Oracle® Fusion Applications

CRM Reporting and Analytics Handbook

Release 11.1.6

E41685-01

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Explains how to use Oracle Fusion CRM Applications to perform current state analysis of business applications.

ORACLE®

Oracle Fusion Applications CRM Reporting and Analytics Handbook, Release 11.1.6

E41685-01

Contents

Preface

Oracle Fusion Applications 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 Fusion Applications offering is an ad-hoc query and self-service reporting solution that provides an easy to use interface for business users to perform current state analysis of their business applications.

This guide contains information about using Oracle Fusion CRM Applications to perform current state analysis of business applications.

Audience

This document is intended for users of Oracle Fusion CRM Applications who want to perform current state analysis of their business applications.

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:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Part I

Key Accounts and Products

This Part describes how to answer business questions related to key accounts and products.

1

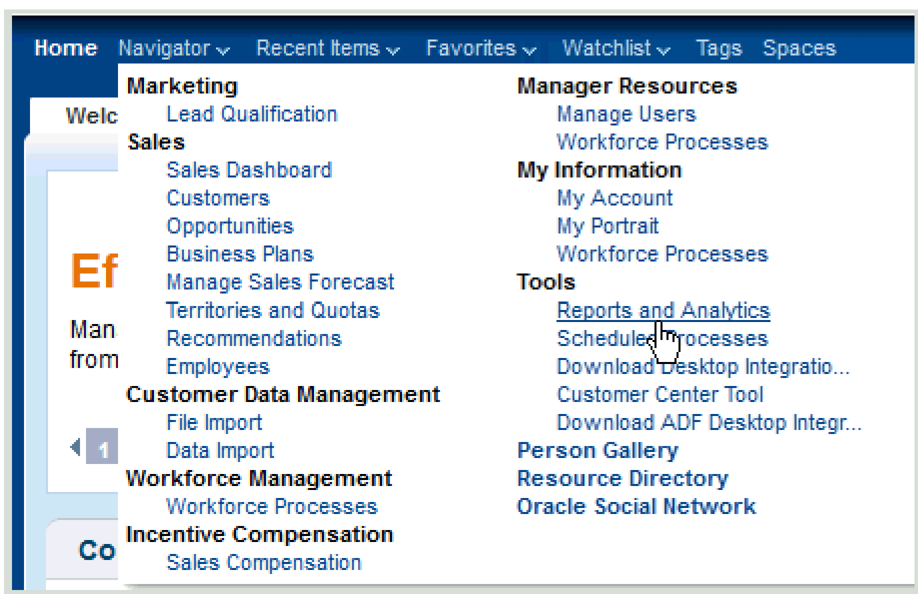
How Do I Find the Top Ten Accounts by Revenue?

This tutorial shows you how to find the top ten accounts by revenue.

This tutorial shows you how to how to find the ten opportunities that can bring in the most revenue if they close. This potential revenue is referred to as Open Opportunity Revenue in the tutorial. 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.

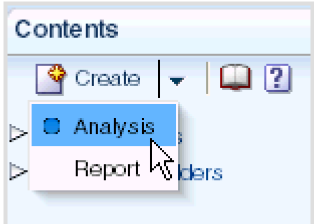
How to Find the Top Ten Accounts by Revenue

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



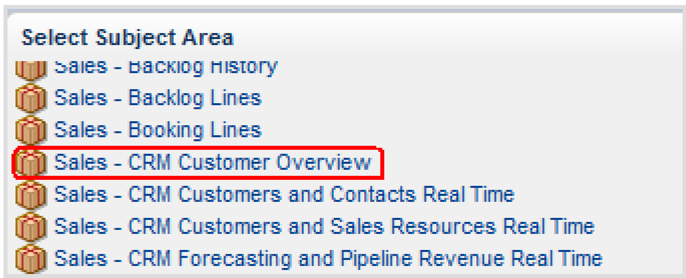
The Reports and Analytics page is displayed.

2. Click **Create** and select **Analytics**.



The Select Subject Area list is displayed.

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



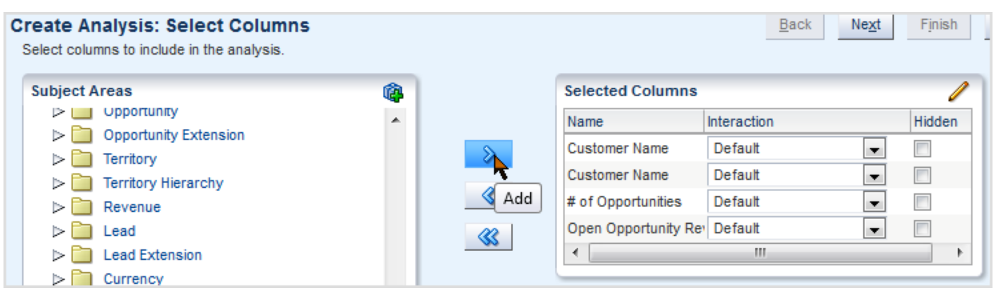
4. Expand the subject area folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:

   - From the Customer folder: Customer Name
   - From the Customer folder: Party Type Code
   - From the Pipeline Facts folder: # of Opportunities
   - From the Pipeline Facts folder: Open Opportunity Revenue

   For each column that you want to add:

   a. Select the column in the Subject Areas list.

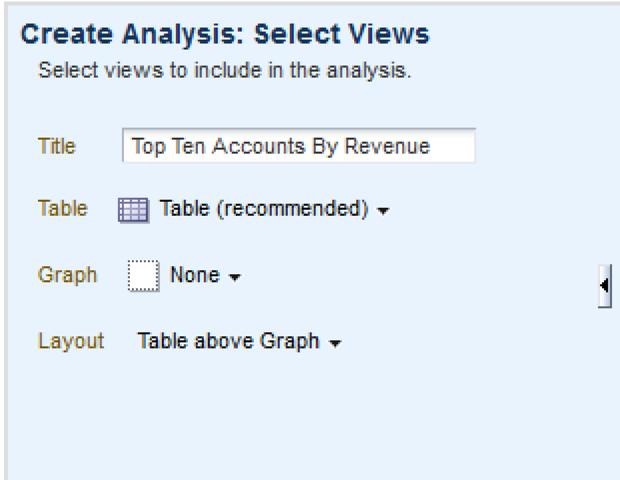
   b. Click the **Add** button (the right arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.



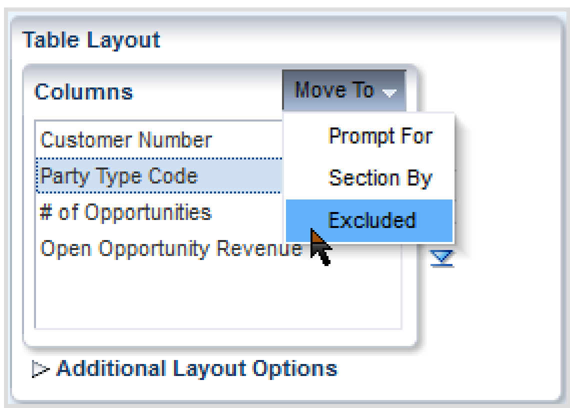
5. Click **Next**.

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

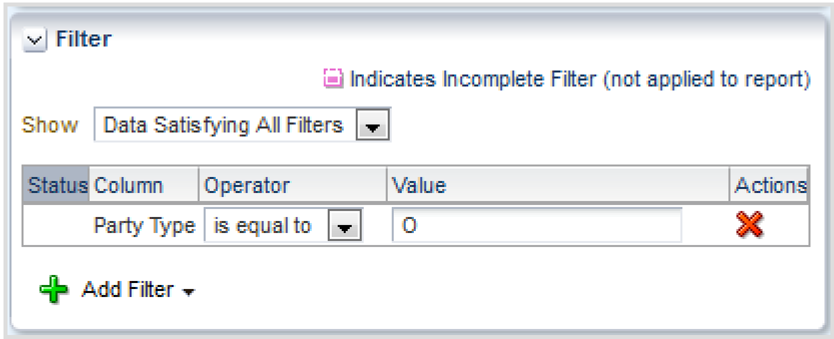
   Click the **Table** box and select **Table (recommended)**.



7. In the **Title** field, enter Top Ten Accounts By Revenue.
8. Click **Next**.
9. To further define the table to include only related account information, exclude Party Type Code (by selecting it, clicking **Move To**, and selecting the **Excluded** option on the Move To menu):



10. Click **Next**.
11. Add a filter to show only the "organization" party type by performing the following steps:
    a. Click **Add Filter** and select **Party Type Code**.
    b. In the Operator column, select **is equal to**.
    c. In the Value column, enter **O**.

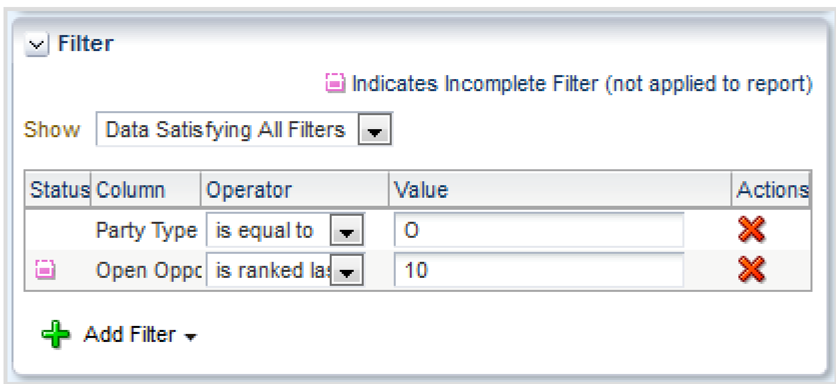


12. Add a filter to show only the ten accounts with the highest amount of revenue by performing the following steps:

    a. Click **Add Filter** and select **Open Opportunity Revenue**.

    b. In the Operator column, select **is ranked last**.

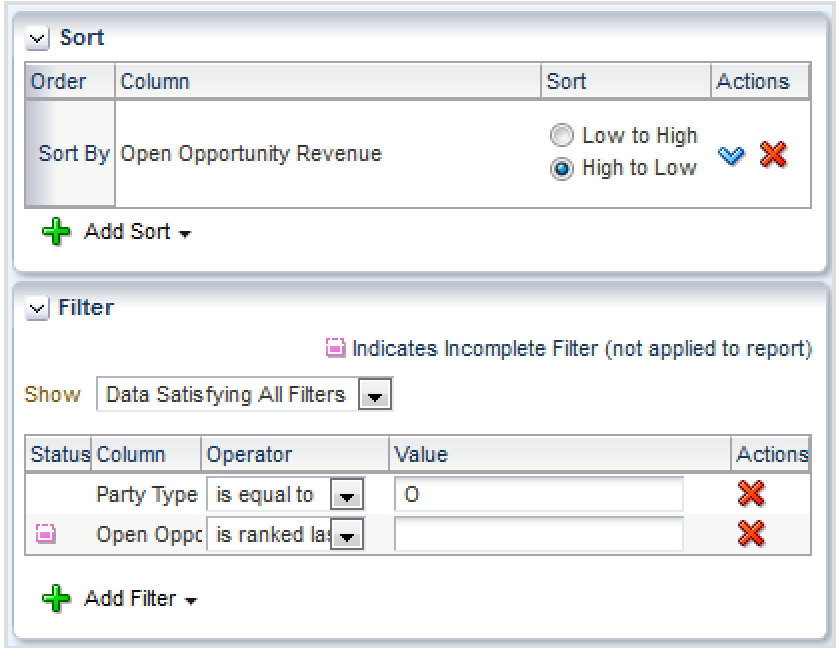
    c. In the Value column, enter **10**.



13. Sort Open Opportunity Revenue from high to low by performing the following steps:

    a. Click **Add Sort** and select **Open Opportunity Revenue**.

    b. Select **High to Low**.



14. Click **Next**.
15. Leave the default settings on this page and click **Next**.
16. 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 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 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, which looks like this:

Top Ten Accounts By Revenue

Customer Number	# of Opportunities	Open Opportunity Revenue
1204	32	111,405,000
266	54	42,833,751.2
183	69	28,815,221
189	53	22,836,275
302	37	20,911,276
269	32	13,033,751.2
180	21	11,010,800
272	32	10,733,751.2
275	48	10,733,751.2
177	11	10,000,000

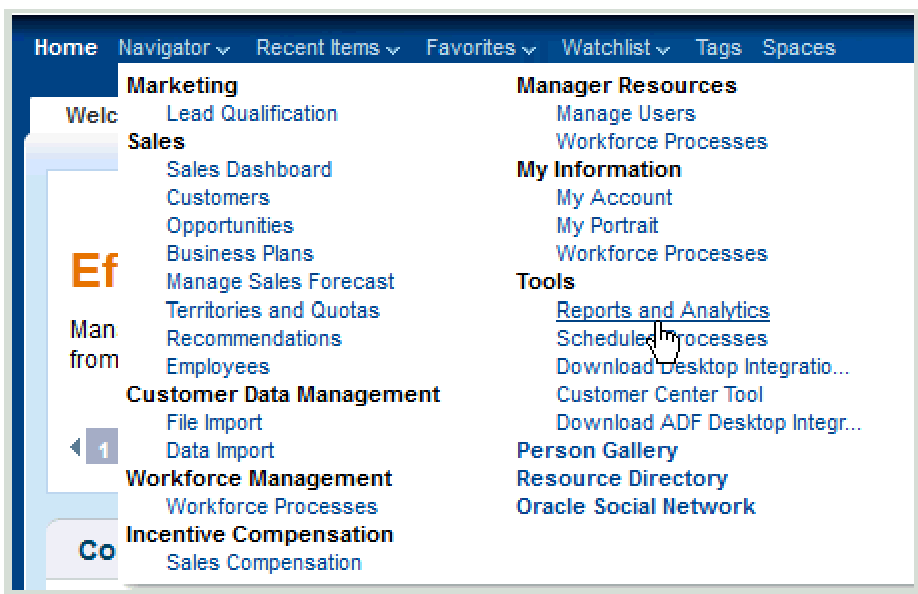
2

Which Are the Top Ten Products by Closed Revenue?

This tutorial shows you how to create a new Fusion report to determine which products rank in the top ten by closed revenue. A Fusion report is based on an "analysis" that defines the information that you want to see in the report. So to create a new Fusion report, you first need to create an analysis. The folder in which you save the analysis controls whether it is only available for your personal use, or whether other people can use the analysis.

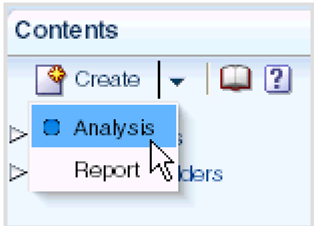
How to Identify the Top Ten Products by Closed Revenue Amount

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



The Reports and Analytics page is displayed.

2. Click **Create** and select **Analysis**.



The Select Subject Area list is displayed.

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

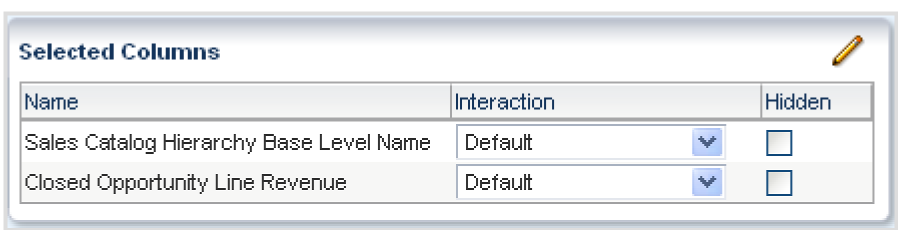
4. Expand the subject area folder (by clicking the arrow next to the folder) and select these columns to include in the analysis:

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

For each column that you want to add:

a. Select the column in the Subject Areas list.

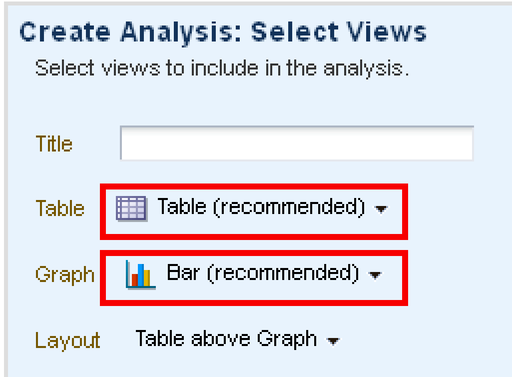
b. Click the **Add** button (the right arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.



5. Click **Next**.

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

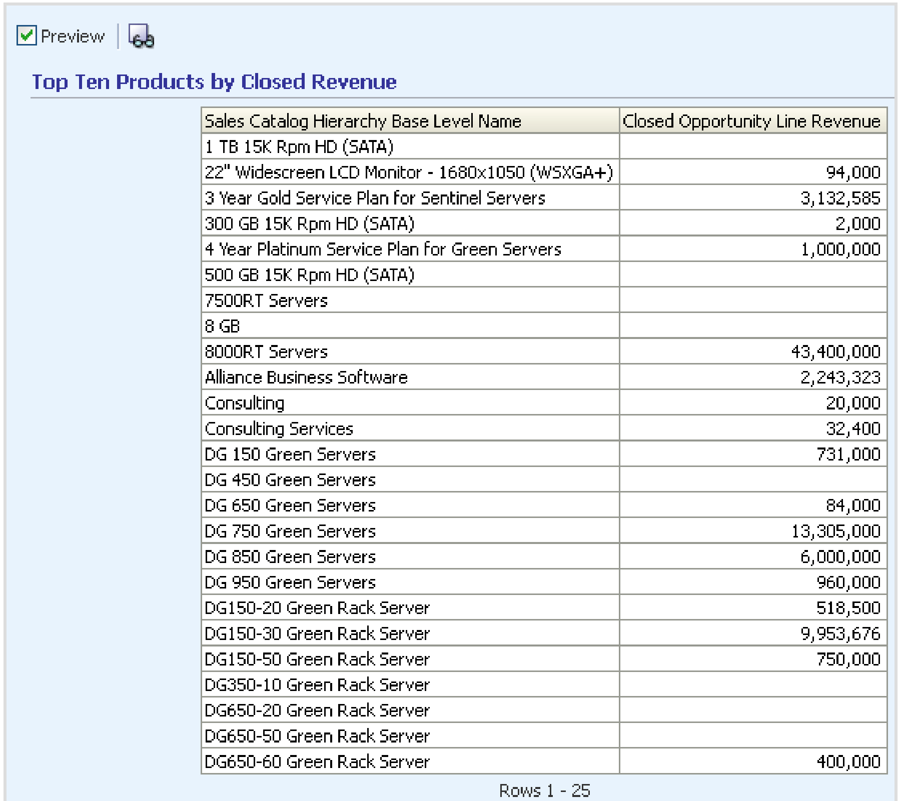
Click **Table (recommended)** from the **Table** box, and click **Bar (recommended)** from the **Graph** box.



7. In the **Title** field, enter "Top Ten Products by Closed Revenue" as the title of the analysis.

8. Select the **Preview** box to preview the view in the analysis.

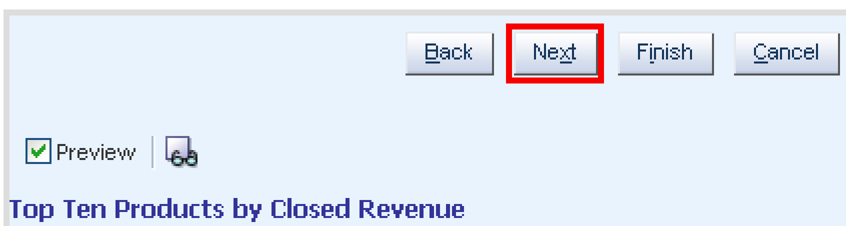
   The view is displayed with data.



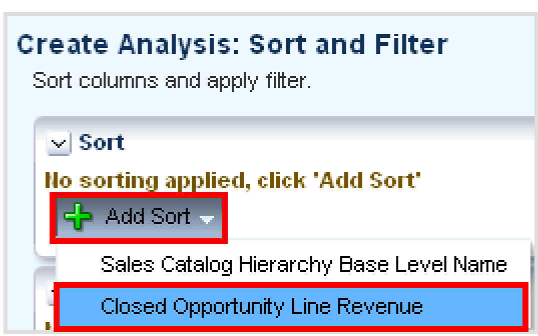
Sales Catalog Hierarchy Base Level Name	Closed Opportunity Line Revenue
1 TB 15K Rpm HD (SATA)	
22" Widescreen LCD Monitor - 1680x1050 (WSXGA+)	94,000
3 Year Gold Service Plan for Sentinel Servers	3,132,585
300 GB 15K Rpm HD (SATA)	2,000
4 Year Platinum Service Plan for Green Servers	1,000,000
500 GB 15K Rpm HD (SATA)	
7500RT Servers	
8 GB	
8000RT Servers	43,400,000
Alliance Business Software	2,243,323
Consulting	20,000
Consulting Services	32,400
DG 150 Green Servers	731,000
DG 450 Green Servers	
DG 650 Green Servers	84,000
DG 750 Green Servers	13,305,000
DG 850 Green Servers	6,000,000
DG 950 Green Servers	960,000
DG150-20 Green Rack Server	518,500
DG150-30 Green Rack Server	9,953,676
DG150-50 Green Rack Server	750,000
DG350-10 Green Rack Server	
DG650-20 Green Rack Server	
DG650-50 Green Rack Server	
DG650-60 Green Rack Server	400,000

Rows 1 - 25

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



10. In the Sort and Filter window, click **Add Sort** and select the Closed Opportunity Line Revenue measure.



11. Add a filter to show only the top 10 products by closed opportunity line revenue by performing the following steps:

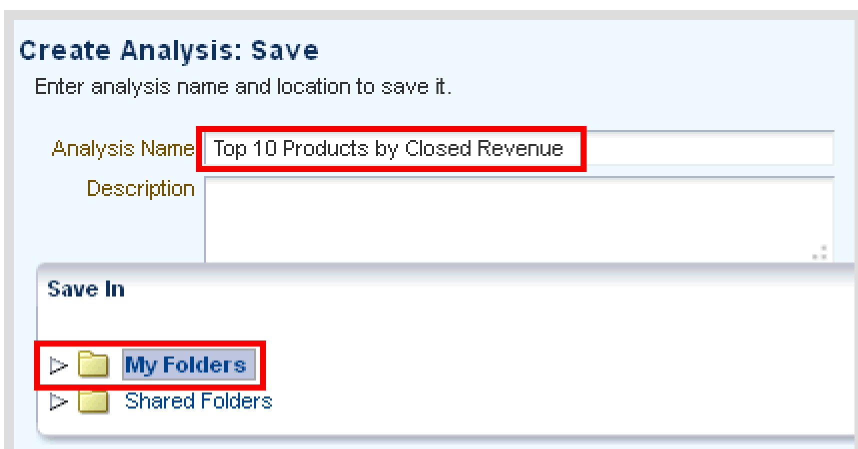
    a. Click **Add Filter** and select **Closed Opportunity Line Revenue**.

   b. In the Operator column, select **is ranked last**.
   c. In the Value column, enter 10.

