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

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

**Audience**

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

**Documentation Accessibility**

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

**Access to Oracle Support**

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

**Related Documents**

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

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

**Conventions**

The following text conventions are used in this document:
<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><code>monospace</code></td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
This Part describes how to answer business questions related to key accounts and products.
How Do I Find the Top Ten Accounts by Revenue?

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

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

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

How to find the top ten accounts by revenue

To create the Top 10 Accounts by Revenue report:

1. From the Navigator menu, select Reports and Analytics.
How to find the top ten accounts by revenue

1. The Reports and Analytics page is displayed.
2. Click the down-arrow button to the right of Create, and then select Analysis.
3. The Select Subject Area list is displayed.
4. Select the Sales - CRM Customer Overview subject area.
5. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:
   - From the Customer folder: Customer Name
   - From the Customer folder: Party Type Code
   - From the Facts > Pipeline Facts folder: # of Opportunities
   - From the Facts > Pipeline Facts folder: Open Opportunity Revenue
   For each column that you want to add:
   a. Select the column in the Subject Areas list.
   b. Click the Add button (the right-arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.
5. Click Next.

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

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

8. Click Next.

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

10. Click Next.

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

12. You can add a filter to show only the 10 accounts with the highest amount of revenue by performing the following steps:
   a. Click Add Filter, and then select Open Opportunity Revenue.
   b. In the Operator column, select is ranked last.
   c. In the Value column, enter 10.
How do I read the Top 10 Accounts by Revenue report?

13. You can sort Open Opportunity Revenue from high to low by performing the following steps:
   a. Click Add Sort, and then select Open Opportunity Revenue.
   b. Select High to Low.

14. Click Next.

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

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

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

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

This report contains the following metrics:

- **Customer Name** — The name of your customer.
- **Party Type Code** — A unique identifier that describes your customer (for example, O (organization) or P (person)).
How do I read the Top 10 Accounts by Revenue report?

- **# of Opportunities** — The number of potential wins for the specific customer.

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

The following image shows an example of the Top 10 Accounts by Revenue report.
How do I read the Top 10 Accounts by Revenue report?
Which Are the Top Ten Product Categories by Closed Revenue?

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

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

How to identify the top ten product categories by closed revenue

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

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

   ![Navigator Menu]

   The Reports and Analytics page is displayed.

2. Click the down-arrow button to the right of Create, and then select Analysis.
How to identify the top ten product categories by closed revenue

The Select Subject Area list is displayed.

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

![Select Subject Area](image)

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

   - From the Product folder: **Sales Catalog Hierarchy Base Level Name**
   - From the Pipeline Detail Facts folder: **Closed Opportunity Line Revenue**

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

![Selected Columns](image)

5. Click **Next**.

6. Specify the views to include in the analysis as follows:

   a. Click the **Table** box, and then select **Table (recommended)**.

   b. Click the **Graph** box, and then select **Bar (recommended)**.

![Create Analysis: Select Views](image)

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

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

10. In the Sort and Filter page, click **Add Sort**, and then select the **Closed Opportunity Line Revenue** measure.
How do I read the Top 10 Product Categories by Closed Revenue report?

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

12. Click Submit to save the analysis.

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

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

How do I read the Top 10 Product Categories by Closed Revenue report?

This report contains the following metrics:
- **Sales Catalog Hierarchy Base Level Name** — The name of the high-level product category.
- **Closed Opportunity Line Revenue** — The revenue that has already been won.

The following image shows an example of the Top 10 Product Categories by Closed Revenue report. The report shows a table and a bar chart.
How do I read the Top 10 Product Categories by Closed Revenue report?

<table>
<thead>
<tr>
<th>Sales Catalog Hierarchy Base Level Name</th>
<th>Closed Opportunity Line Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>C_CRM Database</td>
<td>279,975,609.862</td>
</tr>
<tr>
<td>Business Intelligence Suite Enterprise Edition Plus</td>
<td>382,615,489.685</td>
</tr>
<tr>
<td>Partitioning</td>
<td>517,481,642.634</td>
</tr>
<tr>
<td>Vision Catalog</td>
<td>323,371,249.005</td>
</tr>
<tr>
<td>Assisted Services</td>
<td>323,869,540.474</td>
</tr>
<tr>
<td>C_EBS Financials</td>
<td>366,512,881.283</td>
</tr>
<tr>
<td>C_PSFT Enterprise - FMS</td>
<td>417,212,219.375</td>
</tr>
<tr>
<td>C_EBS Supply Chain Management</td>
<td>426,960,261.032</td>
</tr>
<tr>
<td>Core HRMS</td>
<td>489,574,233.090</td>
</tr>
<tr>
<td>Internet Application Server Enterprise Edition</td>
<td>793,857,835.272</td>
</tr>
</tbody>
</table>

Which Are the Top Ten Product Categories by Closed Revenue?
How do I read the Top 10 Product Categories by Closed Revenue report?
Who Are the Active Customers That Have Not Had a Touch Point in the Last Three Months?

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

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

How to determine the active customers that have not had a touch point in the last three months or more

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

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

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

The Select Subject Area list is displayed.

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

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

For each column that you want to add:
   a. Select the column in the Subject Areas list.
   b. Click the Add button (the right-arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.
How to determine the active customers that have not had a touch point in the last three months or more

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

5. Click Next.

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

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

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c. To optionally change the name of a column’s label, select the column for which you want to change the label, and click Column Properties.

d. In the Column Name field, enter a descriptive name, and then click OK.

Note: The new column label applies only to the current analysis and user.
How do I read the Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months report?

This report contains the following metrics:

- **Name** — The name of your customer.
How do I read the Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months report?

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

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

![Customer List](image)
How do I read the Who Are the Active Customers That Have Not Had a Touch Point in the Last 3 Months report?
What Are My Team's Top Accounts?

This tutorial shows you how to quickly identify the top five accounts that your sales team has the most contact with, as well as the type of interactions that your team members have with those accounts. For example, activity types can be calls, e-mail, or meetings.

You want to know which accounts your sales team targets the most. Use the Top Accounts by My Team's Activities report to determine how much your sales team interacts with their top accounts, and the methods they use the most for reaching out to the top five accounts.

This tutorial is aimed at sales managers.

How to view the Top Accounts by My Team's Activities report

To view the Top Accounts by My Team's Activities report:

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

   ![Navigator Menu]

   The Reports and Analytics page is displayed.

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

   Shared Folders
How do I read the Top Accounts by My Team's Activities report?

3. Click Top Accounts by My Team's Activities, and then select View.

The Top Accounts by My Team's Activities report is displayed.

How do I read the Top Accounts by My Team's Activities report?

This report contains the following metrics:

- **Account** — The top five accounts, sorted by the total number of activities owned by your sales team.
- **# of Activities** — The number of activities owned by your sales team that are due during the selected time frame, by Account.
- **Activity Type** — Tasks and appointment activities such as calls, e-mail, or meetings.

With these metrics, you can see which accounts your sales team has the most interactions planned with for next quarter. For example, if these accounts have the most revenue scheduled to close next quarter, then this information tells you that your sales team is correctly targeting these accounts and effectively managing their interactions with them.
What Are My Team's Most Active Accounts?

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

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

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

How to view the My Team Customers Real Time report

To view the My Team Customers Real Time report:

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

   ![Navigator Menu](image)

   The Reports and Analytics page is displayed.

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

   - **Shared Folders**
   - **Sales**
3. Click My Team Customers Real Time, and then select View.

The My Team Customers Real Time report is displayed.

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

This report contains the following metrics:

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

The following image shows an example of the My Team Customers Real Time report.
This tutorial shows you how to quickly identify the top five accounts that you have the most interactions with, as well as the type of activities you have with those accounts. For example, activity types can be calls, e-mail, or meetings.

You want to know which of your accounts are the most targeted. Use the Top Accounts by My Activities report to determine how much you interact with your top accounts. You can also use this report to discover which methods you use the most for reaching out to your top accounts, and use this information to improve the quality and efficiency of your sales activities.

This tutorial is aimed at sales representatives.

How to view the Top Accounts by My Activities report

To view the Top Accounts by My Activities report:

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

The Reports and Analytics page is displayed.

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

   Shared Folders
How do I read the Top Accounts by My Activities report?

3. Click Top Accounts by My Activities, and then select View.

The Top Accounts by My Activities report is displayed.

How do I read the Top Accounts by My Activities report?

This report contains the following metrics:

- **Account** — The top five accounts, sorted by the total number of activities that you own.
- **# of Activities** — The number of activities that you own and are due for completion within the selected time frame, by Account.
- **Activity Type** — Tasks and appointment activities such as calls, e-mail, or meetings.

With these metrics, for example, you can pinpoint the accounts that you had the most interactions with last quarter. If these accounts had the most revenue scheduled to close at the time, then this information tells you that you correctly targeted these accounts and effectively managed your interactions with them.
What Are My Open Tasks?

