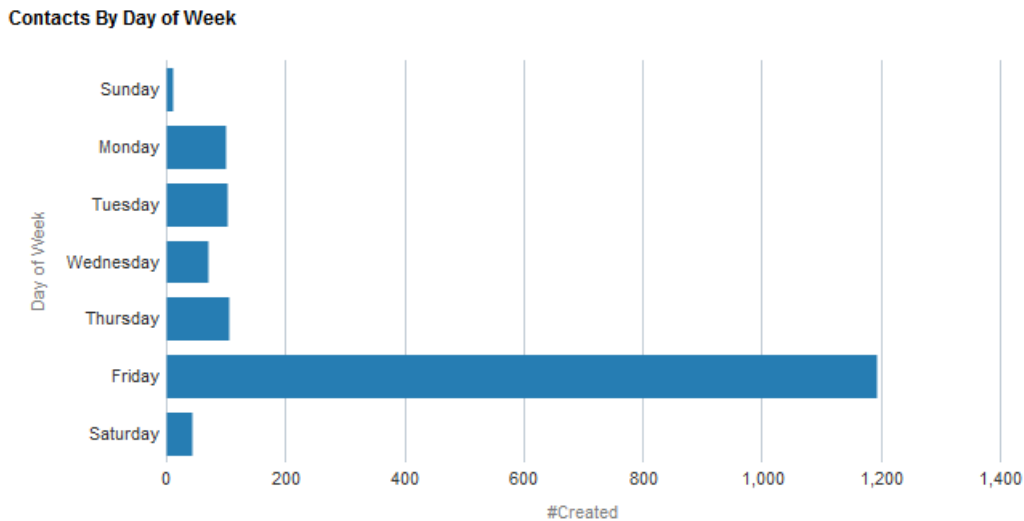


Figure 126: Contacts By Day of Week

Axes	What it shows?
X axis	Number of contacts made
Y axis	Days of a week

Note: Click on the bar against a day to drill down and see the details. This opens the Customer Contact Printable report, filtered to show the relevant data.

8.2.4 Preferred Contact Method

The Preferred Contact Method analysis is a pie chart that shows the spread of contacts across different communication channels.

Preferred Contact Method

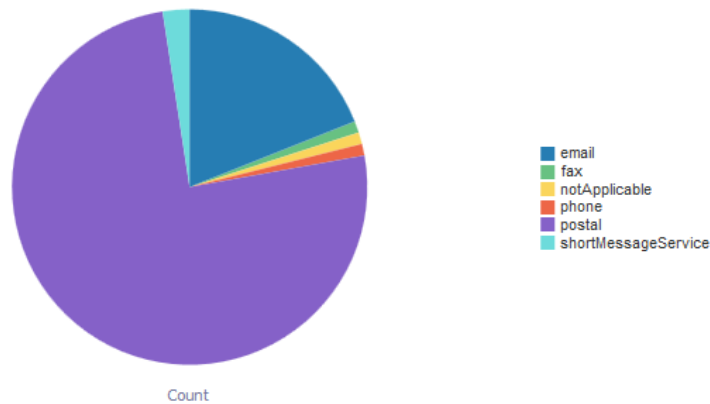


Figure 127: Preferred Contact Method

Note: Click on a section of a pie to drill down and see the corresponding details. This opens the Customer Contact Printable report, filtered to show the relevant data.

8.2.5 Customer Contact Printable Report

The Summary page also includes a printable report called Customer Contact Printable Report. The various fields in the report are:

Filters	<ul style="list-style-type: none"> • Month • Year • Contact Class • Contact Type • Notification Method • Status • State
Fields	<ul style="list-style-type: none"> • Contact Class • Contact Type • State • Notification Method • Status • #Contacts

Note: Click on #Contacts to drill down the report further.

8.3 Ranking Page

The Ranking page of Customer Contact dashboard offers a comparative view of the various customer contacts made over a selected month. The analyses available are:

- Top N Divisions
- Top N States
- Top N Customers
- Most Successful Contact Types

8.3.1 Top N Divisions

The Top N Divisions analysis is a table list that shows the divisions that have had maximum contacts in the selected month. You can click on the contacts count to view the list of contacts and its details.

Top 10 Division

Rank	Division	Contacts
1	California	2
1	Division for Collections	3

Figure 128: Top N Divisions

8.3.2 Top N States

The Top N States analysis is a table list that shows the states that have had maximum contacts in the selected month. You can click on the contacts count to view the list of contacts and its details.

Top 10 States

Rank	State	Contacts
1	California	19
2	New Hampshire	10

Figure 129: Top N States

8.3.3 Top N Customers

The Top N Customers analysis is a table list that shows the customers who have initialised maximum contacts in the selected month. You can click on the contacts count to view the list of contacts and its details.

