

# Oracle® Cloud

## Reference for Fusion CX Analytics



F57960-01  
September 2022



Oracle Cloud Reference for Fusion CX Analytics,

F57960-01

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# Preface

**Topics:**

- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Documentation](#)
- [Conventions](#)

## Audience

This document is intended for Oracle Fusion Analytics Warehouse consumers and authors using the Services to run a business..

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## 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>.

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Oracle customers that have purchased support 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.

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## Related Documentation

These related Oracle resources provide more information.

- Oracle Cloud <http://cloud.oracle.com>
- Administering Oracle Fusion Analytics Warehouse
- Using Oracle Fusion Analytics Warehouse
- Visualizing Data and Building Reports in Oracle Analytics Cloud

## Conventions

The following text conventions are used in this document.

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

# 1

## Introduction

### Overview

This guide lists the predefined objects in Oracle Fusion CX Analytics. You can find information about tables, entity relationships, subject area, job roles, duty roles, associated business questions, metric details, prebuilt analyses, prebuilt KPIs, and prebuilt decks and cards.



# 2

## Tables

### Overview

This section provides information about tables within Oracle Fusion CX Analytics warehouse and their columns, primary keys denoted as key columns, data types, and the referred table and column names.



#### Note:

Tables ending with the suffix `_EN` and those listed in **Tables Without WHO Columns** are for Oracle Internal use only. In addition, tables storing descriptive flexfiled data (DFF tables) aren't included in the documentation

Download this [ZIP file](#) that contains available tables that apply to the current version of Oracle Fusion CX Analytics . Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click **22.R3\_Aug2022\_Fusion\_CX\_Analytics\_Tables.html**.

### Tables Without WHO Columns

All tables have two system date columns which can be used to get the last refresh dates.

The following views based on the data warehouse tables don't have the WHO columns:

- DW\_BUSINESS\_UNIT\_D
- DW\_INV\_ORGANIZATION\_D
- DW\_BUSINESS\_UNIT\_D\_TL
- DW\_INV\_ORGANIZATION\_D\_TL

# 3

## Relationship Diagram

### Overview

This chapter provides diagrams that define the logical relationship of a Fact table with different dimension tables.

Download this [ZIP file](#) that contains available diagrams that apply to the current version of Oracle Fusion CX Analytics. Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click **[22.R3\\_Aug2022\\_Fusion\\_CX\\_Analytics\\_Diagrams.html](#)**.

# 4

## Data Store

### Overview

Enrich your reports by choosing specific columns from various view objects (VOs) from the Oracle Applications Cloud data sources.

Enrich your reports by choosing specific columns from various view objects (VOs) from the Oracle Applications Cloud data sources. You can select the columns from various VOs, create an enrichment dataset, and use that dataset to create a data pipeline activation plan. This enables you to seamlessly extract and load data from additional Oracle Applications Cloud VOs and make it readily available in the autonomous data warehouse tables. You can then use the data for visualization and analysis.

#### **Data Store Spreadsheet**

Use this [spreadsheet](#) that contains available Fusion CX BI View Objects for extraction using Data Enrichment in Oracle Fusion Analytics Warehouse.

# 5

## Data Lineage

### Overview

You can select the subject area for each of the Fusion Analytics Warehouse products and review the data lineage details. This enables you to understand the column and table lineage from the presentation layer to the physical layer.

#### **Data Lineage Spreadsheet**

Use this [spreadsheet](#) that contains Fusion Customer Experience Data Lineage details.

#### **Customer Experience Metric Calculation Spreadsheet**

Use this [spreadsheet](#) that contains Fusion Customer Experience Metric Calculation details.

# 6

## Data Augmentation

### Overview

Entities are key concepts or building blocks for implementing business processes in any Fusion application. Oracle Fusion Analytics Warehouse extracts data for key entities and makes the data available in analysis-friendly data models (tables). Internally, Oracle Fusion Analytics Warehouse keeps track of the tables that capture entity details, as well as tables with references for entities. When the data augmentation framework adds attributes that aren't part of the predefined data model, users see the new information as new attributes associated with the relevant tables. The Entity ID is the set of unique attributes that identifies the entity.

#### **Data Augmentation Spreadsheet**

Use this [spreadsheet](#) that contains Entities and Entity ID mapping details for CX. Select "Entity" in the Data augmentation flow.

# 7

## Subject Areas

### Subject Areas

This chapter provides information on the subject areas with data you maintain in Oracle Analytics for Advertising and Customer Experience (CX). These subject areas, with their corresponding data, are available for you to use when creating and editing analyses and reports. The information for each subject area includes:

This section provides information on the subject areas with data you maintain in Oracle Fusion CX Analytics. These subject areas, with their corresponding data, are available for you to use when creating and editing analyses and reports. The information for each subject area includes:

- Description of the subject area.
- Business questions that can be answered by data in the subject area, with a link to more detailed information about each business question.
- Job-specific groups and duty roles that can be used to secure access to the subject area, with a link to more detailed information about each job role and duty role.
- Primary navigation to the work area that is represented by the subject area.
- Time reporting considerations in using the subject area, such as whether the subject area reports historical data or only the current data. Historical reporting refers to reporting on historical transactional data in a subject area. With a few exceptions, all dimensional data are current as of the primary transaction dates or system date.
- The lowest grain of transactional data in a subject area. The lowest transactional data grain determines how data are joined in a report.
- Special considerations, tips, and things to look out for in using the subject area to create analyses and reports.

### Overview

Download this [ZIP file](#) that contains available subject areas that apply to the current version of Oracle Fusion CX Analytics. Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click [22.R3\\_Aug2022\\_Fusion\\_CX\\_Analytics\\_SubjectAreas.html](#).

### Usage Tracking

#### Description

Usage Tracking is a powerful feature that has been available in Oracle Analytics Cloud. In Oracle Fusion Analytics Warehouse you can track usage to determine which user queries are creating performance bottlenecks, based on query frequency and response time.

Administrators set up the criteria to track user queries and generate usage reports that you can use in a variety of ways such as reports optimization, user session strategies, or plan usage by users, and departments based on the resources that they consume. When reviewing the KPIs, it is important to keep the usability considerations in mind including trends, slice-and-dice, and drilldowns. Where applicable, benchmark information showcasing performance with the peer group is available. Companies typically set strategic quarterly goals in terms of key metrics; where applicable, the KPIs show progress towards such goals.

### Business Questions

This subject area can answer the following business questions:

- What are the average queries ran by the user by month?
- How many number of user sessions were created per month?
- How many distinct queries were run per month?
- How many distinct users used the system?
- How many distinct users used the system in a week?
- What are the average queries ran by the user in a week?
- How many logical queries ran by the top users?

### Duty Roles

The Usage Tracking Analysis Duty role secures access to this subject area. See [Common Duty Roles](#).

### Primary Navigation

Folder: /Shared Folders/Common/Usage Tracking

Workbook: Usage Tracking

### Special Considerations

None.

## Offerings and Functional Areas

This table shows the offerings in Oracle Fusion CX Analytics and their source.

Offering	Functional Area	Activation Dependency *	Subject Areas Covered	Source	Initial Release
Customer Experience Sales Analytics	Sales Pipeline	None	<ul style="list-style-type: none"> <li>• CX - Opportunity</li> <li>• CX - Opportunity Revenue Line</li> <li>• CX - Activity</li> <li>• CX - Opportunity Activity</li> <li>• CX - Lead Activity</li> <li>• CX - Leads</li> </ul>	Oracle CX Cloud (Fusion Sales)	22R2
Customer Experience Sales Analytics	Sales Pipeline Snapshot	Sales Pipeline	<ul style="list-style-type: none"> <li>• CX - Opportunity Snapshot</li> <li>• CX - Opportunity Revenue Line Snapshot</li> <li>• CX - Opportunity Stage Progression</li> </ul>	Oracle CX Cloud (Fusion Sales)	22R2
Customer Experience Sales Analytics	Sales CPQ Integrated Analytics	Sales Pipeline	<ul style="list-style-type: none"> <li>• CX - Opportunity Quote Line</li> <li>• CX - Opportunity Quote Line</li> </ul>	Oracle CX Cloud (Fusion Sales) <sup>+</sup>	22R2
Customer Experience Marketing Analytics	Marketing Campaign Closed Loop Analytics	Sales Pipeline	<ul style="list-style-type: none"> <li>• CX - Campaign Members</li> <li>• CX - Campaign Opportunity Revenue Line</li> </ul>	Oracle CX Cloud (Fusion Sales) <sup>#</sup>	22R2
Customer Experience Service Analytics	B2B Service Analytics	None	<ul style="list-style-type: none"> <li>• CX - B2B Service Request</li> </ul>	Oracle CX Cloud (Fusion B2B Service)	22R2
Subscription Analytics	Subscription Management Analytics	None	<ul style="list-style-type: none"> <li>• CX - Subscriptions</li> <li>• CX - Subscription Bill Line</li> </ul>	Oracle Subscription Management	22R2



Offering	Functional Area	Activation Dependency *	Subject Areas Covered	Source	Initial Release
Customer Experience Marketing Analytic	Marketing Campaign Analytics	None	<ul style="list-style-type: none"> <li>CX - Campaign Activity Analysis</li> </ul>	Oracle Eloqua**	22R3

\* The functional area listed must be activated.

+ The pipeline or functional area is applicable when there's integration between Oracle CX Sales and Oracle Configure, Price, Quote, otherwise the subject area won't have data.

# The pipeline or functional area is applicable when there's integration between Oracle CX Sales and Oracle Eloqua Marketing Automation, otherwise the subject area won't have data.

\*\* Enable the Odata flag for the Eloqua instance.

## Business Questions

For each business question in this section, links are provided for more detailed information about the subject areas, job-specific groups, and duty roles associated with the business question.

### Overview

This section provides business questions that can be answered by data in the subject area, with a link to more detailed information about each business question..

Download this [ZIP file](#) that contains available business questions that apply to the current version of Oracle Fusion CX Analytics. Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click [22.R3\\_Aug2022\\_Fusion\\_CX\\_Analytics\\_BQs.html](#).



#### Note:

Job roles are the same as job-specific groups.

## Job-Specific Groups

For each job-specific group in this section, links are provided for more detailed information about the duty roles, subject areas, and business questions associated with the job-specific group.

### Overview

This section provides job-specific groups that can be used to secure access to the subject area, with a link to more detailed information about each job-specific group.



**Note:**

Job roles are the same as job-specific groups.

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_ADMINISTRAT OR_JOB	Sales Administrator	Has Author privileges	Author OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_VP_JOB	Sales VP	Has Author privileges	Author OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_MANAGER_J OB	Sales Manager	Has Author privileges	Author OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	



Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_REPRESENTA TIVE_JOB	Sales Representative	Has Author privileges	Author OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	
ORA_SVC_CUS TOMER_SERVIC E_REPRESENTA TIVE_JOB	Customer Service Representative	Has Author privileges	Author	CX Service
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_SVC_CUS TOMER_SERVIC E_MANAGER_J OB	Customer Service Manager	Has Author privileges	Author OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	CX Service
ORA_OSS_SUB SCRIPTION_SP ECIALIST_JOB	Subscription Specialist	Has Author privileges	Author OA4F_CX_SUBC RIPTIONS_ANAL YSIS_DUTY OA4F_CX_SUBS CRIPTION_CUS TOM_DATA	CX Subscription

## Common Job-Specific Groups

The common job-specific groups are applicable across the analytics applications that are part of Oracle Fusion Analytics Warehouse such as Oracle Fusion HCM Analytics and Oracle Fusion ERP Analytics.

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Associated Application Role Names	Functional Area
ORA_FND_IN TEGRATION_ SPECIALIST_ JOB	Integration Specialist	Individual responsible for planning, coordinating, and supervising all activities related to the integration of enterprise information systems. Has author privileges.	Author OA4F_COMM ON_DATA_AD MIN_ANALYSI S_DUTY	Not applicable	Common

## Data Roles

For each data role in this chapter, links are provided for more detailed information about the job-specific groups, subject areas, and business questions associated with the data role.

## Overview

This section provides data roles that can be used to secure access to the subject area, with a link to more detailed information about each data role.

Data Role Code	Data Role Name	Description	Functional Area
OA4F_CX_SALES_ACTIVITY_ASSIGNEE_DATA	Sales Activity By Assignee Data Security	Data security role to access activity data by Assignee.	CX Sales
OA4F_CX_SALES_ACTIVITY_DELEGATOR_DATA	Sales Activity By Delegator Data Security	Data security role to access Sales activity data by Delegator.	CX Sales
OA4F_CX_SALES_ACTIVITY_RES_HIER_DATA	Sales Activity By Resource Hierarchy Data Security	Data security role to access activity data by Resource Hierarchy.	CX Sales
OA4F_CX_SALES_ACTIVITY_CUSTOM_DATA	Sales Activity Custom and System Access Group Data Security	Data security role to access Activity data by Activity Access Group data.	CX Sales
OA4F_CX_SALES_LEAD_CUSTOM_DATA	Lead Custom and System Access Group Data Security	Data security role to access Lead data by Access Group data	CX Sales
OA4F_CX_SALES_LEADS_DATA	Lead Data Security	Data security role to access Lead data.	CX Sales
OA4F_CX_SALES_OPPORTUNITY_CUSTOM_DATA	Opportunity Custom and System Access Group Data Security	Data security role to access Opportunity data by Access Group data.	CX Sales
OA4F_CX_SALES_OPPORTUNITY_DATA	Opportunity Data Security	Data security role to opportunity data.	CX Sales
OA4F_CX_SALES_ACCOUNT_DATA	Sales Account Data Security	Data security role to access sales account data.	CX Sales
OA4F_CX_SERVICE_REQUEST_CUSTOM_DATA	Service Request Custom and System Access Group Data Security	Data security role to access B2B Service Request data by Activity Access Group data.	CX Service
OA4F_CX_SERVICE_REQUEST_ALL_DATA	Service Request All Data Security	Data security role to allow access to all Service Request data.	CX Service
OA4F_CX_SALES_OPPORTUNITY_QUOTE_CUSTOM_DATA	Opportunity Quote Custom and System Access Group Data Security	Data security role to access Opportunity Quote data by Access group data.	CX Sales

## Duty Roles

For each duty role in this chapter, links are provided for more detailed information about the job-specific groups, subject areas, and business questions associated with the duty role.

## Overview

This section provides duty roles that can be used to secure access to the subject area, with a link to more detailed information about each duty role.