This tutorial shows you how to view your upcoming weekly or monthly workload and schedule.

You want to be prepared to address all of your open tasks. Use the My Open Tasks report to stay informed about your workload and quickly identify any urgent tasks that are due in the next few days.

This tutorial is aimed at sales representatives.

How to view the My Open Tasks report

To view the My Open Tasks report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   
   Shared Folders
   Sales
   Embedded Content
   Sales Representative
   Dashboards
How do I read the My Open Tasks report?

3. Click **My Open Tasks**, and then select **View**.

The My Open Tasks report is displayed.

**How do I read the My Open Tasks report?**

This report contains the following metrics:

- **# of Tasks** — Number of tasks, by a task type, due by a specific day or week within the selected time frame.
- **Due Date** — Day or week that tasks are due.
- **Task Type** — The type of tasks you own such as call, demo, e-mail, or meeting.

With these metrics, for example, you could see that most of the tasks you need to complete in the next 30 days are calls.

**To drill down for more details on tasks for a specific time frame:**

1. Click a time frame to drill down into the open task details for that time period. In the chart, you click on the bar for that time period.
2. Click **Return** to return to the My Open Tasks report.
What Are My Top Accounts by Open Opportunity Revenue?

This tutorial shows you how to determine your top accounts by opportunity revenue. You want to see what your top opportunities are, so that you can focus on those that will best help you to meet your quota. Knowing which opportunities have the most potential will help you decide where to put your energy and what activities you need to do next. Use the My Top Accounts by Open Opportunities report to help you to meet your target quota.

This tutorial is aimed at sales representatives.

How to view the My Top Accounts by Open Opportunities report

To view the My Top Accounts by Open Opportunities report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
How do I read the My Top Accounts by Open Opportunities report?

This report contains the following metrics:

- **Name** — The name of the account. Note that Name only displays in the table view when you select the List option in the Show View list.

- **Open Opportunity Amount** — The range of amounts to gauge how much opportunity revenue is available. Note that Open Opportunity Amount only displays in the chart view.

- **Actual Opportunity Amount** — The combined amount of opportunity revenue for all of the opportunities for this account.

- **Open Opportunity Count** — The number of opportunities for this account. Note that Open Opportunity Count only displays in the table view when you select the List option in the Show View list.

With these metrics, you can see which customer has the most opportunity revenue, and compare them with other accounts with less potential revenue. You may also want to focus on the account with the most opportunities. Closing these opportunities will help you meet your target quotas.

You can optionally select List in the Show View list to display the chart in table format to compare customers by both number of open opportunities and potential revenue. For example, you might have one open opportunity with one customer, but it may be worth significantly more in potential revenue than the five open opportunities for another customer. You may want to figure out which of your opportunities have the highest win percentage.
What Are My Team's Activities by Type?

This tutorial shows you how to view and evaluate the number of activities by type being managed by your sales team.

Use the My Team's Activities by Type report to ensure that your team's workload is appropriately distributed by sales rep and pro actively pinpoint any resourcing issues.

This tutorial is aimed at sales managers.

How to view the My Team's Activities by Type report

To view the My Team's Activities by Type report:

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

The Reports and Analytics page is displayed.

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

   - Shared Folders
   - Sales
   - Embedded Content
   - Sales Manager
   - Dashboards
3. Click My Team's Activities by Type, and then select View.

The My Team’s Activities by Type report is displayed.

4. In the Timeframe list, select the time period that you want to evaluate. For example, if you want to view the team’s activities that are due in the next 30 days, including today, select Next 30 Days, including Today.

How do I read the My Team's Activities by Type report?

This report contains the following metrics:

- **Activity Owner** — The sales team member that owns sales activities.
- **Activity Type** — The type of activity your sales team members own. For example, e-mail, demo, meeting, or call.
- **Open Activities** — Total number of activities that are not yet complete and have an end date that falls within the selected time frame.
- **Completed Activities** — Total number of activities that have a status of "Complete" and an end date that occurs before the select time frame begins.

With these metrics, for example, you could see which sales representative has the most activities scheduled for the next 30 days. You can also use the report to verify if the workload looks to be evenly distributed for upcoming month.

To drill down into an into the activities for a sales representative:

1. In the graph, click a bar for an individual sales representative to drill down into their activity details.

2. Click Return to return to the My Team’s Activities by Type report.
Part II
Sales Quota and Performance

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

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

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

How to determine how near or far I am in meeting my sales quota for the quarter

To view the Current Period Performance report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
How do I read the Current Period Performance report?

1. Click Current Period Performance, and then select View.

The Current Period Performance report is displayed.

How do I read the Current Period Performance report?

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

This report contains the following metrics:

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

The following image, which displays both a gauge and pivot table, shows an example of the Current Period Performance report.
How to determine how near or far I am in meeting my sales quota for the year

You use the Past Period Performance report to review and assess your quota and attained revenue for the year.

To view the Past Period Performance report:

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

   The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
   - Sales
     - Analytic Library
     - Embedded Content
     - Opportunity and Revenue Management
How do I read the Past Period Performance report?

3. Click Past Period Performance, and then select View.

The Past Period Performance report is displayed.

How do I read the Past Period Performance report?

This report contains the following metrics:

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

The following image shows an example of the Past Period Performance report. This report shows a gauge and a pivot table.
How Am I Performing Against My Sales Targets?

This tutorial shows you how to view your sales performance.

You want to know how you’ve been performing this quarter and this year against your targets. Use the My Performance report to determine the total opportunity revenue in your sales team pipeline, organized by sales stage, that is scheduled to close within the selected forecast period.

This tutorial is aimed at sales representatives.

How to view the My Performance report

To view the My Performance report:

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

   ![Navigator menu screenshot]

   The Reports and Analytics page is displayed.

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

   - Shared Folders
   - Sales
   - Embedded Content
How do I read the My Performance report?

3. Click My Performance, and then select View.

The My Performance report is displayed.

**How do I read the My Performance report?**

This report contains the following metrics:

- **Target Quota** — Your sales goal for the time frame.
- **Won Revenue** — Opportunity revenue that you’ve already closed (won).
- **Remaining Quota** — The difference between the target quota and closed (won) opportunity revenue. You can click the link here to view the My Pipeline report.
- **Quota Attainment** — Percent of the target quota that the sales team has already attained for the quarter. In this example, they have closed (won) 70% of their targeted sales quota for the quarter.

With these metrics, for example, you could see that you have closed $974,013.88 and have to close $407,741.61 to hit your target quota for the current quarter. This tells you that you have already attained 70% of your goal. You can click on your remaining quota to see the My Pipeline report to get a better understanding of what opportunities you can close to meet your target.
How Is My Team Performing Against Their Target Quota?

This tutorial shows you how to evaluate your sales team’s performance against their current quarterly and yearly target quotas.

You want to find out how your team is performing against their sales goals this quarter or this fiscal year. Knowing how your team is doing will help you determine if everyone is on the right track to hit their goals or if they might need assistance. Use the My Team’s Performance report to help figure out how your team is doing.

This tutorial is aimed at sales managers.

How to view the My Team’s Performance report

To view the My Team’s Performance report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
How do I read the My Team's Performance report?

3. Click My Team's Performance, and then select View.

The My Team's Performance report is displayed for a specific performance period (Current Quarter is the default).

4. You can select a forecast period that you want to evaluate. Select Current Year in the Timeframe list.

How do I read the My Team's Performance report?

This report contains the following metrics:

- **Target Quota** — The set revenue amount that you and your team must close this quarter.

- **Won Revenue** — The opportunity revenue you and your team have already closed (won).

- **Remaining Quota** — The difference between the target quota and closed (won) opportunity revenue. You can click the link here to view the My Team's Pipeline report.

- **Quota Attainment** — Percent of the target quota that the sales team has already attained for the quarter.

With these metrics, you can see whether and by what percentage you and your team have met your sales quota for the quarter. You can see your team's target revenue for the quarter, how much you have closed, and how much you and your team are ahead of or behind quota for the quarter.
How Am I Performing Against My Forecasted Goals Versus My Open Pipeline?

This tutorial shows you how to evaluate your sales performance by comparing open pipeline potential revenue with sales forecast figures and won opportunities.

You want to find out how you are performing against your forecasted goals versus your open pipeline and won opportunities. Knowing how you are contributing to the total forecasted sales enables you to determine your progress and evaluate if you are meeting your revenue goals. Use the My Forecast vs. Open Pipeline report to find out how you are doing.

This tutorial is aimed at sales representatives.

How to view the My Forecast vs. Open Pipeline report

To view the My Forecast vs. Open Pipeline report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
3. Click **My Forecast vs. Open Pipeline**, and then select **View**.