12. Click **Finish**.
13. Save the analysis as follows:
   a. In the **Analysis Name** field, specify a name for the analysis such as Top 10 Products by Closed Revenue.
   b. In the Save In list, select the folder in which you want to save the analysis.

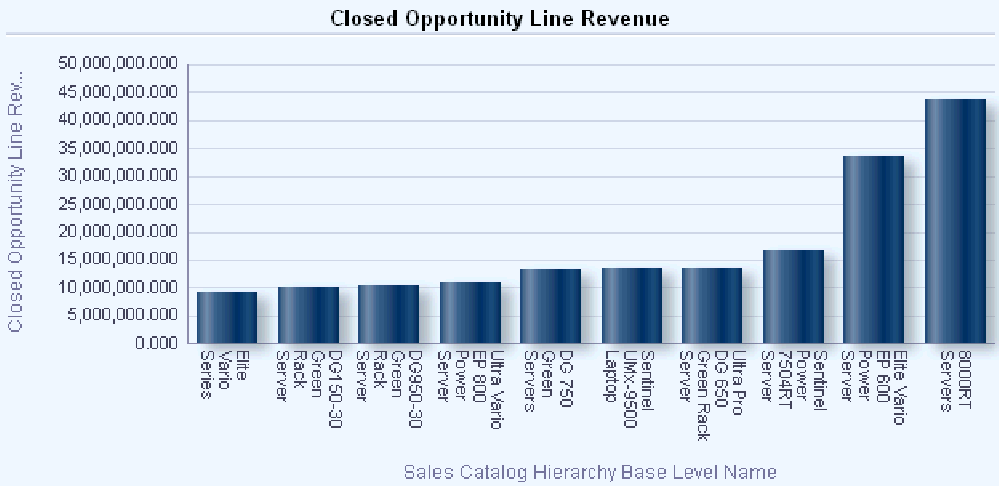
      The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.

      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**, then **OK** in the Confirmation dialog.



You can now navigate to the analysis, which looks like this:

Sales Catalog Hierarchy Base Level Name	Closed Opportunity Line Revenue
Elite Vario Series	9,328,000
DG150-30 Green Rack Server	9,953,676
DG950-30 Green Rack Server	10,500,000
Ultra Vario EP 800 Power Server	10,978,951
DG 750 Green Servers	13,305,000
Sentinel UMx-9500 Laptop	13,455,799.8
Ultra Pro DG 650 Green Rack Server	13,522,551
Sentinel Power 7504RT Server	16,785,865
Elite Vario EP 600 Power Server	33,642,499.2
8000RT Servers	43,400,000



Refresh - Print - Export

Part II

Sales Quota and Performance

This Part describes how to answer business questions related to sales quota and performance.

3

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.

- "How to Evaluate Sales Quota Performance for the Quarter"
- "How to Evaluate Sales Quota Performance for the Year"

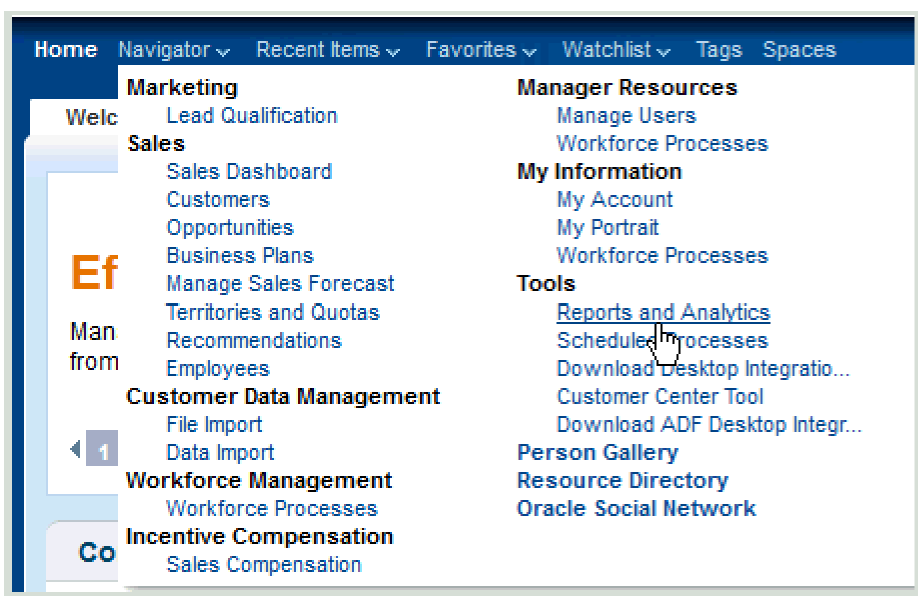
You can add the analyses shown in this tutorial to the sales dashboard. For more information, see "How do I Embed a Report in a Sales Dashboard?" in *Oracle Fusion Applications Reporting and Analytics Handbook*.

How to Evaluate Sales Quota Performance for the Quarter

You use the Current Period Performance analysis 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. Managers and territory owners assign quotas to users.

In this tutorial, the current forecast period is Q3. The administrator configures the sales calendar forecast periods.

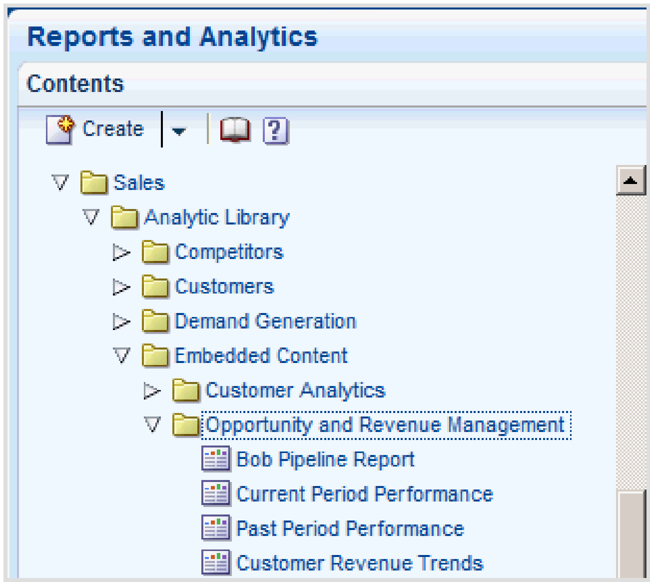
1. From the Navigator menu, select **Reports and Analytics**.



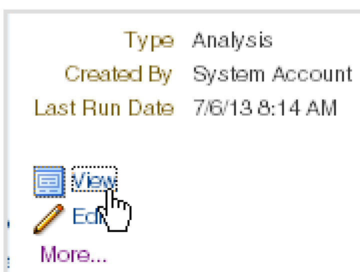
The Reports and Analytics page is displayed.

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

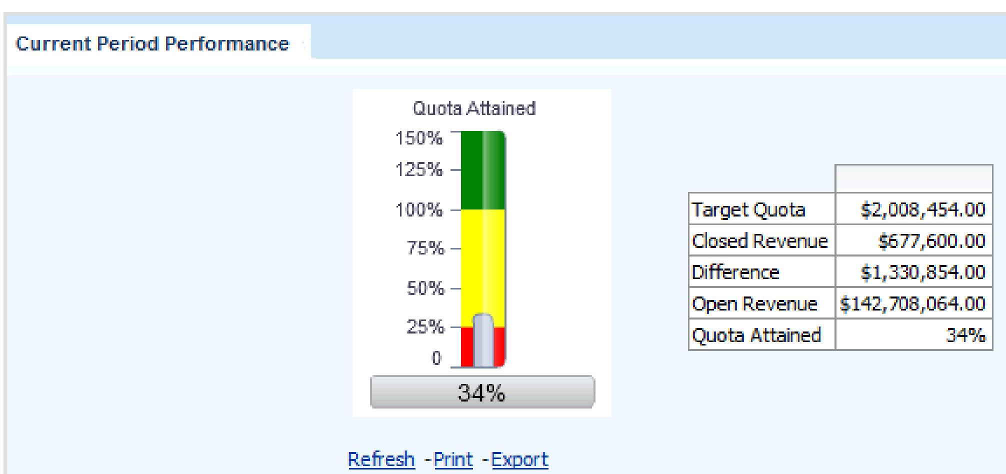
```
Shared Folders
  Sales
    Analytic Library
      Embedded Content
        Opportunity and Revenue Management
```



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



The Current Period Performance analysis is displayed.



4. Evaluate the following analysis elements to determine your sales quota performance for the current quarter:
   - **Target Quota** — Set revenue amount you are required to sell for the quarter. Managers and territory owners set target quotas for users.
   - **Closed Revenue** — Closed (won) opportunity revenue assigned to you with a close date that falls within the quarter.
   - **Difference** — Difference between your target quota and closed revenue.
   - **Open Revenue** — Open opportunity revenue assigned to you and scheduled to close within the quarter.
   - **Quota Attained** — Percent of the target quota you already attained for the quarter. In this tutorial, you have reached 34 percent of your target quota for the quarter.

How to Evaluate Sales Quota Performance for the Year

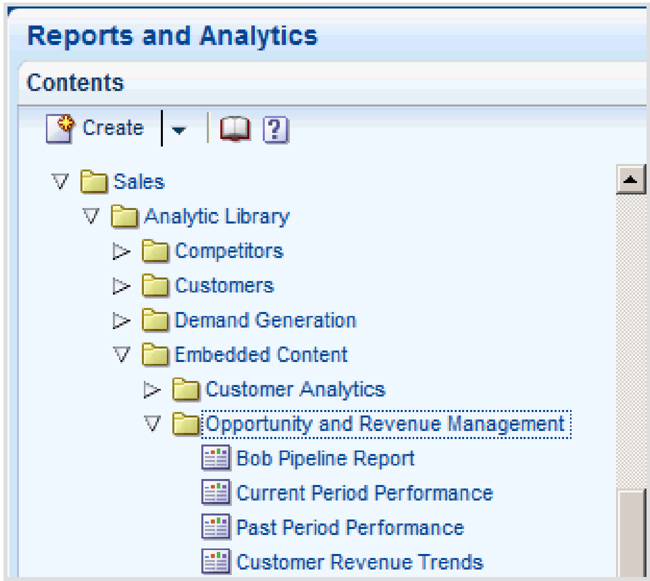
You use the Past Period Performance analysis to view your sales quota performance for the year.

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

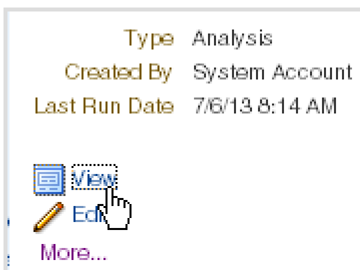
   The Reports and Analytics page is displayed.

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

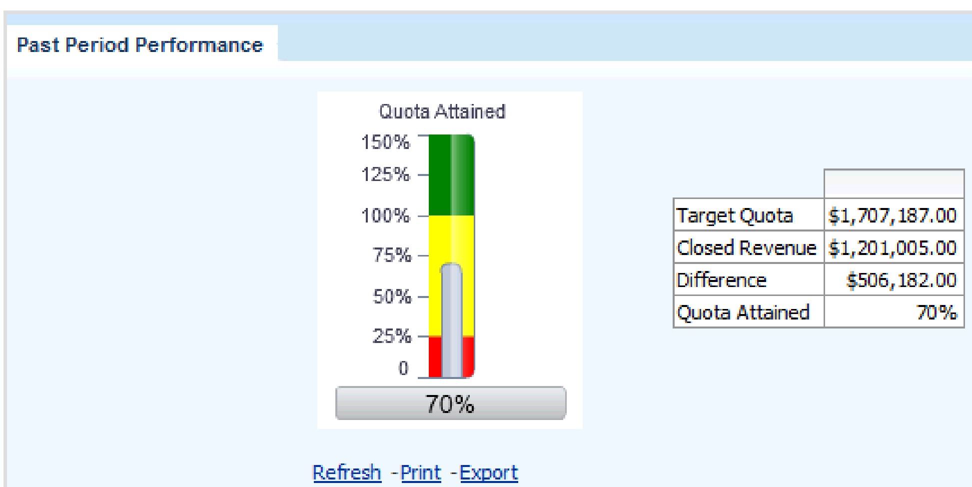
```
Shared Folders
  Sales
    Analytic Library
      Embedded Content
        Opportunity and Revenue Management
```



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



The Past Period Performance analysis is displayed.



4. Evaluate the following analysis elements to determine your sales quota performance for the year:

   - **Target Quota** — Set revenue amount you are required to sell for the year. Managers and territory owners set target quotas for users.
   - **Closed Revenue** — Closed (won) opportunity revenue assigned to you with a close date that falls within the year.

- **Difference —** Difference between your target quota and closed revenue.
- **Quota Attained —** 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.

4

Am I Closing Revenue in Line with My Forecast?

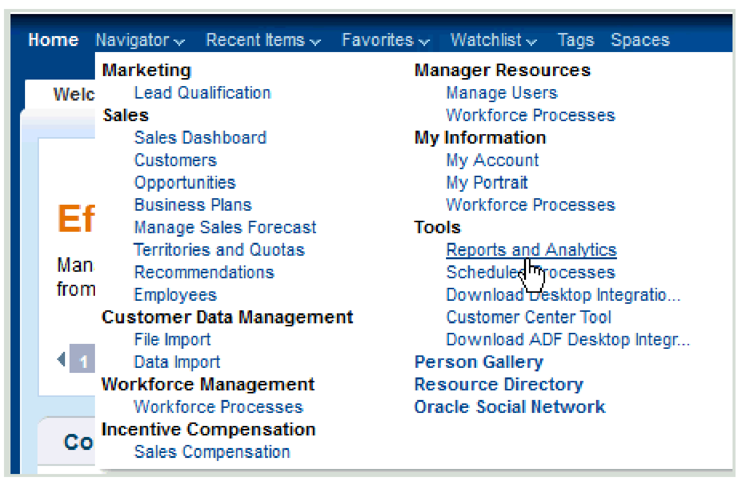
This tutorial shows you how to analyze individual sales performance by comparing closing revenue with sales forecast figures.

This tutorial is aimed at sales representatives.

How to Verify that I Am Closing Revenue in Line with My Forecast Figures

Sales representatives can analyze their own performance by following these steps.

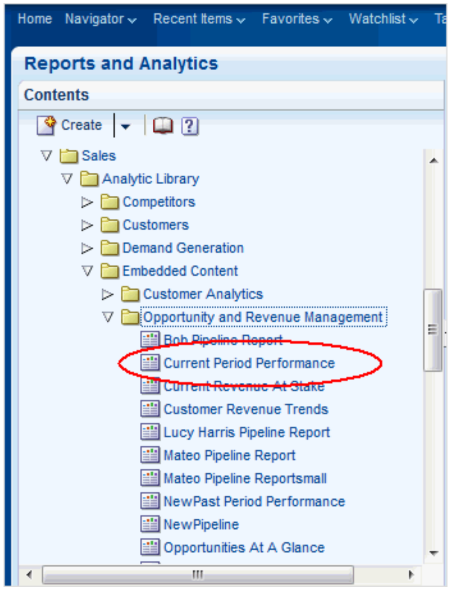
1. From the Navigator menu, select **Reports and Analytics**.



   The Reports and Analytics page is displayed.

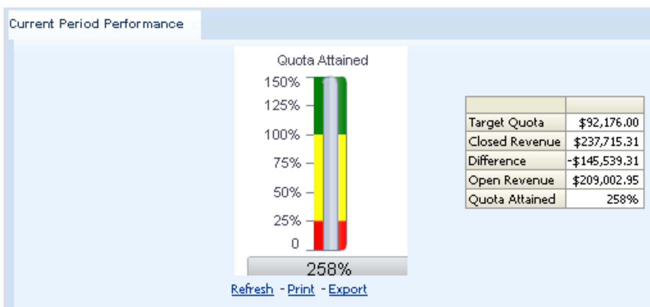
2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):

```
Shared Folders
  Sales
    Analytic Library
      Embedded Content
        Opportunity and Revenue Management
```



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

The Current Period Performance report is displayed.



I can now use this report to analyze my Closed Revenue against Target Quota.

5

Is My Team Closing Revenue in Line with Their Forecast?

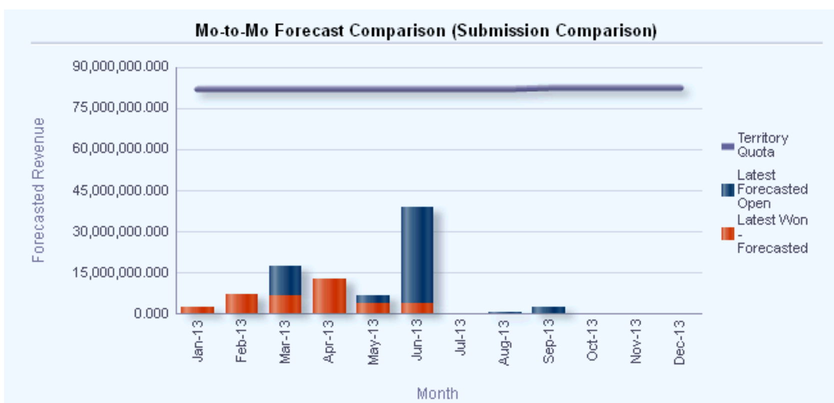
This tutorial shows you how to analyze team sales performance by comparing closing revenue with sales forecast figures.

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

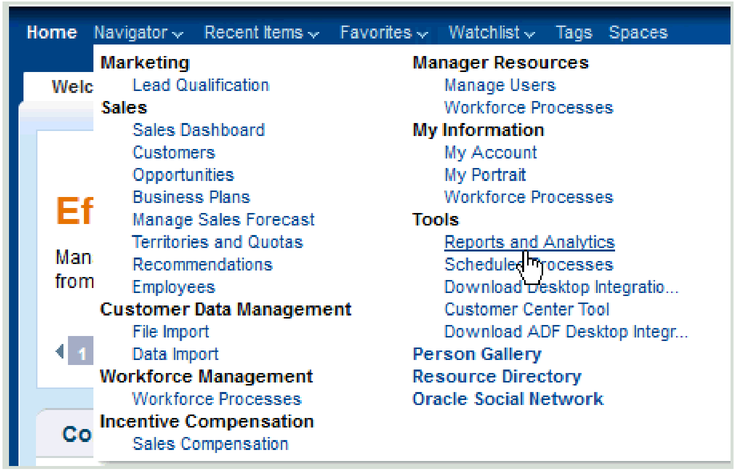
How to Verify that My Team is Closing Revenue in line with Their Forecast

Sales managers and vice presidents can analyze team performance by using the following steps to create a new analysis.

For example, the chart in the following analysis compares month-to-month closing revenue with forecast, against quota.

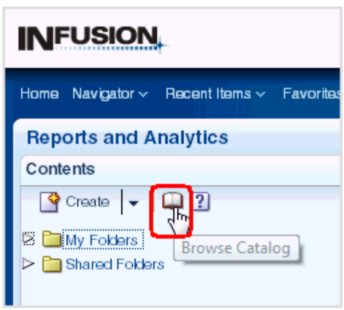


1. From the Navigator menu, select **Reports and Analytics**.

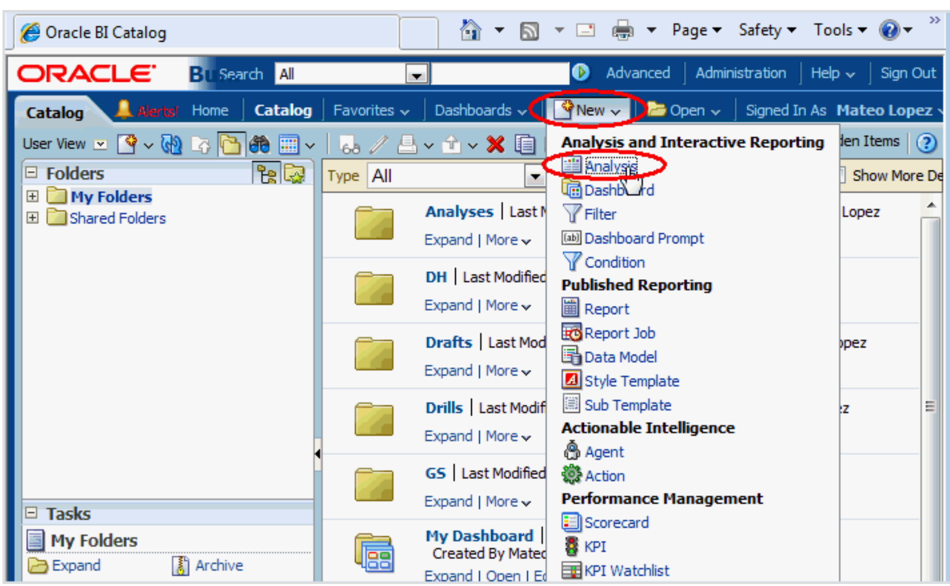


The Reports and Analytics page is displayed.

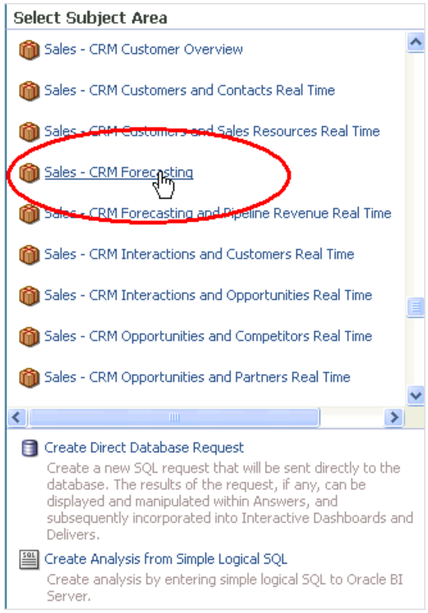
2. In the Contents pane, click **Browse Catalog**.



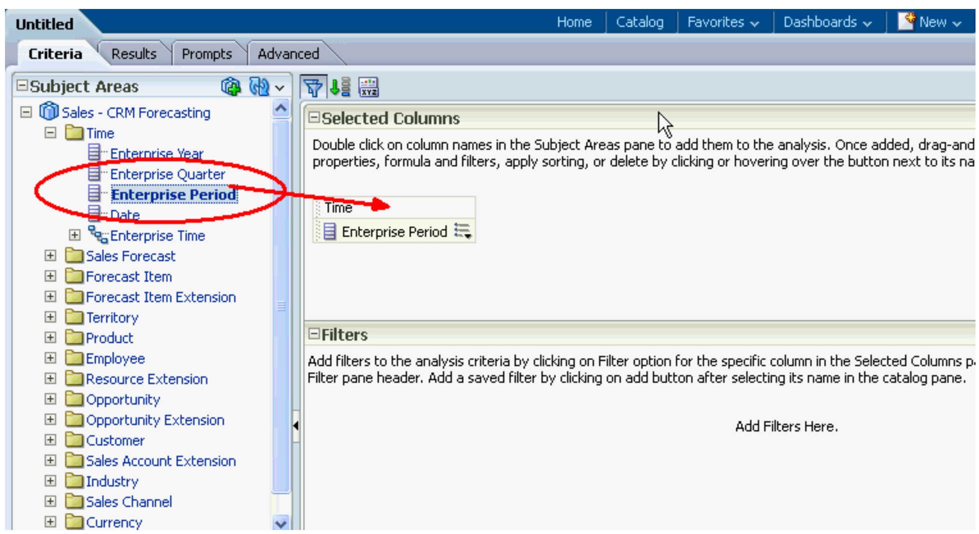
3. In the Oracle BI Catalog window, click **New**, then **Analysis**.