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	Sales Opportunity Activity Analysis Duty	Object security role to control presentation catalog access to "CX - Opportunity Activity" subject area.	CX - Sales	CX - Opportunity Activity
OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY	Lead Activity Analysis Duty	Object security role to control presentation catalog access to "CX - Lead Activity" subject area.	CX - Sales	CX - Lead Activity
OA4F_CX_SALE S_ACTIVITY_DU TY	Sales Activity Analysis Duty	Object security role to control presentation catalog access to "CX - Activity" subject area.	CX - Sales	CX - Activity
OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY	Opportunity Revenue Line Snapshot Duty	Object security role to control presentation catalog access to CX - Opportunity Revenue Line Snapshot subject area.	CX - Sales	CX - Opportunity Revenue Line Snapshot
OA4F_CX_REVN _LINE_ANALYSI S_DUTY	Opportunity Revenue Analysis Duty	Object security role to control presentation catalog access to CX - Opportunity Revenue Line subject area.	CX - Sales	CX - Opportunity Revenue Line
OA4F_CX_OPTY _SNP_ANALYSIS _DUTY	Opportunity Snapshot Duty	Object security role to control presentation catalog access to CX - Opportunity Snapshot subject area.	CX - Sales	CX - Opportunity Snapshot

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_OPTY_PROG_ANALYSIS_DUTY	Opportunity Stage Progression Duty	Object security role to control presentation catalog access to CX - Opportunity Stage Progression subject area.	CX - Sales	CX - Opportunity Stage Progression
OA4F_CX_OPTY_ANALYSIS_DUTY	Opportunity Analysis Duty	Object security role to control presentation catalog access to CX - Opportunity subject area.	CX - Sales	CX - Opportunity
OA4F_CX_LEADS_DUTY	Lead Analysis Duty	Object security role to control presentation catalog access to "CX - Leads" subject area.	CX - Sales	CX - Leads
OA4F_CX_CAMPAIGN_OPTY_REVENUE_LINE_ANALYSIS_DUTY	Campaign Opportunity Revenue Line Analysis Duty	Object security role to control presentation catalog access to "CX - Campaign Opportunity Revenue Line" subject area.	CX - Sales	CX - Campaign Opportunity Revenue Line
OA4F_CX_CAMPAIGN_MEMBERS_ANALYSIS_DUTY	Campaign Members Analysis Duty	Object security role to control presentation catalog access to "CX - Campaign Members" subject area.	CX - Sales	CX - Campaign Members
OA4F_CX_SALES_OPTY_QUOTE_ANALYSIS_DUTY	Opportunity Quote Analysis Duty	Object security role to control presentation catalog access to "CX - Opportunity Quote" subject area.	CX-Sales	CX - Opportunity Quote
OA4F_CX_SERVICE_REQUEST_ANALYSIS_DUTY	Service requests Analysis Duty	Object security role to control presentation catalog access to "CX - B2B Service Requests" subject area.	CX - Service	CX - Service Request

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_SALE S_OPTY_QUOT E_LINE_ANALYS IS_DUTY	Opportunity Quote Line Analysis Duty	Object security role to control presentation catalog access to "CX - Opportunity Quote Line" subject area.	CX-Sales	CX - Opportunity Quote Line
OA4F_CX_SUBC RIPTIONS_ANAL YSIS_DUTY	Subscription Analysis Duty	Object security role to control presentation catalog access to "CX - Subscriptions" subject area.	CX - Subscription	CX - Subscription
OA4F_CX_CAM PAIGN_ACTIVIT Y_ANALYSIS_DU TY	Campaign Activity Analysis Duty	Object security role to control presentation catalog access to "CX - Campaign Activity Analysis" subject area.	CX - Marketing	CX - Campaign Activity Analysis
OA4F_CX_SUBC RIPTION_BILL_L INE_ANALYSIS_ DUTY	Subscription Bill Line Analysis Duty	Object security role to control presentation catalog access to "CX - Subscription Bill Line" subject area.	CX - Subscription	CX - Subscription Bill Line

## Common Duty Roles

The common duty roles are applicable across the analytics applications that are part of Oracle Fusion Analytics Warehouse such as Oracle Fusion HCM Analytics and Oracle Fusion ERP Analytics.

Duty Role Code	Duty Role Name	Details	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_COMMON _DATA_ADMIN_A NALYSIS_DUTY	Data Warehouse Refresh Analysis Duty	Object security role to control presentation catalog access to Common - Warehouse Refresh subject area.	Common	Common - Warehouse Refresh

Duty Role Code	Duty Role Name	Details	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_COMMON_USAGE_TRACKING_DUTY	Usage Tracking Analysis Duty	Object security role to control presentation catalog access to Common - Usage Tracking subject area.	Common	Common - Usage Tracking

## Subject Area Metric Details

### CX Activity

This table describes the Activity Metrics.

Metric	Metric Definition
# of Activities	The total Activities
# of Open Activities	The total Open Activities (Status not equal to Complete/Cancelled)
# of Completed Activities	The total Completed Activities (Status = Complete)
# of Expired Activities	The total Expired Activities (Status not equal to Complete/Cancelled & Current Date > Activity Due Date)
# of Tasks	The total Tasks (Activity function = Task)
# of Appointments	The total Appointments (Activity function = Appointments)
# of Call Reports	The total Call Reports (Activity function = Call Reports)
Average Activity Duration For Completed Activities	Average time to Complete the Activity
Average Number of Activities Per Team Member	Average number of Activity per Team Member. This metric is computed as follows: # of Activities/# of Resources

### CX Campaign Activity Analysis

This table describes the Marketing (Eloqua) Campaign Activity Analysis metrics.

Metric	Metric Definition
# of Responses	The total response activity for the campaign
# of New Contacts	The total new Contacts (New contact is the contact that is created as a result of Campaign response)
# of New Leads	The total new leads generated by the Campaign. (A lead is generated if a contact is newly acquired and responds to the campaign. Contacts are considered leads only once, so contacts are considered new leads only the first time they respond to a campaign. For subsequent responses, the contact is considered an existing lead. )
# of Emails Sent	The total Emails Sent



Metric	Metric Definition
# of Emails Delivered	the total Emails Delivered
# of Bouncebacks	The total Emails that returned a Bounceback (hard or soft)
# of Hard Bouncebacks	The total Emails that returned a Hard Bounceback. A hard bounce back is an Email that permanently couldn't be delivered.
# of Soft Bouncebacks	The total Emails that returned a Soft Bounceback. A soft bounce back is an Email that temporarily couldn't be delivered.
# of Email Opens	The total Email Opens
# of Email Clickthroughs	The total Email Clickthroughs. This includes multiple clicks by the same recipient
# of Possible Forwarders	The total original recipients that forwarded the email atleast once
# of Unsubscribes by Email	The total Email recipients that Unsubscribed. (Globally or Spam Unsubscribed)
# of Spam Unsubscribers by Email	The total Email recipients that marked the email as Spam
# of Existing Visitor Clickthroughs	The total Email clickthrough by returning visitor
# of New Visitor Clickthroughs	The total Email clickthrough by New visitor
# of Form Submissions	The total Form submissions. This includes multiple submissions by the same contact

## CX Campaign Members

These metrics will be used in the Analytics Currency (AC) and Document Currency (DC) fact folder in Subject Area.

- Document Currency is the currency used while entering the data in the application.
- Analytics Currency is the currency defined in the Fusion Analytics Warehouse.
- Analytics Currency and Exchange Rate Type are configured during product implementation.
- Exchange Rate date basis uses Campaign Creation Date to convert to analytics currency.
- Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Campaign Members	The total Campaign Members
# of Contacts	The total Contacts associated to Campaigns
# of Leads	The total Leads associated to Campaigns
# of Responses	The total Campaign Responses
# of Active Campaigns	The total Active Campaigns
# of Campaigns	The total Campaigns
# of Campaign Owners	The total Campaign Owners
Actual Cost	The Actual Cost of the Campaign
Budgeted Cost	The Budgeted Cost of the Campaign

## CX Campaign Opportunity Revenue Line

These metrics will be used in the Document Currency (DC), CX Currency (CC) and Analytics Currency (AC) fact folder in Subject Area.

- Document Currency is the currency used while entering the data in the application.
- CX Currency is the currency defined in the CRM/CX application.
- Analytics Currency is the currency defined in the Fusion Analytics Warehouse.
- Analytics Currency and Exchange Rate Type are configured during product implementation.
- Exchange Rate date basis uses Opportunity Expected Close Date to convert to analytics currency.
- Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Campaigns	The total Campaigns
# of Campaign Owners	The total Campaign Owners
# of Campaign Targeted Accounts	The total Accounts associated to Campaigns
Campaign Budgeted Cost	The Budgeted Cost of the Campaign
Campaign Actual Cost	The Actual Cost of the Campaign
# of Opportunity Revenue Lines	The total Opportunity Revenue Lines associated to Campaigns
# of Open Opportunity Revenue Lines	The total Open Opportunity Revenue Lines associated to Campaigns
# of Won Opportunity Revenue Lines	The total Won Opportunity Revenue Lines associated to Campaigns
# of Lost Opportunity Revenue Lines	The total lost Opportunity Revenue Lines associated to Campaigns
# of No Sale Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines associated to Campaigns
# of Opportunities with Revenue Line	The total Opportunities with Revenue Lines
Revenue Line Won Rate	The Campaign Opportunity Revenue Line Won Rate. This metric is computed as follows: $100 * \# \text{ of Won Revenue Lines} / \# \text{ of Won+Lost Revenue Lines}$
Revenue Line Loss Rate	The Campaign Opportunity Revenue Line Loss Rate. This metric is computed as follows: $100 * \# \text{ of Lost Revenue Lines} / \# \text{ of Won+Lost Revenue Lines}$
Open Opportunity Line Revenue	The total Open Opportunity Line Revenue (for Opportunities associated to Campaigns)
Won Opportunity Line Revenue	The total Won Opportunity Line Revenue (for Opportunities associated to Campaigns)
Lost Opportunity Line Revenue	The total Lost Opportunity Line Revenue (for Opportunities associated to Campaigns)
No Sale Opportunity Line Revenue	The total No Sale Opportunity Line Revenue (for Opportunities associated to Campaigns)
Campaign Attributed Pipeline Revenue	The total Campaign Opportunity Line Revenue (for Opportunities associated to Campaigns)
Campaign ROI	The Campaign ROI. This metric is computed as follows: $(\text{Campaign Attributed Pipeline Revenue} - \text{Campaign Actual Cost}) / \text{Campaign Actual Cost}$
Campaign Cost Per Opportunity Revenue Line	The Campaign Cost per Opportunity Revenue Line. This metric is computed as follows: $\text{Campaign Actual Cost} / \# \text{ of Opportunity Revenue Lines}$

Metric	Metric Definition
Campaign Cost Per Won Opportunity Revenue Line	The Campaign Cost per Won Opportunity Revenue Line. This metric is computed as follows: Campaign Actual Cost/# of Won Opportunity Revenue Lines
Campaign Actual Vs Budgeted Cost	The ratio of Campaign Actual and Budgeted cost. This metric is computed as follows: Campaign Actual Cost/ Campaign Budgeted Cost
Campaign Cost Per Attributed Revenue	The Campaign Cost per Attributed Revenue. This metric is computed as follows: Campaign Actual Cost/ Campaign Attributed Pipeline Revenue
Average Won Opportunity Line Revenue	The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue/# of Won Opportunity Revenue Lines
Campaign Cost Per Opportunity	The Campaign cost per Opportunity. This metric is computed as follows: Campaign Actual Cost/# of Opportunities with Revenue Lines
Campaign Cost Per Won Opportunity Line Revenue	The Campaign cost per Won Opportunity Line Revenue. This metric is computed as follows: Campaign Actual Cost/# of Won Opportunity Revenue Lines

## CX Lead Activity

This table describes the Lead Activity Metrics.

Metric	Metric Definition
# of Lead Activities	The total Activities associated to Leads
# of Open Lead Activities	The total Open Activities associated to Leads (Activity Status not equal to Complete/Cancelled)
# of Completed Lead Activities	The total Completed Activities associated to Leads (Activity Status = Complete)
# of Expired Lead Activities	The total Expired Activities associated to Leads (Activity Status not equal to Complete/Cancelled & Current Date > Activity Due Date)
# of Lead Appointments	The total Appointments associated to Leads (Activity function = Appointments)
# of Lead Call Reports	The total Call Reports associated to Leads (Activity function = Call Reports)
# of Lead Tasks	The total Tasks associated to Leads (Activity function = Task)
# of Lead Activities for Highly Ranked Leads	The total Activities for highly ranked Leads (Lead Rank = Hot)
Activity Rate - Converted Leads	The rate of Activities for Converted Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Converted Leads} / \# \text{ of Converted Leads}$
Activity Rate - Qualified Leads	The rate of Activities for Qualified Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Qualified Leads} / \# \text{ of Qualified Leads}$
Activity Rate - Rejected Leads	The rate of Activities for Rejected Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Rejected Leads} / \# \text{ of Rejected Leads}$

Metric	Metric Definition
Activity Rate - Retired Leads	The rate of Activities for Retired Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Retired Leads} / \# \text{ of Retired Leads}$
Activity Rate - Unaccepted Leads	The rate of Activities for Unaccepted Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Unaccepted Leads} / \# \text{ of Unaccepted Leads}$
Activity Rate - Unassigned Leads	The rate of Activities for Unassigned Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Unassigned Leads} / \# \text{ of Unassigned Leads}$
Activity Rate - Unconverted Leads	The rate of Activities for Unconverted Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Unconverted Leads} / \# \text{ of Unconverted Leads}$
Average Activity Duration For Completed Activities	The average time taken to complete an activity. This metric is computed as follows: $\text{Activity duration for completed activity} / \# \text{ of Completed Activities}$
Lead First Response Time	The time to respond to an assigned Lead. This metric is computed as follows: $\text{Date of first Lead Activity} - \text{Lead assigned date}$
Average Number of Lead Activities Per Team Member	The average number of Lead Activities per Team member.
Lead Activity Rate	The rate of Activities for Leads. This metric is computed as follows: $100 * \# \text{ of Lead Activities} / \# \text{ of Leads}$
Lead Idle Days	The days since the last Lead Activity. This metric is computed as follows: $\text{Current Date} - \text{Last Lead Activity Date}$

## CX Leads

These metrics will be used in the Document Currency (DC), CX Currency (CC) and Analytics Currency (AC) fact folder in Subject Area.