The My Forecast vs. Open Pipeline report is displayed for a specific forecast period (Current Quarter).

4. You can select a forecast period that you want to evaluate. Select **Next Quarter** in the **Timeframe** list. The My Forecast vs. Open Pipeline report is displayed for the next quarter.

**How do I read the My Forecast vs. Open Pipeline report?**

The forecasted sales, won opportunities, and open pipeline totals for the territory owner and specified time period are displayed in the My Forecast vs. Open Pipeline report.

This report contains the following metrics:

- **Timeframe** — A specific range of time for the forecast.
- **Forecast Period** — The specific time period (months) specified for the territory owner.
- **Total Forecast** — The sum of all adjusted item forecasts for the territory owner.
- **Won Revenue** (total) — The sum of all won opportunities for the territory owner.
- **Open Pipeline** (total) — The sum of all open opportunities for the territory owner.
- **Amount - Open Pipeline** — The sum of all open opportunities for the territory owner for the specific time period.
- **Amount - Won Revenue** — The sum of all won opportunities for the territory owner for the specific time period.
- **Amount - Forecast** — The sum of all adjusted item forecasts for the territory owner for the specific time period.

By viewing the Won Revenue and the Open Pipeline metrics, you can determine how a sales representative’s won revenue and remaining sales pipeline potentially combine to meet, exceed, or fall short of forecast revenue.

You can optionally select **List** in the **Show View** list to display the chart in table format.
What Are My Team Leaders' Quarterly Sales?

This tutorial shows you how to identify the current quarter sales progression by the percent quota attained or by revenue won for each of your team leaders.

You want to find out how your team is performing with respect to their closed revenues and their sales targets. Knowing how your team is doing right now enables you to see your sales representatives’ attainment. Use the Team Leadership Board report to find out how your team is doing.

This tutorial is aimed at sales managers.

How to view the Team Leadership Board report

To view the Team Leadership Board report:

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

   ![Navigator Menu](image)

   The Reports and Analytics page is displayed.

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

   Shared Folders
   Sales
   Embedded Content
3. Click Team Leadership Board, and then select View.

The Team Leadership Board report is displayed for the current quarter.

4. In the report, click one of the following buttons:
   - **Won Revenue** — Displays the won revenue for your team leaders for the current quarter. This is the default report display.
   - **Attainment %** — Displays the won revenue and quota attainment for your team leaders for the current quarter.

### How do I read the Team Leadership Board by Won Revenue report?

The Team Leadership Board report contains the following metrics:

- **Won Revenue** — The current quarterly total revenue won by the specific team leader.
- **Target Quota** — The revenue amount that the team leader is targeted to sell for the current quarter.
- **Total Won Revenue** — The current quarterly total revenue won by all of the team leaders.

With these metrics, you can see which sales representatives are the top team leaders, by won revenue for the current quarter. You can optionally select **List** in the **Show View** list to display the chart in table format.

**To drill down for more detail on a team leader's won revenue:**

1. Click the resource (team leader) name, the revenue amount bar, or the amount value text for the bar. You can view the Won Revenue report to get more details on the revenue currently in the sales pipeline for that employee for the quarter.
   - The opportunity name, customer name, close date, and revenue won are displayed.
2. Click **Return** to return to the Team Leadership Board report.

### How do I read the Team Leadership Board by Attainment % report?

The Team Leadership Board by Attainment % report contains the following metrics:

- **Resource** — The name of the team leader.
How do I read the Team Leadership Board by Attainment % report?

- **Target Quota** — The revenue amount that the team leader is targeted to sell for the current quarter.
- **Quota Attainment** — Percent of the target quota that the team leader has attained for the current quarter.
- **Total Won Revenue** — The current quarterly total revenue won by all of the team leaders.

With these metrics, you can see which sales representatives are the top team leaders, by won revenue as a percentage of their target quota for the current quarter. You can optionally select List in the Show View list to display the chart in table format.

You can optionally select List in the Show View list to display the chart in table format.
How do I read the Team Leadership Board by Attainment % report?
How Is My Team Performing Against Their Forecasted Goals Versus Their Open Pipeline?

This tutorial shows you how to evaluate your team’s sales performance by comparing open pipeline potential against sales forecast figures and won opportunities for each team member against a specific forecast period.

You want to find out how your team is performing against their forecasted goals versus their open pipeline and won opportunities. Knowing how each individual team member contributes to the total forecasted sales enables you to see if they are meeting their revenue goals. Knowing how your team is doing also allows you to recognize their success or take corrective actions. Use the Forecast vs Open Pipeline: My Team report to find out how your team is doing.

This tutorial is aimed at sales managers.

How to view the Forecast vs Open Pipeline: My Team report

To view the Forecast vs Open Pipeline: My Team report:

1. From the Navigator menu, select Reports and Analytics.
How do I read the Forecast vs Open Pipeline: My Team report?

The Reports and Analytics page is displayed.

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

3. Click Forecast vs Open Pipeline: My Team, and then select View.

   The Forecast vs Open Pipeline: My Team report is displayed for a specific forecast period (Current Quarter).

4. You can select a period that you want to evaluate. Select the period in the Timeframe list.

   The Forecast vs Open Pipeline: My Team report is displayed for the next quarter.

How do I read the Forecast vs Open Pipeline: My Team report?

The forecasted sales, won opportunities, and open pipeline totals for the team’s territories and specified time period (specifically, the current quarter) are displayed in the Forecast vs Open Pipeline: My Team report. Territory, territory owner, and contributions are displayed as bars relative to the territory owner’s open pipeline, won opportunities, and forecasted totals.

This report contains the following metrics:

- **Timeframe** — A specific range of time for the forecast.
- **Territory** — The specific territory owner and territory name.
- **Total Forecast** — The total of all adjusted forecasts for the all team members for all selected forecast territories.
- **Won Revenue** (total) — The total of all won opportunities for all team members for all selected forecast territories.
- **Open Pipeline** (total) — The total of all open opportunity revenues for all team members for all selected forecast territories.
- **Amount - Open Pipeline** — The sum of all open opportunities for the specific territory owner and territory name.
- **Amount - Won Revenue** — The sum of all closed (won) opportunities for the specific territory owner and territory name.

- **Amount - Forecast** — The sum of all adjusted forecasts for the specific territory owner and territory name.

Using this chart you can determine which sales representative in a territory had the most forecasted revenue, won revenue, and open pipeline opportunities for next quarter, and which sales representative had the least amount of revenue for his territory.

You can optionally select **List** in the **Show View** list to display the chart in table format.
How do I read the Forecast vs Open Pipeline: My Team report?
What Is My Organization's Sales Performance Trend?

This tutorial shows you how to view your team's sales performance trend.
You want to see how your sales teams are performing over time. You want to see if they are selling well, keeping their sales steady, or failing to perform. Knowing this will help you delegate resources, set quotas in the future, allocate your time, and take corrective action. Use the Sales Performance Trend report to help your team anticipate and form strategies to maximize revenue opportunities.

This tutorial is aimed at sales vice presidents.

How to view the Sales Performance Trend report

To view the Sales Performance Trend report:

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

   ![Navigator menu with Reports and Analytics highlighted]

   The Reports and Analytics page is displayed.

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

   Shared Folders
3. Click Sales Performance Trend, and then select View.

The Sales Performance Trend report is displayed.

How do I read the Sales Performance Trend report?

The Sales Performance Trend report contains the following metrics:

- **Quarter** — The fiscal quarter.
- **Won Opportunity Count** — The number of won opportunities. Note that **Won Opportunity Count** only displays in the table view when you select the List option in the Show View list.
- **Won Opportunity Amount** — The amount of won opportunity revenue.
- **Lost Opportunity Count** — The number of lost opportunities. Note that **Lost Opportunity Count** only displays in the table view when you select the List option in the Show View list.
- **Lost Opportunity Amount** — The amount of lost opportunity revenue.

With these metrics, as an example, you might determine that your sales teams won the most revenue in the fourth quarter of 2013, but your teams also lost the most revenue in that quarter. You could see by the four represented quarters that your sales teams have lost more revenue than they’ve made except for the second quarter. You may want to discuss with your sales teams what their sales strategies are, and, for the coming quarter, work out a new plan so that they can maximize their opportunities.

You can optionally select List in the Show View list to display the chart in table format.

To drill down for more detail on sales performance trends:

1. Click the won or lost opportunity amount bar or the amount value text for the bar. You can view the Sales Performance Trend report for a specific quarter to get more details on trends.
   - In the Sales Performance Trend report, the opportunity name, owner name, account name, revenue won, and close date are displayed.
2. Click Return to return to the Sales Performance Trend report.
What Is My Organization's Forecast Versus Current Quota?

This tutorial shows you how to view and evaluate the forecast versus quota report.

You want to see what your organization’s forecasts are versus their current quotas. Use the Forecast vs Quota report to give you insight into your team’s sales and to help you with setting quotas for the next period.