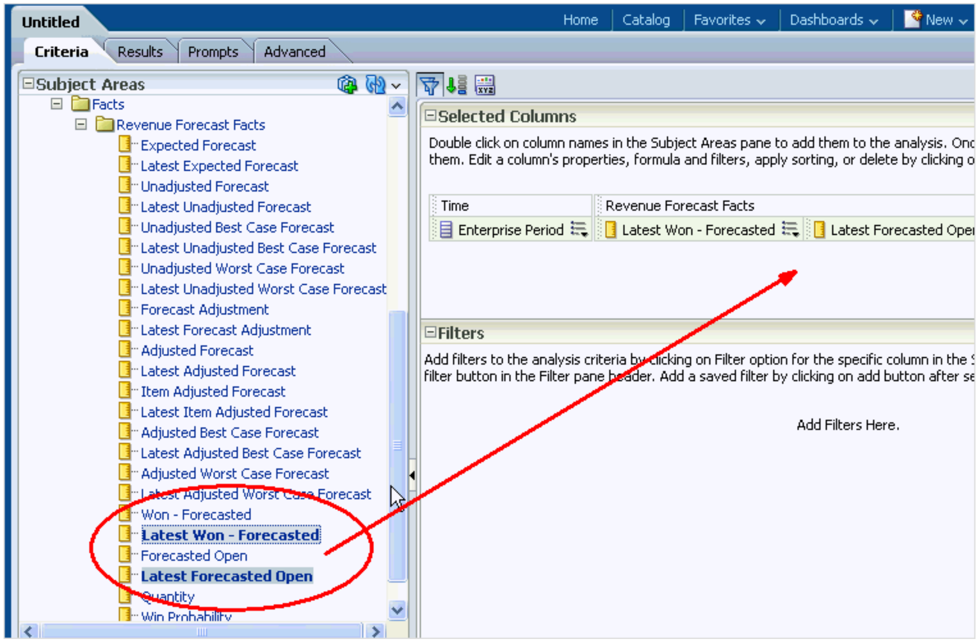
4. In the list of subject areas, click **Sales - CRM Forecasting**.



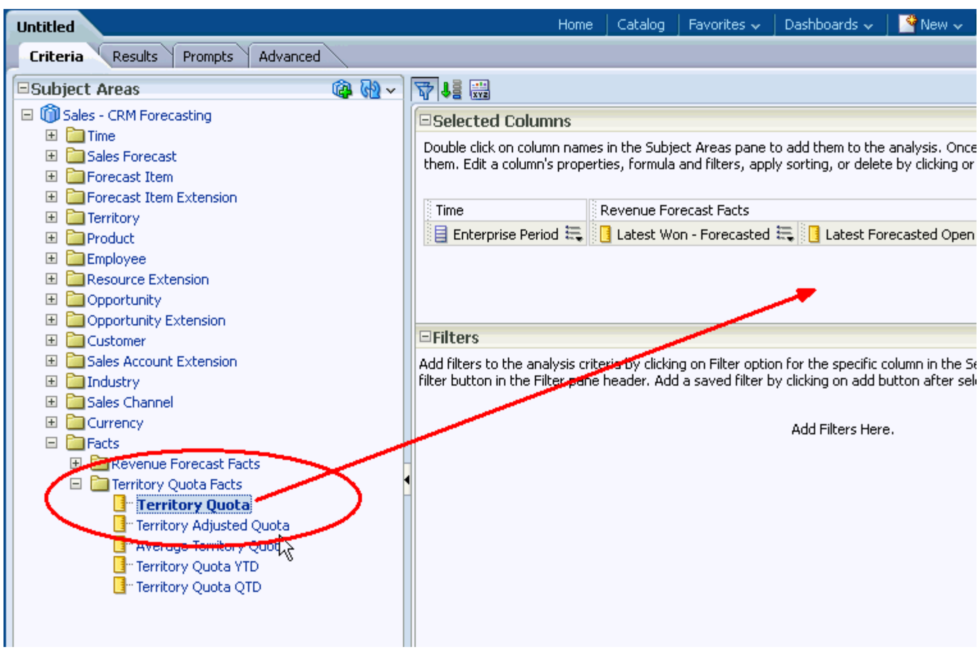
5. In the Subject Areas tab, expand the Time area, and drag **Enterprise Period** to the Selected Columns area.



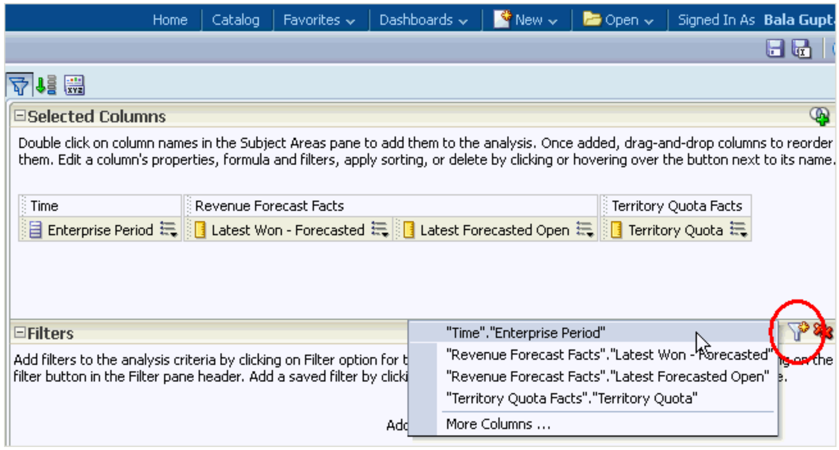
6. In the Subject Areas tab, expand the Facts\Revenue Forecast Facts area, and drag **Latest Forecasted Open** and **Latest Won - Forecasted** to the Selected Columns area.



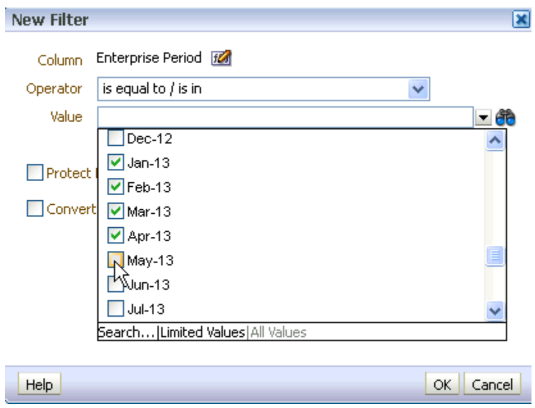
7. In the Subject Areas tab, expand the Facts\Territory Quota Facts area, and drag **Territory Quota** to the Selected Columns area.



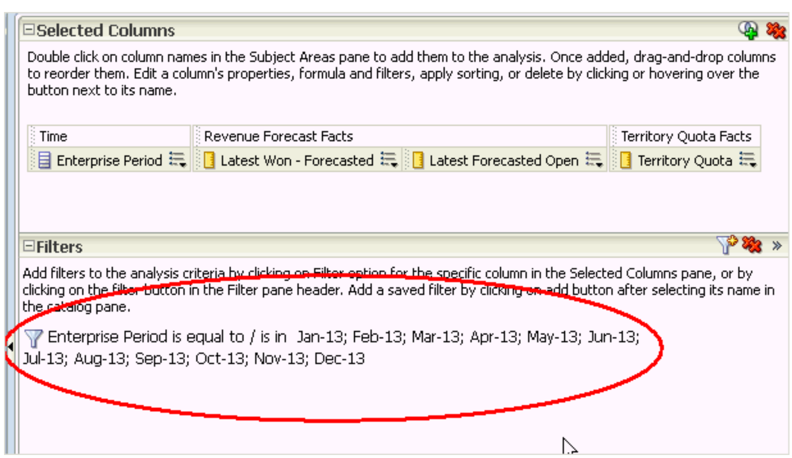
8. In the Filters area, click the filter icon, and select "Time"."Enterprise Period".



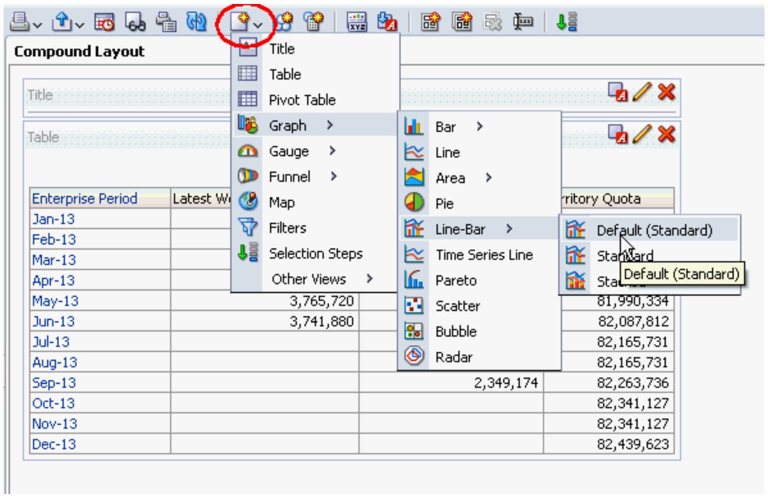
9. At the New Filter dialog, select **is equal to/is in** from the **Operator** list, click the down arrow next to the **Value** field, select the box next to Jan-13, Feb-13, Mar-13 and so on to Dec-13, then click **OK**.



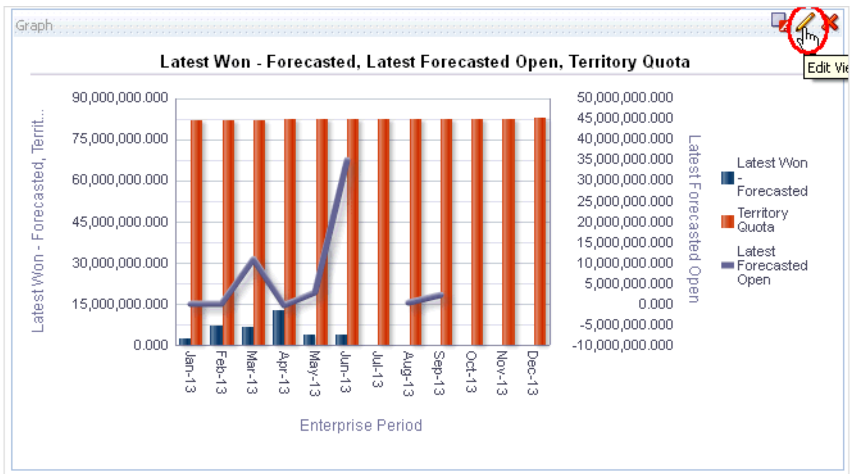
After you click **OK**, you see Jan-13; Feb-13; Mar-13; and so on displayed in the Filters area.



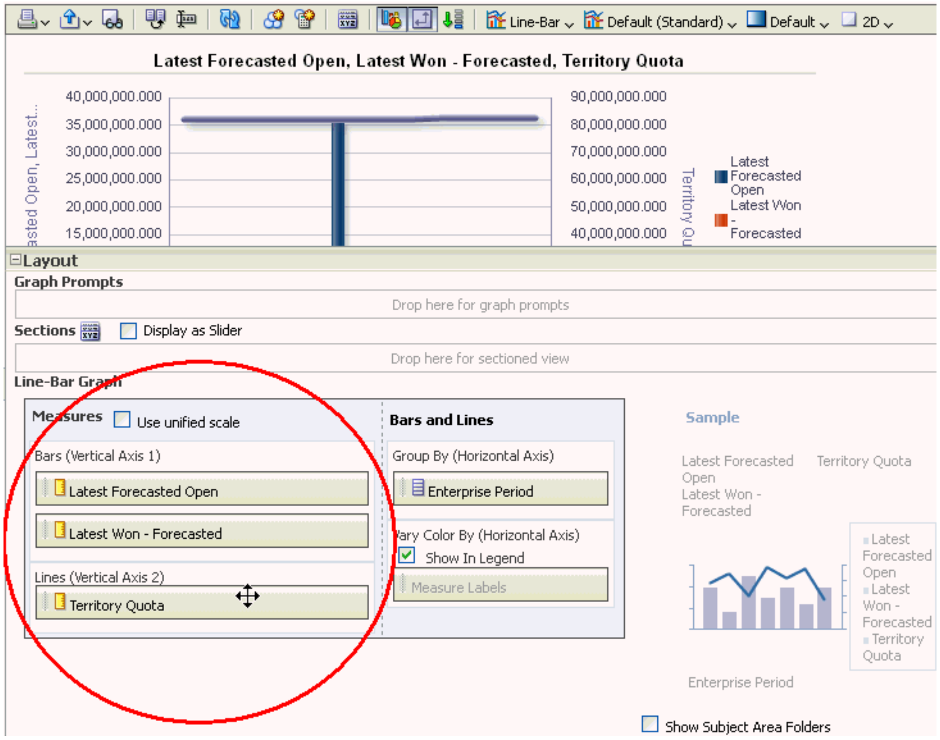
10. Click **Results** to display the Results tab, then click **New View** and select **Graph**, then **Line-Bar**, then **Default**.



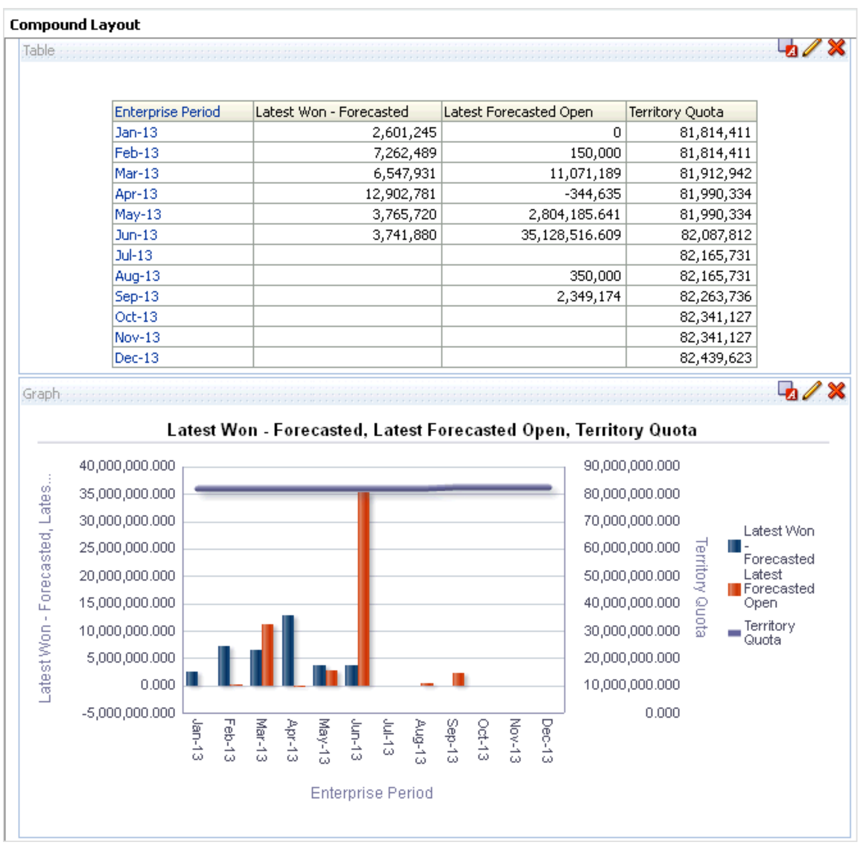
11. Click **Edit View** at the top of the Graph area.



12. In the Layout area, drag **Latest Won - Forecasted** from the Lines (Vertical Axis 2) area to the Bars (Vertical Axis 1) area, then drag **Territory Quota** from the Bars (Vertical Axis 1) area to the Lines (Vertical Axis 2) area.



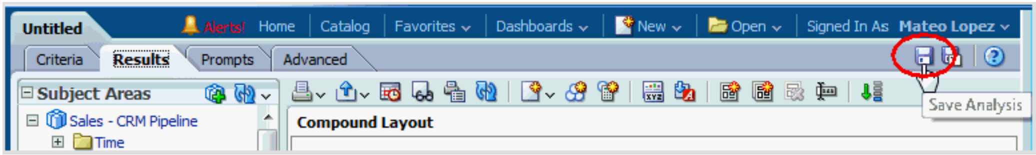
13. Click **Done**.



Enterprise Period	Latest Won - Forecasted	Latest Forecasted Open	Territory Quota
Jan-13	2,601,245	0	81,814,411
Feb-13	7,262,489	150,000	81,814,411
Mar-13	6,547,931	11,071,189	81,912,942
Apr-13	12,902,781	-344,635	81,990,334
May-13	3,765,720	2,804,185.641	81,990,334
Jun-13	3,741,880	35,128,516.609	82,087,812
Jul-13			82,165,731
Aug-13		350,000	82,165,731
Sep-13		2,349,174	82,263,736
Oct-13			82,341,127
Nov-13			82,341,127
Dec-13			82,439,623

I can now use this report to analyze latest won forecast, latest forecast open, and quota.

14. To save the analysis, click the **Save Analysis** icon near the top-right corner.



15. Save the analysis as follows:

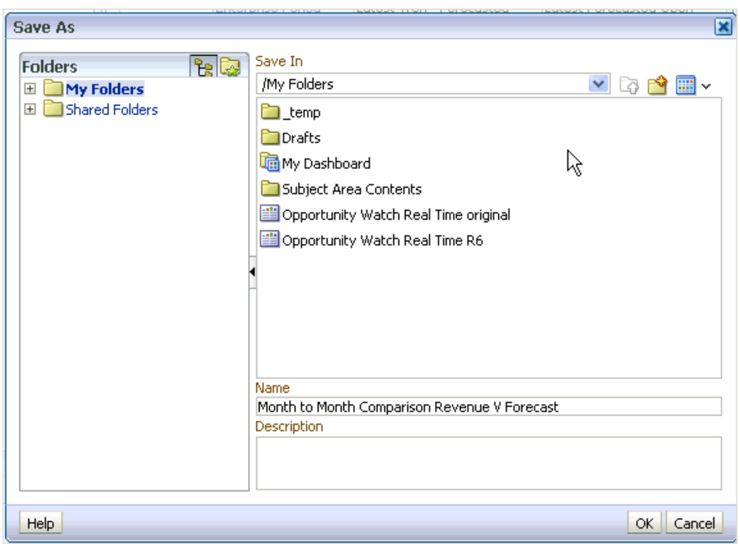
a. In the **Name** field, specify a name for the analysis.

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 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.

The following example shows My Folders as the Save In target directory and "Month to Month Comparison Revenue V Forecast" as the Name for the analysis.



c. Click **OK**.

Part III

Pipeline

This Part describes how to answer business questions related to the sales pipeline.

6

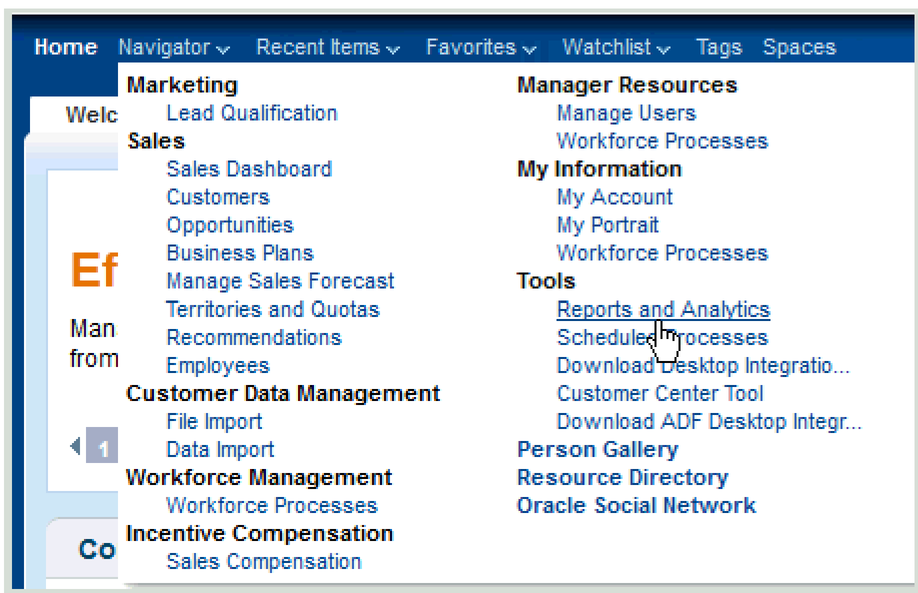
Is Our Overall Pipeline Healthy Enough to Meet Sales Goals?

This tutorial shows you how to access the Pipeline analysis to determine if your sales pipeline or your team's sales pipeline is healthy enough to meet sales goals.

This analysis provides information about opportunity revenue and sales stage target revenue. By comparing opportunity revenue to sales stage target revenue, you can determine pipeline health.

How to Access the Pipeline Analysis

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

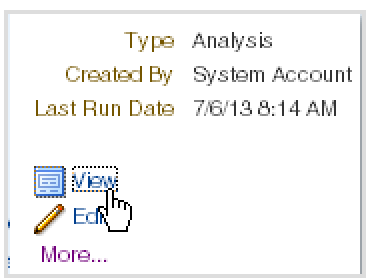


   The Reports and Analytics page is displayed.

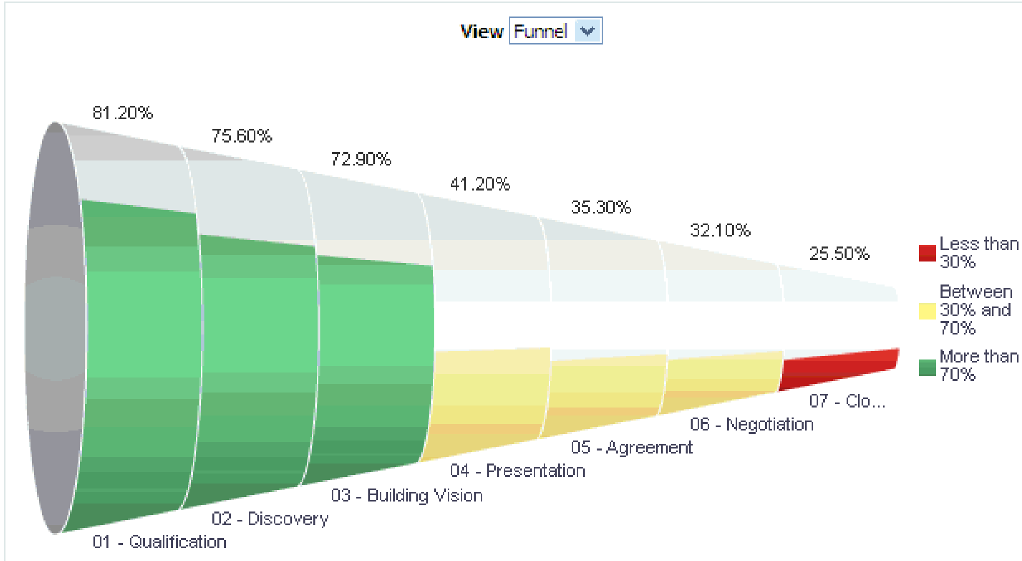
2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):

```
Shared Folders
  Sales
    Analytic Library
      Embedded Content
        Opportunity and Revenue Management
```

3. Click **Pipeline Report** and select **View**.



The Pipeline analysis is displayed.