- Document Currency is the currency used while entering the data in the application.
- CX Currency is the currency defined in the CRM/CX application.
- Analytics Currency is the currency defined in the Fusion Analytics Warehouse.
- Analytics Currency and Exchange Rate Type are configured during product implementation.
- Exchange Rate date basis uses Lead Creation Date to convert to analytics currency.
- Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Leads	The total number of Leads
# of Leads Converted	The total Converted Leads (Lead Status = Converted)
# of Leads Generated from Marketing Source	The total Leads generated from Marketing Source (Lead Source = Marketing)
# of Leads Generated from Non Marketing Source	The total Leads generated from Non- marketing Source (Lead Source not equal to Marketing)
# of Assigned Leads	The total assigned leads (Assignment status = Assigned)

Metric	Metric Definition
# of Accounts with Leads	The total Accounts with Leads
# of Contacts with Leads	The total Contacts with Leads
# of Accepted Leads	The total Accepted Leads (Accepted Flag = Y)
# of Rejected Leads	The total Rejected Leads (Assignment Status = Rejected)
# of Retired Leads	The total Retired Leads (Lead Status = Retired)
# of Unaccepted Leads	The total Unaccepted Leads (Accepted Flag = N)
# of Unassigned Leads	The total Unassigned Leads. This metric is computed as follows: # of Leads - # of Assigned Leads
# of Uncovered Leads	The total Unconverted Leads. This metric is computed as follows: # of Leads - # of Converted Leads
# of Unqualified Leads	The total Unqualified leads (Lead Status = Unqualified)
# of Leads from Account	The total leads from Account (Sales Account Type = Customer)
# of Leads from Prospect Account	The total leads from Prospect (Sales Account Type = Prospect)
# of Prospect Leads Converted	The total Converted Leads from Prospect(Lead Status = Converted, Sales Account Type = Prospect)
# of Accounts Leads Converted	The total Converted Leads from Account(Lead Status = Converted, Sales Account Type = Customer)
# of Qualified Leads	The total Qualified Leads (Lead Status = Qualified)
# of Partner Assigned Leads	The total leads assigned to a Partner
# of highly Ranked Qualified Leads	The total Qualified Hot Leads (Lead Status = Qualified, Rank Name = Hot)
# of Low Ranked Qualified Leads	The total Qualified Cool Leads (Lead Status = Qualified, Rank Name = Cool)
# of Qualified Expired Leads	The total Qualified Expired Leads (Lead Status = Qualified, Current Date > Lead Expiry Date)
# of Medium Ranked Qualified Leads	The total Qualified Warm Leads (Lead Status = Qualified, Rank Name = Warm)
Ratio of Highly Ranked Qualified Leads to Qualified Leads	Ratio of Highly Ranked Qualified Leads to Qualified Leads
Ratio of Medium Ranked Qualified Leads to Qualified Leads	Ratio of Medium Ranked Qualified Leads to Qualified Leads
Ratio of Retired Leads to Ratio of Unqualified Leads	Ratio of Retired Leads to Unqualified Leads
Ratio of Converted Leads to Qualified Leads	Ratio of Converted Leads to Qualified Leads
Ratio of Low Ranked Qualified Leads to Qualified Leads	Ratio of Low Ranked Qualified Leads to Qualified Leads
Ratio of Qualified Leads to Unqualified Leads	Ratio of Qualified Leads to Unqualified Leads
Lead Qualification Rate (%)	Rate of Qualified Leads to the total Leads. This metric is computed as follows: $100 * \# \text{ of Qualified Leads} / \# \text{ of Leads}$
Leads to Opportunity Conversion (%)	Rate of Converted Leads to the total Leads. This metric is computed as follows: $\# \text{ of Converted Leads} / \# \text{ of Leads}$
Rejected Leads (%)	Rate of Rejected Leads to the total Leads. This metric is computed as follows: $\# \text{ of Rejected Leads} / \# \text{ of Leads}$
Retired Leads (%)	Rate of Retired Leads to the total Leads. This metric is computed as follows: $\# \text{ of Retired Leads} / \# \text{ of Leads}$
Leads Conversion % (Across Levels in Lead Owner Resource Hierarchy)	Lead to Opportunity Conversion % calculated at the total level of lead owner hierarchy

Metric	Metric Definition
Leads Conversion % (Across Levels in Primary Partner Hierarchy)	Lead to Opportunity Conversion % calculated at the total level of primary partner hierarchy
Leads Conversion % (Across Levels in Sales Account Hierarchy)	Lead to Opportunity Conversion % calculated at the total level of sales account hierarchy
Lead Idle Days	The total days the Active Lead is idle (Lead Status not equal to Retired/Rejected). This metric is computed as follows: Current Date - Last Activity Date
Average Lead Age (Days)	The average age of the Leads. This metric is computed as follows: For Converted or Retired Leads, the day when it was converted/Retired - Lead Created date. For others it is the Current Date - the Lead created date
Average Number of Days to Convert Leads	The Average number of days to Convert a lead. This metric is computed as follows: Total Lead Age of Converted leads/ # of Converted Leads
Average Number of Days Open for Unqualified Leads	The Average number of days to Qualify a lead. This metric is computed as follows: Total Lead Age of Unqualified leads/ # of Unqualified Leads
Lead Qualification to Conversion Velocity	Rate of Converting the Qualified Leads. This metric is computed as follows: Lead Converted Date - Lead Qualified Date / # of Converted Leads
Lead Qualification Velocity	Rate of Qualifying the Leads. This metric is computed as follows: Lead Qualified Date - Lead Created Date/# of Qualified Leads
Potential Revenue	The total Lead Revenue
Total Market Potential	The total Lead Revenue for Qualified or Unqualified Leads
Budget Amount	The total Budget Amount
Raw Lead Amount	The total Raw Lead Amount

## CX Opportunity

This table describes the Opportunity Metrics.

Metric	Metric Definition
# of Opportunities	The total number of Opportunities
# of Open Opportunities	The total Open Opportunities (Opportunity Status = Open)
# of Won Opportunities	The total Won Opportunities (Opportunity Status = Won)
# of Lost Opportunities	The total Lost Opportunities (Opportunity Status = Lost)
# of No Sale Opportunities	The total No Sale Opportunities (Opportunity Status = No Sale)
# of Competitive Opportunities	The total Opportunities with atleast one Competitor
# of Competitive Won Opportunities	The total Won Opportunities with atleast one Competitor
# of Competitive Lost Opportunities	The total Lost Opportunities with atleast one Competitor
# of Competitive Open Opportunities	The total Open Opportunities with atleast one Competitor
# of Competitive No Sale Opportunities	The total No Sale Opportunities with atleast one Competitor
# of Accounts with Won Opportunities	The total Accounts with Won Opportunities

Metric	Metric Definition
# of Expired Opportunities	The total Expired Opportunities. This metric is computed as follows: Opportunity Status = Open, Current Date > Opportunity Expected Close Date
Average # of Days to Close	Average number of days to Close an Opportunity. This metric is computed as follows: Total days needed to close Opportunities/# of Open Opportunities
Average # of Days to Open	Average number of days the Opportunity is Open. This metric is computed as follows: Total days the Opportunity is Open/# of Open Opportunities
Average Opportunity Win Probability	Average probability to Win the Opportunity. This metric is computed as follows: Total win probabilities/# of Opportunities
Average Age of Closed Opportunities	Average Age of Closed Opportunities. This metric is computed as follows: Total Closed Opportunities Age/# of Closed Opportunities
Average Age of Won Opportunities	Average Age of Won Opportunities. This metric is computed as follows: Total Won Opportunities Age/# of Won Opportunities
Average Age of Lost Opportunities	Average Age of Lost Opportunities. This metric is computed as follows: Total Lost Opportunities Age/# of Lost Opportunities
Average Age of No Sale Opportunities	Average Age of No Sale Opportunities. This metric is computed as follows: Total No Sale Opportunities Age/ number of No Sale Opportunities
Win Rate	Rate of Winning Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won and Lost Opportunities}$
Loss Rate	Rate of Losing Opportunities. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won and Lost Opportunities}$
Conversion Rate	Rate of Converting Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Opportunities}$
Competitor Win Rate	Rate of Winning Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Won and Lost Opportunities}$
Competitive Loss Rate	Rate of Losing Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Lost Opportunities} / \text{Total Competitive Closed Opportunities}$
Competitor Conversion Rate	Rate of Converting Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Opportunities}$
# of Converted Opportunities	The total Opportunities which were created by converting the Leads.
# of Converted Open Opportunities	The total Open Opportunities which were created by converting the Leads.
# of Converted Won Opportunities	The total Won Opportunities which were created by converting the Leads.
# of Converted Lost Opportunities	The total Lost Opportunities which were created by converting the Leads.
# of Unconverted Opportunities	The total Opportunities which were not created by converting the Leads.

Metric	Metric Definition
# of Unconverted Closed Opportunities	The total Closed Opportunities which were not created by converting the Leads.
# of Unconverted Won Opportunities	The total Won Opportunities which were not created by converting the Leads.
Average Age of Converted Opportunity	Average Age of Converted Opportunities. This metric is computed as follows: $\text{sum}(\text{Opportunity Close Date} - \text{Opportunity Creation Date}) / \# \text{ of Converted Closed Opportunities}$
Average Age of Converted Won Opportunity	Average Age of Converted Won Opportunities. This metric is computed as follows: $\text{sum}(\text{Opportunity Close Date} - \text{Opportunity Creation Date}) / \# \text{ of Converted Won Opportunities}$
Average Age of Unconverted Opportunity	Average Age of Unconverted Opportunities. This metric is computed as follows: $\text{sum}(\text{Opportunity Close Date} - \text{Opportunity Creation Date}) / \# \text{ of Unconverted Closed Opportunities}$
Average Age of Unconverted Won Opportunity	Average Age of Unconverted Won Opportunities. This metric is computed as follows: $\text{sum}(\text{Opportunity Close Date} - \text{Opportunity Creation Date}) / \# \text{ of Unconverted Won Opportunities}$
Ratio of # of lost Opportunities (unconverted) to Converted Lost Opportunities	The ratio of Unconverted Lost Opportunities to Converted Lost Opportunities. This metric is computed as follows: $(\# \text{ of Lost Opportunities} - \# \text{ of Converted Lost Opportunities}) / \# \text{ of Converted Lost Opportunities}$
Converted Lead Contribution to Opportunities %	The ratio of Converted Opportunities (created from Leads) in all the Opportunities. This metric is computed as follows: $(\# \text{ of Converted Opportunities} / \# \text{ of Opportunities}) * 100$
Converted Lead Contribution to Won Opportunities %	The ratio of Converted Won Opportunities (created from Leads) in all the Won Opportunities. This metric is computed as follows: $(\# \text{ of Converted Won Opportunities} / \# \text{ of Won Opportunities}) * 100$
Converted Lead Contribution to Closed Opportunities %	The ratio of Converted Closed Opportunities (created from Leads) in all the Closed Opportunities. This metric is computed as follows: $(\# \text{ of Converted Closed Opportunities} / \# \text{ of Closed Opportunities}) * 100$
Converted Lead Contribution to Lost Opportunities %	The ratio of Converted Lost Opportunities (created from Leads) in all the Lost Opportunities. This metric is computed as follows: $(\# \text{ of Converted Lost Opportunities} / \# \text{ of Lost Opportunities}) * 100$
# of Renewal Opportunities	The total Renewal Opportunities (Opportunity Type Code = Renewal)
# of Expansion Opportunities	The total Expansion Opportunities (Opportunity Type Code = Expansion)
# of New Opportunities	The total New Opportunities (Opportunity Type Code = New)
# of Open Renewal Opportunities	The total Open Renewal Opportunities (Opportunity Status = Open and Opportunity Type Code = Renewal)
# of Open Expansion Opportunities	The total Open Expansion Opportunities (Opportunity Status = Open and Opportunity Type Code = Expansion)
# of Open New Opportunities	The total Open New Opportunities (Opportunity Status = Open and Opportunity Type Code = New)



Metric	Metric Definition
# of Lost Renewal Opportunities	The total Lost Renewal Opportunities (Opportunity Status = Lost and Opportunity Type Code = Renewal)
# of Lost Expansion Opportunities	The total Lost Expansion Opportunities (Opportunity Status = Lost and Opportunity Type Code = Expansion)
# of Lost New Opportunities	The total Lost New Opportunities (Opportunity Status = Lost and Opportunity Type Code = New)
# of Won Renewal Opportunities	The total Won Renewal Opportunities (Opportunity Status = Won and Opportunity Type Code = Renewal)
# of Won Expansion Opportunities	The total Won Expansion Opportunities (Opportunity Status = Won and Opportunity Type Code = Expansion)
# of Won New Opportunities	The total Won New Opportunities (Opportunity Status = Won and Opportunity Type Code = New)
# of No Sale Renewal Opportunities	The total No Sale Renewal Opportunities (Opportunity Status = No Sale and Opportunity Type Code = Renewal)
# of No Sale Expansion Opportunities	The total No Sale Expansion Opportunities (Opportunity Status = No Sale and Opportunity Type Code = Expansion)
# of No Sale New Opportunities	The total No Sale New Opportunities (Opportunity Status = No Sale and Opportunity Type Code = New)
Renewal Opportunities Win Rate	The Win Rate of the Renewal Opportunities. This metric is computed as follows: (# of Won Renewal Opportunities/# of Won+Lost renewal Opportunities)
Renewal Opportunities Loss Rate	The Loss rate of the Renewal Opportunities. This metric is computed as follows: (# of Lost Renewal Opportunities/# of Won+Lost renewal Opportunities)
Renewal Opportunities Conversion Rate	The Conversion rate of the Renewal Opportunities. This metric is computed as follows: (# of Won Renewal Opportunities/# of renewal Opportunities)
Expansion Opportunities Win Rate	The Win Rate of the Expansion Opportunities. This metric is computed as follows: (# of Won Expansion Opportunities/# of Won+Lost Expansion Opportunities)
Expansion Opportunities Loss Rate	The Loss rate of the Expansion Opportunities. This metric is computed as follows: (# of Lost Expansion Opportunities/# of Won+Lost Expansion Opportunities)
Expansion Opportunities Conversion Rate	The Conversion rate of the Expansion Opportunities. This metric is computed as follows: (# of Won Expansion Opportunities/# of Expansion Opportunities)
New Opportunities Win Rate	The Win Rate of the New Opportunities. This metric is computed as follows: (# of Won New Opportunities/# of Won+Lost New Opportunities)
New Opportunities Loss Rate	The Loss rate of the New Opportunities. This metric is computed as follows: (# of Lost New Opportunities/# of Won+Lost New Opportunities)
New Opportunities Conversion Rate	The Conversion rate of the New Opportunities. This metric is computed as follows: (# of Won New Opportunities/# of New Opportunities)

## CX Opportunity Activity

This table describes the Opportunity Activity Metrics.