This tutorial is aimed at sales vice presidents.

How to view the Forecast Vs Quota report

To view the Forecast vs Quota report:

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

The Reports and Analytics page is displayed.

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

   Shared Folders
   Sales
   Embedded Content
   Sales Executive
How do I read the Forecast Vs. Quota report?

The Forecast vs Quota report is displayed.

3. Click **Forecast vs Quota**, and then select **View**.

4. You can select a forecast period that you want to evaluate. Select **Next Quarter** in the **Timeframe** list. The Forecast vs Quota report is displayed for that quarter.

**How do I read the Forecast Vs. Quota report?**

The Forecast vs Quota report contains the following metrics:

- **Total Forecast** — The forecast amount for this period.
- **Target Quota** — The set revenue amount that your sales team must close this quarter.
- **Remaining Quota** — The difference between the forecasted amount and the target quota revenue.
- **Forecast vs Quota** — Percent of the forecasted amount of revenue to the target quota that your sales team has available to attain for the quarter.

With these metrics, for example, you could see that your organization has forecasted that it will sell only $22,500,500.00, but its target quota is $33,750,950.00. They've only projected 67% of what they will need to hit their target quotas. You may want to find out why their projections are so low and if meeting the target quota will be possible based on the opportunities in the sales pipeline.
What Is My Partners' Quarterly And Yearly Closed Revenue?

This tutorial shows you how to evaluate your sales partners’ performance for their quarterly and yearly won opportunities.

You want to find out how your sales partners have performed in the past four quarters. Knowing how your sales partners are doing enables you to see if they are meeting their revenue goals. Knowing how your sales partners are doing also allows you to recognize your sales partners’ success or take corrective actions. Use the My Partners’ Won Opportunities report to find out how your sales partners are doing.

This tutorial is aimed at channel sales managers.

How to view the My Partners’ Won Opportunities report

To view the My Partners’ Won Opportunities report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
3. Click My Partners' Won Opportunities, and then select View.

The My Partners’ Won Opportunities report is displayed for the last four sales revenue quarters.

4. In the report, click one of the following buttons:
   - **Amount** — Displays the won revenue for your partners for the past four quarters. This is the default report display.
   - **Count** — Displays the won revenue and number of won opportunities for your partners for the past four quarters.

How do I read the My Partners' Won Opportunities by Amount report?

The My Partners’ Won Opportunities by Amount report contains the following metrics showing the total won revenue for all partners for each quarter of the current year:

- **Amount** — The sum of revenue amount that all partners closed for the specified quarter.

- **Number of Won Opportunities** — The total number of opportunities that all partners closed for the specified quarter. Note that **Number of Won Opportunities** only displays in the table view when you select the **List** option in the **Show View** list.

- **Quarter** — The periods (quarters) that your partners are accountable for winning (closing) opportunity revenue.

With these metrics, you might see that the second and third quarters had the least amount of won opportunities with zero dollars in the second quarter and less than 50 thousand dollars in closed revenue in the third quarter.

You can optionally select **List** in the **Show View** list to display the chart in table format.

**To drill down for more detail on a partner's won opportunities by amount:**

1. Click a value on the chart line. You can view the My Partners’ Won Opportunities by Amount report for the selected quarter to see more details on the partners’ won opportunities.

2. Click **Return** to return to the My Partners’ Won Opportunities by Amount report.
How do I read the My Partners' Won Opportunities by Count report?

The My Partners' Won Opportunities by Count report contains the following metrics about the total number of closed opportunities for all partners for each quarter of the current year:

- **Amount** — The sum of revenue amount that all partners closed for the specified quarter. Note that **Amount** only displays in the table view when you select the **List** option in the **Show View** list.

- **Number of Won Opportunities** — The total number of opportunities that all partners closed for the specified quarter.

- **Quarter** — The periods (quarters) that your partners are accountable for winning (closing) opportunity revenue.

With these metrics, you might see that the third quarter had the highest number of won opportunities.

You can optionally select **List** in the **Show View** list to display the chart in table format.

**To drill down for more detail on a partner's won opportunities by count:**

1. Click a count value on the chart line. You can view the My Partners' Won Opportunities by Count report for the selected quarter to see more details on the partners' won opportunities.

2. Click **Return** to return to the My Partners' Won Opportunities by Count report.
How do I read the My Partners' Won Opportunities by Count report?
What Are My Partners' Current Quarterly Sales?

This tutorial shows you how to identify the current quarterly sales progression by your sales partners.

You want to find out how your sales partners are performing this quarter. Knowing how your sales partners are doing right now enables you to see if your sales partners are meeting their revenue goals. Knowing how your sales partners are doing also allows you to recognize your sales partners’ success or take corrective actions. Use the Partner Leadership Board report for the current quarter to find out how your sales partners are doing.

This tutorial is aimed at channel sales managers.

How to view the Partner Leadership Board report

To view the Partner Leadership Board report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
How do I read the Partner Leadership Board report?

The Partner Leadership Board report displays each partner's closed business, as well as the total for all won revenue opportunities.

The report contains the following metrics:

- **Total Won Revenue** — The total deal or opportunity line revenue amount that all partners won this quarter.
- **Revenue** — The total revenue amount that a given partner closed by channel this quarter.

Using this report, you can determine which partner indicates that they have closed on the most opportunities this quarter. Other partners with low closure rates indicate that you need to do further investigation.

**To drill down for more detail on a specific partner's won opportunities:**

1. Click a partner name label, the revenue amount bar for the partner name, or the amount value text for the bar. You can view the Partner Leadership Board report for the past four quarters.

   The opportunity name, customer name (account), closed date, and revenue won are displayed.

2. Click **Return** to return to the Partner Leadership Board report.
How Do I Evaluate My Partners' Win Rates?

This tutorial shows you how to identify the quarterly progression of opportunity win rates for your partners.

You want to find out how effective your partners are in closing (winning) opportunity revenue. Knowing this enables you to effectively manage partner relationships. Use the My Partners' Opportunity Win Rate report to find out how well your partners are performing.

This tutorial is aimed at channel sales managers.

How to view the My Partners' Opportunity Win Rate report

To view the My Partners' Opportunity Win Rate report:

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

The Reports and Analytics page is displayed.

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

   Shared Folders
   Partner
   Embedded Content
How do I read the My Partners' Opportunity Win Rate report?

How do I read the My Partners' Opportunity Win Rate report?

The My Partners’ Opportunity Win Rate report shows the percent win rate attained for the last four quarters for your partners.

This report contains the following metrics:

- **Win Rate** — The percent of opportunities closed (won) for your partners by quarter.
- **Quarter** — The periods (quarters) that your partners are accountable for winning (closing) opportunity revenue.

Using this chart you can track results across quarters, trending your partners’ closing revenues. For example, you might see for partners a dramatic quarterly increase in performance and value added to the sales pipeline, compared to flatter performance in earlier quarters. You might need to further investigate the reasons for this performance.

You can optionally select **List** in the **Show View** list to display the chart in table format.

**To drill down for more detail on a specific partner's opportunity win rates:**

1. Click a win rate percent on the chart line to view the opportunity win rate by partner for a specific quarter. The My Partners’ Opportunity Win Rate report displays the partner name, number of opportunities, number of won opportunities, and the win rate.

2. Click **Return** to return to the My Partners’ Opportunity Win Rate report.
How do I read the My Partners' Opportunity Win Rate by Count report?

The My Partners' Opportunity Win Rate by Count report shows the total number of potential opportunities and won opportunities attained for the last four quarters by your partners.

This report contains the following metrics:

- **Number of Opportunities** — The total number of potential opportunities that were available in the pipeline for your partners for the last four quarters.

- **Number of Won Opportunities** — The total number of opportunities converted into wins by your partners for the last four quarters.

- **Quarter** — The periods (quarters) that your partners are accountable for winning (closing) opportunity revenue.

The chart might indicate mixed results for trending your partners' closing revenues, which could drive further investigation. For example, you might see that a quarter had the highest number of potential sales in the pipeline, but your partners only converted half of those opportunities into wins.

You can optionally select **List** in the **Show View** list to display the chart in table format.
This Part describes how to answer business questions related to the sales pipeline.
This tutorial shows you how to find out how much of the pipeline revenue expected to close in the current quarter is under competitive threat. A report is based on an analysis that defines the information that you want to see in the report. So to create a new report, you first need to create an analysis.

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

How to determine the current quarter pipeline revenue under competitive threat

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

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

The Reports and Analytics page is displayed.

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

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

4. Expand the Subject Areas folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:
   - From the Time folder: **Enterprise Quarter**
   - From the Customer folder: **Customer**
   - From the Competitor folder: **Name**
   - From the Competitor folder: **Meaning** (Note that this column is the threat level of the competitor.)
   - From the Pipeline Facts folder: **Expected Opportunity Revenue**
   - From the Pipeline Facts folder: **# of Days to Close**
   - From the Pipeline Facts folder: **# of Opportunities**

For each column that you want to add:

a. Select the column in the Subject Areas list.