4. Use the **View** option to change the analysis' view from Funnel (the default view) to the Table or Graph view.

7

How Does My Current Forecast Compare with My Pipeline?

This tutorial shows you how to compare your current forecast with your pipeline.

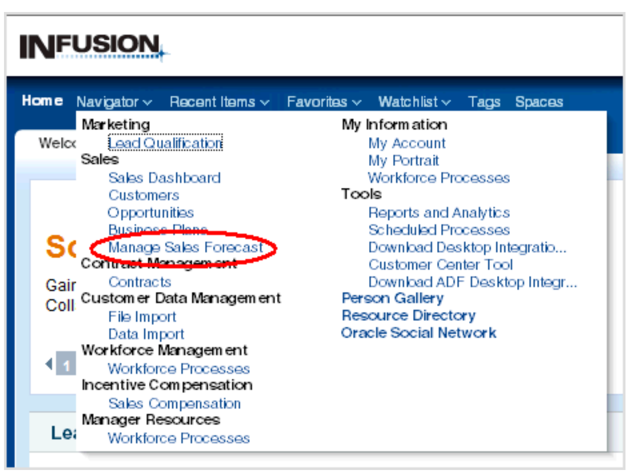
Forecasting future sales is a method of providing predictions of future revenue for specific time periods. Typically, sales managers create a sales forecast for a sales territory and for a specific time period. The forecast includes revenue from all opportunities that meet the set criteria.

Sales representatives can see the current forecasts for their territories (as well as past and future forecasts) from the Manage Sales Forecasts page. The forecasting data on that page includes the following terms:

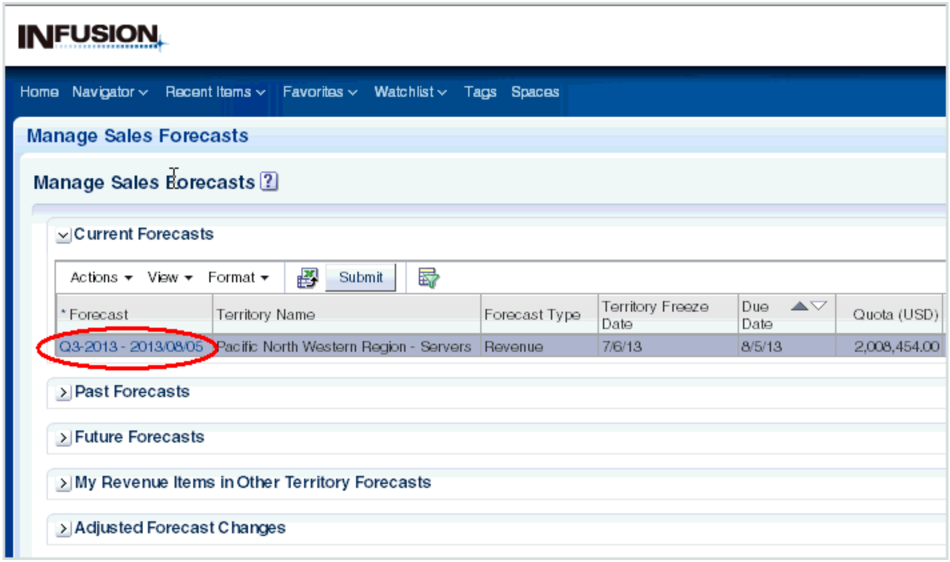
- Closed revenue - the actual revenue for the target territory that was closed during the forecast period
- Pipeline - the total revenue that is scheduled to close within the forecast period
- Quota - the revenue target associated with the expected performance of a sales representative's territory for a given forecast period

How to Compare Your Current Forecast with Your Pipeline

1. From the **Navigator** menu, select **Manage Sales Forecast**.



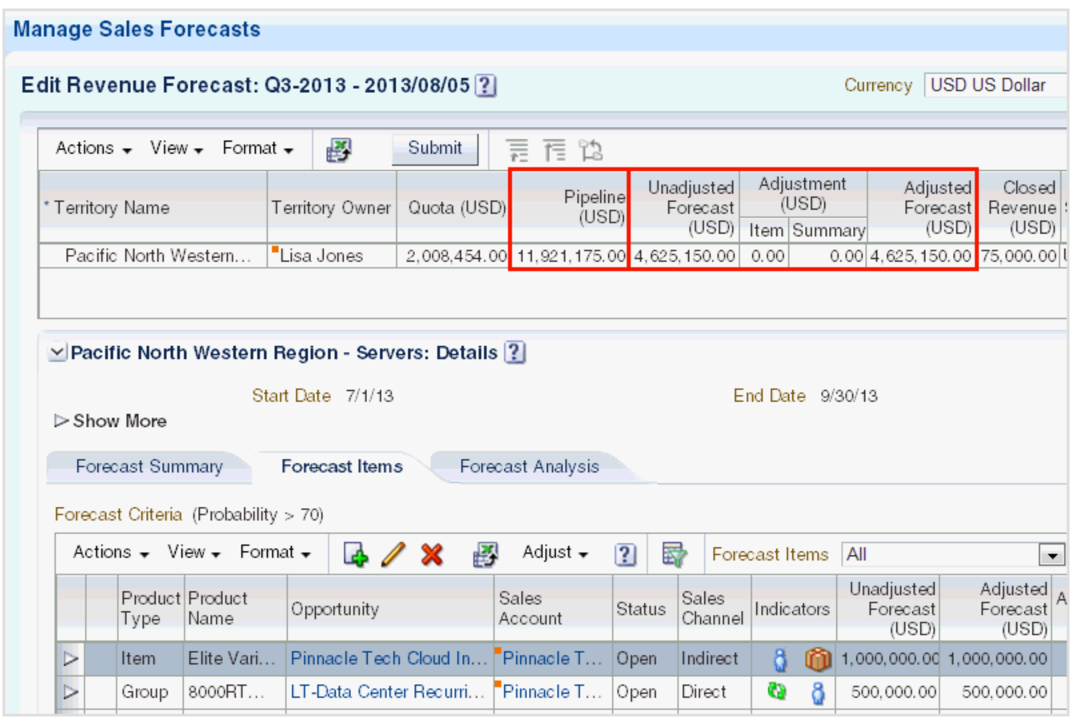
2. In the Current Forecasts pane of the Manage Sales Forecasts page, click a revenue forecast - that is, a forecast whose Forecast Type is Revenue - for the territory that you want to examine.



3. A **Revenue Forecast:** <*Period*> page is displayed, available either for viewing or editing. If you are in the time period for updating forecast information, you can edit the forecast; otherwise you can only view the forecast data.

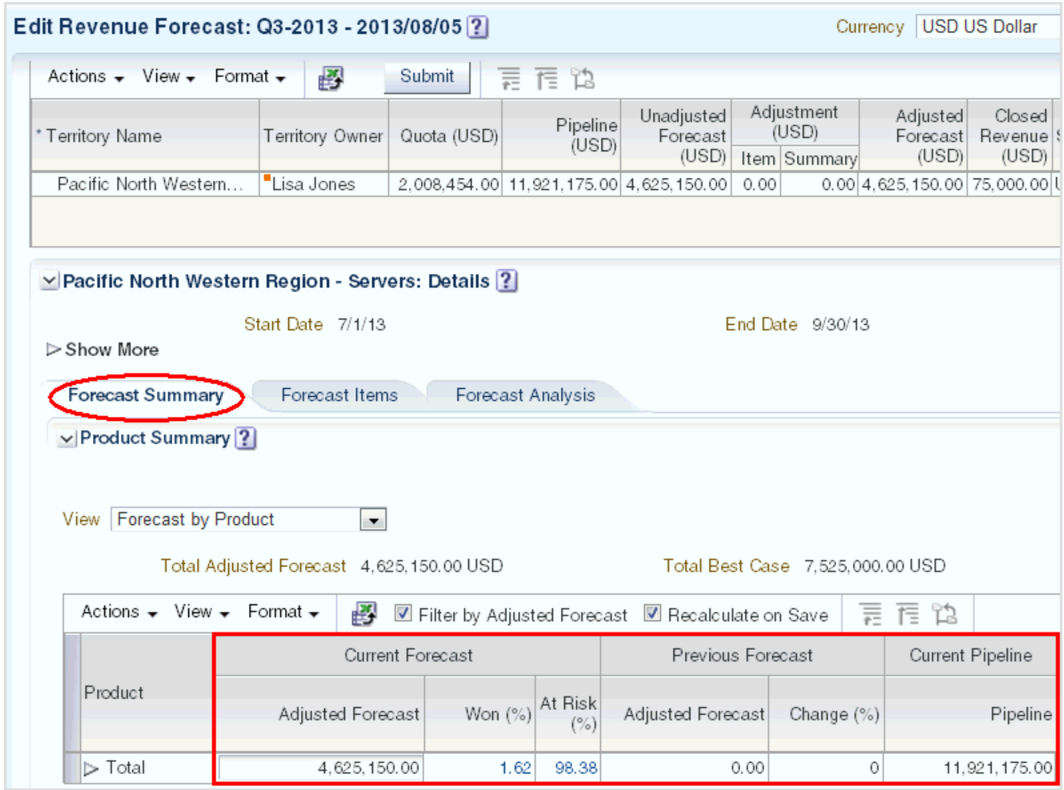
   The lower part of the page contains one or more forecast-related tabs. The Forecast Items tab is always displayed. The Forecast Summary and Forecast Analysis tabs are available if a sales administrator has enabled them.

   The following figure shows an Edit Revenue Forecast page, with the Forecast Items tab visible, and the Forecast Summary and Forecast Analysis tabs enabled.



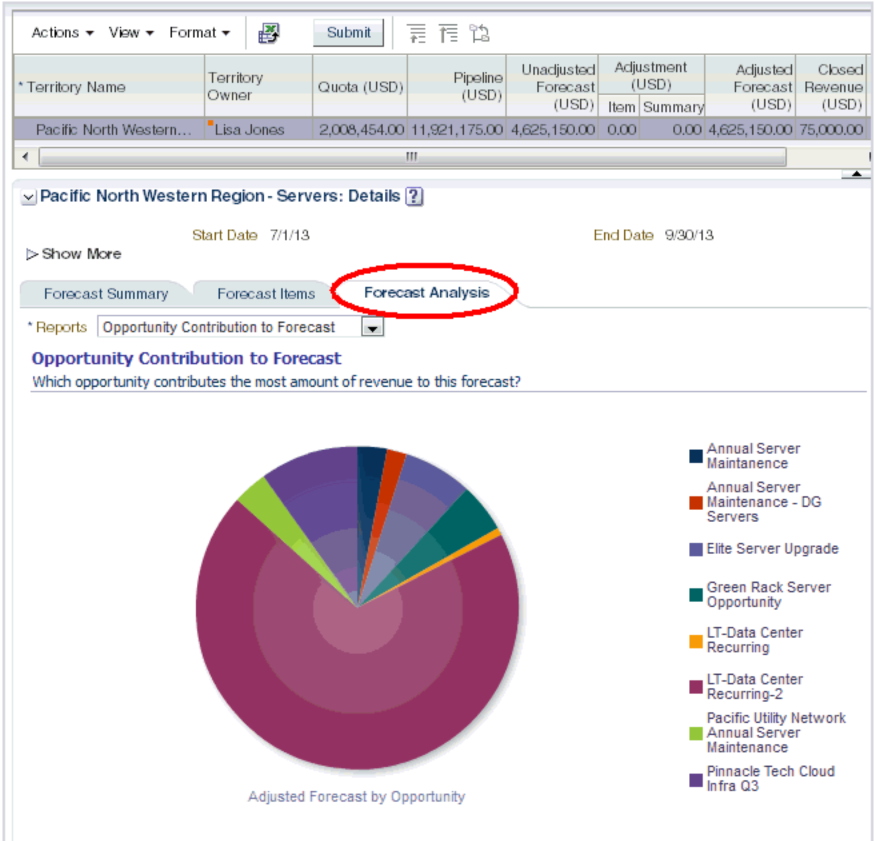
   In this page, you can view both your adjusted and unadjusted forecasts for the territory, and compare these forecasts with your pipeline.

4. If the Forecast Summary tab is enabled, click that tab to see more details about the current and previous forecast and the current pipeline.

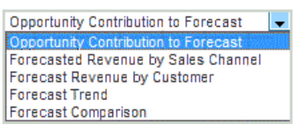


The Forecast Summary tab allows users to enter adjustments at an aggregate level by product and time. Specifically, instead of adjusting forecasts from an individual line item level, managers can view the aggregate product forecast and make summary adjustments at that aggregate level.

5. If the Forecast Analysis tab is enabled, then click that tab to see one or more forecast-related, context-sensitive analytic reports.

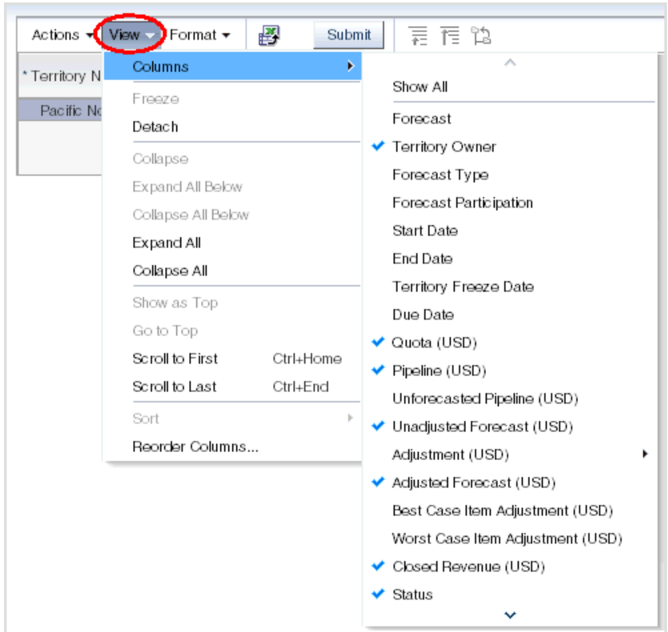


6. Select additional analytic reports to view from the Reports menu.



7. In the Revenue Forecast page, you can also see additional forecast and pipeline details, by selecting more columns.

   To select other columns, click **View**, then **Columns**, then select from the displayed column list.



8. View and analyze past and future forecasts by expanding the appropriate **Past Forecasts** and **Future Forecasts** panes in the Manage Sales Forecast page. The columns and options on these panes are similar to those in the Current Forecasts pane.

8

How Long Is It Taking Me and My Sales Team to Convert Leads to Opportunities?

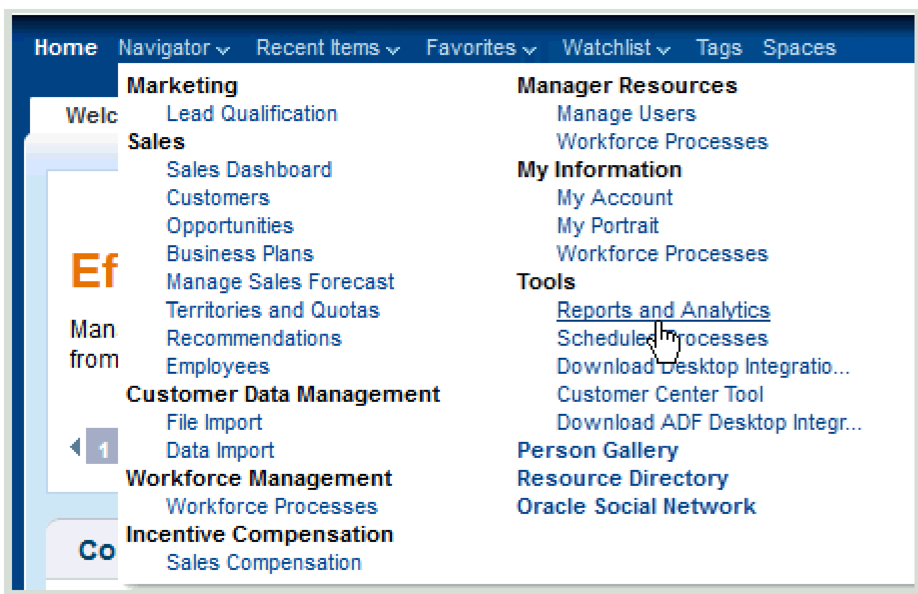
This tutorial shows you how to view the average number of days it takes to convert leads to opportunities.

If you are logged in to Fusion Applications as a sales manager or vice president, then you can see the average number of days that it takes you and your sales team to convert leads to opportunities.

If you are logged in to Fusion Applications as a sales representative, then you can see the average number of days that it takes you to convert leads to opportunities.

How to View the Time It Takes to Convert Leads to Opportunities

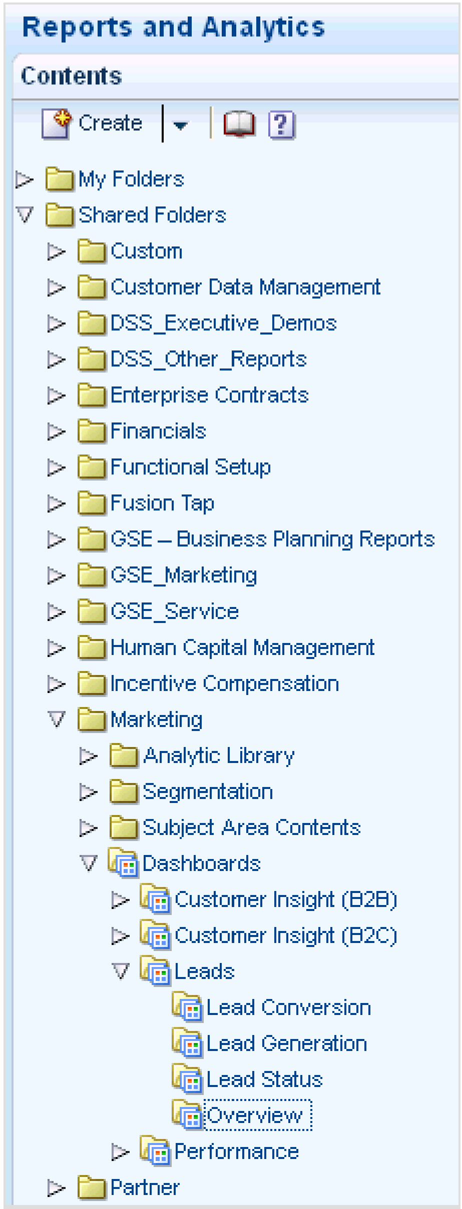
1. From the Navigator menu, select **Reports and Analytics**.



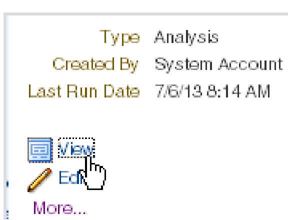
The Reports and Analytics page is displayed.

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

```
Shared Folders
  Marketing
    Dashboards
      Leads
```



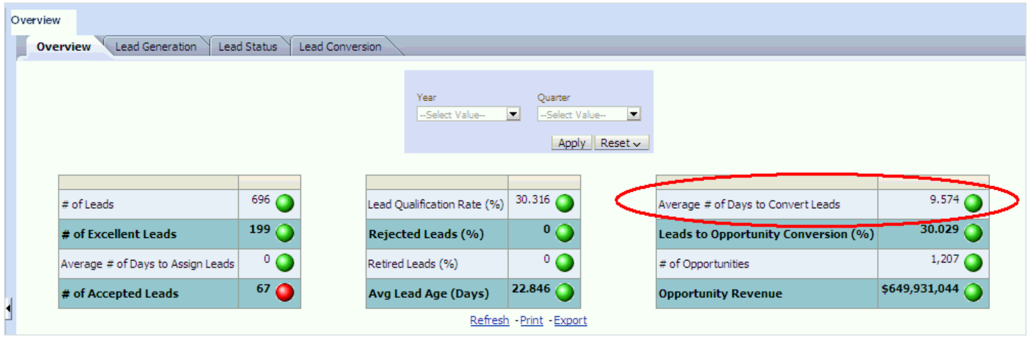
3. Click **Overview**, and select **View**.



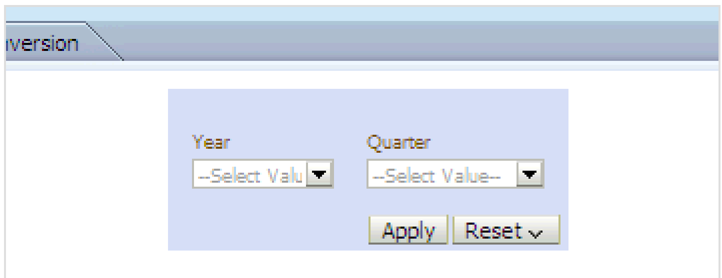
The Leads dashboard is displayed.

If you are a sales manager or vice president, then the Overview tab shows the average number of days that it takes you and your sales team to convert leads to opportunities.

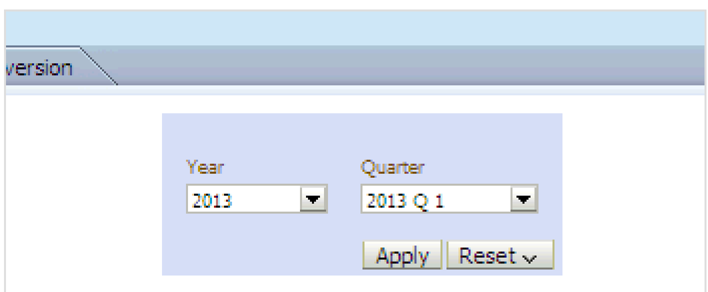
If you are a sales representative, then the Overview tab shows the average number of days that it takes you to convert leads to opportunities.



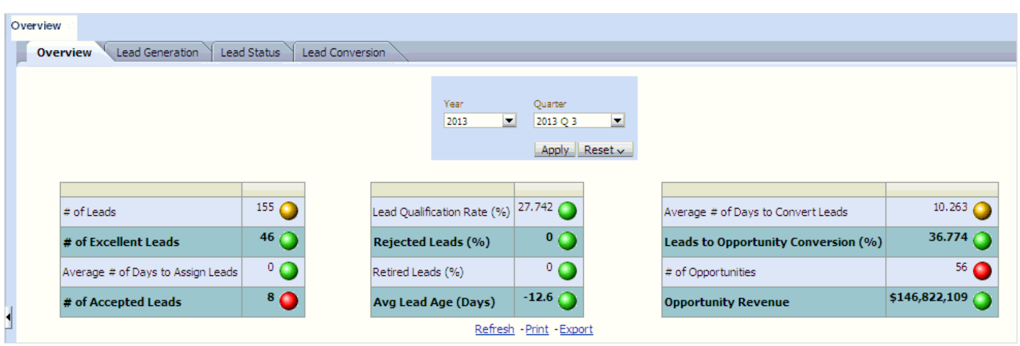
Note that if you do not select a year and quarter, then the data displayed represents all data entered in the application.