Metric	Metric Definition
# of Opportunity Activities	The total Activities associated to Opportunities
# of Open Opportunity Activities	The total Open Activities associated to Opportunities (Activity Status not equal to Complete/Cancelled)
# of Completed Opportunity Activities	The total Completed Activities associated Opportunities (Activity Status = Complete)
# of Expired Opportunity Activities	The total Expired Activities associated to Opportunities (Activity Status not equal to Complete/Cancelled & Current Date > Activity Due Date)
# of Opportunity Tasks	The total Tasks associated to Opportunities (Activity function = Task)
# of Opportunity Appointments	The total Tasks associated to Appointments (Activity function = Appointments)
# of Opportunity Call Reports	The total Tasks associated to Call Reports (Activity function = Call Reports)
Average Activity Duration For Open Activities	The average time of an activity. This metric is computed as follows: Activity duration for Activities not in Cancelled or Complete status/# of Activities not in Cancelled or Complete status
Average Activity Duration for Completed Activities	The average time taken to complete an activity. This metric is computed as follows: Activity duration for completed activity/# of Completed Activities
Activity Rate - Opportunities	The rate of Activities for Opportunities. This metric is computed as follows: $100 * \# \text{ of Opportunity Activities} / \# \text{ of Opportunities}$
Activity Rate - Open Opportunities	The rate of Activities for Open Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for Open Opportunities} / \# \text{ of Open Opportunities}$
Activity Rate - Won Opportunities	The rate of Activities for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for Won Opportunities} / \# \text{ of Won Opportunities}$
Activity Rate - Lost Opportunities	The rate of Activities for Lost Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Activity Rate - No Sale Opportunities	The rate of Activities for No Sale Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$
Task Rate - Open Opportunities	The rate of Tasks for Open Opportunities. This metric is computed as follows: $100 * \# \text{ of Tasks for Open Opportunities} / \# \text{ of Open Opportunities}$
Task Rate - Won Opportunities	The rate of Tasks for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Tasks for Won Opportunities} / \# \text{ of Won Opportunities}$
Task Rate - Lost Opportunities	The rate of Tasks for Lost Opportunities. This metric is computed as follows: $100 * \# \text{ of Tasks for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Task Rate - No Sale Opportunities	The rate of Tasks for No Sale Opportunities. This metric is computed as follows: $100 * \# \text{ of Tasks for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$

Metric	Metric Definition
Appointment Rate - Open Opportunities	The rate of Appointments for Open Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for Open Opportunities} / \# \text{ of Open Opportunities}$
Appointment Rate - Won Opportunities	The rate of Appointments for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for Won Opportunities} / \# \text{ of Won Opportunities}$
Appointment Rate - Lost Opportunities	The rate of Appointments for Lost Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Appointment Rate - No Sale Opportunities	The rate of Appointments for No Sale Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$
Call Report Rate - Open Opportunities	The rate of Call Reports for Open Opportunities. This metric is computed as follows: $100 * \# \text{ of Call Reports for Open Opportunities} / \# \text{ of Open Opportunities}$
Call Report Rate - Won Opportunities	The rate of Call Reports for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Call Reports for Won Opportunities} / \# \text{ of Won Opportunities}$
Call Report Rate - Lost Opportunities	The rate of Call Reports for Lost Opportunities. This metric is computed as follows: $100 * \# \text{ of Call Reports for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Call Report Rate - No Sale Opportunities	The rate of Call Reports for No Sale Opportunities. This metric is computed as follows: $100 * \# \text{ of Call Reports for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$
Average Number of Emails Sent for Won Opportunities	The average number of Emails sent for Won Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Email for Won Opportunities} / \# \text{ of Won Opportunities}$
Average Number of Emails Sent for Lost Opportunities	The average number of Emails sent for Lost Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Email for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Average Number of Meetings for Won Opportunities	The average number of Meetings for Won Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Meetings for Won Opportunities} / \# \text{ of Won Opportunities}$
Average Number of Meetings for Lost Opportunities	The average number of Meetings for Lost Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Meetings for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Average Number of Demos for Won Opportunities	The average number of Demos for Won Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Demos for Won Opportunities} / \# \text{ of Won Opportunities}$
Average Number of Demos for Lost Opportunities	The average number of Demos for Lost Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Demos for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Average Number of Calls for Won Opportunities	The average number of Calls for Won Opportunities. This metric is computed as follows: $\# \text{ of Activities of type code = Calls for Won Opportunities} / \# \text{ of Won Opportunities}$

Metric	Metric Definition
Average Number of Calls for Lost Opportunities	The average number of Calls for Lost Opportunities. This metric is computed as follows: # of Activities of type code = Calls for Lost Opportunities/# of Lost Opportunities
Average Number of Opportunity Activities Per Team Member	The average number of Opportunity Activities per Team member

## CX Opportunity Quote

This table describes the Opportunity Quotes Metrics.

Metric	Metric Definition
# of Active Quotes	The total number of Active Quotes
# of Expired Quotes	The total number of Expired Quotes
# of Quotes	The total number of Quotes
# of Unique Quotes	The total number of Unique Quotes (based on External Quote number, ignores Quotes versions and treats Quotes with same Quote id as one)
Average # of Quotes for Open Opportunities	The average number of Quotes for Open Opportunities. This metric is computed as follows: # of Quotes/# of Open Opportunities
Average # of Quotes for Won Opportunities	The average number of Quotes for Won Opportunities. This metric is computed as follows: # of Quotes/# of Won Opportunities
Average # of Quotes for Lost Opportunities	The average number of Quotes for Lost Opportunities. This metric is computed as follows: # of Quotes/# of Lost Opportunities
Average # of Quotes for No-Sale Opportunities	The average number of Quotes for No Sale Opportunities. This metric is computed as follows: # of Quotes/# of No-Sale Opportunities
Average Active Quote Cycle Time	The average Quote Cycle Time. This metric is computed as follows: (Quote Order Placed on Date - Quote Creation Date)/# of Active Quotes
Average Length of Contract (Active Quote)	The average Length of the Contract. This metric is computed as follows: (Contract End Date - Contract Start Date)/# of Active Quotes
Average Opportunity to Current Active Quote Time	The average time between Opportunity and Quote creation date. This metric is computed as follows: (Quote Creation Date - Opportunity Creation Date)/# of Active Quotes
Active Quote To Won Opportunity Time	The average time between Won Opportunity Close Date and Quote creation date. This metric is computed as follows: (Opportunity Close Date - Quote Creation Date)/# of Active Quotes for Won Opportunities
Active Quote To Lost Opportunity Time	The average time between Lost Opportunity Close Date and Quote creation date. This metric is computed as follows: (Opportunity Close Date - Quote Creation Date)/# of Active Quotes for Lost Opportunities
Active Quote to Contract Start Time	The time to start the Contract after the Quote is created. This metric is computed as follows: (Contract Start Date - Quote Creation Date)/# of Active Quotes

Metric	Metric Definition
Average Number of Active Quote Iterations	The average number of Quotes created per Active Quote. This metric is computed as follows: # of Quotes/# of Active Quotes
# of Won Active Quotes	The total number of Active Quotes Won
# of Lost Active Quotes	The total number of Active Quotes Lost
# of In-Progress Active Quotes	The total number of Active In-Progress Quotes
# of Closed Active Quotes	The total number of Active Quotes Closed (Won+Lost)
Active Quote Win Rate	The rate of winning Active Quotes. This metric is computed as follows: $100 * \# \text{ of Won Quotes} / \# \text{ of Closed Quotes}$
Active Quote Loss Rate	The rate of losing Active Quotes. This metric is computed as follows: $100 * \# \text{ of Lost Quotes} / \# \text{ of Closed Quotes}$
Active Quote Conversion Rate	The rate of converting the Active Quotes. This metric is computed as follows: $100 * \# \text{ of Closed Quotes} / \# \text{ of Active Quotes}$
# of Active Quotes with Proposal	The total number of Active Quotes with Proposal
Contract Value (Active Quotes)	The total Quote Contract value in Active Quotes
Average Contract Value (Active Quotes)	The average Contract value per Active Quote. This metric is computed as follows: $\text{Total Contract Value} / \# \text{ of Active Quotes}$
Recurring Revenue Amount (Active Quotes)	The total Recurring Revenue Amount from Active Quotes
Average Recurring Revenue (Active Quotes)	The average Recurring Revenue Amount from Active Quotes. This metric is computed as follows: $\text{Total Recurring Revenue Amount} / \# \text{ of Active Quotes}$
Non Recurring Revenue Amount (Active Quotes)	The total Non-Recurring Revenue Amount from Active Quotes
Average Non Recurring Revenue (Active Quotes)	The average Non-Recurring Revenue Amount from Active Quotes. This metric is computed as follows: $\text{Total Non-Recurring Revenue Amount} / \# \text{ of Active Quotes}$
Usage Revenue Amount (Active Quotes)	The total Usage Revenue Amount from Active Quotes
Average Usage Revenue (Active Quotes)	The average Usage Revenue Amount from Active Quotes. This metric is computed as follows: $\text{Total Usage Revenue Amount} / \# \text{ of Active Quotes}$
Raw Contract Value	The total Quote Contract value in all Quotes
Raw Recurring Revenue Amount	The total Recurring Revenue Amount from all Quotes
Raw Non Recurring Revenue Amount	The total Non-Recurring Revenue Amount from all Quotes
Raw Usage Revenue Amount	The total Usage Revenue Amount from all Quotes

## CX Opportunity Quote Lines

This table describes the Opportunity Quote Line Metrics.

Metric	Metric Definition
# of Lines for Active Quotes	The total Quote Lines from Active Quotes
# of Unique Quotes with Lines	The Unique Quotes with atleast one Quote Line
# of Active Quotes with Lines	The total Active Quotes with atleast one Quote Line

Metric	Metric Definition
# of Quotes with Lines	The total Quotes with atleast one Quote Line
# of Won Lines for Active Quotes	The total Won Quote Lines from Active Quotes
# of Lost Lines for Active Quotes	The total Lost Quote Lines from Active Quotes
# of In-Progress Lines for Active Quotes	The total In-Progress Quote Lines from Active Quotes
# of Closed Lines for Active Quotes	The total Closed (Won+Lost) Quote Lines from Active Quotes
Line Win Rate for Active Quotes	The Quote Line Win Rate (# of Won Lines for Active Quotes) / ( # of Closed Lines for Active Quotes) *100
Line Loss Rate for Active Quotes	The Quote Line Loss Rate (# of Lost Lines for Active Quotes) / ( # of Closed Lines for Active Quotes) *100
Line Conversion Rate for Active Quotes	The Quote Line Conversion Rate (# of Won Lines for Active Quotes / # of Lines for Active Quotes *100)
Average Line Cycle Time for Active Quotes	The average Quote Line Cycle Time. This metric is computed as follows: (Quote Order Placed on Date - Quote Creation Date)/(# of Lines for Active Quotes)
Average Length of the Contract for Active Quote Lines	The average Length of the Contract. This metric is computed as follows: (Quote Line Contract End Date - Quote Line Contract Start Date) / (# of Lines for Active Quotes)
Contract Line Value for Active Quotes	The total Contract value (Sum of Recurring Revenue, Non-Recurring Revenue and Usage Revenue) of Quote Lines from Active Quotes
Non-Recurring Line Revenue for Active Quotes	The total Non-Recurring Revenue of a Quote Line from Active Quotes
Recurring Line Revenue for Active Quotes	The total Recurring Revenue of a Quote Line from Active Quotes
Usage Line Revenue for Active Quotes	The total Usage Revenue of a Quote Line from Active Quotes
Average Contract Line Value for Active Quotes	The Average Contract Value (Total Contract Value / # of Quote Lines)
Average Recurring Line Revenue for Active Quotes	The Average Recurring Revenue (Total Recurring Revenue Amount / # of Quote Lines)
Average Non-Recurring Line Revenue for Active Quotes	The Average Non-Recurring Revenue (Total Non-Recurring Revenue Amount / # of Quote Lines)
Average Usage Line Revenue for Active Quotes	The Average Usage Revenue Amount (Total Usage Revenue/ # of Quote Lines)
Raw Quote Line Contract Value	Total Contract Value of Quote Lines
Raw Quote Line Non-Recurring Revenue	Total Non Recurring Revenue amount of Quote Lines
Raw Quote Line Recurring Revenue	Total Recurring Revenue amount of Quote Lines
Raw Quote Line Usage Revenue	Total Usage Revenue amount of Quote Lines

## CX Opportunity Revenue Line

These metrics will be used in the Document Currency (DC), CX Currency (CC) and Analytics Currency (AC) fact folder in Subject Area.

- Document Currency is the currency used while entering the data in the application.
- CX Currency is the currency defined in the CRM/CX application. Analytics Currency is the currency defined in Fusion Analytics Warehouse.

- Analytics Currency and Exchange Rate Type are configured during product implementation.
- Exchange Rate date basis uses Opportunity Expected Close Date to convert to analytics currency.
- Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Opportunity Revenue Lines	The total Opportunity Revenue Lines
# of Open Opportunity Revenue Lines	The total Open Opportunity Revenue Lines (Revenue Status = Open)
# of Won Opportunity Revenue Lines	The total Won Opportunity Revenue Lines (Revenue Status = Won)
# of Lost Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines (Revenue Status = Lost)
# of No Sale Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines (Revenue Status = No Sale)
# of Competitive Opportunity Revenue Lines	The total Opportunity Revenue Lines with atleast one Competitor
# of Open Competitive Opportunity Revenue Lines	The total Open Opportunity Revenue Lines with atleast one Competitor
# of Won Competitive Opportunity Revenue Lines	The total Won Opportunity Revenue Lines with atleast one Competitor
# of Lost Competitive Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines with atleast one Competitor
# of No Sale Competitive Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines with atleast one Competitor
# of Expired Opportunity Revenue Lines	The total Expired Opportunity Revenue Lines with atleast one Competitor
Opportunity Line Revenue	The total Opportunity Line Revenue
Expected Opportunity Line Revenue	The total Expected Opportunity Line Revenue
Open Opportunity Line Revenue	The total Open Opportunity Line Revenue (Revenue Status = Open)
Won Opportunity Line Revenue	The total Won Opportunity Line Revenue (Revenue Status = Won)
Lost Opportunity Line Revenue	The total Lost Opportunity Line Revenue (Revenue Status = Lost)
No Sale Opportunity Line Revenue	The total No Sale Opportunity Line Revenue (Revenue Status = No Sale)
Competitive Opportunity Line Revenue	The total Opportunity Line Revenue with atleast one competitor
Open Competitive Opportunity Line Revenue	The total Open Opportunity Line Revenue with atleast one competitor
Won Competitive Opportunity Line Revenue	The total Won Opportunity Line Revenue with atleast one competitor
Lost Competitive Opportunity Line Revenue	The total Lost Opportunity Line Revenue with atleast one competitor
No Sale Competitive Opportunity Line Revenue	The total No Sale Opportunity Line Revenue with atleast one competitor
Opportunity Line Split Revenue	The total Opportunity Line Split Revenue
Expired Opportunity Line Revenue	The total Expired Opportunity Line Revenue (status = Open and Current Date > Expected Close date for Revenue Line)

Metric	Metric Definition
Revenue Line Conversion Rate	The Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Opportunity Revenue Lines}$
Revenue Line Won Rate	The Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$
Revenue Line Loss Rate	The Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$
Revenue Line Competitive Conversion Rate	The Competitive Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Competitive Opportunity Revenue Lines}$
Revenue Line Competitive Won Rate	The Competitive Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Won+Lost Competitive Revenue Lines}$
Revenue Line Competitive Loss Rate	The Competitive Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost competitive Revenue Lines} / \# \text{ of Won+Lost Competitive Revenue Lines}$
Average Won Opportunity Line Revenue	The average Won Opportunity Line Revenue. This metric is computed as follows: $\text{Won Opportunity Line Revenue} / \# \text{ of Won Opportunity Revenue Lines}$
Average Age of Won Opportunity Revenue Lines	The average age of the Won Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Won Revenue Line Close Date} - \text{Won Revenue Line Created Date}) / \# \text{ of Won Opportunity Revenue Lines}$
Average Age of Lost Opportunity Revenue Lines	The average age of the Lost Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Lost Revenue Line Close Date} - \text{Lost Revenue Line Created Date}) / \# \text{ of Lost Opportunity Revenue Lines}$
Average Age of No Sale Opportunity Revenue Lines	The average age of the No Sale Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{No Sale Revenue Line Close Date} - \text{No Sale Revenue Line Created Date}) / \# \text{ of No Sale Opportunity Revenue Lines}$
Average Age of Opportunity Revenue Lines	The average age of the Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Won/Lost/No Sale Revenue Line Close Date} - \text{Won/Lost/No Sale Revenue Line Created Date}) / \# \text{ of Won+Lost+No Sale Opportunity Revenue Lines}$
Average # of Days Open	The average number of days an Opportunity Revenue Line is Open. This metric is computed as follows: $(\text{Current Date} - \text{Open Opportunity Revenue Line Creation Date}) / \# \text{ of Open Opportunity Revenue Lines}$
# of Raw Opportunity Revenue Lines	The total Raw Opportunity Revenue Lines
Raw Opportunity Line Revenue	The total Raw Opportunity Line Revenue
Weighted Open Opportunity Line Revenue	The total Weighted Opportunity Line Revenue. This metric is computed as follows: $\text{Open Opportunity Revenue} * \text{Win Probability}$
% Change Open Opportunity Line Revenue Same Time Last Year	The % change in Open Opportunity Line Revenue compared to the Last Year, at this time