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

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

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

8. Click Next.

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

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

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

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

14. Save the analysis as follows:
   a. In the Analysis Name field, enter **Current Quarter Pipeline Revenue Under Competitive Threat**.
   b. In the Save In list, select the folder in which you want to save the analysis.

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

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

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

---

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

This report contains the following metrics:

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

The following image shows an example of the Current Quarter Pipeline Revenue Under Competitive Threat report.
How do I read the Current Quarter Pipeline Revenue Under Competitive Threat report?
What Are My Team's Tasks on Open Opportunities?

This tutorial shows you how to monitor the completion status of tasks related to currently active opportunities.

You want to see more detailed information about what your sales team is doing to manage and connect with their accounts. Use the My Team’s Tasks on Open Opportunities report to identify the sales reps that are performing well, as well as the ones that may need additional support.

This tutorial is aimed at sales managers.

How to view the My Team's Tasks on Open Opportunities report

To view the My Team's Tasks on Open Opportunities report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
How do I read the My Team's Tasks on Open Opportunities report?

3. Click My Team's Tasks on Open Opportunities, and then select View.

The My Team's Tasks on Open Opportunities report is displayed.

How do I read the My Team's Tasks on Open Opportunities report?

This report contains the following metrics:

- **Team Member** — Sales team member that has completed tasks within the selected time period.
- **% Completion** — Percent of tasks with the status "Complete", by sales team member.

With these metrics, for example, you could see that your top performer completed 80% of her open opportunity tasks whereas a lower performing team member only closed 25% of his tasks. This information can help you to see at a glance that the lower performing sales representative may need some coaching with task management skills.

**To drill down into an into the open opportunity tasks for a sales representative:**

1. In the graph, click a bar for an individual sales team member to drill down into their open opportunity task details.

2. Click **Return** to return to the My Team's Tasks on Open Opportunities report.
Where Are My Opportunities Stalled in the Sales Process?

This tutorial shows you how to view and evaluate your stalled opportunities. You want to see more information about your opportunities that are not progressing through the sales pipeline. Use the My Stalled Opportunities report to identify your stalled opportunities are stalled and take corrective actions to ensure that you close the opportunity revenue on time.

This tutorial is aimed at sales representatives.

How to view the My Stalled Opportunities report

To view the My Stalled Opportunities report:

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

The Reports and Analytics page is displayed.

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

Shared Folders
Sales
Embedded Content
Sales Representative
Dashboards

3. Click My Stalled Opportunities, and then select View.

The My Stalled Opportunities report is displayed.

How do I read the My Stalled Opportunities report?

This report contains the following metrics:

- **Opportunity** — Open opportunity assigned to you with an expected close date that falls within the current quarter.
- **Sales Stage** — Sales stage assigned to the opportunity. The sales stage indicates how far along the opportunity is in the sales process.
- **Days Stalled** — Number of days the opportunity has been sitting in the current sales stage beyond the maximum number of days allowed for the sales stage.
- **Opportunity Revenue** — Line revenue linked to the opportunity that is scheduled to close in the current quarter.

With these metrics, for example, you could see that your opportunities are stalled at the beginning of the sales process in the Qualification stage. If your opportunities have been stalled in this stage for 53 days, this tells you that your deals are not moving in the right direction like they should. You can use this information to investigate further and take immediate steps to move these deals ahead towards closure.
This tutorial shows you how to view your sales pipeline.
You want to know how much opportunity revenue you have in your sales pipeline.
You also need to know how much of that revenue is in each of the various sales stages.
Use the My Pipeline report to determine the total opportunity revenue in your sales pipeline, organized by stage, that is scheduled to close within the selected period.
This tutorial is aimed at sales representatives.

How to view the My Pipeline report

To view the My Pipeline report:

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

   ![Navigator Menu](image)

   The Reports and Analytics page is displayed.

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

   - **Shared Folders**
3. Click My Pipeline, and then select View.

The My Pipeline report is displayed.

4. In the Timeframe list, select the period that you want to evaluate.

For example, if you want to view the current quarter, select Current Quarter.

How do I read the My Pipeline report?

This report contains the following metrics:

- **Total Revenue** — Total opportunity revenue scheduled to close within the selected period.
- **Open Pipeline** — Open opportunity revenue that has not yet been closed (won).
- **Won Revenue** — Opportunity revenue already closed (won).
- **Revenue by Sales Stage** — Total opportunity revenue per sales stage.
- **Sales Stage** — The names of the sales stages. Note that Sales Stage only displays in the table view when you select the List option in the Show View list.
- **Opportunity Count** — The number of opportunities in each stage. Note that Opportunity Count only displays in the table view when you select the List option in the Show View list.
- **Revenue Percent** — The percent of the total opportunity revenue in each stage. Note that Revenue Percent only displays in the table view when you select the List option in the Show View list.

With these metrics, for example, you might see that you have most of your revenue in the Qualification stage. This is revenue that has the least likelihood of becoming won revenue. You may want to see what opportunities in the early sales stages can be moved further along in the pipeline toward closure so you can meet your quota.

You can optionally select List in the Show View list to display the chart in table format.
How Much Opportunity Revenue in My Team's Pipeline is Scheduled to Close Within a Specified Period?

This tutorial shows you how to view your team's sales pipeline.

You want to know how your team's open opportunity revenue is distributed across the sales stages. Looking at the maturity of the sales pipeline can help you mitigate risk and meet your goals. Use the My Team's Pipeline (by Stage) report to determine the total opportunity revenue in your sales team pipeline, organized by sales stage, that is scheduled to close within the selected fiscal quarter.

This tutorial is aimed at sales managers.

How to view the My Team's Pipeline report

To view the My Team's Pipeline report:

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

   ![Navigator Menu]

   The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
3. Click **My Team's Pipeline**, and then select **View**.

4. In the **Timeframe** list, select the forecast period that you want to evaluate. For example, if you want to view the current quarter, select **Current Quarter**.

5. In the report, click one of the following buttons:
   - **By Stage** — Displays your team’s pipelines information by sales stage.
   - **By Resource** — Displays your team’s pipeline information by sales representative.

---

### How do I read the My Team's Pipeline by Stage report?

This report contains the following metrics:

- **Total Revenue** — You and your team’s total opportunity revenue scheduled to close within the selected forecast period.
- **Open Pipeline** — Open opportunity revenue that has not yet been closed (won).
- **Won Revenue** — Opportunity revenue already closed (won).
- **Revenue by Sales Stage** — Total opportunity revenue per sales stage and the percent of the total revenue currently in the stage.

With these metrics, you can see the total revenue at each sales stage. For example, your team might have $88,696,454.34 in open opportunity revenue. You can also drill down into each stage to learn more. You know that you want the bulk of your opportunity revenue in the later sales stages. If too much of the opportunity revenue is in the early stages of the pipeline, there may not be enough time to close it before the quarter is over.

It's important to note that revenue in the Closed Sales Stage (last bar in the chart) is not the same as closed revenue. Revenue in the Closed Sales Stage may or may not be closed (won) from a win/loss stand point.

You can optionally select **List** in the **Show View**.

To drill down for more details on an individual stage:
1. Click an individual sales stage to drill down into the details for that stage. In a graph, you click on the bar for that stage. In the list view, click on the name of the stage.

For example, when you drill down into the Qualification stage, the win percent, opportunity name, account owner, account name, close date, and revenue won are displayed.

2. Click Return to return to the My Team’s Pipeline by Stage report.

**How do I read the My Team’s Pipeline by Resource report?**

This report contains the following metrics:

- **Total Revenue** — You and your team’s total opportunity revenue scheduled to close within the selected forecast period.
- **Open Pipeline** — Open opportunity revenue that has not yet been closed (won).
- **Won Revenue** — Opportunity revenue already closed (won).
- **Revenue by Sales Resource** — Total opportunity revenue for each representative, colored by sales stage.

With these metrics, you could see that you have more revenue in your sales pipeline than the sales representative you manage. In this case, you may need to have a conversation with the representative, who has the bulk of his opportunity revenue in the qualification stage. As his manager, you may need to help him work on those opportunities.

You can optionally select **List** in the **Show View** list to display the chart in table format.

**To drill down into an individual sales stage for a representative:**

1. Click an individual sales representative to drill down into the details for that stage. In a graph, you click on the bar for that stage. In the list view, click on the name of the representative.

2. Click Return to return to the My Team’s Pipeline by Resource report.
How do I read the My Team's Pipeline by Resource report?
This Part describes how to answer business questions related to sales opportunities.
What Are the Top Ten Open Opportunities, Their Days to Close, and Total Revenue?