4. To display data for a specific year and quarter, select the appropriate values, and click **Apply**.



The data displayed is updated based on the year and quarter selected.



9

What Are My Forecast and Closed Revenues for the Quarter? How Do They Compare Against My Quota?

This tutorial shows how to view forecast and closed revenue for the current quarter, and how to compare that revenue against quota. The tutorial is based on the point of view of an individual sales representative.

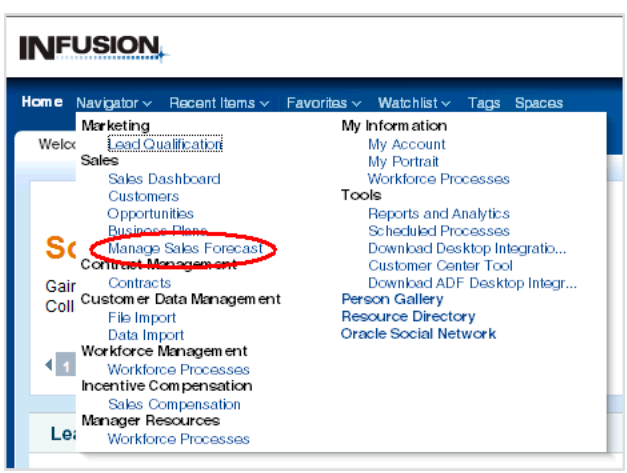
Forecasting future sales is a method of providing predictions of future revenue for specific time periods. Typically, sales managers create a sales forecast for a sales territory and for a specific time period. The forecast includes revenue from all opportunities that meet the set criteria.

Sales representatives can see the current forecasts for their territories (as well as past and future forecasts) from the Manage Sales Forecasts page. The forecasting data on that page includes the following terms:

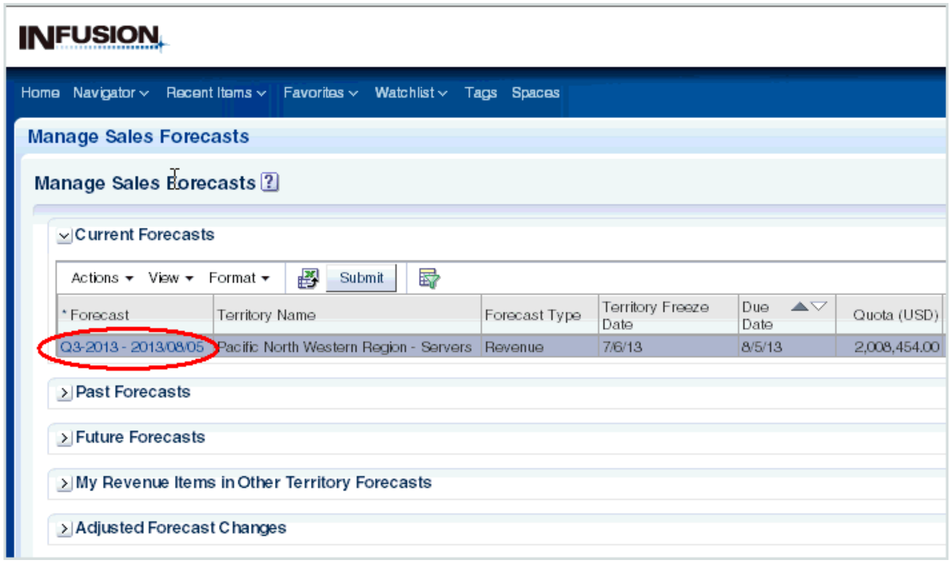
- Closed revenue - the actual revenue for the target territory that was closed during the forecast period
- Pipeline - the total revenue that is scheduled to close within the forecast period
- Quota - the revenue target associated with the expected performance of a sales representative's territory for a given forecast period

How to Find Your Forecast and Closed Revenues for the Quarter and Compare Them Against Your Quota

1. From the **Navigator** menu, select **Manage Sales Forecast**.



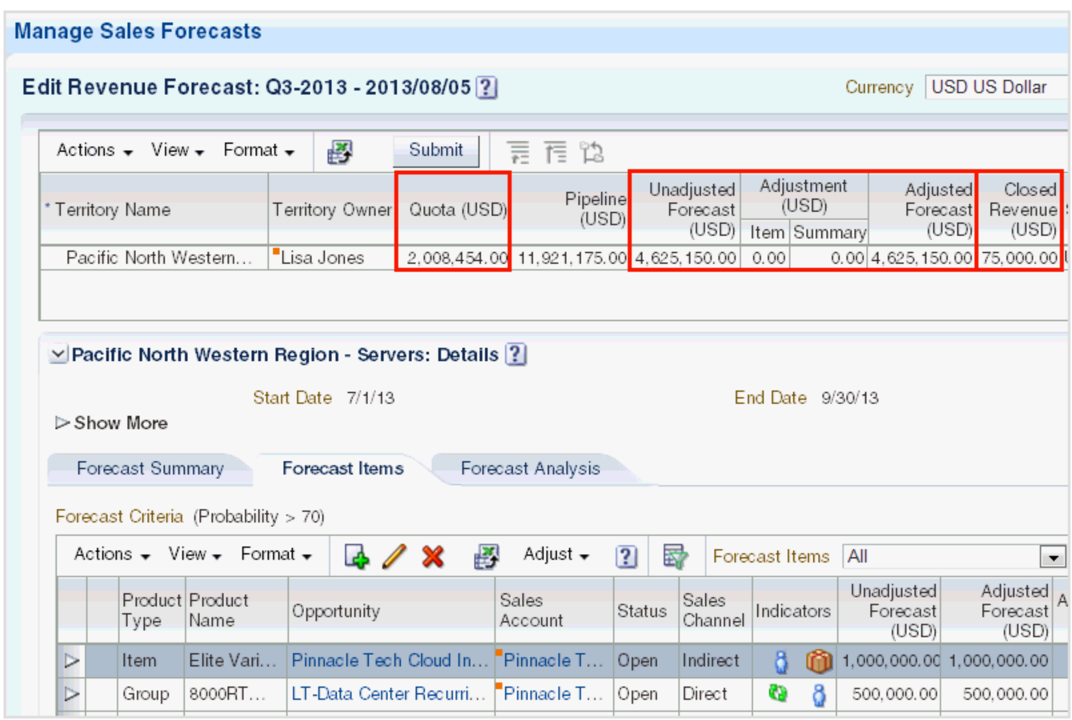
2. In the Current Forecasts pane of the Manage Sales Forecasts page, click a revenue forecast - that is, a forecast whose Forecast Type is Revenue - for the territory that you want to examine.



3. A **Revenue Forecast:** <*Period*> page is displayed, available either for viewing or editing. If you are in the time period for updating forecast information, you can edit the forecast; otherwise you can only view the forecast data.

   The lower part of the page contains one or more forecast-related tabs. The Forecast Items tab is always displayed. The Forecast Summary and Forecast Analysis tabs are available if a sales administrator has enabled them.

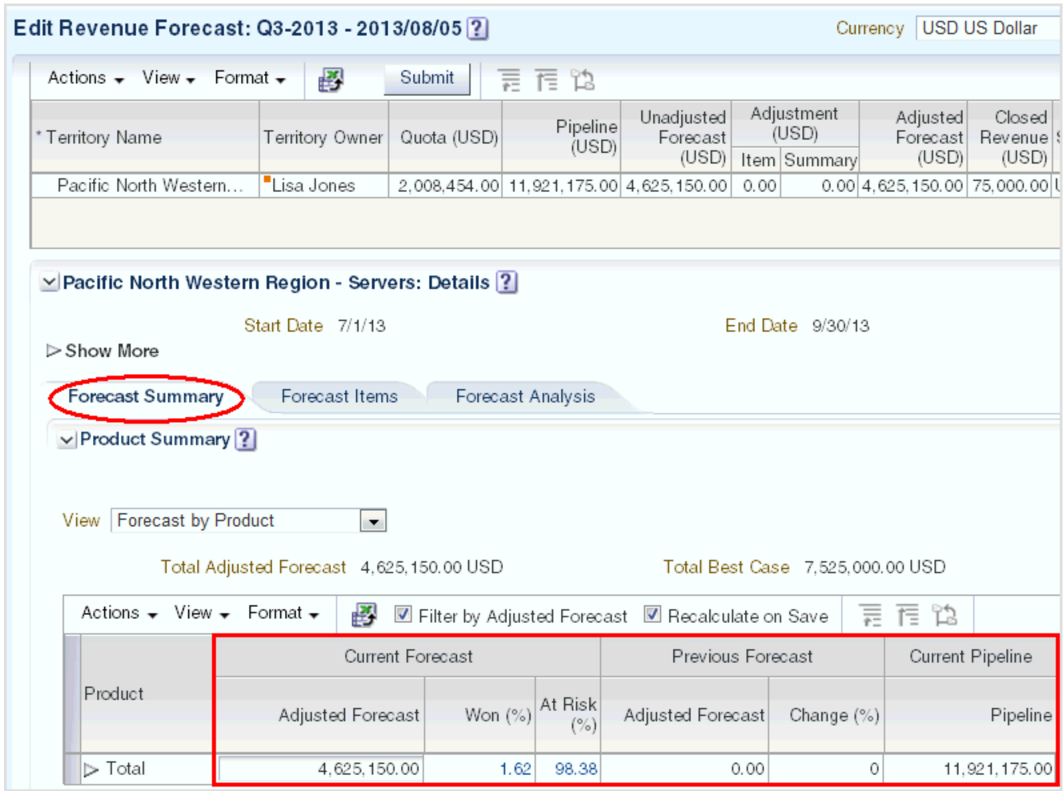
   The following figure shows an Edit Revenue Forecast page, with the Forecast Items tab visible, and the Forecast Summary and Forecast Analysis tabs enabled.



In this page, you can:

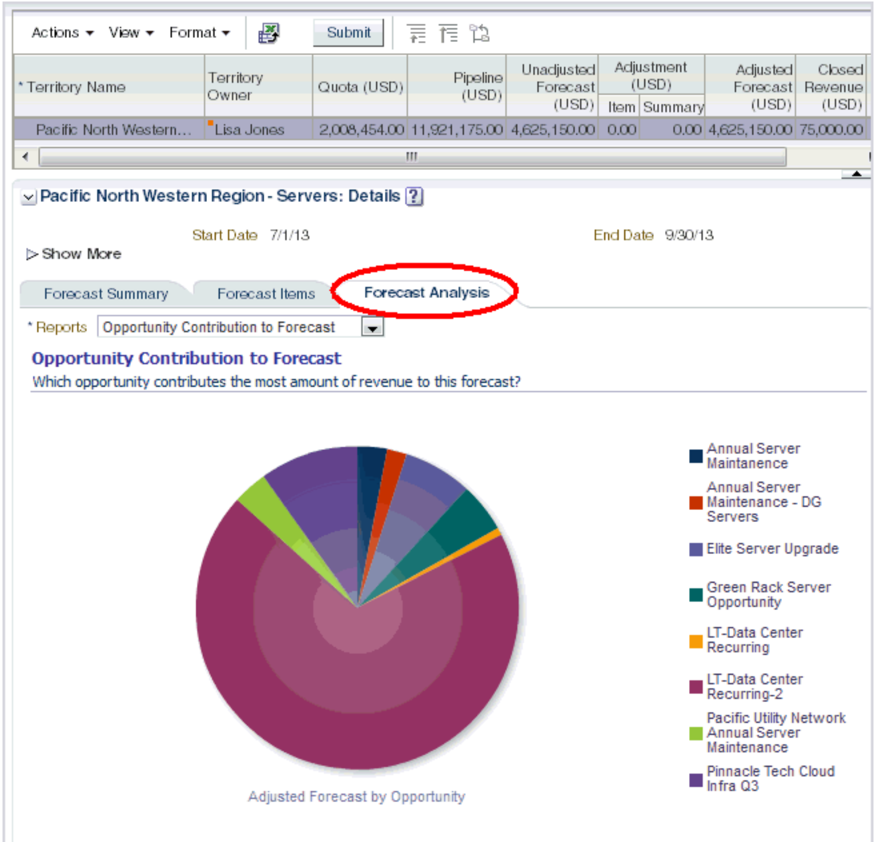
- View and compare your forecast and closed revenue for the current period - typically the current quarter
- View and compare your forecast and closed revenue against your quota for the current period

4. If the Forecast Summary tab is enabled, click that tab to see more details about the current and previous forecast and the current pipeline.

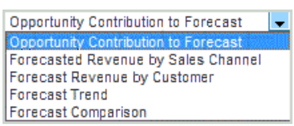


The Forecast Summary tab allows users to enter adjustments at an aggregate level by product and time. Specifically, instead of adjusting forecasts from an individual line item level, managers can view the aggregate product forecast and make summary adjustments at that aggregate level.

5. If the Forecast Analysis tab is enabled, click that tab to see one or more forecast-related, context-sensitive analytic reports.

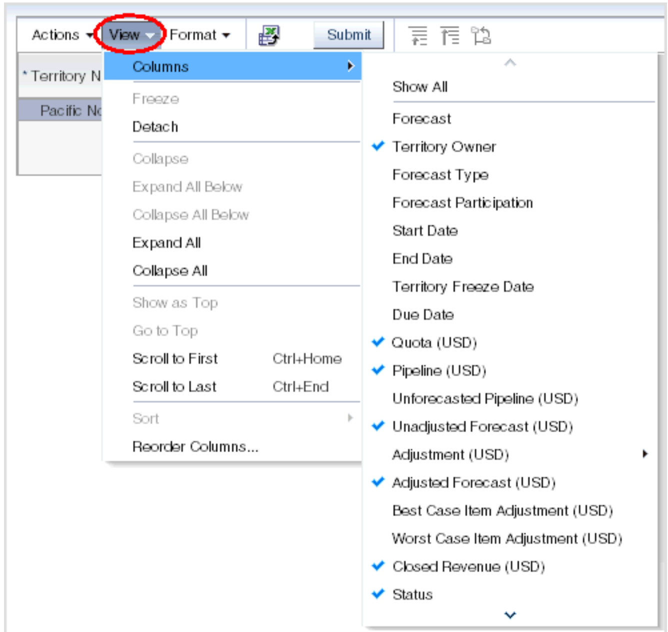


6. Select additional analytic reports to view from the Reports menu.



7. In the Revenue Forecast page, you can also see additional forecast and pipeline details, by selecting more columns.

   To select other columns, click **View**, then **Columns**, then select from the displayed column list.



8. View and analyze past and future forecasts by expanding the appropriate **Past Forecasts** and **Future Forecasts** panes in the Manage Sales Forecast page. The columns and options on these panes are similar to those in the Current Forecasts pane.

Part IV

Opportunities

This Part describes how to answer business questions related to sales opportunities.

10

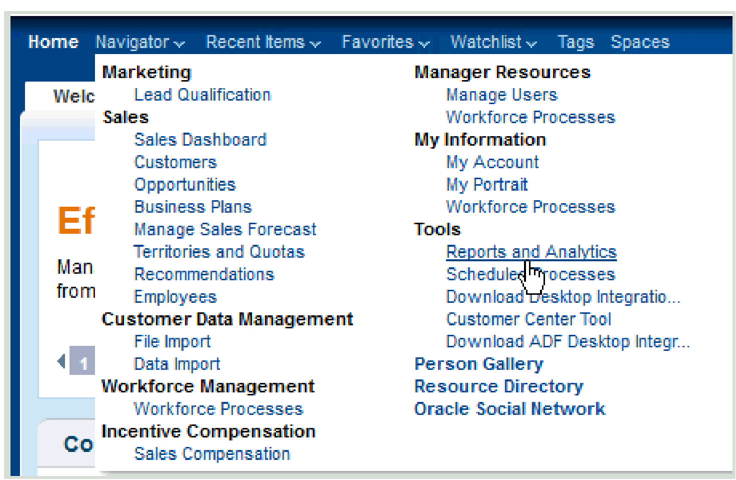
What Are the Top 10 Open Opportunities? What Are Their Days to Close and Total Revenues?

A Fusion report is based on an "analysis" that defines the information that you want to see in the report. So a Fusion report is based on an analysis. This tutorial shows you how to use a Fusion report to analyze open opportunities by answering the following two questions:

- What are the top 10 open opportunities by revenue?
- How many days do they have to close and what are their revenues?

How to Identify the Top Ten Opportunities by Total Revenue and Their Days to Close and Revenue

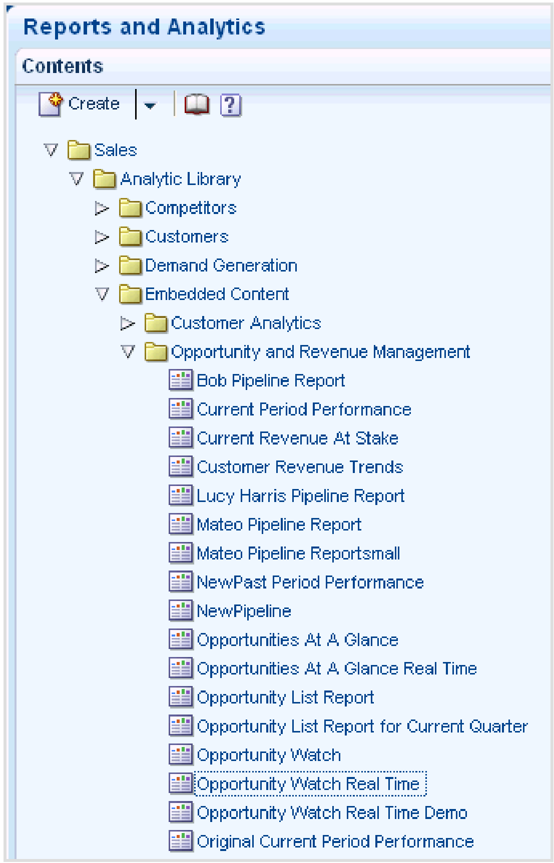
1. From the Navigator menu, select **Reports and Analytics**.



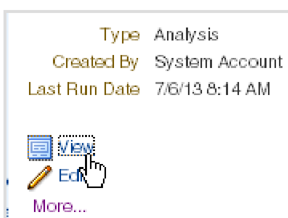
The Reports and Analytics page is displayed.

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

```
Shared Folders
  Sales
    Analytic Library
      Embedded Content
        Opportunity and Revenue Management
```



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



The **Opportunity Watch Real Time** analysis is displayed. The top 10 opportunities in the analysis are sorted by their value, or revenue.

Action	Opportunity	Sales Account	Value	Sales Stage Name	Days to Close	Win Probability (%)
	Network Xpress Service Deal Q2	Network Xpress Corp	$50,000,000.00	01 - Qualification	45	60
	Network Xpress new server deal Q2	Network Xpress Corp	$30,000,000.00	01 - Qualification	23	70
	Network Xpress Server Upgrade	Network Xpress Corp	$8,000,000.00	01 - Qualification	45	55
	BW Server Service	Business World	$7,000,000.00	01 - Qualification	14	65
	LT-Data Center Recurring-2	Pinnacle Technologies	$6,000,000.00	01 - Qualification	0	90
	Pinnacle Server Maintenance	Pinnacle Technologies	$5,000,000.00	01 - Qualification	13	10
	Network Xpress Elite Servers	Network Xpress Corp	$5,000,000.00	01 - Qualification	14	60
	Network Xpress System Upgrade	Network Xpress Corp	$5,000,000.00	01 - Qualification	45	55
	Network Xpress Service Deal	Network Xpress Corp	$4,000,000.00	01 - Qualification	14	65
	Network Xpress new service deal	Network Xpress Corp	$4,000,000.00	01 - Qualification	23	60

Rows 1 - 10

This report displays the following:

- All open opportunities in the current quarter, sorted by value (total revenue), with the highest value opportunities at the top of the list
- Number of days before each opportunity is set to close
- Sales account associated with each opportunity
- Win probability for each opportunity

11

What Is the Opportunity Revenue Distribution Across Sales Stages?

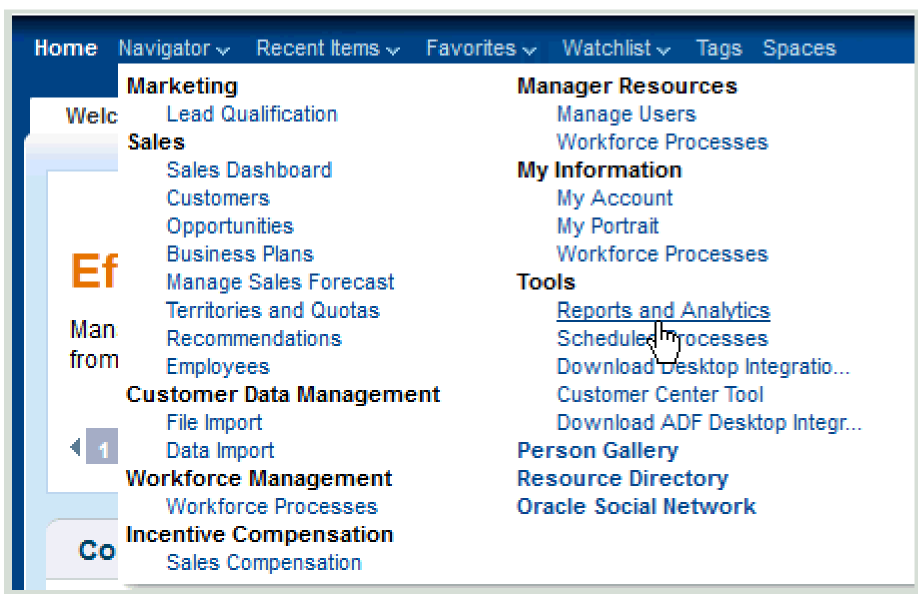
This tutorial shows you how determine opportunity revenue distribution across all stages of the sales pipeline.

You can add the analysis shown in this tutorial to the sales dashboard. For more information, see "How do I Embed a Report in a Sales Dashboard?" in *Oracle Fusion Applications Reporting and Analytics Handbook*.

How to View Opportunity Revenue Distribution Across Sales Stages

You use the Pipeline analysis to determine the total opportunity revenue, organized by sales stage, that is scheduled to close within the current forecast period. Sales stages represent the progression of an opportunity though the sales process.