Top 10 Customers

Rank	Customer Name	Customer ID	Contacts
1	Durant1805,Kevin1805	9145945251	1
1	George1814,Paul1814	0838404810	1
1	George1897,Paul1897	4166094843	1
1	Lothbrok1539,Ragnar1539	1691035971	1
1	Lothbrok4256,Ragnar4256	9532522503	1
1	Lothbrok4259,Ragnar4259	6138431299	1
1	Lothbrok4265,Ragnar4265	6239302214	1
1	Lothbrok4279,Ragnar4279	8107828517	1
1	Lothbrok4310,Ragnar4310	7191499956	1
1	Lothbrok4311,Ragnar4311	6789960092	1


 Rows 1 - 10

Figure 130: Top N Customers

8.3.4 Most Successful Contact Types

The Most Successful Contact Types analysis is a table list that shows the most commonly used contact type in the selected month. You can click on the contacts count to view the list of contacts and its details.

Most Successful Contact Types

Rank	Contact Type	Success Contacts
1	Terminate Subscriber Notification	19

Figure 131: Most Successful Contact Types

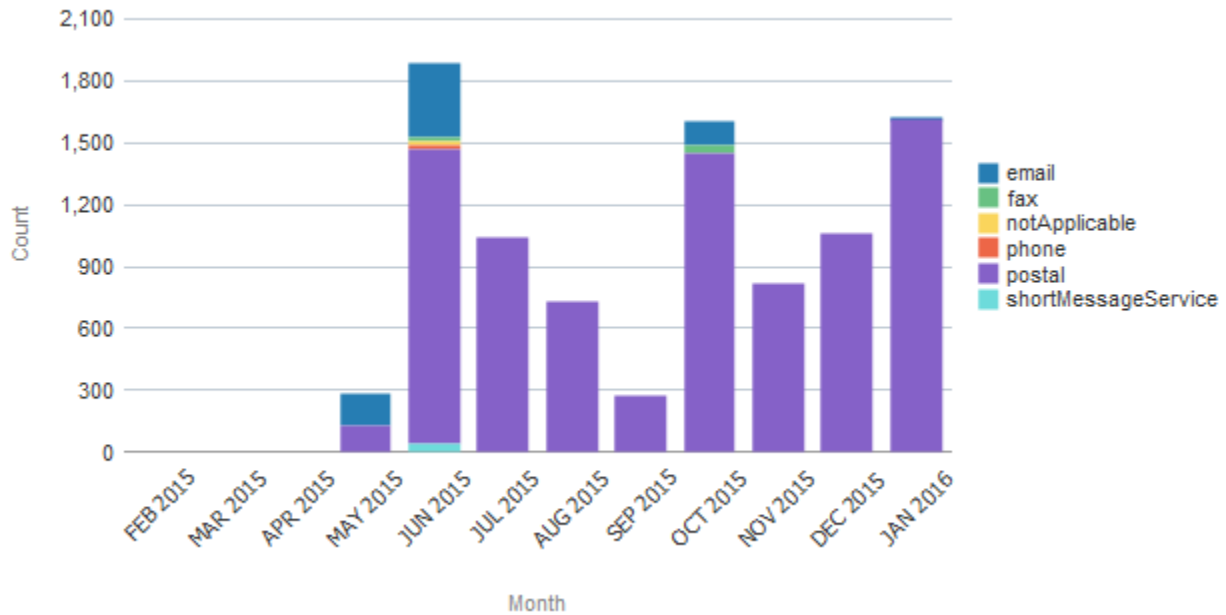
8.4 Trend Page

The Trend page of Customer Contact dashboard provides insights on the trend of customer contacts over the last 12 months, counting from the selected month. The analyses available are:

- Preferred Contact Method Trend
- Contact Status Trend
- Division Trend
- Contact Type Trend

8.4.1 Preferred Contact Method Trend

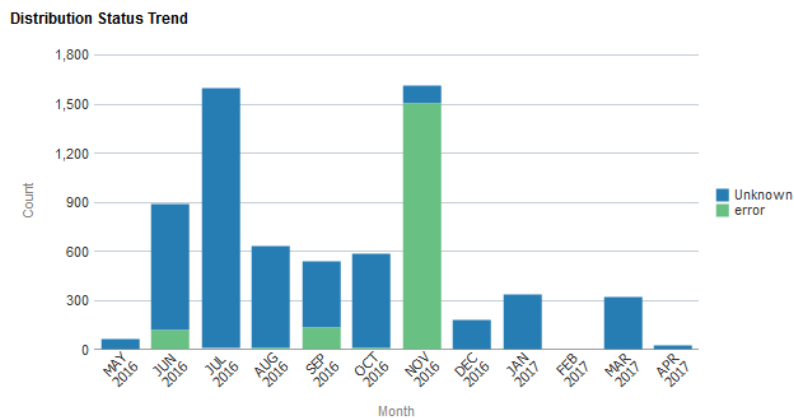
The Preferred Contact Method Trend analysis is a bar chart that shows the trend of customer contacts. Contacts of each preferred contact method are stacked over the other for each month.