This tutorial shows you how to analyze open opportunities.

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

How to find the top ten opportunities, their days to close, and total revenue

To view the Opportunity Watch Real Time report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
   - Sales
   - Analytic Library
3. Click Opportunity Watch Real Time, and then select View.

The Opportunity Watch Real Time report is displayed.

How do I read the Opportunity Watch Real Time report?

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

This report contains the following metrics:

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

The following image shows an example of the Opportunity Watch Real Time report.
How do I read the Opportunity Watch Real Time report?

<table>
<thead>
<tr>
<th>Action</th>
<th>Opportunity</th>
<th>Sales Account</th>
<th>Value</th>
<th>Days to Close</th>
<th>Win Probability (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Nikon#23306419</td>
<td>Pinnacle Technologies (BETTLE, US)</td>
<td>$1,794,888,576.00</td>
<td>5</td>
<td>40</td>
</tr>
<tr>
<td></td>
<td>Canon#6591223853943</td>
<td>Automotive -002-0001 (Pinehurst, US)</td>
<td>$485,851,829.00</td>
<td>8</td>
<td>90</td>
</tr>
<tr>
<td></td>
<td>Canon#6885928757331</td>
<td>Honda Civic 08901 (Irving, US)</td>
<td>$176,067,929.00</td>
<td>8</td>
<td>80</td>
</tr>
<tr>
<td></td>
<td>BEAVI</td>
<td>SF5668754000 (Pinehurst, US)</td>
<td>$27,777,988.00</td>
<td>8</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Nissan #32-426929</td>
<td>CR/MNETHO 1006 (CASTEFINUE, IT)</td>
<td>$27,532,560.00</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>MobNMS117247119</td>
<td>Norway (MOLDE, NO)</td>
<td>$23,423,423.00</td>
<td>13</td>
<td>70</td>
</tr>
<tr>
<td></td>
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<td>Norway (MOLDE, NO)</td>
<td>$19,598,364.00</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Nikon#48859265825</td>
<td>CUST_58852304 (Columbus, US)</td>
<td>$11,659,658.00</td>
<td>1</td>
<td>58</td>
</tr>
<tr>
<td></td>
<td>CROQOPT</td>
<td>Automotive 101343048</td>
<td>$9,500,000.00</td>
<td>1</td>
<td>100</td>
</tr>
</tbody>
</table>

What Are the Top Ten Open Opportunities, Their Days to, Total Revenue?
How do I read the Opportunity Watch Real Time report?
How Many Leads Do Not Result in Conversion to Opportunity?

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

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

How to determine the number of leads that do not result in conversion to opportunities

To create the Leads Not Converted report:

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

The Reports and Analytics page is displayed.

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

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

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

   - From the Time folder: **Year**
   - From the Time folder: **Quarter**
   - From the Facts > Lead Facts folder: **# of Rejected Leads**
   - From the Facts > Lead Facts folder: **# of Leads**

For each column that you want to add:

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

   a. Click the Add/Remove Subject Areas button.

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

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

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

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

9. Click Submit to save the analysis.

10. Save the analysis as follows:

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

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

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

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

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

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

How do I read the Leads Not Converted report?

This report contains the following metrics:

- **Year** — The time frame (year) that the leads were not converted.
How do I read the Leads Not Converted report?

- **Quarter** — The time frame (quarters) that the leads were not converted.
- **# of Leads** — The total amount of leads for the specified time period.
- **# of Rejected Leads** — The amount of the leads that were rejected for the specified time period.
- **# of Retired Leads** — The amount of the leads that had no likelihood of being converted to an opportunity for the specified time period.

The following image shows an example of the Leads Not Converted report.
How do I read the Leads Not Converted report?
What Are My Unaccepted Leads by Age?

This tutorial shows you how to identify your total number of unaccepted leads by age since they were assigned to you.

You want to find out how many leads are in your queue that you have not yet accepted, based on the dates that they were assigned to you. Knowing how old your unaccepted leads are enables you to accept the leads that you deem valuable, and then convert or retire those leads. Use the My Unaccepted Leads by Age report to ensure that your unaccepted aging leads get your full attention.

This tutorial is aimed at sales representatives.

How to view the My Unaccepted Leads by Age report

To view the My Unaccepted Leads by Age report:

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

The Reports and Analytics page is displayed.

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

What Are My Unaccepted Leads by Age?  28-1
3. Click **My Unaccepted Leads by Age**, and then select **View**.

   The My Unaccepted Leads by Age report is displayed.

### How do I read the My Unaccepted Leads by Age report?

This report contains the following metrics:

- **Lead Age** — The number of days that the lead has been assigned to you.
- **Lead Count** — The total number of leads for a specific age range.
- **Total Leads** — The total number of all open leads.
- **Deal Size** — The total monetary amount the customer is expected to spend. The deal size is automatically determined by the products entered for the lead. Adding or removing products causes the deal size to be recalculated. Note that **Deal Size** only displays in the table view when you select the **List** option in the **Show View** list.

You can optionally select **List** in the **Show View** list to display the chart in table format as shown in the image.

**To drill down for more detail on all open leads for a given lead age range:**

1. Click the lead age bar or the number link above the lead age bar in the bar chart. You can view the My Unaccepted Leads by Age detail report to get more details on the open leads to determine those that are not viable and potentially close them so they no longer appear as an open lead.

2. Click **Return** to return to the My Unaccepted Leads by Age report.
Who is the Primary Sales Resource Associated With Each Opportunity For This Customer?

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

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

How to determine who is the primary sales resource associated with each opportunity for this customer

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

1. From the Navigator menu, select Reports and Analytics.
How to determine who is the primary sales resource associated with each opportunity for this customer

The Reports and Analytics page is displayed.

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

![Browse Catalog](image1)

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

![Oracle BI Catalog](image2)

4. In the Select Subject Area list, select **Sales - CRM Pipeline**.

![Select Subject Area](image3)
5. In the Subject Areas pane, expand the Opportunity folder, and then double-click **Opportunity Name** to add the column to the Selected Columns pane.

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

8. In the New Filter dialog, perform the following steps:
   a. Select is equal to/is in from the Operator list.
   b. In the Value field, enter Agile Solutions. (Note that you can also select one or more values from the Value list, or you can search for a value.)
   c. Click OK. The filter is added to the Filters pane.
9. Click Results. Your analysis is displayed.

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

This report contains the following metrics:

- **Opportunity Name** — The name of the opportunity associated with the primary resource and the customer.

- **Owner First Name** — The first name of the primary sales representative (resource) who owns this opportunity.

- **Owner Last Name** — The last name of the primary sales representative (resource) who owns this opportunity.

- **Customer Name** — The name of the sales representative’s customer.

The following image shows an example of the Primary Sales Resource Associated With Each Opportunity For This Customer report.
How Well Are Our Sales Representatives Dispositioning Leads?

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

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

How to determine how well sales representatives are dispositioning leads

To create the Leads Dispositioning by Sales Representative report:

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

   ![Navigator Menu](image)

   The Reports and Analytics page is displayed.

2. Click the down-arrow button to the right of Create, and then select Analysis.
How to determine how well sales representatives are dispositioning leads

The Select Subject Area list is displayed.

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

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

   - From the Employee folder: **Employee Name**
   - From the Facts > Lead Facts folder: **# of Leads**
   - From the Facts > Lead Facts folder: **# of Open Leads**
   - From the Facts > Lead Facts folder: **# of Qualified Leads**
   - From the Facts > Lead Facts folder: **# of Rejected Leads**
   - From the Facts > Lead Facts folder: **Avg Lead Age (Days)**

For each column that you want to add:

a. Select the column in the Subject Areas list.

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

a. Click the Add/Remove Subject Areas button.

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

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

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

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

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

9. Click Submit to save the analysis.

10. Save the analysis as follows:
    a. In the Analysis Name field, specify a name for the analysis.
    b. In the Save In list, select the folder in which you want to save the analysis.
       The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
       If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
    c. Click Submit, and then click OK in the Confirmation dialog.
       The final report is saved in the specified folder. You can now navigate to the analysis.
How do I read the Leads Dispositioning by Sales Representative report?

This report contains the following metrics:

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

The following image shows an example of the Leads Dispositioning by Sales Representative report.
How do I read the Leads Dispositioning by Sales Representative report?
What is the Age and Number of My Open Leads?

This tutorial shows you how to identify your total number of accepted leads by age since they were assigned.

You want to find out how many leads are in your queue, based on the dates that they were assigned to you. Knowing how old your leads are enables you to convert or retire the leads. Use the My Open Leads by Age report to ensure that your aging leads get your full attention.

This tutorial is aimed at sales representatives.

How to view the My Open Leads by Age report

To view the My Open Leads by Age report:

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

The Reports and Analytics page is displayed.