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

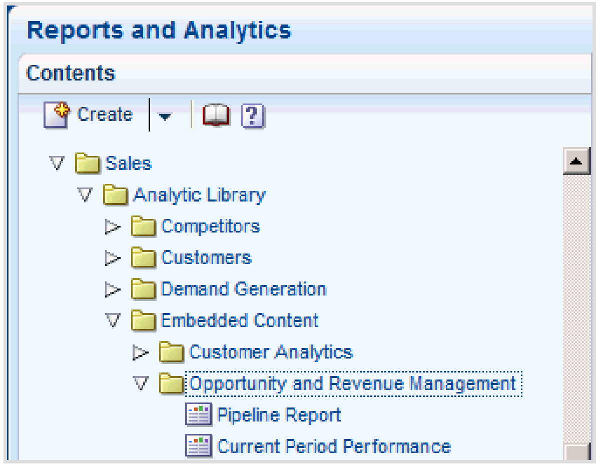


   The Reports and Analytics page is displayed.

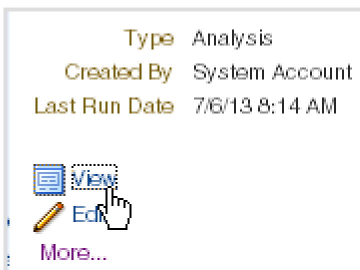
2. From the Contents pane, expand the following folders (by clicking the arrow next to each folder):

```
Shared Folders
  Sales
    Analytic Library
```

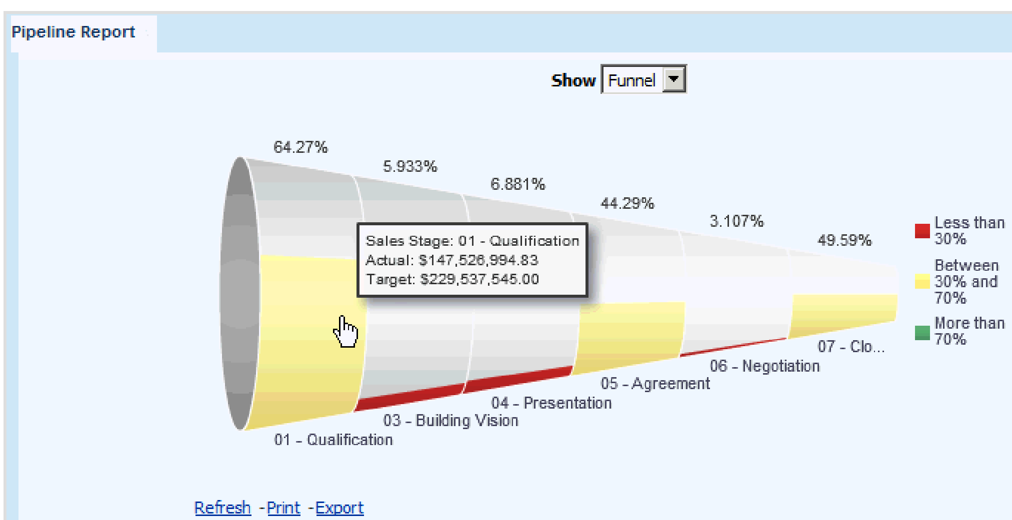
```
Embedded Content
  Opportunity and Revenue Management
```



3. Click **Pipeline Report**, and select **View**.



The Pipeline analysis is displayed.



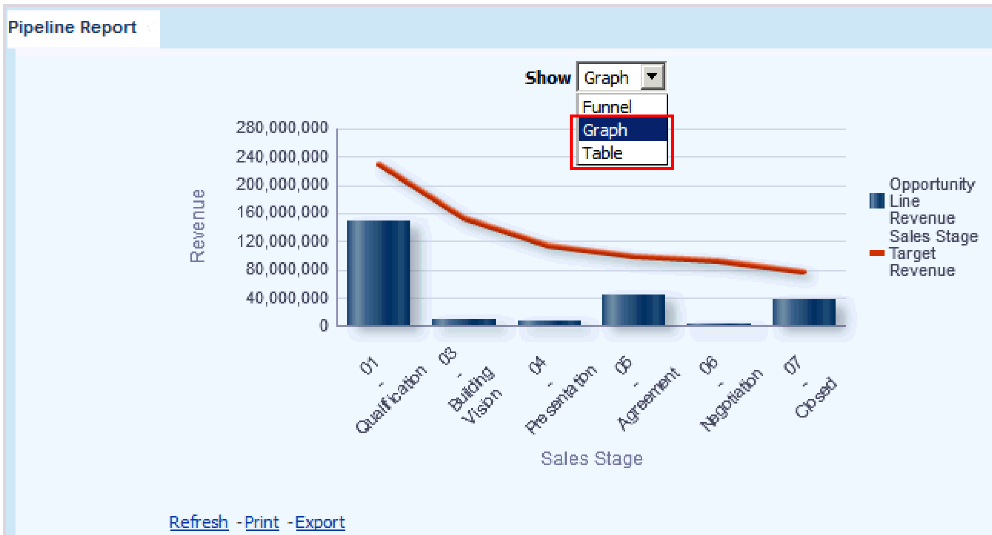
4. With the Funnel view selected, move the cursor over the colored areas of each sales stage in the funnel to determine the opportunity revenue currently in that stage and scheduled to close within the current forecast period.

   In this tutorial, the current (Actual) opportunity revenue is over 147 million dollars with 64.27 percent of the sales target revenue as met in the Qualification stage.

When the administrator defines the sales process, each sales stage is assigned a given quota factor, typically ranging from 1 to 3. In addition, managers and territory owners set user quotas.

The sales target for each sales stage is automatically calculated by multiplying the current user's quota by the sales stage quota factor.

5. Optionally, from the Show menu, select **Graph** or **Table** to change the analysis display as shown in the following figure.



Part V

Competitors

This Part describes how to answer business questions related to competitors.

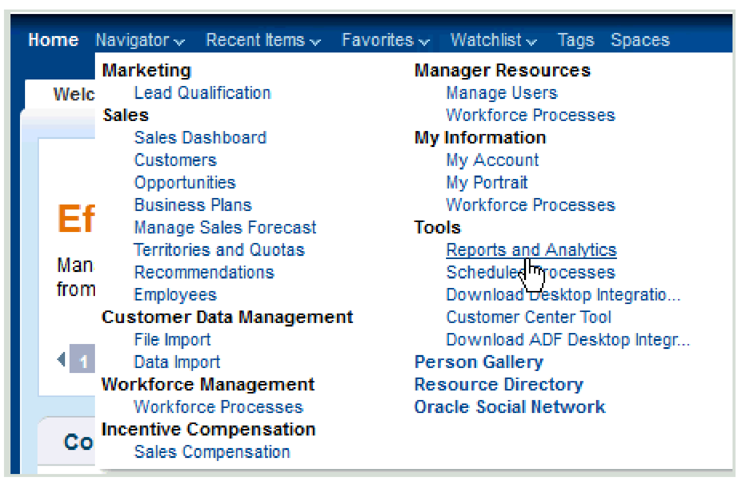
12

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

This tutorial shows you how to create an analysis to determine your top competitors and your revenue exposure to those competitors, that is, the revenue at stake in currently open opportunities where there are competitors.

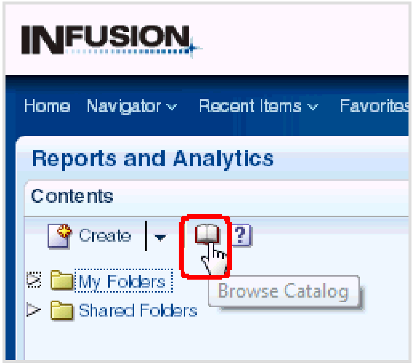
How to Identify Your Top Competitors and Your Revenue Exposure to Them

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

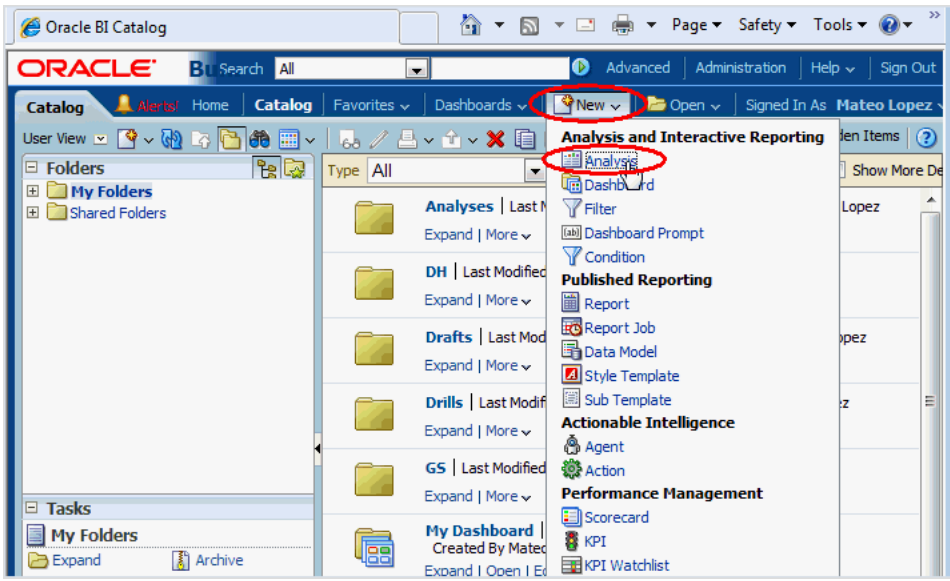


   The Reports and Analytics page is displayed.

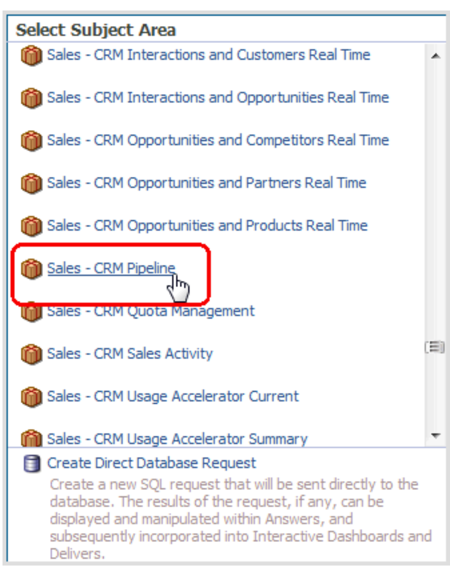
2. In the Contents pane, click the **Browse Catalog** icon.



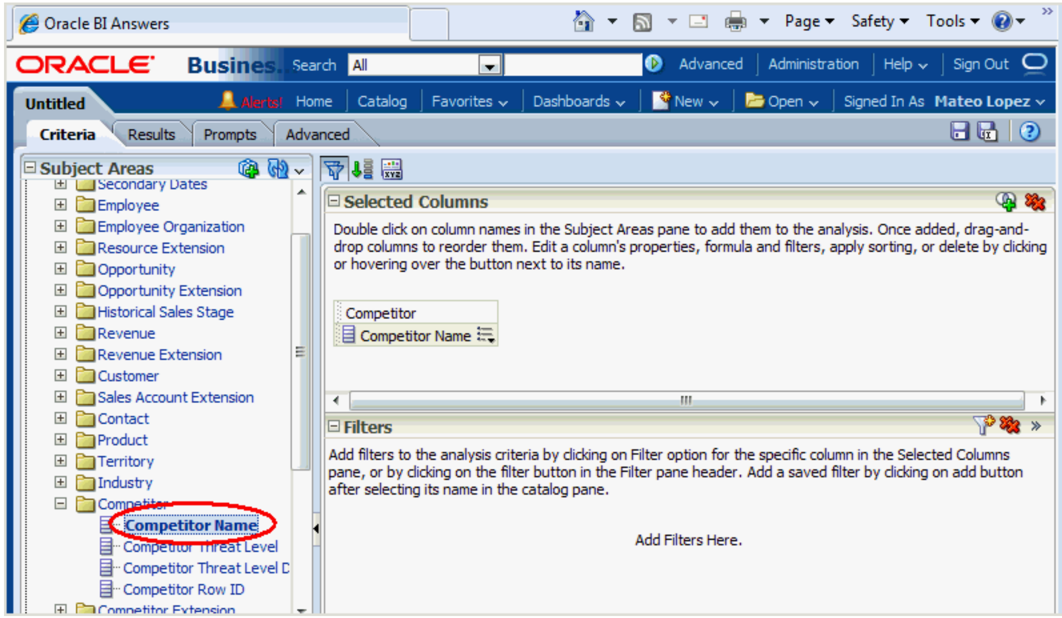
3. In the Oracle BI Catalog window, click **New**, then **Analysis**.



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

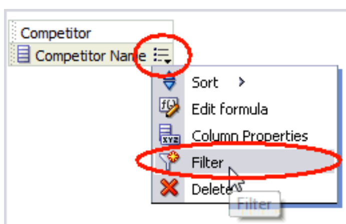


5. In the Subject Areas list, expand **Competitor**, then double-click **Competitor Name**.This automatically adds Competitor Name to the Selected Columns list.

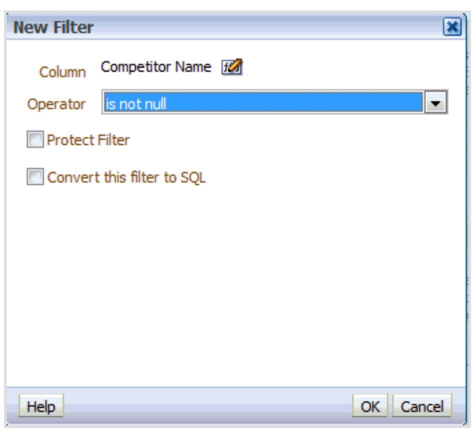


6. Restrict the analysis to exclude blank competitor names, that is, for opportunities where there are no competitors, by performing the following steps:

   a. Click the icon beside Competitor Name, and select **Filter**.

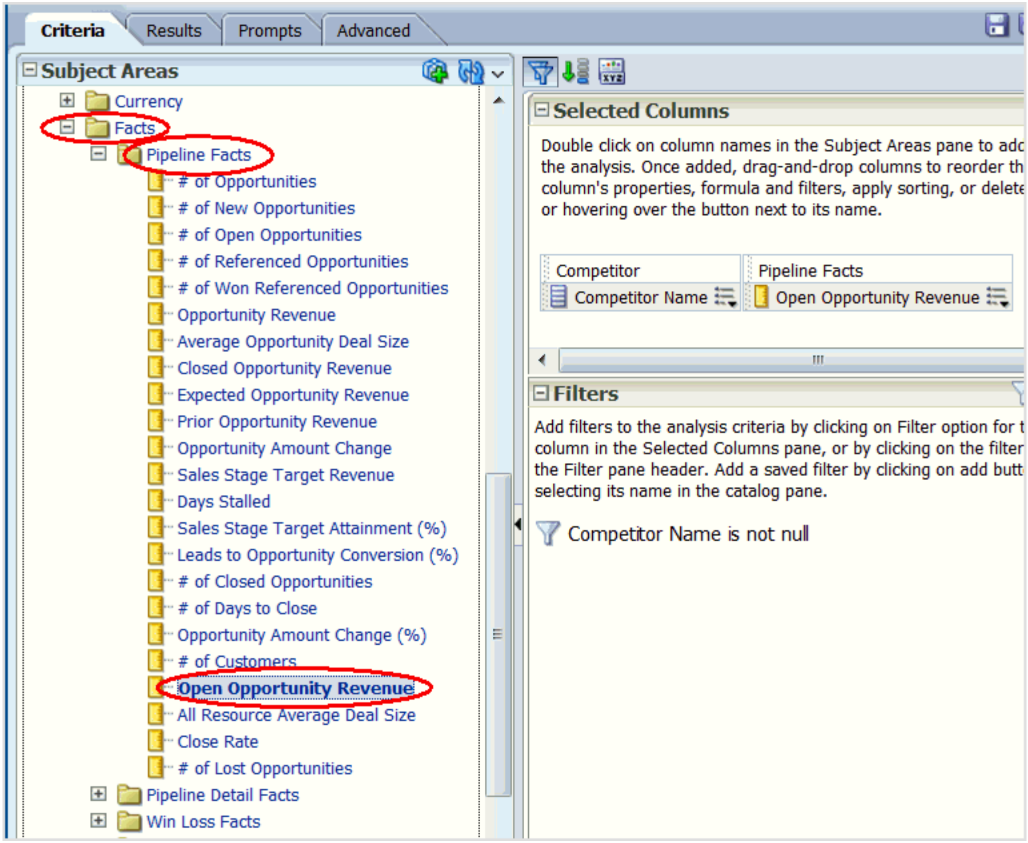


   b. Select **is not null** for the Operator.

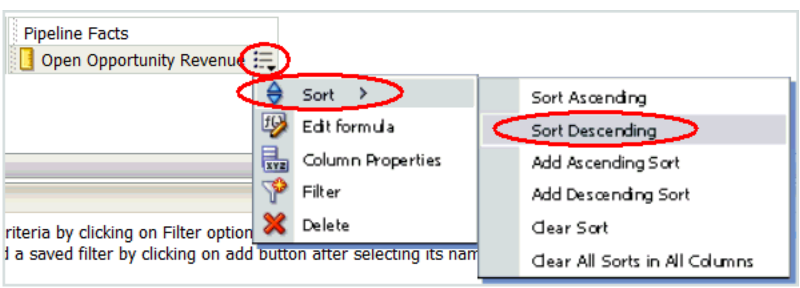


   c. Click **OK**.

7. In the Subject Areas list, expand **Facts**, then **Pipeline Facts**, and double-click **Open Opportunity Revenue**.

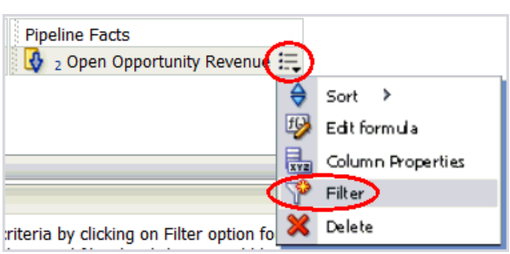


8. To enable the highest value revenues to be displayed first, click the icon beside Open Opportunity Revenue, select **Sort**, then **Sort Descending**.

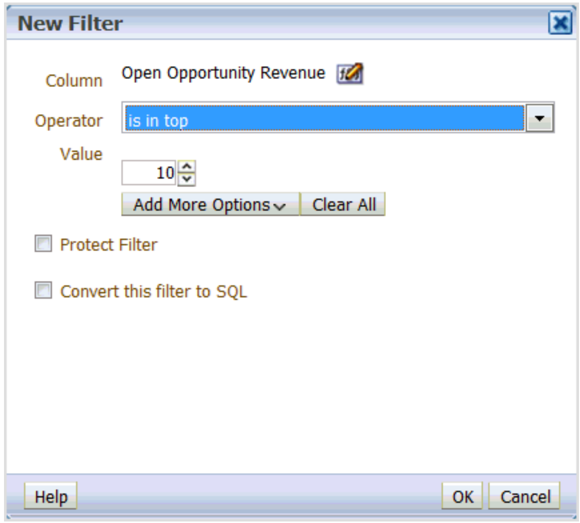


9. Restrict the analysis to the top 10 highest value revenues, by performing the following steps:

   a. Click the icon beside Open Opportunity Revenue, and select **Filter**.

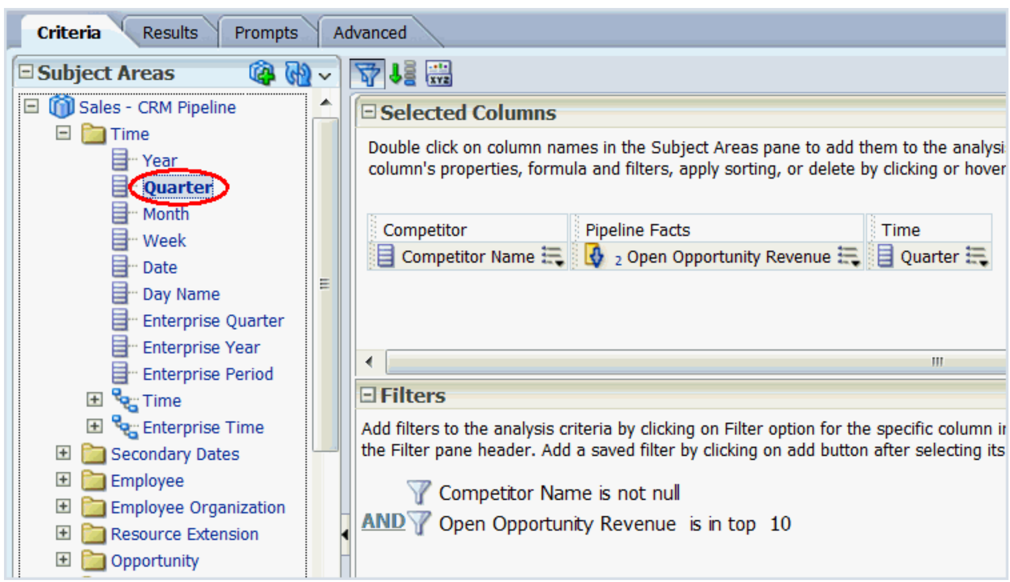


   b. Select **is in top** for the **Operator**, and leave 10 as the default **Value**.

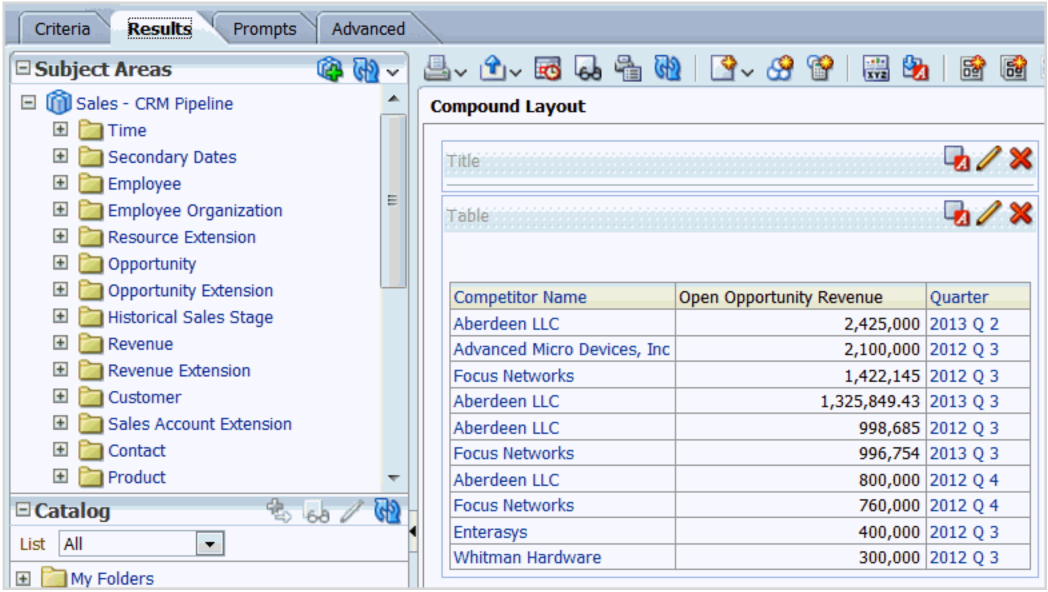


c. Click **OK**.