Metric	Metric Definition
% Change Open Opportunity Line Revenue Same Time Last Quarter	The % change in Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Open Opportunity Line Revenue Same Time Last Period	The % change in Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Won Opportunity Line Revenue Same Time Last Year	The % change in Won Opportunity Line Revenue compared to the Last Year, at this time
% Change Won Opportunity Line Revenue Same Time Last Quarter	The % change in Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Won Opportunity Line Revenue Same Time Last Period	The % change in Won Opportunity Line Revenue compared to the Last Period, at this time
% Change Lost Opportunity Line Revenue Same Time Last Year	The % change in Lost Opportunity Line Revenue compared to the Last Year, at this time
% Change Lost Opportunity Line Revenue Same Time Last Quarter	The % change in Lost Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Lost Opportunity Line Revenue Same Time Last Period	The % change in Lost Opportunity Line Revenue compared to the Last Period, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Year	The % change in No Sale Opportunity Line Revenue compared to the Last Year, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Quarter	The % change in No Sale Opportunity Line Revenue compared to the Last Quarter, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Period	The % change in No Sale Opportunity Line Revenue compared to the Last Period, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Year	The % change in Weighted Open Opportunity Line Revenue compared to the Last Year, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Quarter	The % change in Weighted Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Period	The % change in Weighted Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Year	The % change in Average Won Opportunity Line Revenue compared to the Last Year, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Quarter	The % change in Average Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Period	The % change in Average Won Opportunity Line Revenue compared to the Last Period, at this time
# of Renewal Opportunity Revenue Lines	The total Renewal Opportunity Revenue Lines
# of New Opportunity Revenue Lines	The total New Opportunity Revenue Lines
# of Expansion Opportunity Revenue Lines	The total Expansion Opportunity Revenue Lines
Opportunity Line Recurring Revenue	The total Opportunity Line Recurring Revenue
Opportunity Line Non-Recurring Revenue	The total Opportunity Line Non-Recurring Revenue
Opportunity Line Usage Revenue	The total Opportunity Line Usage Revenue
Open Opportunity Line Recurring Revenue	The total Open Opportunity Line Recurring Revenue (Revenue Status = Open)
Open Opportunity Line Non-Recurring Revenue	The total Open Opportunity Line Non-Recurring Revenue (Revenue Status = Open)
Open Opportunity Line Usage Revenue	The total Open Opportunity Line Usage Revenue (Revenue Status = Open)
Won Opportunity Line Recurring Revenue	The total Won Opportunity Line Recurring Revenue (Revenue Status = Won)
Won Opportunity Line Non-Recurring Revenue	The total Won Opportunity Line Non-Recurring Revenue (Revenue Status = Won)

<b>Metric</b>	<b>Metric Definition</b>
Won Opportunity Line Usage Revenue	The total Won Opportunity Line Usage Revenue (Revenue Status = Won)
Lost Opportunity Line Recurring Revenue	The total Lost Opportunity Line Recurring Revenue (Revenue Status = Lost)
Lost Opportunity Line Non-Recurring Revenue	The total Lost Opportunity Line Non-Recurring Revenue (Revenue Status = Lost)
Lost Opportunity Line Usage Revenue	The total Lost Opportunity Line Usage Revenue (Revenue Status = Lost)
No Sale Opportunity Line Recurring Revenue	The total No Sale Opportunity Line Recurring Revenue (Revenue Status = No Sale)
No Sale Opportunity Line Non-Recurring Revenue	The total No Sale Opportunity Line Non-Recurring Revenue (Revenue Status = No Sale)
No Sale Opportunity Line Usage Revenue	The total No Sale Opportunity Line Usage Revenue (Revenue Status = No Sale)
Renewal Opportunity Line Revenue	The total Renewal Opportunity Line Revenue (Revenue Type = Renew)
Renewal Open Opportunity Line Revenue	The total Open Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Open)
Renewal Won Opportunity Line Revenue	The total Won Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Won)
Renewal Lost Opportunity Line Revenue	The total Lost Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Lost)
Renewal No Sale Opportunity Line Revenue	The total No Sale Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = No Sale)
New Opportunity Line Revenue	The total New Opportunity Line Revenue (Revenue Type = New)
New Open Opportunity Line Revenue	The total Open New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Open)
New Won Opportunity Line Revenue	The total Won New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Won)
New Lost Opportunity Line Revenue	The total Lost New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Lost)
New No Sale Opportunity Line Revenue	The total No Sale New Opportunity Line Revenue (Revenue Type = New and Revenue Status = No Sale)
Expansion Opportunity Line Revenue	The total Expansion Opportunity Line Revenue (Revenue Type = Expansion)
Expansion Open Opportunity Line Revenue	The total Open Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Open)
Expansion Won Opportunity Line Revenue	The total Won Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Won)
Expansion Lost Opportunity Line Revenue	The total Lost Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Lost)
Expansion No Sale Opportunity Line Revenue	The total No Sale Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = No Sale)
Non-Renewal Opportunity Line Revenue	The total Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew)

Metric	Metric Definition
Non-Renewal Open Opportunity Line Revenue	The total Open Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = Open)
Non-Renewal Won Opportunity Line Revenue	The total Won Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = Won)
Non-Renewal Lost Opportunity Line Revenue	The total Lost Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = Lost)
Non-Renewal No Sale Opportunity Line Revenue	The total No Sale Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = No Sale)
% Renewal Opportunity Line Revenue	The % of Renewal Opportunity Line Revenue of the total Opportunity Line Revenue. This metric is computed as follows: (Renewal Opportunity Line Revenue / Opportunity Line Revenue)
% Renewal Open Opportunity Line Revenue	The % of Renewal Open Opportunity Line Revenue of the total Open Opportunity Line Revenue. This metric is computed as follows: (Renewal Open Opportunity Line Revenue / Open Opportunity Line Revenue)
% Renewal Won Opportunity Line Revenue	The % of Renewal Won Opportunity Line Revenue of the total Won Opportunity Line Revenue. This metric is computed as follows: (Renewal Won Opportunity Line Revenue / Won Opportunity Line Revenue)
% Renewal Lost Opportunity Line Revenue	The % of Renewal Lost Opportunity Line Revenue of the total Lost Opportunity Line Revenue. This metric is computed as follows: (Renewal Lost Opportunity Line Revenue / Lost Opportunity Line Revenue)

## CX Opportunity Revenue Line Snapshot

These metrics will be used in the Document Currency (DC), CX Currency (CC) and Analytics Currency (AC) fact folder in Subject Area.

- Document Currency is the currency used while entering the data in the application.
- CX Currency is the currency defined in the CRM/CX application.
- Analytics Currency is the currency defined in Fusion Analytics Warehouse.
- Analytics Currency and Exchange Rate Type are configured during product implementation.
- Exchange Rate date basis uses Opportunity Expected Close Date to convert to analytics currency.
- Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Opportunity Revenue Lines	The total Opportunity Revenue Lines
# of Open Opportunity Revenue Lines	The total Open Opportunity Revenue Lines (Revenue Status = Open)
# of Won Opportunity Revenue Lines	The total Won Opportunity Revenue Lines (Revenue Status = Won)

Metric	Metric Definition
# of Lost Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines (Revenue Status = Lost)
# of No Sale Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines (Revenue Status = No Sale)
# of Competitive Opportunity Revenue Lines	The total Opportunity Revenue Lines with atleast one Competitor
# of Open Competitive Opportunity Revenue Lines	The total Open Opportunity Revenue Lines with atleast one Competitor
# of Won Competitive Opportunity Revenue Lines	The total Won Opportunity Revenue Lines with atleast one Competitor
# of Lost Competitive Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines with atleast one Competitor
# of No Sale Competitive Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines with atleast one Competitor
# of Expired Opportunity Revenue Lines	The total Expired Opportunity Revenue Lines
Opportunity Line Revenue	The total Opportunity Line Revenue
Open Opportunity Line Revenue	The total Open Opportunity Line Revenue (Revenue Status = Open)
Won Opportunity Line Revenue	The total Won Opportunity Line Revenue (Revenue Status = Won)
Lost Opportunity Line Revenue	The total Lost Opportunity Line Revenue (Revenue Status = Lost)
No Sale Opportunity Line Revenue	The total No Sale Opportunity Line Revenue (Revenue Status = No Sale)
Competitive Opportunity Line Revenue	The total Opportunity Line Revenue with atleast one competitor
Open Competitive Opportunity Line Revenue	The total Open Opportunity Line Revenue with atleast one competitor
Won Competitive Opportunity Line Revenue	The total Won Opportunity Line Revenue with atleast one competitor
Lost Competitive Opportunity Line Revenue	The total Lost Opportunity Line Revenue with atleast one competitor
No Sale Competitive Opportunity Line Revenue	The total No Sale Opportunity Line Revenue with atleast one competitor
Expired Opportunity Line Revenue	The total Expired Opportunity Line Revenue (status = Open and Current Date > Expected Close date for Revenue Line)
Expected Opportunity Line Revenue	The total Expected Opportunity Line Revenue
Opportunity Line Split Revenue	The total Opportunity Line Split Revenue
Revenue Line Conversion Rate	The Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Opportunity Revenue Lines}$
Revenue Line Won Rate	The Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$
Revenue Line Loss Rate	The Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$

Metric	Metric Definition
Revenue Line Competitive Conversion Rate	The Competitive Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Competitive Opportunity Revenue Lines}$
Revenue Line Competitive Won Rate	The Competitive Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Competitive Won+Lost Opportunity Revenue Lines}$
Revenue Line Competitive Loss Rate	The Competitive Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost competitive Revenue Lines} / \# \text{ of Won+Lost Competitive Revenue Lines}$
Average Won Opportunity Line Revenue	The average Won Opportunity Line Revenue. This metric is computed as follows: $\text{Won Opportunity Line Revenue} / \# \text{ of Won Opportunity Revenue Lines}$
Average Age of Won Opportunity Revenue Lines	The average age of the Won Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Won Revenue Line Close Date} - \text{Won Revenue Line Created Date}) / \# \text{ of Won Opportunity Revenue Lines}$
Average Age of Lost Opportunity Revenue Lines	The average age of the Lost Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Lost Revenue Line Close Date} - \text{Lost Revenue Line Created Date}) / \# \text{ of Lost Opportunity Revenue Lines}$
Average Age of No Sale Opportunity Revenue Lines	The average age of the No Sale Opportunity Revenue Lines ( $\text{sum}(\text{No Sale Revenue Line Close Date} - \text{No Sale Revenue Line Created Date}) / \# \text{ of No Sale Opportunity Revenue Lines}$ )
Average Age of Opportunity Revenue Lines	The average age of the Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Won/Lost/No Sale Revenue Line Close Date} - \text{Won/Lost/No Sale Revenue Line Created Date}) / \# \text{ of Won+Lost+No Sale Opportunity Revenue Lines}$
Average # of Days Open	The average number of days an Opportunity Revenue Line is Open. This metric is computed as follows: $(\text{Current Date} - \text{Open Opportunity Revenue Line Creation Date}) / \# \text{ of Open Opportunity Revenue Lines}$
# of Raw Opportunity Revenue Lines	The total Raw Opportunity Revenue Lines
Raw Opportunity Line Revenue	The total Raw Opportunity Line Revenue
Weighted Open Opportunity Line Revenue	The total Weighted Opportunity Line Revenue. This metric is computed as follows: $\text{Open Opportunity Revenue} * \text{Win Probability}$
% Change Open Opportunity Line Revenue Same Time Last Year	The % change in Open Opportunity Line Revenue compared to the Last Year, at this time
% Change Open Opportunity Line Revenue Same Time Last Quarter	The % change in Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Open Opportunity Line Revenue Same Time Last Period	The % change in Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Won Opportunity Line Revenue Same Time Last Year	The % change in Won Opportunity Line Revenue compared to the Last Year, at this time
% Change Won Opportunity Line Revenue Same Time Last Quarter	The % change in Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Won Opportunity Line Revenue Same Time Last Period	The % change in Won Opportunity Line Revenue compared to the Last Period, at this time

Metric	Metric Definition
% Change Lost Opportunity Line Revenue Same Time Last Year	The % change in Lost Opportunity Line Revenue compared to the Last Year, at this time
% Change Lost Opportunity Line Revenue Same Time Last Quarter	The % change in Lost Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Lost Opportunity Line Revenue Same Time Last Period	The % change in Lost Opportunity Line Revenue compared to the Last Period, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Year	The % change in No Sale Opportunity Line Revenue compared to the Last Year, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Quarter	The % change in No Sale Opportunity Line Revenue compared to the Last Quarter, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Period	The % change in No Sale Opportunity Line Revenue compared to the Last Period, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Year	The % change in Weighted Open Opportunity Line Revenue compared to the Last Year, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Quarter	The % change in Weighted Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Period	The % change in Weighted Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Year	The % change in Average Won Opportunity Line Revenue compared to the Last Year, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Quarter	The % change in Average Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Period	The % change in Average Won Opportunity Line Revenue compared to the Last Period, at this time

## CX Opportunity Snapshot

This table describes the Opportunity Snapshot Metrics.

Metric	Metric Definition
# of Opportunities	The total Opportunities
# of Open Opportunities	The total Open Opportunities in the system (Opportunity Status = Open)
# of Won Opportunities	The total Won Opportunities in the system (Opportunity Status = Won)
# of Lost Opportunities	The total Lost Opportunities in the system (Opportunity Status = Lost)
# of No Sale Opportunities	The total No Sale Opportunities in the system (Opportunity Status = No Sale)
# of Competitive Opportunities	The total Opportunities with atleast one Competitor
# of Competitive Won Opportunities	The total Won Opportunities with atleast one Competitor
# of Competitive Lost Opportunities	The total Lost Opportunities with atleast one Competitor
# of Competitive Open Opportunities	The total Open Opportunities with atleast one Competitor
# of Competitive No Sale Opportunities	The total No Sale Opportunities with atleast one Competitor
# of Sales Accounts with Won Opportunities	The total Sales Accounts with Won Opportunities
# of Expired Opportunities	The total Expired Opportunities (Opportunity Status = Open, Current Date > Opportunity Expected Close Date)

Metric	Metric Definition
Average # of Days to Close	Average number of days to Close an Opportunity. This metric is computed as follows: Total days needed to close Opportunities/# of closed Opportunities
Average # of Days Open	Average number of days the Opportunity is Open. This metric is computed as follows: Total days the Opportunity is Open/# of Open Opportunities
Average Opportunity Win Probability	Average probability to Win the Opportunity. This metric is computed as follows: Total win probabilities/# of Opportunities
Average Age of Closed Opportunities	Average Age of Closed Opportunities. This metric is computed as follows: Total Closed Opportunities Age/# of Closed Opportunities
Average Age of Won Opportunities	Average Age of Won Opportunities. This metric is computed as follows: Total Won Opportunities Age/# of Won Opportunities
Average Age of Lost Opportunities	Average Age of Lost Opportunities. This metric is computed as follows: Total Lost Opportunities Age/# of Lost Opportunities
Average Age of No Sale Opportunities	Average Age of No Sale Opportunities. This metric is computed as follows: Total No Sale Opportunities Age/ number of No Sale Opportunities
Win Rate	Rate of Winning Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won and Lost Opportunities}$
Loss Rate	Rate of Losing Opportunities. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won and Lost Opportunities}$
Conversion Rate	Rate of Converting Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Opportunities}$
Competitor Win Rate	Rate of Winning Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Won and Lost Opportunities}$
Competitive Loss Rate	Rate of Losing Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Lost Opportunities} / \text{Total Competitive Closed Opportunities}$
Competitor Conversion Rate	Rate of Converting Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Opportunities}$

## CX Opportunity Stage Progression

This table describes the Opportunity Stage Progression Metrics.