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

   Shared Folders
How do I read the My Open Leads by Age report?

The My Open Leads by Age report shows the total number of open leads by a given lead age range in days.

This report contains the following metrics:

- **Lead Age** — The number of days that the lead has been assigned to you.
- **Lead Count** — The total number of leads for a specific age range.
- **Total Leads** — The total number of all open leads.
- **Deal Size** — The total monetary amount the customer is expected to spend. The deal size is automatically determined by the products entered for the lead. Adding or removing products causes the deal size to be recalculated. Note that Deal Size only displays in the table view when you select the List option in the Show View list.

With these metrics, you could see, for example, that most of your leads are more than 60 days old, and that you must work more efficiently to move your new leads forward into opportunities or consider retiring the older leads when applicable.

You can optionally select List in the Show View list to display the chart in table format.

To drill down for more detail on all open leads for a given lead age range:

1. Click the lead age bar or the number link above the lead age bar in the bar chart. You can view the My Open Leads by Age detail report to get more details on the open leads to determine those that are not viable and potentially close them so they no longer appear as an open lead.

   The My Open Leads by Age report shows the rank, open lead, account name, primary contact, deal size, and age of the lead.

2. Click Return to return to the My Open Leads by Age report.

The My Open Leads by Age report is displayed.
What Are My Open Leads By Source?

This tutorial shows you how to identify your open leads and their sources. You want to see what your open leads are and from which channels they originated. Use the My Open Leads by Source report to help you plan your lead follow up activities. For example, you can use this information to work on all leads coming from the Social Media channel, and then progress to another source, such as Direct Mail.

This tutorial is aimed at sales representatives.

How to view the My Open Leads by Source report

To view the My Open Leads by Source report:

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

The Reports and Analytics page is displayed.

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
   - Sales
   - Embedded Content
   - Sales Representative
   - Dashboards
How do I read the My Open Leads by Source report?

3. Click My Open Leads by Source, and then select View.

The My Open Leads by Source report is displayed.

4. You can select a lead age range that you want to evaluate. Select Older than 12 months in the Timeframe list.

The My Open Leads by Source report displays for leads that are older than 12 months.

How do I read the My Open Leads by Source report?

The My Open Leads by Source report displays the number of open leads from four sources for leads older than 12 months, including different channels: direct mail, e-mail, model based predictions, and phone.

This report contains the following metrics:

- **Timeframe** — A specific range of time for the lead’s age.
- **Lead Source** — The set revenue amount that each employee must close for the specified time frame.
- **Lead Count** — The total number of leads within the specific time frame generated by the lead source.
- **Deal Size** — The total monetary amount the customer is expected to spend. The deal size is automatically determined by the products entered for the lead. Adding or removing products causes the deal size to be recalculated. Note that Deal Size only displays in the table view when you select the List option in the Show View list.

With these metrics, you might see that you have six leads that are older than 12 months, and those leads were generated across four channels.

You can optionally select List in the Show View list to display the chart in table format.

To drill down for more detail on an open lead by source:

1. Click in a slice (wedge) of the pie chart or the number link associated with the slice in the pie chart. You can view the My Open Leads by Source detail report to get more details on the open leads from a lead source.

   The My Open Leads by Source report shows the rank, open lead, account name, primary contact, deal size, and age of the lead.

2. Click Return to return to the My Open Leads by Source report.
What Are the Details of Leads Assigned to My Team?

This tutorial shows you how to identify the total number of leads assigned to your sales team by status, employee (resource), and lead channel.

You want to find detailed information about the leads that are assigned to your sales team. Knowing this, you can effectively coach your team to qualify and convert leads to opportunities. Use the My Team's Leads report to ensure that you know exactly how your sales team is performing on their leads right now.

This tutorial is aimed at sales managers.

How to view the My Team's Leads report

To view the My Team's Leads report:

1. From the Home page, click Analytics.

The Reports and Analytics page is displayed.

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

   ![MyTeam's Leads report](image-url)
3. Click **My Team's Leads**, and then select **View**.

The My Team's Leads report is displayed.

4. You can select a lead age range that you want to evaluate. Select **Older than 12 months** in the **Timeframe** list.

The My Team's Leads by Status report displays for leads that are older than a year.

5. In the report, click one of the following buttons:
   - **By Status** — Displays your team's leads by status. This is the default report display.
   - **By Resource** — Displays your team's leads by employee.
   - **By Source** — Displays your team's leads by lead channel.

**How do I read the My Team's Leads by Status report?**

The My Team’s Leads by Status report displays the total number of leads by status. This report contains the following metrics:

- **Timeframe** — A specific range of time for the lead’s age.
- **Lead Status** — The current status of leads within a specific period. Lead status can be of the following types:
  - **Converted** — The lead has been converted to an opportunity.
  - **Qualified** — The lead is ready for sales attention. Leads can have a status of qualified based on many factors including the status of the budget and the period of the project.
  - **Retired** — The lead is retired when there is no likelihood of the lead being converted to an opportunity or when a lead is no longer followed up by Sales and not evaluated by Marketing over a certain period of time.
  - **Unqualified** — The lead requires additional information and qualification activities by the sales team. This is the default status assigned to all new leads.
- **Lead Count** — The total number of leads within the specific period for any particular lead status.
How do I read the My Team’s Leads by Resource report?

The My Team’s Leads by Resource report displays the total number of leads by employee.

This report contains the following metrics:

- **Timeframe** — A specific range of time for the lead’s age.
- **Resource** — The employee on the sales team who is assigned to the lead.
- **Lead Count** — The total number of leads within the specific period for any particular resource.
- **Lead Status** — The current status of leads within a specific period.
  - **Converted** — The lead has been converted to an opportunity.
  - **Qualified** — The lead is ready for sales attention. Leads can have a status of qualified based on many factors including the status of the budget and the period of the project.
  - **Retired** — The lead is retired when there is no likelihood of the lead being converted to an opportunity or when a lead is no longer followed up by Sales and not evaluated by Marketing over a certain period of time.
  - **Unqualified** — The lead requires additional information and qualification activities by the sales team. This is the default status assigned to all new leads.
- **Total Leads** — The total number of leads within the specific period for all resources.

With these metrics, you might see that most of the team’s leads are assigned to one sales representative, and that most of these leads are either qualified or converted. The majority of another representatives’s leads might show as unqualified. You can use this...
How do I read the My Team’s Leads by Source report?

The My Team’s Leads by Source report displays the total number of leads by lead channel (source).

This report contains the following metrics:

- **Timeframe** — A specific range of time for the lead’s age.
- **Lead Source** — The lead channel that generates the lead.
- **Lead Count** — The total number of leads within the specific period for a lead channel.
- **Total Leads** — The total number of leads within the specific period for all lead sources.

With these metrics, you might see that the majority of the team’s leads, which are older than a year, were originated from the **Model based prediction** lead source and that they were retired.

If you click the bar for a channel in the bar chart, you can view a detailed page of all the open leads by lead source for a specified period.

You can optionally select **List** in the **Show View** list to display the chart in table format.

To drill down for more detail on your team’s leads by source:

1. Click a lead source bar or the number link for it in the bar chart. You can view the My Team’s Leads by Source detail report to get more details on your team’s leads by source.
2. Click **Return** to return to the My Team’s Leads by Source report.
What Are My Organization's Top Open Opportunities?

This tutorial shows you how to view the top open opportunities.

You want to know what the top open opportunities are for your sales organization. Use the Top Open Opportunities report to tell you where the best revenue opportunities exist and to whom they belong. With this information, you can focus your attention on the opportunities that make the largest difference to your company's bottom line.

This tutorial is aimed at sales vice presidents.

How to view the Top Open Opportunities report

To view the Top Open Opportunities report:

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

   ![Navigator Menu](image)

   The Reports and Analytics page is displayed.

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

   - Shared Folders
How do I read the Top Open Opportunities report?

3. Click Top Open Opportunities, and then select View.

The Top Open Opportunities report is displayed.

How do I read the Top Open Opportunities report?

This report contains the following metrics:

- **Win %** — The number of opportunities won as a percentage of the total number of outstanding opportunities expected to close in that quarter.
- **Amount** — The amount of open opportunity revenue in the sales stage.
- **Name** — The name of the opportunity. Note that Name only displays in the table view when you select the List option in the Show View list.
- **Owner** — The sales representative who owns the opportunity. Note that Owner only displays in the table view when you select the List option in the Show View list.
- **Account** — The name of your customer. Note that Account only displays in the table view when you select the List option in the Show View list.
- **Close Date** — The date when the opportunity will be closed. If the opportunity is closed, this is the date the opportunity was closed. Note that Close Date only displays in the table view when you select the List option in the Show View list.
- **Sales Stage** — The part of the sales pipeline that the opportunity is in. Note that Sales Stage only displays in the table view when you select the List option in the Show View list.