10. In the Subject Areas list, expand **Time**, then double-click **Quarter**.



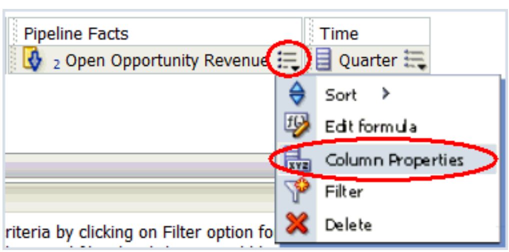
11. To get a preview of the analysis so far, click the **Results** tab.



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 icon beside Open Opportunity Revenue, and select **Column Properties**.



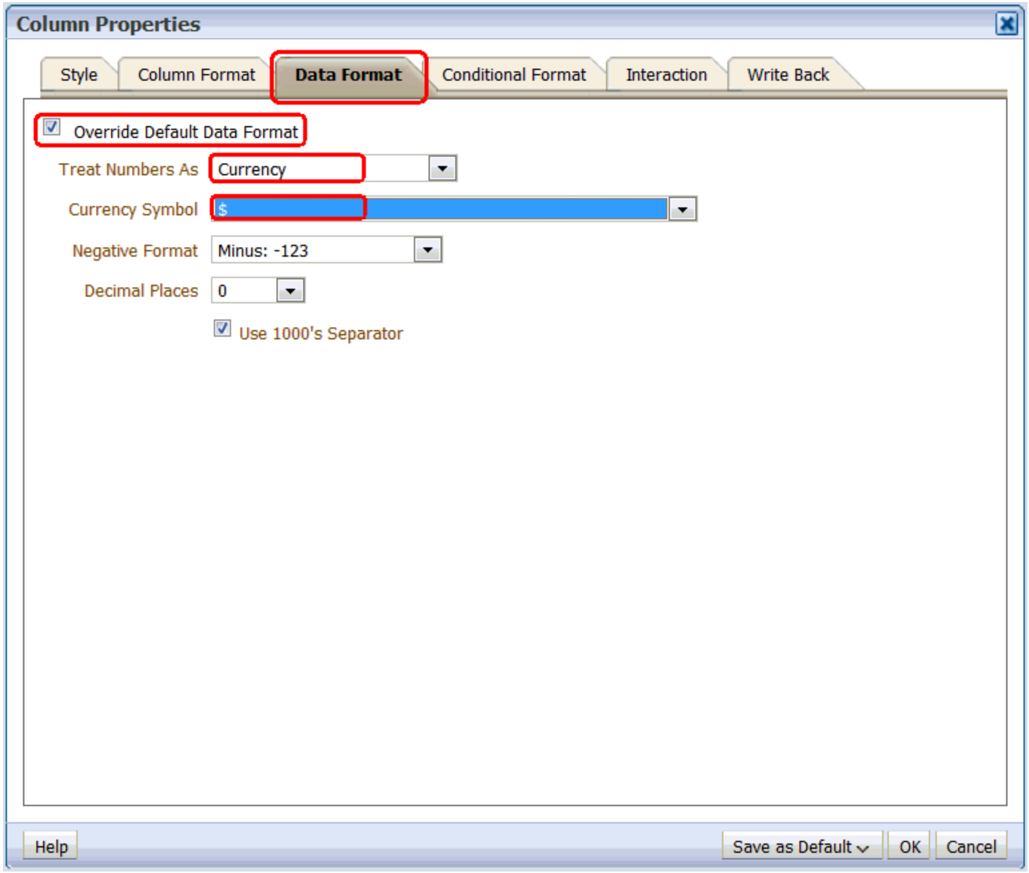
    c. In the Column Properties window, click the **Data Format** tab.

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

    e. For **Treat Numbers As**, select **Currency**.

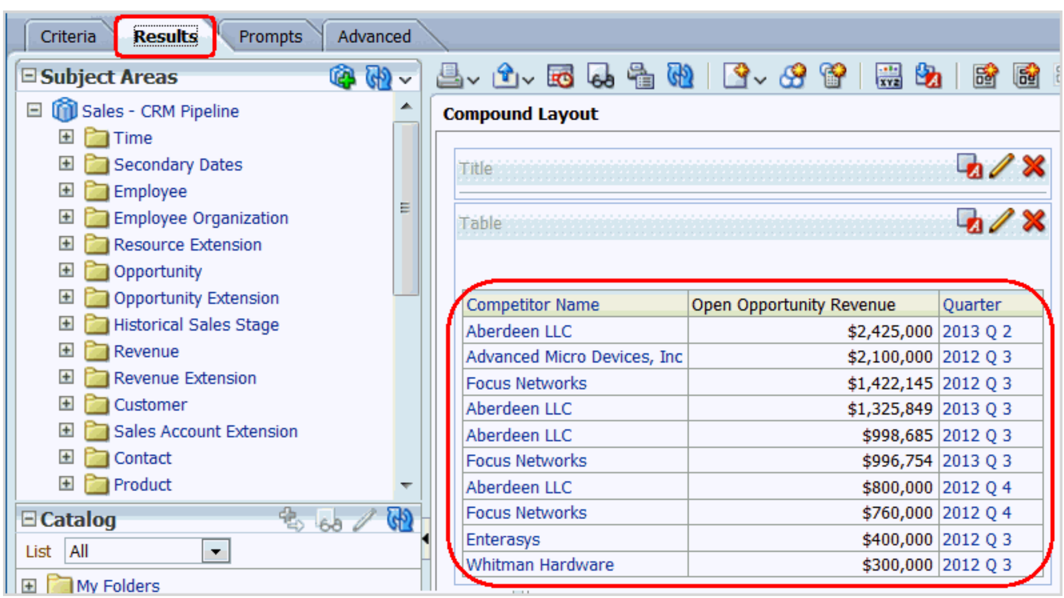
    f. For the **Currency Symbol**, select the currency you require *(the following figure shows $)*.

    g. Leave the default value of 0 for **Decimal Places**.



h. Click **OK**.

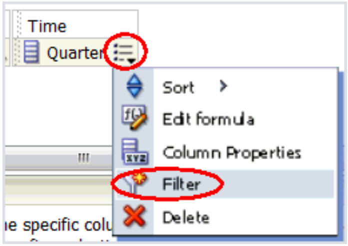
13. To get a preview of the analysis, click the **Results** tab.



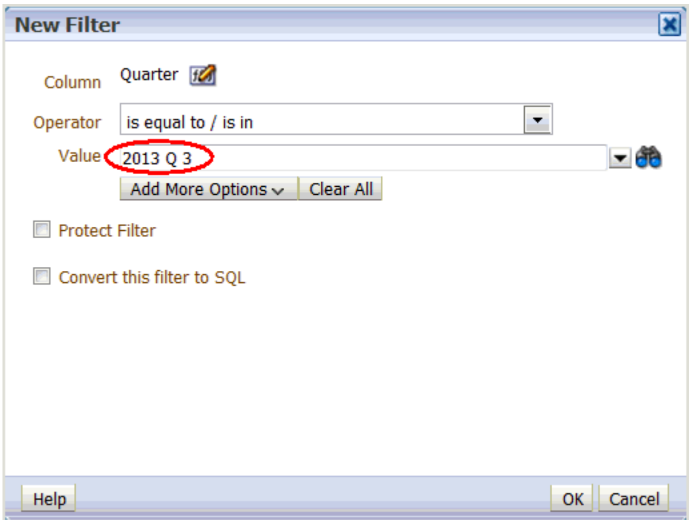
14. If this displays the output that you want, then you can save the analysis at this point, by continuing at step 15.

If you want the analysis to display only the most recent quarter's data, then perform the following steps to supply a filter:

a. Click the **Criteria** tab, then click the icon beside Quarter, and select **Filter**.

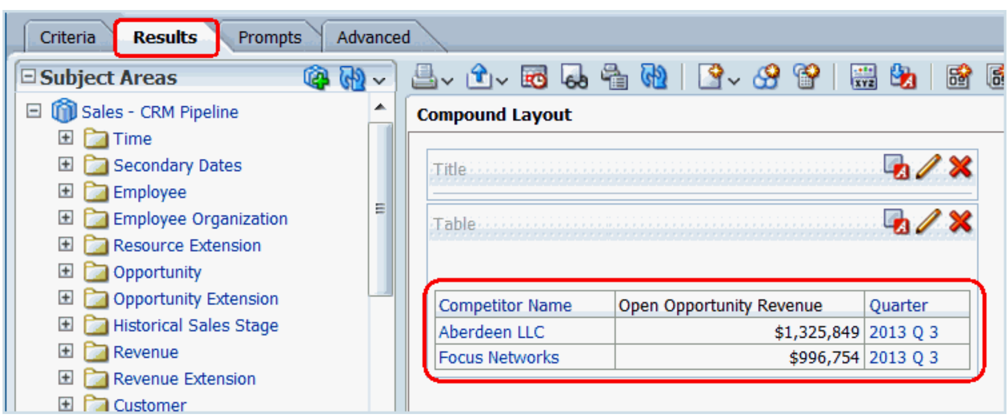


b. Enter or select the most recent quarter (in the example, 2013 Q 3) for the **Value**.

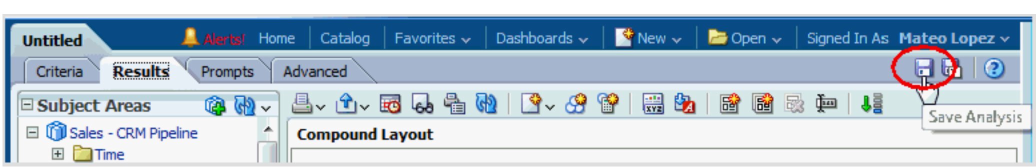


c. Click **OK**.

d. Optionally, preview the analysis, by clicking the Results tab.



15. To save the analysis, click the **Save Analysis** icon near the top-right corner.



16. Save the analysis as follows:

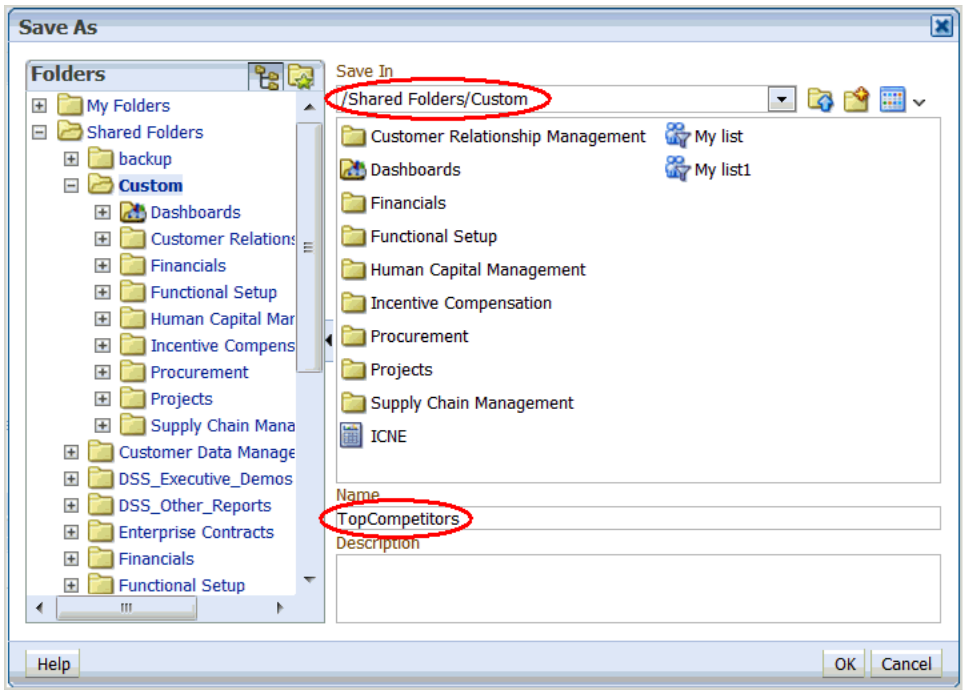
a. In the **Name** field, specify a name for the analysis.

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 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.

The following example shows Shared Folders/Custom as the Save In target directory and TopCompetitors as the Name for the analysis.



c. Click **OK**.

You can now navigate to the analysis, which, if you saved the analysis for all quarters, looks like this:

Competitor Name	Open Opportunity Revenue	Quarter
Aberdeen LLC	$2,425,000	2013 Q 2
Advanced Micro Devices, Inc	$2,100,000	2012 Q 3
Focus Networks	$1,422,145	2012 Q 3
Aberdeen LLC	$1,325,849	2013 Q 3
Aberdeen LLC	$998,685	2012 Q 3
Focus Networks	$996,754	2013 Q 3
Aberdeen LLC	$800,000	2012 Q 4
Focus Networks	$760,000	2012 Q 4
Enterasys	$400,000	2012 Q 3
Whitman Hardware	$300,000	2012 Q 3

If you saved the analysis for the most recent quarter, the analysis looks similar to the following:

Competitor Name	Open Opportunity Revenue	Quarter
Aberdeen LLC	$1,325,849	2013 Q 3
Focus Networks	$996,754	2013 Q 3

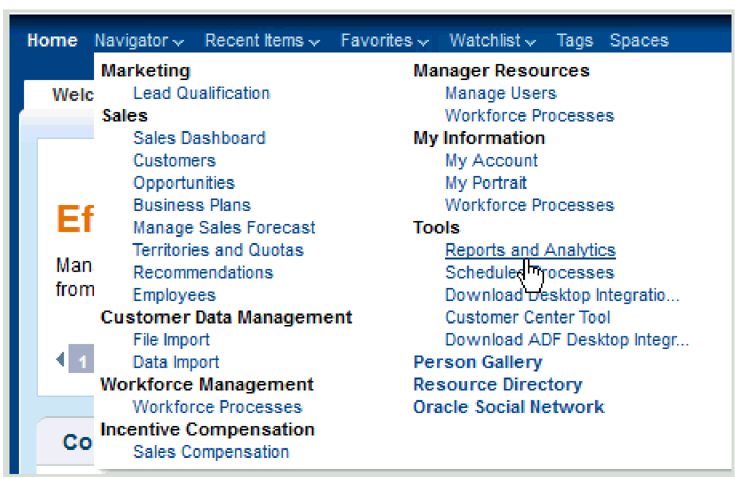
13

Which Were the High Value Opportunities that We Most Recently Lost to Our Competitors?

This tutorial shows you how to create an analysis to determine which were the high value opportunities that were most recently lost to competitors.

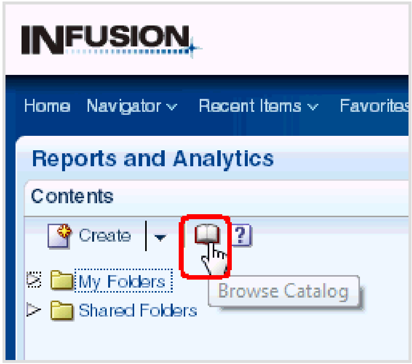
How to Identify the High Value Opportunities Recently Lost to Competitors

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

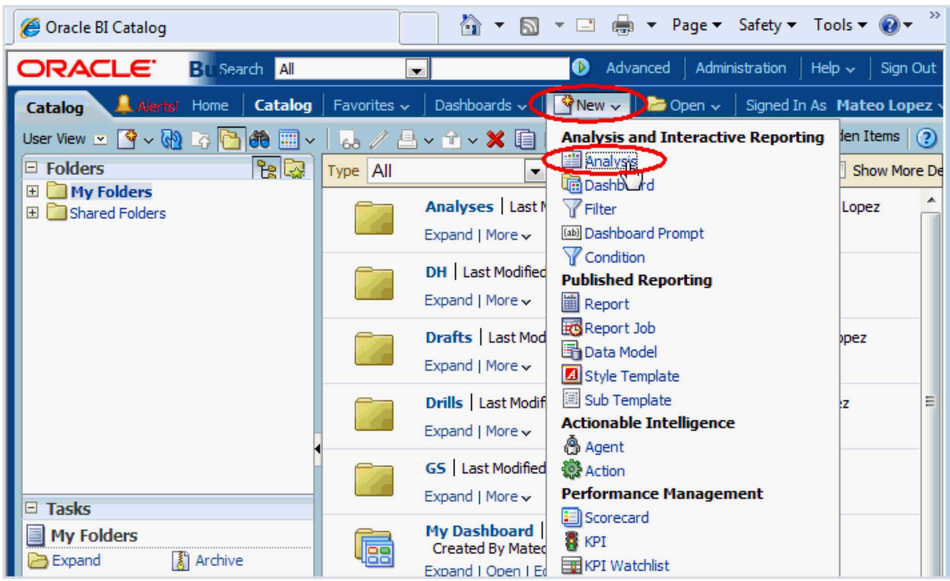


The Reports and Analytics page is displayed.

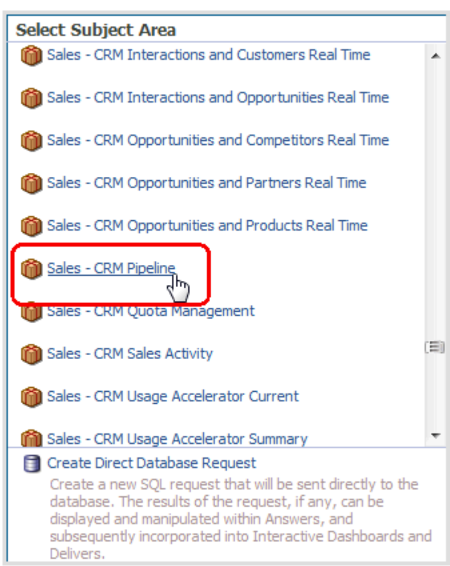
2. In the Contents pane, click the **Browse Catalog** icon.



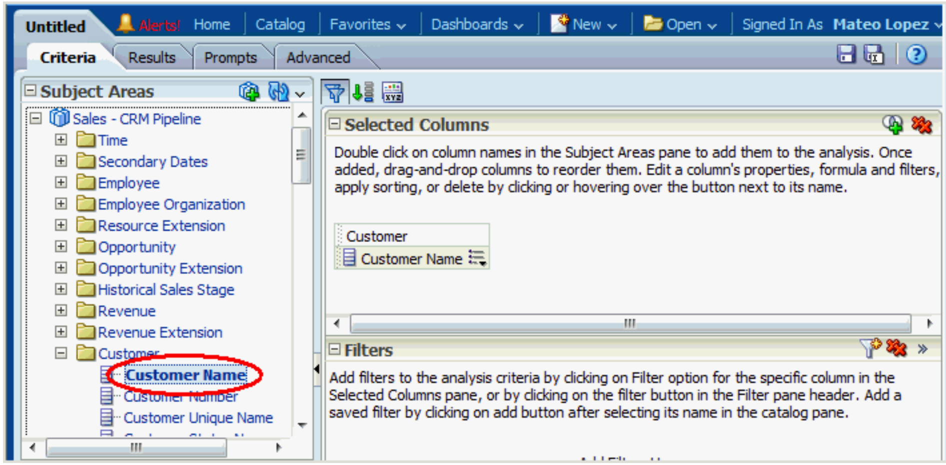
3. In the Oracle BI Catalog window, click **New**, then **Analysis**.



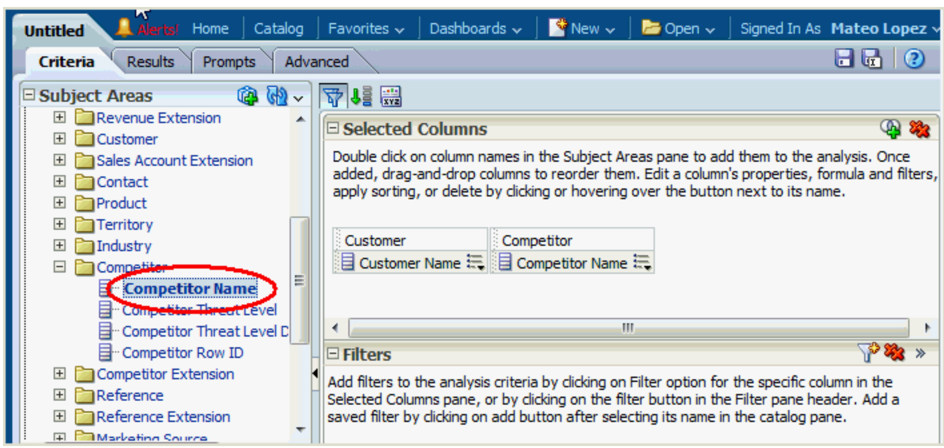
4. Select the **Sales - CRM Pipeline** subject area.



5. In the Subject Areas list, expand **Customer**, then double-click **Customer Name**. This automatically adds Customer Name to the Selected Columns list.

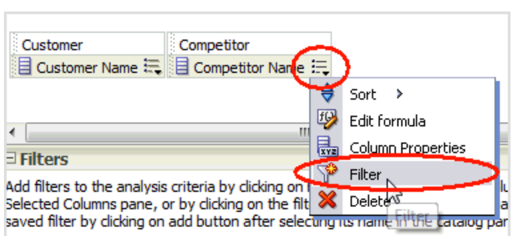


6. In the Subject Areas list, select **Competitor**, then double-click **Competitor Name**.

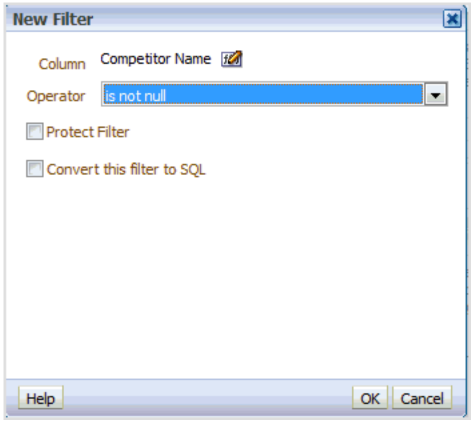


7. Restrict the analysis to exclude blank competitor names, that is, for opportunities where there were no competitors, by performing the following steps:

   a. Click the icon beside Competitor Name, and select **Filter**.

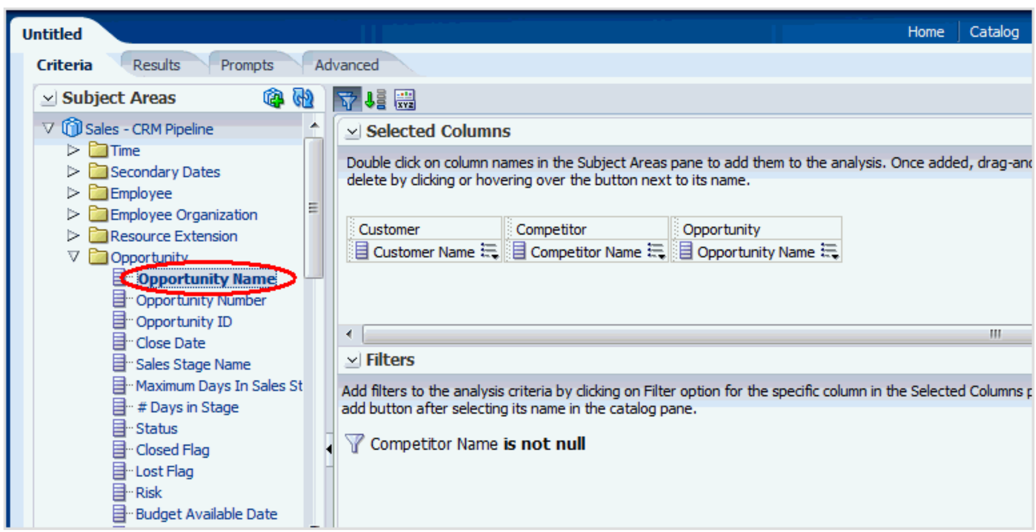


   b. Select **is not null** for the Operator.