Metric	Metric Definition
# of Opportunities	The total Opportunities
# of Opportunities Across Stages	The total Opportunities across Stages
# of Progressed Opportunities	The total Progressed Opportunities

Metric	Metric Definition
% Progressed	The Progressed Opportunity Percentage. This metric is computed as follows: # of Progressed Opportunities/# of Opportunities Across Stages
% Opportunities by Stage	The % of Opportunities in a stage of the total Opportunities
Average # of Days in Stage	The average number of days in a Sales stage. This metric is computed as follows: sum of days in stage/# of Opportunities
Average # of Days Stalled in Stage	The average number of stalled days in a Sales stage. This metric is computed as follows: sum of stalled days/# of Opportunities
Win Rate	The rate of winning Opportunities. This metric is computed as follows: 100 * # of Won opportunities/# of Won+Lost Opportunities
Loss Rate	The rate of losing Opportunities. This metric is computed as follows: 100 * # of Lost opportunities/# of Won+Lost Opportunities
Conversion Rate	The rate of converting Opportunities. This metric is computed as follows: 100 * # of Won Opportunities/# of Opportunities

## CX Sales Opportunity

This table describes the Sales Opportunity Metrics.

Metric	Metric Definition
# of Converted Opportunities	The total Opportunities which were created by converting the Leads.
# of Converted Open Opportunities	The total Open Opportunities which were created by converting the Leads.
# of Converted Won Opportunities	The total Won Opportunities which were created by converting the Leads.
# of Converted Lost Opportunities	The total Lost Opportunities which were created by converting the Leads.
# of Unconverted Opportunities	The total Opportunities which were not created by converting the Leads.
# of Unconverted Closed Opportunities	The total Closed Opportunities which were not created by converting the Leads.
# of Unconverted Won Opportunities	The total Won Opportunities which were not created by converting the Leads.
Average Age of Converted Opportunity	Average Age of Converted Opportunities. This metric is computed as follows: sum(Opportunity Close Date - Opportunity Creation Date)/# of Converted Closed Opportunities
Average Age of Converted Won Opportunity	Average Age of Converted Won Opportunities. This metric is computed as follows: sum(Opportunity Close Date - Opportunity Creation Date)/# of Converted Won Opportunities



Metric	Metric Definition
Average Age of Unconverted Opportunity	Average Age of Unconverted Opportunities. This metric is computed as follows: $\text{sum}(\text{Opportunity Close Date} - \text{Opportunity Creation Date}) / \# \text{ of Unconverted Closed Opportunities}$
Average Age of Unconverted Won Opportunity	Average Age of Unconverted Won Opportunities. This metric is computed as follows: $\text{sum}(\text{Opportunity Close Date} - \text{Opportunity Creation Date}) / \# \text{ of Unconverted Won Opportunities}$
Ratio of # of lost Opportunities (unconverted) to Converted Lost Opportunities	The ratio of Unconverted Lost Opportunities to Converted Lost Opportunities. This metric is computed as follows: $(\# \text{ of Lost Opportunities} - \# \text{ of Converted Lost Opportunities}) / \# \text{ of Converted Lost Opportunities}$
Converted Lead Contribution to Opportunities %	The ratio of Converted Opportunities (created from Leads) in all the Opportunities. This metric is computed as follows: $(\# \text{ of Converted Opportunities} / \# \text{ of Opportunities}) * 100$
Converted Lead Contribution to Won Opportunities %	The ratio of Converted Won Opportunities (created from Leads) in all the Won Opportunities. This metric is computed as follows: $(\# \text{ of Converted Won Opportunities} / \# \text{ of Won Opportunities}) * 100$
Converted Lead Contribution to Closed Opportunities %	The ratio of Converted Closed Opportunities (created from Leads) in all the Closed Opportunities. This metric is computed as follows: $(\# \text{ of Converted Closed Opportunities} / \# \text{ of Closed Opportunities}) * 100$
Converted Lead Contribution to Lost Opportunities %	The ratio of Converted Lost Opportunities (created from Leads) in all the Lost Opportunities. This metric is computed as follows: $(\# \text{ of Converted Lost Opportunities} / \# \text{ of Lost Opportunities}) * 100$

## CX Service Request

This table describes the Service Request Metrics.

Metric	Metric Definition
# of SRs	The total number of SRs
# of Critical SRs	The total number of Critical SRs
# of In Progress SRs	The total number of in progress SRs (status = In Progress)
# of In Progress Critical SRs	The total number of Critical SRs that are In Progress status
# of New SRs	The total number of new SRs (status = New)
# of New Critical SRs	The total number of Critical SRs that are in New status
# of Open SRs	The total number of Open SRs (status = In Progress, New and Waiting)
# of Open Critical SRs	The total number of Critical SRs that are Open (status = In Progress, New and Waiting)
# of SRs Pending Agent Action	The total number of SRs assigned to an Agent having status as In Progress or New
# of Unassigned SRs	The total number of SRs that have not been assigned
# of Waiting SRs	The total number of SRs that are in Queue and waiting to be assigned (status = Waiting)

Metric	Metric Definition
# of Waiting Critical SRs	The total number of Critical SRs that are in Queue and waiting to be assigned (status = Waiting)
# of Closed SRs	The total number of Closed SRs (status = Closed)
# of Closed Critical SRs	The total number of Critical SRs that are in Closed status (status = Closed)
# of Resolved SRs	The total number of SRs that are Resolved (status = Resolved)
# of Resolved Critical SRs	The total number of Critical SRs that are Resolved (status = Resolved)
# of Reopened SRs	The total number of SRs that are Reopened
# of Low Severity SRs	The total number of Low severity SRs (severity = Low)
# of Medium Severity SRs	The total number of Medium severity SRs (severity = Medium)
# of High Severity SRs	The total number of High severity SRs (severity = High)
# of Open High Severity Critical SRs	The total number of Critical SRs that are High severity and Open (status = In Progress, New and Waiting)
# of SRs Resolved in under 24 hrs	The total number of SRs that were resolved in under 24 hours after they were opened
# of SRs Resolved in 24-48 hrs	The total number of SRs that were resolved in between 24-48 hours after they were opened
# of Initial Resource Assigned SRs	The total number of assigned SRs
# of Internal Resolved Closed SRs	The total number of SRs with Resolved or Closed status
% Reopened SRs	The % of now Closed SRs that were Reopened in SR lifecycle. This metric is computed as follows: (# of Reopened SRs that are in Closed state/# of Closed SRs)*100
SR Resolution Rate	The SRs Resolution rate. This metric is computed as follows: $100 * \frac{\text{\# of Resolved + Closed SRs}}{\text{\# of SRs}}$
SR Resolution Rate (monthly)	The monthly SR resolution Rate
Month Ago SR Resolution Rate (Monthly)	The SR Resolution rate of the previous month
SR Resolution Velocity Rate (Monthly)	The change in Velocity of SRs resolution. This metric is computed as follows: $\frac{\text{SR resolution rate Current month} - \text{SR resolution rate Previous month}}{\text{SR resolution rate Previous month}} * 100$
Open SR Age (Days)	# of days since the SR was reported (doesn't apply for Closed/Resolved SRs)
Average Open SR Age (Days)	The average number of days a SRs is Open
Total Time to Assign to Resource(Days)	The total number of days to assign a resource to SRs
Total Time to Assign to Resource(Hours)	The total number of hours to assign a resource to SRs
Total Time to Assign to Resource(Mins)	The total number of minutes to assign a resource to SRs
Total Time to Assign to Queue (Days)	The total number of days to assign a SRs to a Queue
Total Time to Assign to Queue (Hours)	The total number of hours to assign a SRs to a Queue
Total Time to Assign to Queue (Mins)	The total number of minutes to assign a SRs to a Queue
Total Time to Close (Days)	The total number of days to close the SRs
Total Time to Close (Hours)	The total number of hours to close the SRs
Total Time to Close (Mins)	The total number of minutes to close the SRs
Total Time to Resolve (Days)	The total number of days to resolve a SRs
Total Time to Resolve (Hours)	The total number of hours to resolve a SRs
Total Time to Resolve (Mins)	The total number of minutes to resolve a SRs

Metric	Metric Definition
Average Time to Assign to Resource (Days)	The average number of days to assign a resource to the SRs
Average Time to Assign to Resource (Hours)	The average number of hours to assign a resource to the SRs
Average Time to Assign to Resource (Mins)	The average number of minutes to assign a resource to the SRs
Average Time to Close (Days)	The average days to close the SRs
Average Time to Close (Hours)	The average hours to close the SRs
Average Time to Close (Mins)	The average minutes to close the SRs
Average Time to Resolve (Days)	The average days to resolve the SRs
Average Time to Resolve (Hours)	The average hours to resolve the SRs
Average Time to Resolve (Mins)	The average minutes to resolve the SRs
# of Raw SRs	The total SRs in the sytem including the deleted ones (delete flag = Y)

## CX Subscription Bill Line

This table describes the Subscription Bill Line Metrics. These metrics will be used in the Document Currency (DC) and Analytics Currency (AC) fact folder in Subject Area. Document Currency is the currency used while entering the data in the application. Analytics Currency is the currency defined in Oracle Fusion Analytics Warehouse. Analytics Currency and Exchange Rate Type are configured during product implementation. Exchange Rate date basis uses Subscription Start Date to convert to analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
Subscription Bill Amount	The total Subscription Bill Amount
Subscription Invoiced Amount with Tax	The total Subscription Invoiced Amount with Tax
Subscription Invoiced Bill Amount	The total Subscription Invoiced Bill Amount
Subscription Invoiced Onetime Charges	The total Subscription Invoiced Onetime Charges
Subscription Invoiced Recurring Charges	The total Subscription Invoiced Recurring Charges
Subscription Invoiced Usage Amount	The total Subscription Invoiced Usage Amount
Subscription Invoiced Usage Quantity	The total Subscription Invoiced Usage Quantity
Subscription Onetime Charges	The total Subscription Onetime Charges
Subscription Recurring Charges	The total Subscription Recurring Charges
Subscription Usage Amount	The total Subscription Usage Amount
Subscription Usage Quantity	The total Subscription Usage Quantity

## CX - Subscriptions

This table describes the Subscription Metrics.

Metric	Metric Definition
# of Subscriptions	The total Subscriptions
# of Active Subscriptions	The total Active Subscriptions

Metric	Metric Definition
'# of New Active Subscriptions	The total new Subscriptions that are Active (started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions)
# of Active Subscriptions Added - Last 30 days	The total Subscriptions Added in the last 30 days that are Active
'# of Expired Subscriptions	The total Expired Subscriptions
# of Subscriptions Expired - Last 30 days	The total Subscriptions Expired in the last 30 days
# of Active Subscriptions Expiring - Next 30 days	The total Active Subscriptions Expiring in the next 30 days
'# Renewed Active Subscriptions	The total Renewed Subscriptions that are Active
'# Renewed Subscriptions	The total Renewed Subscriptions
'# of Terminated Subscriptions	The total terminated subscriptions
# of Evergreen Subscriptions	The total Evergreen Subscriptions (no end date)
'# of Expansion Active Subscriptions	The total Expansion Subscriptions (Target subscription MRR > Source Subscription MRR) that are Active
'# of Expansion Subscriptions	The total Expansion Subscriptions (Target subscription MRR > Source Subscription MRR)
# of Active Subscription Upgrades	The total Upgraded Subscriptions (amend reason = ORA_UPGRADE) that are Active
# of Subscription Upgrades	The total Upgraded Subscriptions (amend reason = ORA_UPGRADE)
# of Active Subscription Downgrades	The total Downgraded Subscriptions (amend reason = ORA_DOWNGRADE) that are Active
# of Subscription Downgrades	The total Downgraded Subscriptions (amend reason = ORA_DOWNGRADE)
# of Customers	The total Customers
# of Customers with Active Subscriptions	The total customers with at least one Active Subscription
# of Products	The total Products
# of Products with Active Subscriptions	The total Products that have Active Subscriptions
Subscription Total Contract Value (TCV)	The total Subscription Contract Value
Subscription Invoiced Amount	The total Subscription Invoiced Amount
Subscription Credited Amount	The total Subscription Credited Amount
Subscription Closed Amount	The total Subscription Closed Amount
Subscription Cancelled Amount	The total Subscription Cancelled Amount
Subscription MRR	The total Monthly Recurring Revenue
Active Subscription MRR	The total Monthly Recurring Revenue for Active Subscription
First Active MRR	The total new MRR of Active subscriptions (which aren't a result of an amendment, suspension, or renewal of existing subscriptions)
Expansion Active MRR	The total Expansion MRR for Active Subscriptions (The difference in MRR between a target and source of an amendment relationship where the target MRR > Source MRR and the target start date falls within this period and not in Draft/Cancelled)
Contraction Active MRR	The total Contraction MRR for Active Subscription(The difference in MRR between a target and source of an amendment relationship where the target MRR < Source MRR and the target start date falls within this period and not in Draft/Cancelled)

<b>Metric</b>	<b>Metric Definition</b>
Activated Renewal MRR	The total Activated Renewal MRR (Active Subscriptions that were renewed from existing subscriptions)
Average Revenue per Customer (ARPU)	The Total Average Revenue per Customer (ARPU). This metric is computed as follows: Total Active MRR/Total number of Active Customers
Early Termination Fee	Early Termination Fee

# 8

## Prebuilt

### Prebuilt Analyses

Prebuilt Analyses are the functional analysis defined using Oracle Data Visualizer on Oracle Analytics Cloud (OAC). Only analytic currency metrics are used in these analyses. These tables show the summary of predefined analyses available for each module.