With these metrics, you might see that many of your opportunities have a Win % higher than 80%. You might have one opportunity that the sales representative thinks is most likely not going to be won. You may want to find out why that opportunity has such a low win percentage when the rest of them are so high.

You can optionally select List in the Show View list to display the chart in table format.
How Do I Determine My Organization's Opportunity Aging by Sales Stage?

This tutorial shows you how to view and evaluate opportunity age and incidence by stage.

You want to see what opportunities are stalled or have been sitting in the sales pipeline without movement. Use the Sales Stage by Age report to help you monitor the life cycle of your team members’ opportunities and to formulate a plan to take corrective measures to ensure that they maximize those opportunities.

This tutorial is aimed at sales vice presidents.

How to view the Sales Stage by Age report

To view the Sales Stage by Age report:

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

   The Reports and Analytics page is displayed.

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

   Shared Folders
How do I read the Sales Stage by Age report?

This report contains the following metrics:

- **Opportunity Count** — The number of opportunities that are in the sales stage.
- **Sales Stage** — The sales stages in the sales process.
- **Total Opportunities** — The total number of opportunities.
- **Days in Stage** — The number of opportunities represented in discrete periods, such as 0-10 Days or 60+ Days.

With these metrics, you might see that your sales teams have most of their opportunities in the qualification stage. The large majority of these opportunities may have been in that stage for more than 60 days, which means they most likely have a low win percentage.

You can optionally select List in the Show View list to display the chart in table format.

By reading the metrics in both the chart and table, you might see that you have a total of 185 opportunities in the Qualification stage that have been there for more than 60 days. You might also see that you have opportunities in the last three stages that have also been there for more than 60 days. These opportunities need to be touched again to get them moving into the next stage. You may want to investigate the reasons behind these stalled opportunities.

To drill down for more detail on sales stages:

1. Click the opportunity count bar or the sales stage text label on the Y-axis. You can view the Sales Stage by Age report for a specific sales stage to get more details on the opportunity. This report displays win percent, opportunity name, opportunity owner name, account name, revenue won, and close date.

   You can also select a Sales Stage in the Show list.

2. Click **Return** to return to the Sales Stage by Age report.
This Part describes how to answer business questions related to competitors.
Who Are My Top Competitors and What Is Our Revenue Exposure to Them?

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

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

How to identify your top competitors and your revenue exposure to them

To create the Top Competitors report:

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

   ![Navigator Menu]

   The Reports and Analytics page is displayed.

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

4. Select the Sales - CRM Pipeline subject area.
How to identify your top competitors and your revenue exposure to them

Who Are My Top Competitors and What Is Our Revenue Exposure to Them?

The Criteria page is displayed.

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

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

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

   ![](image1.png)

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

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

   ![](image2.png)

9. In the New Filter dialog, perform the following steps:
   
   a. Select **is not null** from the **Operator** list.
How to identify your top competitors and your revenue exposure to them

Who Are My Top Competitors and What Is Our Revenue Exposure to Them?

10. Add a second filter that restricts Open Opportunity Revenue to the top 10 highest revenue values by performing the following steps:
   a. Click the Options button to the right of Open Opportunity Revenue, and then select Filter.
   b. In the New Filter dialog, select is in top in the Operator list.
   c. Accept 10 as the default value in the Value field.
d. Click OK. The second filter is added to the Filters pane.

11. Preview your analysis. Click the Results tab.

12. To enable Open Opportunity Revenue to display local currency values, with no decimal places, perform the following steps:
   a. Click the Criteria tab.
   b. Click the Options button to the right of Open Opportunity Revenue, and then select Column Properties.
c. In the Column Properties dialog, select the Data Format tab.
d. Select the Override Default Data Format box.
e. In the Treat Numbers As list, select Currency.
f. In the Currency Symbol list, select the currency that you require (for example, $).
g. Accept the default values for Negative Format (Minus: -123) and Decimal Places (0).

h. Click OK.

13. Click the Results tab to preview your analysis.

14. Click the Criteria tab.

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

17. Save the analysis as follows:
   a. Click Save.
   b. The Save As dialog is displayed. In the Name field, enter Top Competitors.
   c. In the Folders list, select the folder in which you want to save the analysis.
      The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.
      If you save the analysis in My Folders, then it is available only for your personal use. If you save the analysis in Shared Folders\Custom, then it is available to all users who can access Shared Folders\Custom.
d. Click OK.

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

How do I read the Top Competitors report?

This report contains the following metrics:

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

The following image shows an example of the Top Competitors report for 2013 Q3.
How do I read the Top Competitors report?
Which Were the High-Value Opportunities That We Lost to Our Competitors?

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

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

How to identify the high-value opportunities lost to competitors

To create the High-Value Lost Opportunities report:

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

![Navigator Menu]

The Reports and Analytics page is displayed.

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

4. Select the Sales - CRM Pipeline subject area.
How to identify the high-value opportunities lost to competitors

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

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

6. Similarly, add the following columns to the Selected Columns pane:
How to identify the high-value opportunities lost to competitors

- From the Competitor folder: Competitor Name
- From the Opportunity folder: Opportunity Name
- From the Time folder: Date
- From the Facts > Win Loss Facts folder: Lost Competitive Opportunity Revenue

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

8. In the New Filter dialog, perform the following steps:
   a. Select is not null from the Operator list.
   b. Click OK. The filter is added to the Filters pane.
9. Add a second filter that restricts Lost Competitive Opportunity Revenue to the top 10 highest revenue values, by performing the following steps:

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

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

c. Accept 10 as the default value in the Value field.

d. Click OK. The second filter is added to the Filters pane.
10. Add a sort to display the highest value revenue first. Click the **Options** button to the right of Lost Competitive Opportunity Revenue. Select **Sort**, and then select **Sort Descending**.

![Sort Descending](image)

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

11. To shorten the column heading for Lost Competitive Opportunity Revenue, perform the following steps:

   a. Click the **Options** button to the right of Lost Competitive Opportunity Revenue, and then select **Column Properties**.

   ![Column Properties](image)

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

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

13. Click the Results tab to preview the analysis.

14. Save the analysis as follows:
How do I read the High-Value Lost Opportunities report?

a. Click Save.

![Image](untitled.png)

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

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

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

d. Click OK.

   ![Image](save-as.png)

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

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

This report contains the following metrics:

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

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Competitor Name</th>
<th>Opportunity Name</th>
<th>Date</th>
<th>Lost Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACustomer_JIVJEGK</td>
<td>Dell</td>
<td>ACOs</td>
<td>12/06/2012</td>
<td>$4,046,828</td>
</tr>
<tr>
<td>CUSTOMER_ID3105630</td>
<td>NEC</td>
<td>Agile Sentinel</td>
<td>11/19/2012</td>
<td>$3,308,885</td>
</tr>
<tr>
<td>Pinnacle Technologies</td>
<td>Dell</td>
<td>EPM Group - RAT</td>
<td>1/9/2013</td>
<td>$2,858,000</td>
</tr>
<tr>
<td>Horrory</td>
<td>Dell</td>
<td>Kering</td>
<td>12/06/2012</td>
<td>$2,958,853</td>
</tr>
<tr>
<td>High Technology_ID01612071</td>
<td>Dell</td>
<td>Agile Solutions</td>
<td>12/06/2012</td>
<td>$1,657,820</td>
</tr>
<tr>
<td>Communications_ID022218999</td>
<td>Hewlett-Packard</td>
<td>Boeing - BPSL</td>
<td>11/13/2012</td>
<td>$1,292,182</td>
</tr>
<tr>
<td>Professional Services_ID01622840</td>
<td>Hewlett-Packard</td>
<td>Rocker - 888840</td>
<td>11/13/2012</td>
<td>$1,292,182</td>
</tr>
<tr>
<td>Healthcare_ID01585300</td>
<td>Hewlett-Packard</td>
<td>Agile Solutions</td>
<td>12/06/2012</td>
<td>$493,420</td>
</tr>
<tr>
<td>Public Sector_ID02291570</td>
<td>Aberdeen LLC</td>
<td>G20 - C2bix</td>
<td>1/5/2013</td>
<td>$393,420</td>
</tr>
<tr>
<td>CUSTOMER</td>
<td>NEC</td>
<td>Boeing - HR</td>
<td>1/2/2013</td>
<td>$1,04,568</td>
</tr>
</tbody>
</table>
How do I read the High-Value Lost Opportunities report?
What Are the Most Likely Reasons That We Lose Against Our Competitors?

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

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

How to identify the most likely reasons that we lose against our competitors

To view the Reason Lost report:

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

2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):
   - Shared Folders
   - Sales
   - Analytic Library
How do I read the Reason Lost report?

3. Click **Reason Lost** and select **View**.

The Reason Lost report is displayed.

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

This report contains the following metrics:

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

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