Preferred Contact Method Trend**Figure 132: Preferred Contact Method Trend**

Axes	What it shows?
X axis	Month Shows the last 12 months
Y axis	Count Number of contacts made with the preferred method

8.4.2 Distribution Status Trend

The Distribution Status Trend analysis is a stacked bar chart that shows the trend of customer contacts over the last N months, with contacts of each status stacked over the other.

**Figure 133: Distribution Status Trend**

Axes	What it shows?
X axis	Month Shows the last 12 months
Y axis	Count Number of contacts in each status

8.4.3 Division Trend

The Division Trend analysis is a bar chart that shows the trend of customer contacts made against a selected division, over the last 12 months. You can select the Division from the drop-down list at the top of the analysis.

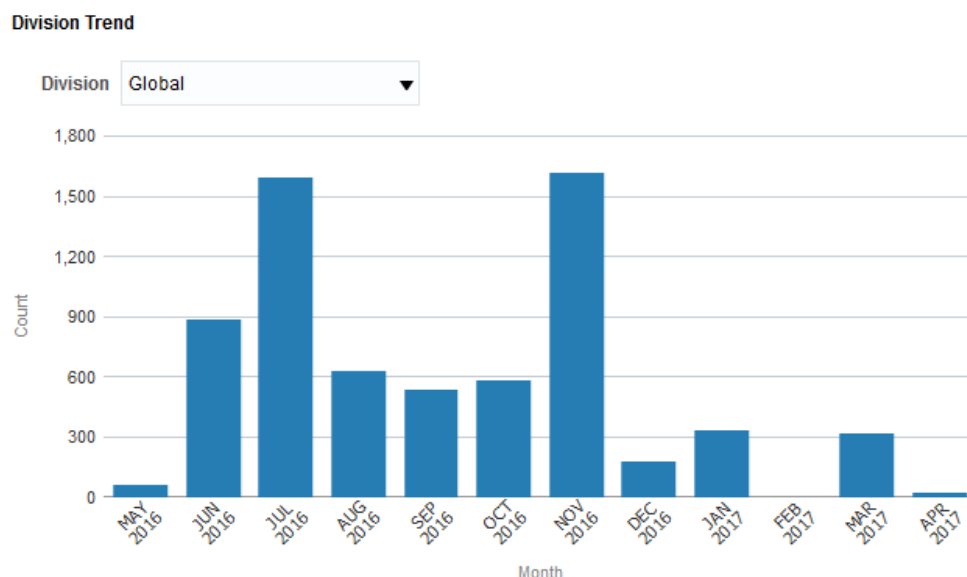


Figure 134: Division Trend

Axes	What it shows?
X axis	Month Shows the last 12 months
Y axis	Count Number of contacts for the selected division

8.4.4 Contact Type Trend

The Contact Type Trend analysis is a bar chart that shows the trend of contacts of a selected type, over the last 12 months. You can select the Contact Type from the drop-down list at the top of the analysis.

Contact Type Trend

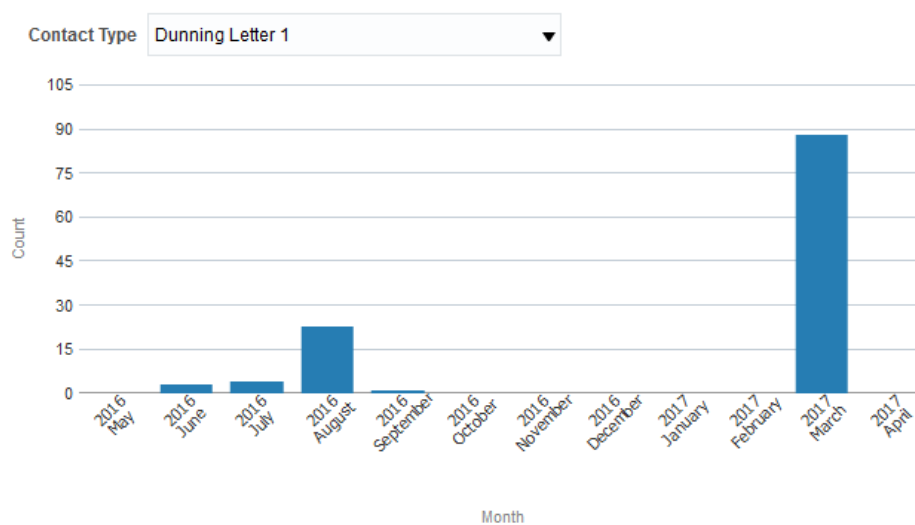


Figure 135: Contact Type Trend

Axes	What it shows?
X axis	Month Shows the last 12 months
Y axis	Count Number of contacts of selected contact type