#### Activity Management

<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
New Activities	Shows the number of activities created in the last 7 days and provides a break down by different parameters such as Creation Date, Activity Type and Owner.	CX - Activity
Number of Activities	Shows number of activities performed by sales resources based on Activity Date, activity status and activity type.	CX - Activity
Activity Duration for Completed Activities	Shows how long it takes for a sales resource to complete an activity and provides a break down based on Activity type. Summaries are included to show the metric based on Activity owner, number of activities completed, Activity Type, Date and status.	CX - Activity
Team Member Activity Rate	Provides useful insights on the average number of activities are being performed by a team member and includes a breakdown based on different activity type.	CX - Activity
Lead Activities Rate	Shows number of Activities performed on leads and provides a break down based on leads status and activity date.	CX - Lead Activity
Opportunities Activities Rate	Shows number of Activities performed on Opportunities and provides a break down by opportunity outcome and status.	CX - Opportunity Activity
Activity Rate - Won Opportunities	This analysis provides insights on the number of activities performed on opportunities that go on to win. Helps businesses users understand how many activities does it require on an average to win an opportunity.	CX - Opportunity Activity

<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
Task Rate - Won Opportunities	This analysis provides insights on the number of tasks performed on opportunities that go on to win. Helps businesses users understand how many tasks and which types of tasks contribute to an opportunity win.	CX - Opportunity Activity

## Lead Management

<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
New Leads	Shows the number of Leads created in the last 7 days and provides a break down by different parameters such as Creation Date, Origin, Product and Account type.	CX - Leads
Number of Leads	Shows number of leads by Creation Date, Status, Product, Account and other Lead related attributes.	CX - Leads
Average Lead Age	This project shows average lead age by Lead Status and Lead Creation Period for the current quarter.	CX - Leads
Lead Qualification Rate	Provides an analysis on qualified leads for the current quarter and shows a break down of converted leads by different lead attributes such as status, lead creation date, age and by lead qualification velocity.	CX - Leads
Lead Conversion Rate	Provides an analysis for lead conversions for the current quarter and shows a break down of converted leads by different lead attributes such as lead channel and sales account.	CX - Leads
Won Revenue by Lead Channel	Provides insights on which lead channels contribute to highest won revenue.	CX - Leads
Lead to Opportunity Velocity	Shows insights on how quickly leads are converting to opportunities and allows comparison of this metric with other velocity metrics such as lead qualification to conversion velocity.	CX - Leads
Accounts - Leads	Lists Sales resources or Credit Recovers with highest number of wins and deal sizes.	CX - Leads
Lead Conversion Overview	Shows the summary of the Lead Conversion and how it trends over time.	CX - Leads

## Marketing Campaigns

Analyses Detail	Analyses Description	Related Subject Areas
Campaign Attributed Leads	Shows the number of leads generated from each campaign that was created in the current quarter.	CX - Campaign Members
Campaign Attributed Opportunities	Shows the number of opportunities generated from each campaign that was created in the current quarter. This uses last touch attribution model.	CX - Campaign Opportunity Revenue Line
Campaign Attributed Pipeline	Shows the pipeline contribution from the opportunities attributable to the campaign.	CX - Campaign Opportunity Revenue Line
Campaign ROI	This analysis shows the ROI from each Campaign and the attributable won revenue.	CX - Campaign Opportunity Revenue Line
Cost Per Opportunity Revenue Line	Provides insights on average campaign cost incurred or generating a single opportunity revenue line. Also provides comparison based on different campaigns.	CX - Campaign Opportunity Revenue Line
Cost Per Won Revenue	Shows the average campaign cost for every earning. Also provides comparison of this metric with different campaigns and by Product.	CX - Campaign Opportunity Revenue Line
Top Campaigns	Shows best performing campaigns based on different parameters such as - ROI, number of wins, revenue generated etc	CX - Campaign Opportunity Revenue Line
Campaign Targeted Accounts	Shows which accounts were targeted by different campaigns and the result based on ROI, Opportunity outcome and revenue generated.	CX - Campaign Opportunity Revenue Line

## Opportunity Management

Analyses Detail	Analyses Description	Related Subject Areas
Sales Pipeline - Pipeline Shape	Provides a visual breakdown of Open Opportunity Pipeline Revenue by different Sales Stages and trend of the Open Opportunity Pipeline Revenue from Last Six Enterprise Periods.	CX - Opportunity Revenue Line Snapshot
Sales Pipeline - Pipeline Review	Provides a Visual summary of Open Opportunities and their revenue numbers by Close Date and Sales Stage.	CX - Opportunity Revenue Line
Sales Pipeline - Pipeline Trend YoY	Shows historical trends of Open Opportunity Revenue based on historical snapshots.	CX - Opportunity Revenue Line Snapshot



<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
Sales Pipeline Velocity	Shows Sales Pipeline Velocity for different quarters and number of days spent in stage by opportunities broken down by Opportunity status and Opportunity Owner.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Stage Progression
Sales Stage Progression	Shows movement of Opportunities thru Sales Stages in terms of total and also percentages.	CX - Opportunity Stage Progression
Sales Cycle Analysis	Provides insights on bottle necks in the sales cycle and in which stages are the opportunities spending the most amount of time.	CX - Opportunity Stage Progression
Stalled Opportunities	Provides a list of Stalled Opportunities in the system broken down by Sales Stage. Only those Opportunities with more than 50% win probability are considered in the visualization.	CX - Opportunity Stage Progression
Sales Stage Velocity	Provides insights on how quickly opportunities are moving thru the sales funnel and also relative to their outcomes (Won or Lost).	CX - Opportunity Stage Progression
Sales Funnel Leakage	Analyzes from which Sales stage are Opportunities moving to Closed - Lost and how they compare to those that are Closed - Won.	CX - Opportunity Revenue Line
Top Deals At Risk	Provides an overview of Top Opportunities (in terms of revenue and win probability > 50%) that are at risk of not closing.	CX - Opportunity Revenue Line
Weighted Pipeline - Detail	Compares Open Pipeline with Weighted Pipeline by Sales Stage and Closing Quarter.	CX - Opportunity Revenue Line
Weighted Pipeline - Trend	Shows trends of Weighted Pipeline based on snapshot period and also a projection over the next 3 months.	CX - Opportunity Revenue Line
Won Sales	Shows key metrics related to Won Sales such as Won Opportunity Line Revenue and Number of Won Opportunity Revenue Lines, Win Rate and Conversion Rate. Also shows how Won opportunities compares to Open and Lost opportunities during the same time period.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line
Win - Loss Analysis	Shows Won and Lost Revenue by Different Quarters and a historical trend over the last 6 quarters. Also shows Won Revenue by top 10 territories and products.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line
Lost Sales	Shows Lost Opportunity Revenue Lines by Amount and by Lost Quarter. Also includes key conversion metrics such as Revenue Line Loss Rate %.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line

<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
Win - Loss Analysis	Shows Won and Lost Revenue by Different Quarters and a historical trend over the last 6 quarters. Also shows Won Revenue by top 10 territories and products.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line
Average Deal Size	Provides a break down of Average deal Size by Sales Stage, Opportunity Owner, Territory Owner and Product/Group.	CX - Opportunity Revenue Line
Average Deal Size - Trend Analysis	Shows a trend of Average Deal Size by Territory and by Product and how the metric has evolved historically.	CX - Opportunity Revenue Line Snapshot
Win Rate and Conversion Rate Analysis	Shows Revenue Line Win Rate and Conversion Rate Percentages and by Sales Stage.	CX - Opportunity Revenue Line
Win Rate and Conversion Rate Trend	Shows historical trend of Revenue Line Win Rate and Conversion Rate and by Sales Stage.	CX - Opportunity Revenue Line Snapshot
Top 20 Accounts	Shows Top 20 Accounts based on Open and Won Revenue and also provides a breakdown of Won Revenue by Account and Product and Account and Territory.	CX - Opportunity Revenue Line
Team All - Stars	Lists Sales resources or Credit Recovers with highest number of wins and deal sizes.	CX - Opportunity Revenue Line
Converted Opportunity Pipeline	Shows the summary of the Converted Opportunities (converted from Leads) such as: Converted Opportunity Line Revenue, Average Won Line Revenue, Converted Revenue over Time.	CX - Opportunity Revenue Line
Opportunity Days to Close	Shows how long it takes to Close the Opportunities and the comparison with the converted Opportunities closure time and rates.	CX - Opportunity
Converted Opportunity Revenue	Shows the Pipeline contributed by Converted Opportunities.	CX - Opportunity
Renewal Sales Overview	Shows the summary of the Opportunities created as part of the Renewal selling.	CX - Opportunity Revenue Line

## Quote and Order Capture

<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
Opportunity Quotes	Shows the summary of the Opportunity Quotes raised, statuses by their Owners, Quotes raised over time period etc.	CX - Opportunity Quote

<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
Quote Cycle Time	Provides insight on the time it takes when an Opportunity moves to Quote, Quote to Order Placed and Contract start time.	CX - Opportunity Quote
Quote Contract Value	Shows summary of the Quote Contract value and details such as Contract value by Owner, by Opportunity name etc.	CX - Opportunity Quote
Quote Revenue	Shows the summary of the Quote Revenue and how it's split into Recurring, Non-Recurring, Usage based revenue and related details.	CX - Opportunity Quote
Opportunity Quote Lines	Shows the summary of Opportunity Quote Lines, the Contract Value, and the discount offered.	CX - Opportunity Quote Line
Opportunity Quotes - Trends	Shows the trend of Quote generation, Won Quote Line, Discount %, and the Cycle time.	CX - Opportunity Quote

## Service Request Management

<b>Analyses Detail</b>	<b>Analyses Description</b>	<b>Related Subject Areas</b>
SR Overview	Shows the summary of the Service Requests such as - Total SRs, Critical SRs, SRs pending agent Action, SRs by time etc.	CX - Service Request
Critical SRs	Shows the summary information for Critical SRs such as Critical SRs in various statuses, by Assignee and Customers etc.	CX - Service Request
Critical SR Details	Provides the details of the Critical SRs by Sales Account and related details.	CX - Service Request
Agent Performance Details	Provides insights on how the Service Agents performance is, such as the Resolved SRs, Average time to resolve etc.	CX - Service Request
SR Resolution	Shows the summary of the Resolved SRs, time it took to resolve them by month, by severity etc.	CX - Service Request
SRs by Channel	Shows the summary of SRs by different Channels that were used for the SRs.	CX - Service Request
SRs by Service Category	Shows the summary of SRs by Service Category for which the SRs were raised.	CX - Service Request

## Subscription Management

Analyses Detail	Analyses Description	Related Subject Areas
Subscription Overview	Shows the summary of the Subscription such as - Subscription MRR, Subscription Total Contract Value, Average Revenue per Customer, MRR due for Renewal, etc.	CX - Subscriptions

## Prebuilt KPIs

KPIs are measurements that define and track specific business goals and objectives that often roll up into larger organizational strategies that require monitoring, improvement, and evaluation.

KPIs can be used as an analysis in cards and decks to allow a user to view KPI performance and drill into the details to understand why a KPI value may be off the target. KPIs can also be used to automatically trigger alerts to specific users when KPI target values reach critical status levels. Only analytic currency metrics are used in the prebuilt KPIs.

## Activity Management

KPI Name	KPI Description	Related Subject Areas
Number of Activities	Number of Activities	CX - Activity
New Activities	Activities created in the last 7 days	CX - Activity
Activity Rate - Won Opportunities	Average Number of Activities for Won Opportunities.	CX - Opportunity Activity
Task Rate - Won Opportunities	Average Number of Tasks Created for Won Opportunities.	CX - Opportunity Activity
Appointment Rate - Won Opportunities	Average Number of Appointments Created for Won Opportunities.	CX - Opportunity Activity
Meeting Rate for Won Opportunities	Average Number of Meetings for Won Opportunities	CX - Opportunity Activity
Demo Rate Won Opportunities	Average Number of Demos for Won Opportunities	CX - Opportunity Activity
Average Number of Activities Per Team Member For Won Opportunities	Average Number of Activities Per Team Member For Won Opportunities	CX - Opportunity Activity
Average Number of Activities Per Team Member For Lost Opportunities	Average Number of Activities Per Team Member For Lost Opportunities	CX - Opportunity Activity
Activity Rate for Open Opportunities	Average Number of Activities for currently open Opportunities	CX - Opportunity Activity
Number of Customer facing tasks for Won Opportunities	Number of tasks of type - Call, Chat, Demo, Meeting, Email for Won Opportunities	CX - Opportunity Activity
Number of Customer facing tasks for Lost Opportunities	Number of tasks of type - Call, Chat, Demo, Meeting, Email for Lost Opportunities	CX - Opportunity Activity
Activity Duration For Completed Activities	Average Activity Duration For Completed Activities	CX - Activity

KPI Name	KPI Description	Related Subject Areas
Opportunity Activities Rate	Average Number of Activities Per Opportunity	CX - Opportunity Activity
Lead Activities Rate	Average Number of Activities Per Lead	CX - Lead Activity
Team Member Activity Rate	Average Number of Activities Per Team Member	CX - Activity

## Lead Management

KPI Name	KPI Description	Related Subject Areas
Number of Leads	Number of Leads Created in the reporting period	CX - Leads
Lead Qualification Rate (%)	Number of Leads qualified expressed as a percentage of the total number of Leads created	CX - Leads
Lead Conversion Rate (%)	Number of Leads converted expressed as a percentage of the total number of Leads created	CX - Leads
Lead Rejection Rate (%)	Number of Leads rejected expressed as a percentage of the total number of Leads created	CX - Leads
Average Lead Age	Average number of Days the lead is open before it is converted or rejected or retired	CX - Leads
Lead Qualification to Conversion Velocity	Average number of Days before the qualified lead is converted	CX - Leads
Number of Qualified Expired Leads	Number of Qualified Expired Leads	CX - Leads
Won Revenue By Lead Channel	Won Opportunity Revenue Generated from Leads based on their Lead Channel	CX - Leads
Accounts - Leads	Accounts with highest number of open Leads	CX - Leads
Opportunity Pipeline Split - Sales vs Marketing	Number of Open Opportunities by Sales Stage for Opportunities generated from Sales vs Marketing	CX - Leads
New Leads	New Leads Created (based on Lead Creation Date)	CX - Leads
Lead to Opportunity Velocity	Average number of days taken from the day Lead is created to the day it is converted	CX - Leads

## Marketing Campaigns

KPI Name	KPI Description	Related Subject Areas
Campaign Attributed Leads	Number of Leads generated from Marketing Campaigns	CX - Campaign Members

KPI Name	KPI Description	Related Subject Areas
Campaign Attributed Opportunities	Number of Opportunities generated from Marketing Campaigns (Last Touch Model)	CX - Campaign Opportunity Revenue Line
Campaign Attributed Pipeline	Pipeline Revenue Contribution from Campaign attributable Opportunities (Last Touch Model)	CX - Campaign Opportunity Revenue Line
Campaign Attributed Won Revenue	The total revenue attributed to a campaign for all Opportunities with an Closed Won status	CX - Campaign Opportunity Revenue Line
Campaign ROI	Campaign Return on Investment based on Campaign Actual Cost and Campaign Attributable Revenue	CX - Campaign Opportunity Revenue Line
Campaign Responses	Number of Responses for each Campaign	CX - Campaign Member
Campaign Actual Vs Budgeted Cost	Ratio of Actual cost / Budgeted Cost for every campaign	CX - Campaign Opportunity Revenue Line
Campaign Attributed Won Opportunity Revenue Lines	Number of Won Opportunity Revenue Lines from Opportunities attributable to a Campaign	CX - Campaign Opportunity Revenue Line
Campaign Attributed Lost Opportunity Revenue Lines	Number of Lost Opportunity Revenue Lines from Opportunities attributable to a Campaign	CX - Campaign Opportunity Revenue Line
Campaign Attributed Open Opportunity Revenue Lines	Number of Open Opportunity Revenue Lines from Opportunities attributable to a Campaign	CX - Campaign Opportunity Revenue Line
Cost Per Opportunity Revenue Line	Ratio of Campaign Actual Cost and Number of Opportunity Revenue Lines	CX - Campaign Opportunity Revenue Line
Cost Per Won Opportunity Revenue Line	Ratio of Campaign Actual Cost and Number of Won Opportunity Revenue Lines	CX - Campaign Opportunity Revenue Line
Cost Per Won Revenue	Ratio of Campaign Actual Cost and Won Opportunity Line Revenue	CX - Campaign Opportunity Revenue Line
Cost Per Attributed Revenue	Ratio of Campaign Actual Cost and Total Attributable Opportunity Line Revenue	CX - Campaign Opportunity Revenue Line
Top Campaigns	Top Campaigns with highest Won Revenue	CX - Campaign Opportunity Revenue Line
Campaign Engaged Contacts	Number of Contacts Targeted By Campaigns	CX - Campaign Member
Campaign Targeted Accounts	Number of Accounts Targeted By Campaigns	CX - Campaign Opportunity Revenue Line