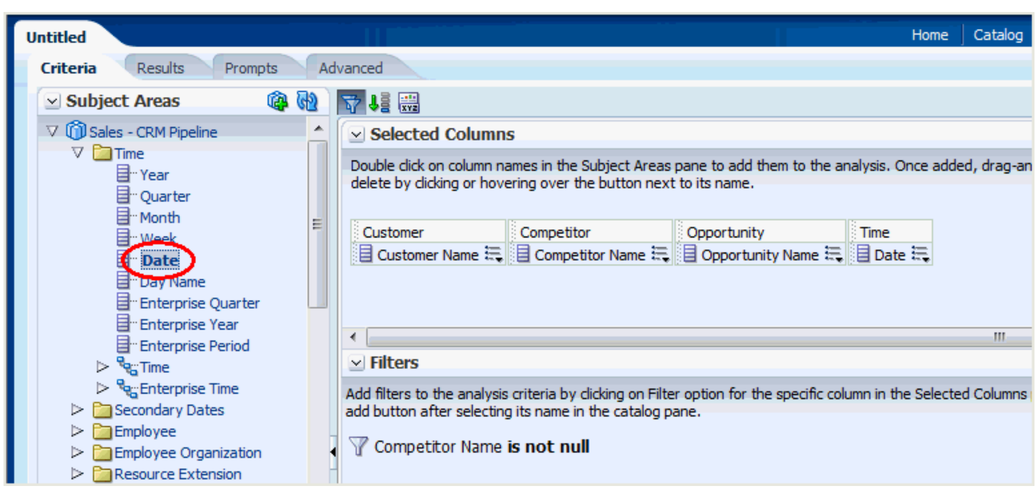


c. Click **OK**.

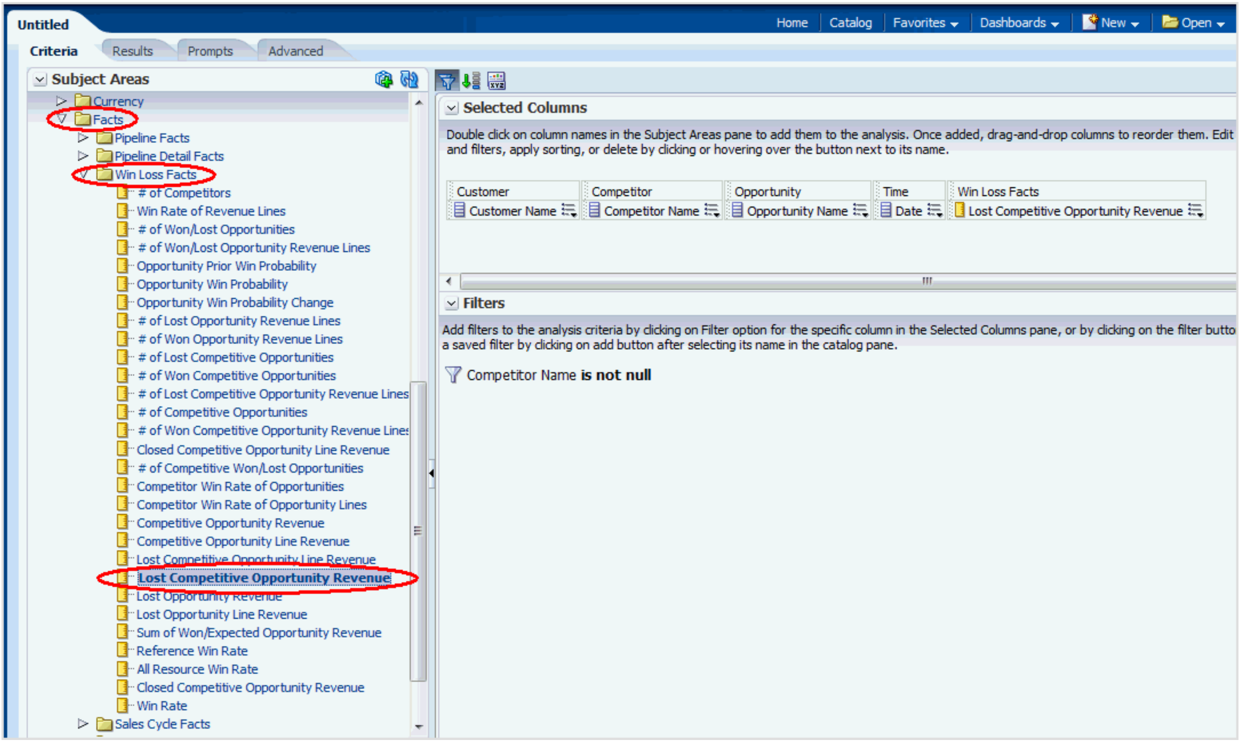
8. In the Subject Areas list, expand **Opportunity**, then double-click **Opportunity Name**.



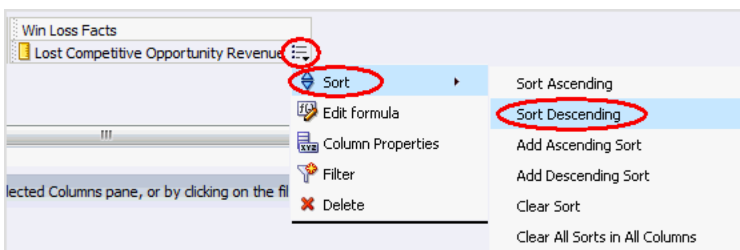
9. In the Subject Areas list, expand **Time**, then double-click **Date**.



10. In the Subject Areas list, expand **Facts**, then **Win Loss Facts**, and double-click **Lost Competitive Opportunity Revenue**.

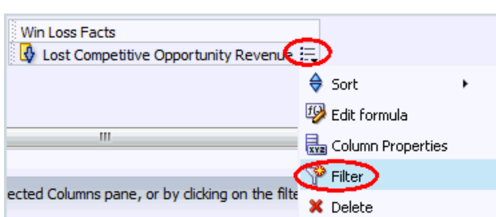


11. To enable the highest value revenues to be displayed first, click the icon beside Lost Competitive Opportunity Revenue, select **Sort**, then **Sort Descending**.

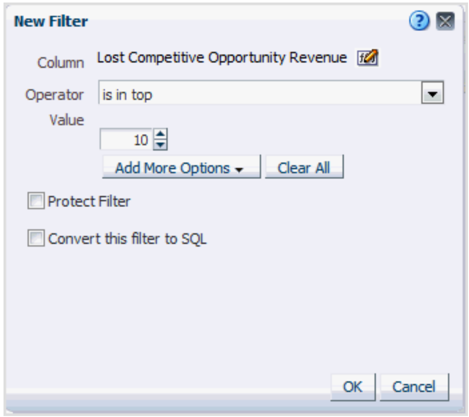


12. Restrict the analysis to the top 10 highest value revenues, by performing the following steps:

   a. Click the icon beside Lost Competitive Opportunity Revenue, and select **Filter**.



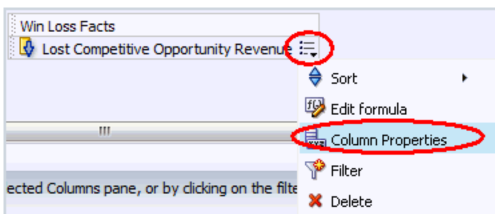
   b. Select **is in top** for the **Operator**, and leave 10 as the default **Value**.



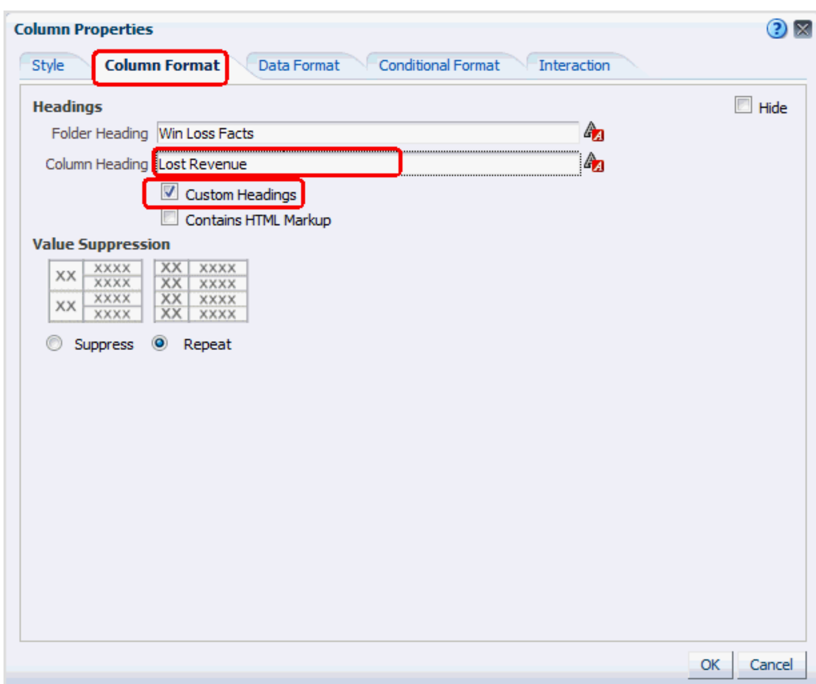
c. Click **OK**.

13. To shorten the column heading for Lost Competitive Opportunity Revenue - to Lost Revenue, for example - perform the following steps:

    a. Click the icon beside Lost Competitive Opportunity Revenue, and select **Column Properties**.



    b. In the Column Properties window, click the **Column Format** tab, select **Custom Headings**, then enter **Lost Revenue** for the **Column Heading**.



14. To enable Lost Revenue to display local currency values, with no decimal places, perform the following steps:

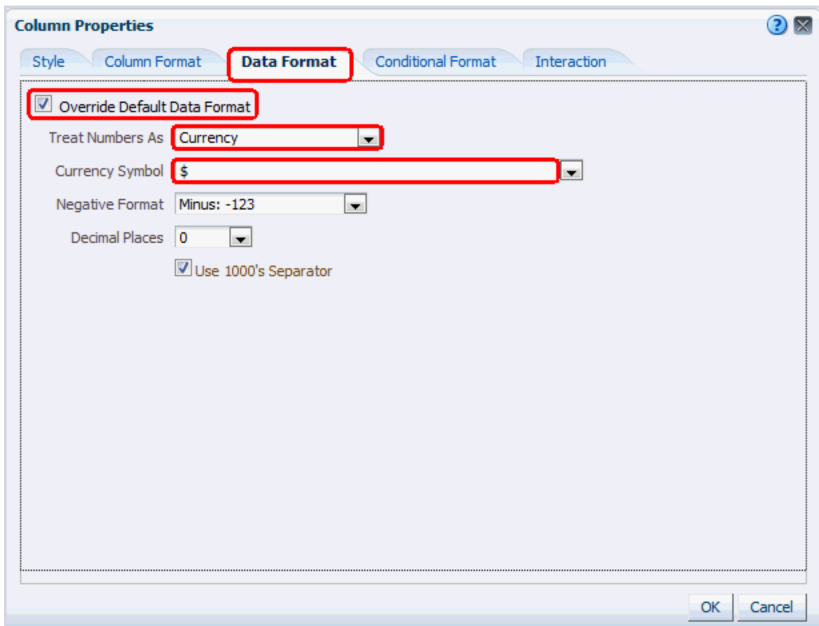
    a. In the Column Properties window, click the **Data Format** tab.

    b. Select **Override Default Data Format.**

    c. For **Treat Numbers As**, select **Currency**.

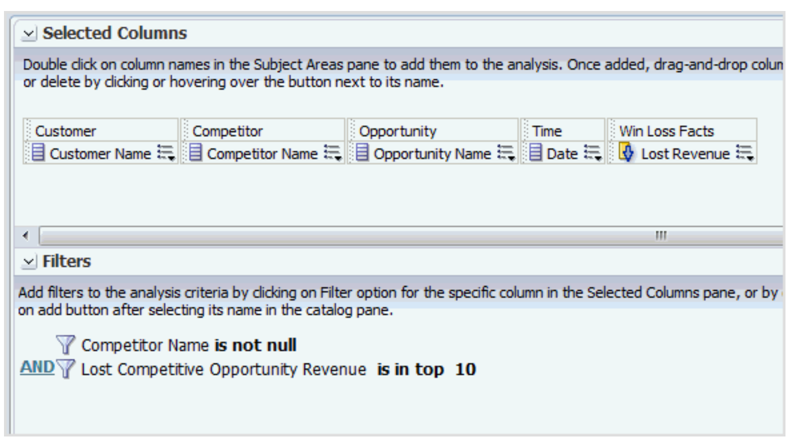
    d. For the **Currency Symbol**, select the currency you require *(the following figure shows $)*.

    e. Leave the default value of 0 for **Decimal Places**.

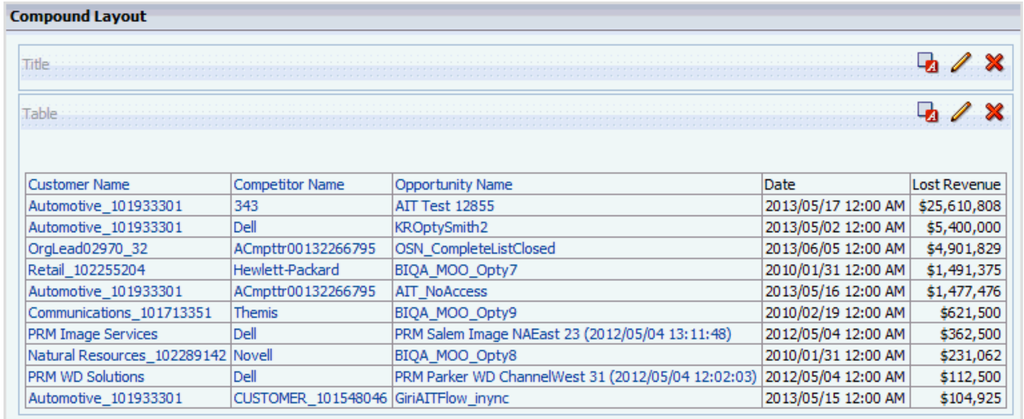


    f. Click **OK**.

15. At this point, the **Criteria** for the analysis displays the two filters:

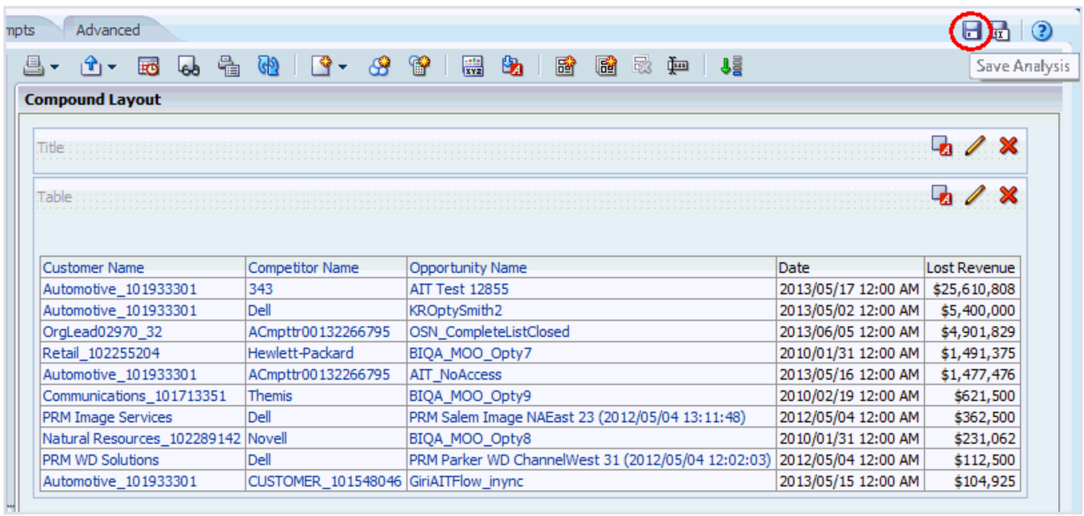


16. Click the **Results** tab to show the preview results for this analysis:



Customer Name	Competitor Name	Opportunity Name	Date	Lost Revenue
Automotive_101933301	343	AIT Test 12855	2013/05/17 12:00 AM	$25,610,808
Automotive_101933301	Dell	KROptySmith2	2013/05/02 12:00 AM	$5,400,000
OrgLead02970_32	ACmpttr00132266795	OSN_CompleteListClosed	2013/06/05 12:00 AM	$4,901,829
Retail_102255204	Hewlett-Packard	BIQA_MOO_Opty7	2010/01/31 12:00 AM	$1,491,375
Automotive_101933301	ACmpttr00132266795	AIT_NoAccess	2013/05/16 12:00 AM	$1,477,476
Communications_101713351	Themis	BIQA_MOO_Opty9	2010/02/19 12:00 AM	$621,500
PRM Image Services	Dell	PRM Salem Image NAEast 23 (2012/05/04 13:11:48)	2012/05/04 12:00 AM	$362,500
Natural Resources_102289142	Novell	BIQA_MOO_Opty8	2010/01/31 12:00 AM	$231,062
PRM WD Solutions	Dell	PRM Parker WD ChannelWest 31 (2012/05/04 12:02:03)	2012/05/04 12:00 AM	$112,500
Automotive_101933301	CUSTOMER_101548046	GiriAITFlow_inync	2013/05/15 12:00 AM	$104,925

17. To save the analysis, click the **Save Analysis** icon near the top-right corner.



Customer Name	Competitor Name	Opportunity Name	Date	Lost Revenue
Automotive_101933301	343	AIT Test 12855	2013/05/17 12:00 AM	$25,610,808
Automotive_101933301	Dell	KROptySmith2	2013/05/02 12:00 AM	$5,400,000
OrgLead02970_32	ACmpttr00132266795	OSN_CompleteListClosed	2013/06/05 12:00 AM	$4,901,829
Retail_102255204	Hewlett-Packard	BIQA_MOO_Opty7	2010/01/31 12:00 AM	$1,491,375
Automotive_101933301	ACmpttr00132266795	AIT_NoAccess	2013/05/16 12:00 AM	$1,477,476
Communications_101713351	Themis	BIQA_MOO_Opty9	2010/02/19 12:00 AM	$621,500
PRM Image Services	Dell	PRM Salem Image NAEast 23 (2012/05/04 13:11:48)	2012/05/04 12:00 AM	$362,500
Natural Resources_102289142	Novell	BIQA_MOO_Opty8	2010/01/31 12:00 AM	$231,062
PRM WD Solutions	Dell	PRM Parker WD ChannelWest 31 (2012/05/04 12:02:03)	2012/05/04 12:00 AM	$112,500
Automotive_101933301	CUSTOMER_101548046	GiriAITFlow_inync	2013/05/15 12:00 AM	$104,925

18. Save the analysis as follows:

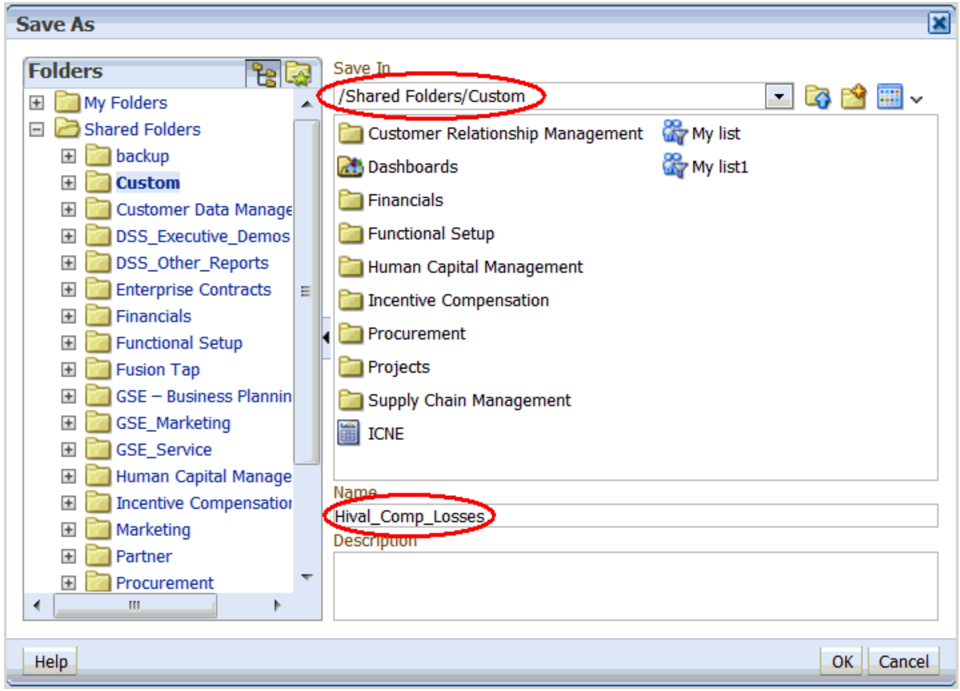
a. In the **Name** field, specify a name for the analysis.

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 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.

The following example shows Shared Folders/Custom as the Save In target directory and Hival_Comp_Losses as the Name for the analysis.



c. Click **OK**.

You can now navigate to the analysis, which looks like this:

Customer Name	Competitor Name	Opportunity Name	Date	Lost Revenue
Automotive_101933301	343	AIT Test 12855	2013/05/17 12:00 AM	$25,610,808
Automotive_101933301	Dell	KROptySmith2	2013/05/02 12:00 AM	$5,400,000
OrgLead02970_32	ACmpttr00132266795	OSN_CompleteListClosed	2013/06/05 12:00 AM	$4,901,829
Retail_102255204	Hewlett-Packard	BIQA_MOO_Opty7	2010/01/31 12:00 AM	$1,491,375
Automotive_101933301	ACmpttr00132266795	AIT_NoAccess	2013/05/16 12:00 AM	$1,477,476
Communications_101713351	Themis	BIQA_MOO_Opty9	2010/02/19 12:00 AM	$621,500
PRM Image Services	Dell	PRM Salem Image NAEast 23 (2012/05/04 13:11:48)	2012/05/04 12:00 AM	$362,500
Natural Resources_102289142	Novell	BIQA_MOO_Opty8	2010/01/31 12:00 AM	$231,062
PRM WD Solutions	Dell	PRM Parker WD ChannelWest 31 (2012/05/04 12:02:03)	2012/05/04 12:00 AM	$112,500
Automotive_101933301	CUSTOMER_101548046	GiriAITFlow_inync	2013/05/15 12:00 AM	$104,925