## Sales

KPI Name	KPI Description	Related Subject Areas
Won Sales	Total Sales Revenue For the Period where Opportunity Status Category= 'WON'.	CX - Opportunity Revenue Line

KPI Name	KPI Description	Related Subject Areas
Lost Sales	Total Sales Revenue For the Period where Opportunity Status Category= 'LOST'.	CX - Opportunity Revenue Line
Sales Pipeline	Total Revenue of opportunity Revenue Lines with an 'Open' status category	CX - Opportunity Revenue Line
Weighted Pipeline	Weighted Pipeline measures Sales Revenue based on Opportunity Win Probability percentages assigned to the open Opportunities in the current pipeline	CX - Opportunity Revenue Line
Sales Pipeline Velocity	Indicates how quickly deals move through the pipeline and generating revenue.	CX - Opportunity Stage Progression
Sales Stage Velocity	Indicates Average time spent in stage before Opportunities move to Closed - Won or Closed - Lost	CX - Opportunity Stage Progression
Sales Funnel Leakage	Also known as Stage Drop Off Rates, sales funnel leakage tells you where prospects drop out of your funnel at the greatest rates.	CX - Opportunity Revenue Line
Sales Stage Progression	Shows how quickly Opportunities are moving through the Sales Stages	CX - Opportunity Stage Progression
Average Deal Size	Closed opportunity line revenue averaged over number of revenue lines.	CX - Opportunity Revenue Line
Win Rate %	The rate in which Opportunity revenue lines are being Closed - Won.	CX - Opportunity Revenue Line
Deals At Risk	Top 'N' open Opportunities (by Revenue) with Win Probability of <= 50%	CX - Opportunity Revenue Line
Revenue From Accounts	List of Top Accounts by Won Revenue for the reporting period	CX - Opportunity Revenue Line
Team All-Stars	Displays details of Primary Resources with Top 10 wins by Revenue for the time period	CX - Opportunity Revenue Line
Number of Leads	Number of Leads Created in the reporting period	CX - Leads
Lead Qualification Rate (%)	Number of Leads qualified expressed as a percentage of the total number of Leads created	CX - Leads
Lead Conversion Rate (%)	Number of Leads converted expressed as a percentage of the total number of Leads created	CX - Leads
Lead Rejection Rate (%)	Number of Leads rejected expressed as a percentage of the total number of Leads created	CX - Leads
Average Lead Age	Average number of Days the lead is open before it is converted or rejected or retired	CX - Leads
Lead Qualification to Conversion Velocity	Average number of Days before the qualified lead is converted	CX - Leads

KPI Name	KPI Description	Related Subject Areas
Number of Qualified Expired Leads	Number of Qualified Expired Leads	CX - Leads
Won Revenue By Lead Channel	Won Opportunity Revenue Generated from Leads based on their Lead Channel	CX - Leads
Accounts - Leads	Accounts with highest number of open Leads	CX - Leads
Opportunity Pipeline Split - Sales vs Marketing	Number of Open Opportunities by Sales Stage for Opportunities generated from Sales vs Marketing	CX - Leads
New Leads	New Leads Created (based on Lead Creation Date)	CX - Leads
Lead to Opportunity Velocity	Average number of days taken from the day Lead is created to the day it is converted	CX - Leads
Number of Activities	Number of Activities	CX - Activity
New Activities	Activities created in the last 7 days	CX - Activity
Activity Rate - Won Opportunities	Average Number of Activities for Won Opportunities.	CX - Opportunity Activity
Task Rate - Won Opportunities	Average Number of Tasks Created for Won Opportunities.	CX - Opportunity Activity
Appointment Rate - Won Opportunities	Average Number of Appointments Created for Won Opportunities.	CX - Opportunity Activity
Meeting Rate for Won Opportunities	Average Number of Meetings for Won Opportunities	CX - Opportunity Activity
Demo Rate Won Opportunities	Average Number of Demos for Won Opportunities	CX - Opportunity Activity
Average Number of Activities Per Team Member For Won Opportunities	Average Number of Activities Per Team Member For Won Opportunities	CX - Opportunity Activity
Average Number of Activities Per Team Member For Lost Opportunities	Average Number of Activities Per Team Member For Lost Opportunities	CX - Opportunity Activity
Activity Rate for Open Opportunities	Average Number of Activities for currently open Opportunities	CX - Opportunity Activity
Number of Customer facing tasks for Won Opportunities	Number of tasks of type - Call, Chat, Demo, Meeting, Email for Won Opportunities	CX - Opportunity Activity
Number of Customer facing tasks for Lost Opportunities	Number of tasks of type - Call, Chat, Demo, Meeting, Email for Lost Opportunities	CX - Opportunity Activity
Activity Duration For Completed Activities	Average Activity Duration For Completed Activities	CX - Activity
Opportunity Activities Rate	Average Number of Activities Per Opportunity	CX - Opportunity Activity
Lead Activities Rate	Average Number of Activities Per Lead	CX - Lead Activity
Team Member Activity Rate	Average Number of Activities Per Team Member	CX - Activity



## Sales & Marketing

KPI Name	KPI Description	Related Subject Areas
Campaign Attributed Leads	Number of Leads generated from Marketing Campaigns	CX - Campaign Members
Campaign Attributed Opportunities	Number of Opportunities generated from Marketing Campaigns (Last Touch Model)	CX - Campaign Opportunity Revenue Line
Campaign Attributed Pipeline	Pipeline Revenue Contribution from Campaign attributable Opportunities (Last Touch Model)	CX - Campaign Opportunity Revenue Line
Campaign Attributed Won Revenue	The total revenue attributed to a campaign for all Opportunities with an Closed Won status	CX - Campaign Opportunity Revenue Line
Campaign ROI	Campaign Return on Investment based on Campaign Actual Cost and Campaign Attributable Revenue	CX - Campaign Opportunity Revenue Line
Campaign Responses	Number of Responses for each Campaign	CX - Campaign Member
Campaign Actual Vs Budgeted Cost	Ratio of Actual cost / Budgeted Cost for every campaign	CX - Campaign Opportunity Revenue Line
Campaign Attributed Won Opportunity Revenue Lines	Number of Won Opportunity Revenue Lines from Opportunities attributable to a Campaign	CX - Campaign Opportunity Revenue Line
Campaign Attributed Lost Opportunity Revenue Lines	Number of Lost Opportunity Revenue Lines from Opportunities attributable to a Campaign	CX - Campaign Opportunity Revenue Line
Campaign Attributed Open Opportunity Revenue Lines	Number of Open Opportunity Revenue Lines from Opportunities attributable to a Campaign	CX - Campaign Opportunity Revenue Line
Cost Per Opportunity Revenue Line	Ratio of Campaign Actual Cost and Number of Opportunity Revenue Lines	CX - Campaign Opportunity Revenue Line
Cost Per Won Opportunity Revenue Line	Ratio of Campaign Actual Cost and Number of Won Opportunity Revenue Lines	CX - Campaign Opportunity Revenue Line
Cost Per Won Revenue	Ratio of Campaign Actual Cost and Won Opportunity Line Revenue	CX - Campaign Opportunity Revenue Line
Cost Per Attributed Revenue	Ratio of Campaign Actual Cost and Total Attributable Opportunity Line Revenue	CX - Campaign Opportunity Revenue Line
Top Campaigns	Top Campaigns with highest Won Revenue	CX - Campaign Opportunity Revenue Line
Campaign Engaged Contacts	Number of Contacts Targeted By Campaigns	CX - Campaign Member
Campaign Targeted Accounts	Number of Accounts Targeted By Campaigns	CX - Campaign Opportunity Revenue Line

## Opportunity Management

KPI Name	KPI Description	Related Subject Areas
Won Sales	Total Sales Revenue For the Period where Opportunity Status Category= 'WON'.	CX - Opportunity Revenue Line
Lost Sales	Total Sales Revenue For the Period where Opportunity Status Category= 'LOST'.	CX - Opportunity Revenue Line
Sales Pipeline	Total Revenue of opportunity Revenue Lines with an 'Open' status category	CX - Opportunity Revenue Line
Weighted Pipeline	Weighted Pipeline measures Sales Revenue based on Opportunity Win Probability percentages assigned to the open Opportunities in the current pipeline	CX - Opportunity Revenue Line
Sales Pipeline Velocity	Indicates how quickly deals move through the pipeline and generating revenue.	CX - Opportunity Revenue Line
Sales Stage Velocity	Indicates Average time spent in stage before Opportunities move to Closed - Won or Closed - Lost	CX - Opportunity Stage Progression
Sales Funnel Leakage	Also known as Stage Drop Off Rates, sales funnel leakage tells you where prospects drop out of your funnel at the greatest rates.	CX - Opportunity Revenue Line
Sales Stage Progression	Shows how quickly Opportunities are moving through the Sales Stages	CX - Opportunity Stage Progression
Average Deal Size	Closed opportunity line revenue averaged over number of revenue lines.	CX - Opportunity Revenue Line
Win Rate %	The rate in which Opportunity revenue lines are being Closed - Won.	CX - Opportunity Revenue Line
Deals At Risk	Top 'N' open Opportunities (by Revenue) with Win Probability of <= 50%	CX - Opportunity Revenue Line
Revenue From Accounts	List of Top Accounts by Won Revenue for the reporting period	CX - Opportunity Revenue Line
Team All-Stars	Displays details of Primary Resources with Top 10 wins by Revenue for the time period	CX - Opportunity Revenue Line
Opportunity Line Type	Shows Opportunity Revenue Lines by Type	CX - Opportunity Revenue Line
Revenue Type	Shows Renewal Revenue by type (Recurring, Non-Recurring, Usage)	CX - Opportunity Revenue Line
Renewal Pipeline	Shows all the Open Renewal Opportunities	CX - Opportunity Revenue Line
Renewal Revenue	Shows the Renewal Pipeline Amount	CX - Opportunity Revenue Line
Renewal Pipeline %	Shows the Renewal Pipeline Revenue of the total Opportunity Revenue	CX - Opportunity Revenue Line
Won Renewal Revenue	Shows the Won Renewal Pipeline Revenue	CX - Opportunity Revenue Line

KPI Name	KPI Description	Related Subject Areas
Renewal Opportunities Win Rate	Shows the rate of winning Renewal Opportunities	CX - Opportunity Revenue Line
Lost Renewal Revenue	Shows the Renewal Pipeline Revenue that is Lost	CX - Opportunity Revenue Line
Lead Conversion	Won and Lost Opportunities from Converted Leads	CX - Opportunity
Opportunities from Leads (%)	% of Opportunities of the total, from the converted Leads	CX - Opportunity
Average Converted Opportunity Line Revenue	Average Opportunity Line Revenue of the Opportunities converted from Leads	CX - Opportunity Revenue Line
Line Revenue from Converted Leads	Open Opportunities Line revenue from converted leads	CX - Opportunity Revenue Line
Lead Generated Pipeline	# of Open Opportunities by Sales Stage for Opportunities generated from leads vs from non-leads	CX - Opportunity
Days to Close Converted Leads	Average of (Opportunity Close Date - Opportunity Creation Date) for opportunities converted from Leads	CX - Opportunity

## Quote and Order Capture

KPI Name	KPI Description	Related Subject Areas
Active Quotes	Number of Active Quotes created	CX - Opportunity Quote
Average Quotes for Won Opportunities	Average Number of Quotes for Won Opportunities	CX - Opportunity Quote
Quote Cycle Time	Total elapsed time from Quote-to-Order	CX - Opportunity Quote
Quote Conversion Rate	Number of Closed as a percentage of Active Quotes	CX - Opportunity Quote
Average Contract Value	Average Contract Value	CX - Opportunity Quote
Opportunity to Quote Velocity	Opportunity to Quote Cycle Time	CX - Opportunity Quote
Average Recurring Revenue	Average Recurring Revenue	CX - Opportunity Quote
Active Quote Win Rate	Number of Won Quotes as a percentage of Closed Quotes	CX - Opportunity Quote
Number of Quotes Lines	Number of Quote Lines created	CX - Opportunity Quote Line
Number of Active Quotes with Lines	Number of Active Quotes with Quote Lines	CX - Opportunity Quote Line
Contract Line Value	Total Contract Line Value for Active Quotes	CX - Opportunity Quote Line
Average Contract Line Value	Average Contract Quote Line Value	CX - Opportunity Quote Line
Quote Line Conversion Rate	Number of Quote Lines Converted	CX - Opportunity Quote Line
Average Quote Line Cycle Time	Average elapsed time from Quote Line-to-Order	CX - Opportunity Quote Line
Number of Quoted Opportunities	Number of Quoted Opportunities	CX - Opportunity

## Service Request Management

KPI Name	KPI Description	Related Subject Areas
Service Requests by Status	CX Service Request	CX - Service Request
SR Backlog Rate (%)	% of Open SRs relative to the total SR's by age category	CX - Service Request
Escalation (Critical SR's)	Number of SRs that are marked Critical	CX - Service Request
SR Resolution (%)	Number of SRs in Resolved Status	CX - Service Request
Agent Performance	Average Time to Resolve (Days) by Service Agents	CX - Service Request
SRs by Service Category	Number of Open SRs by Service Category	CX - Service Request
SRs by Channel	Number of Open SRs by Channel	CX - Service Request
Top 10 Customers (With Active SRs)	Top 10 Customers with Most Active Open SRs	CX - Service Request

## Prebuilt Decks and Cards

A deck is a top-level object for executive consumption with multiple KPI cards added to a deck. Each deck contains up to 8 cards. A card is a visual presentation of a KPI with a drill-down capability to Data Visualization content.

## Prebuilt Decks and Cards

Deck Name	Deck Description
Sales Pipeline	The Sales Pipeline deck contains Seven KPIs for measuring the overall health of the sales pipeline.
Win-Loss Analysis	The Win-Loss Analysis deck contains Six KPIs that provides insights and metrics on Opportunity outcomes (Won and Lost) and the related opportunity revenue figures.
Sales Activity	The Sales Activity deck contains eight KPIs that provides insights on Sales Activities performed in the current quarter and how they relate to Opportunity outcomes (Won and Lost).
Leads	The Leads deck provides Eight KPIs for tracking important lead metrics including those related to Lead conversions and Lead qualifications.
Campaign Effectiveness	The Campaign Effectiveness Deck includes Eight KPIs that helps Marketing and Sales users measure Campaign ROI metrics and important conversion metrics as part of Campaign to Opportunity process flow.
Opportunity Quotes	The Opportunity Quote deck includes KPIs that helps Sales users get an insight on the Quotes created in the system and the contract value and cycle times associated.
SR Management	The SR Management deck includes KPIs that helps Service Managers and Reps to get an overview of the SRs raised in the system, and what's the rate, escalations and how is it being handled by the Agents.

Deck Name	Deck Description
Lead Conversion	The Lead Conversion deck includes KPIs that provide insight on the Leads that are getting Converted to Opportunities, the rate of conversion, their contribution to overall Opportunities, and their performance in terms of revenue closure and time to close the Opportunities.
Renewal Sales	The Renewal Sales deck includes KPIs that provide insights and metrics on the Renewal Opportunity Pipeline and the related revenue figures and their won rate.